# Power Platform Build your own Power Apps Solution

## Module 2: Teams

Hands-on Lab Step-by-Step

June 2021

# Contents

# Microsoft Teams

## Lab Prerequisites

Follow the pre-requisite steps described in the document: **00-BYOPAS Lab 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.

**NOTE:** It is not recommended to do these exercises on a tenant other than a demo tenant or a trial tenant. If you are completing these exercises on an active tenant managed by your company's IT department, some features may not be available due to admin policies. If you are working on your company's tenant, please ensure that your tenant allows loading of custom apps to Teams. If this is not possible, you can start an E3 trial tenant and pick up where you left off by downloading the completed solution and importing it as outlined in the paragraph above.

Another option would be to contact your IT admin and ensure that they allow users to upload custom apps and app pinning. They can assign permission to this in the Teams Admin center and instructions are included in the lab content pack. They have the option to create a user group of the lab participants and provide that group with temporary approval to upload and pin apps for the purpose of this lab.

**This lab is subject to the Terms of Use at the end of this document.**

## About Microsoft Teams

Microsoft Teams is a hub for teamwork, which brings together everything a team needs: chat and threaded conversations, meetings & video conferencing, PSTN calling*, content collaboration with the power of Office applications, and the ability to create and integrate apps and workflows that your business relies on.

Adding your Power App to Teams makes it more accessible and easier to distribute. By adding your app to a Teams channel or pinning it to the app bar, you and other users will know where to find it. Also, some app's usefulness is enhanced by being in the same tool as your team's chat and collaboration. Adding apps to Teams brings more of your work into a common place and reduces the time you spend searching for and switching between the tools you need.

# Exercise 1: Setup Teams

In this exercise, you will change the Teams policy to allow custom app uploading, you will create a new team, add channels, and then add users to your team and channels.

In this module, we will use Teams web client because it requires no installation and you may find that you already have some content set up for you in Teams.
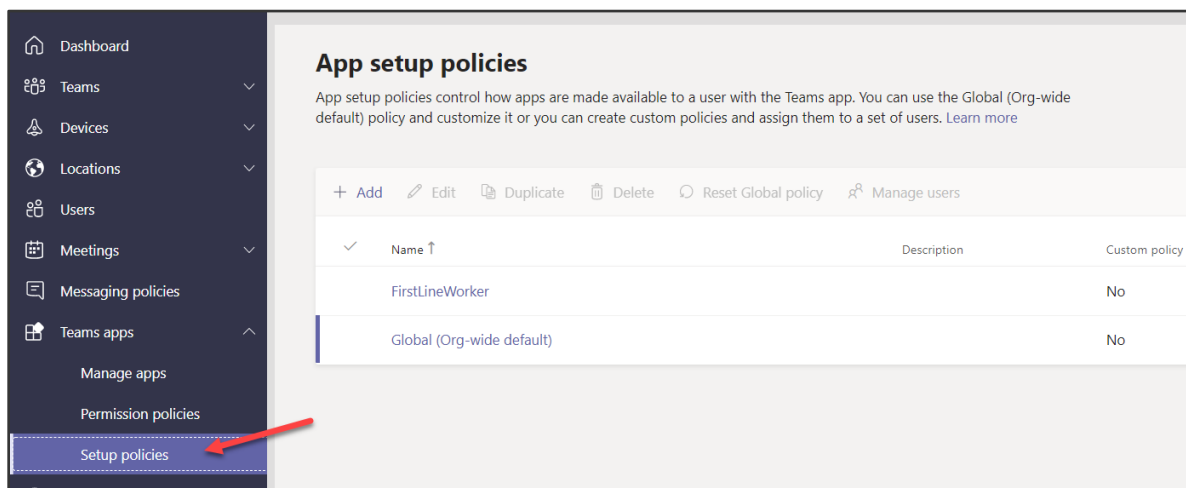
Note: You can also download the desktop client version of Teams, and the setup steps are the same.

## Task 1: Set Teams admin controls

**Note:**  *If you do not have admin privileges to check these policies, your instructor should do it for you.*
You will now make sure that your Teams admin policies are setup in a way that allow you to upload apps.

1.  Open a new browser tab and navigate to Microsoft Teams admin center.
2.  On the admin center menu on the left, click Teams app, and then select Setup policies.
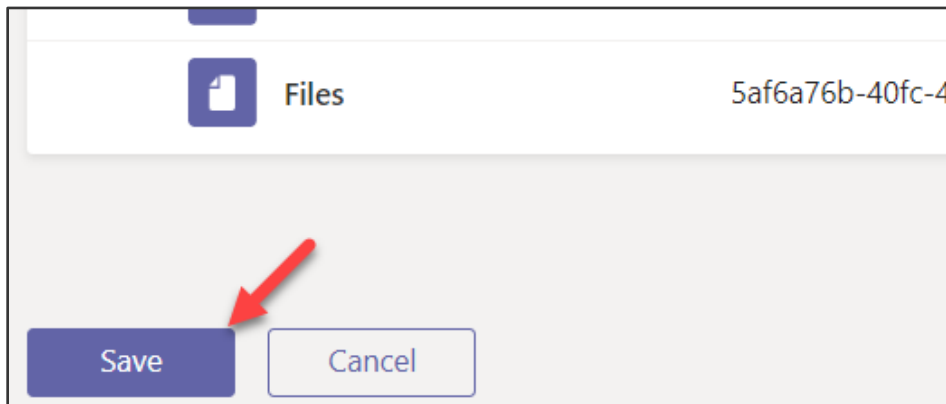


3.  On the **App setup policies** screen, select the category **Global (Org-wide default).**
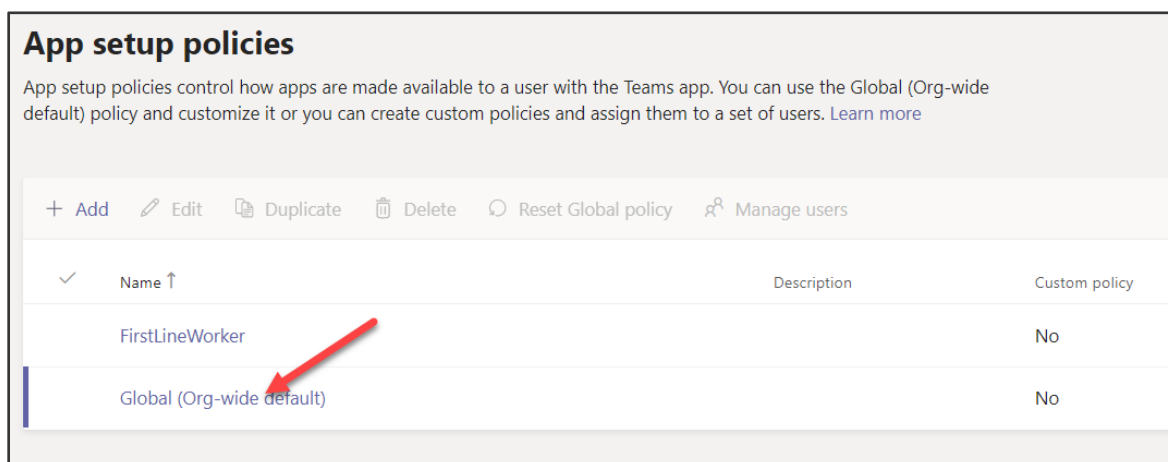
4. Turn on both **Upload custom apps** and **Allow user pinning**.
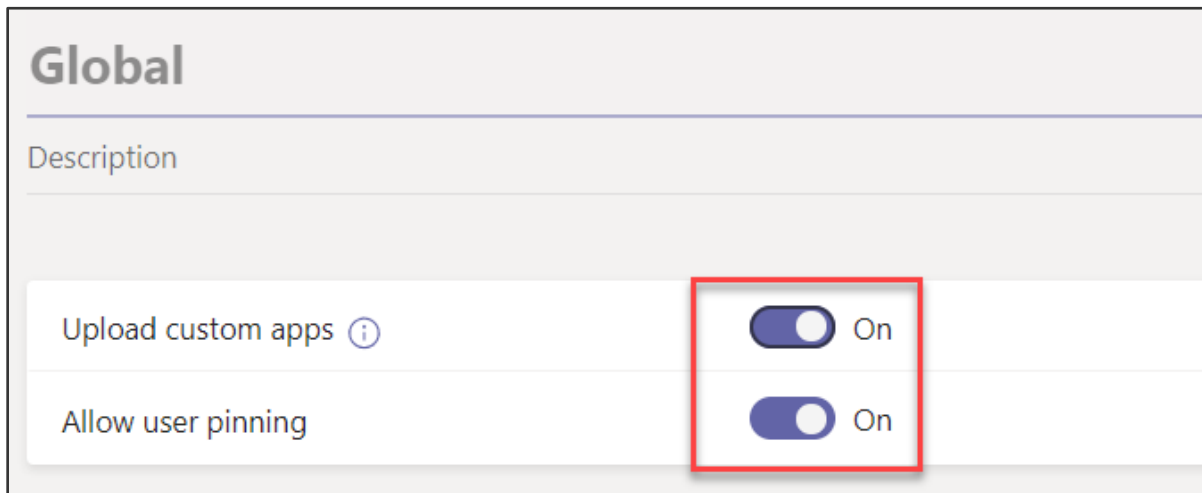


5. Click **Save**.



# Task 2: Open Teams web client

**Note:** You can also download the desktop client version of Teams, and the setup steps are the same. If you are in an instructor-led training or working on an already established tenant, the web client may be the easier option and you may find that you already have some content set up for you in Teams. You will find the desktop and web client versions of Teams to be very similar.

1. In a private browser session, navigate to Microsoft Teams
2. Click **Use the web app instead** at the bottom.
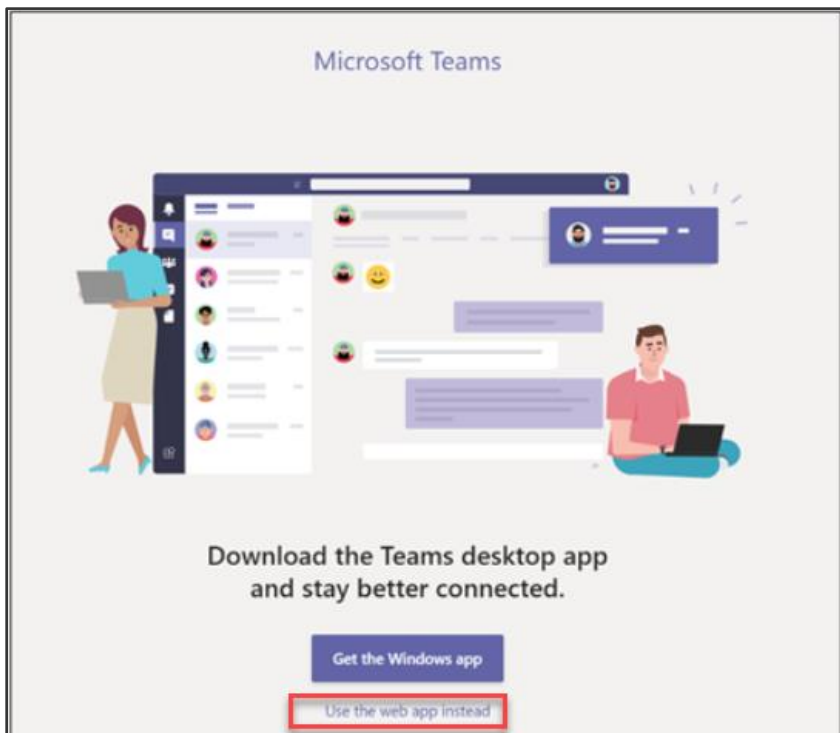
3.       Click **Close** to close the welcome screen.
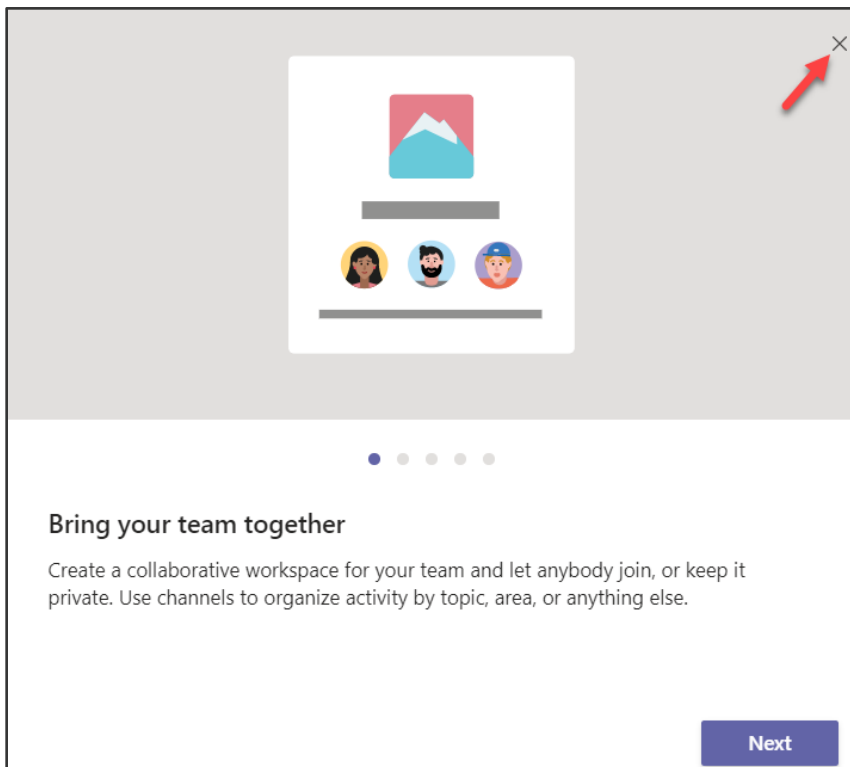


4.        Make sure to leave this browser tab open as you will be coming back to this throughout the lab

Note: When you first set up Teams, a new team will be created based on your tenant name. This can be modified and used to your personal preference. We will next show you how to set up a team from scratch so you can add more Teams for new projects or workgroups.
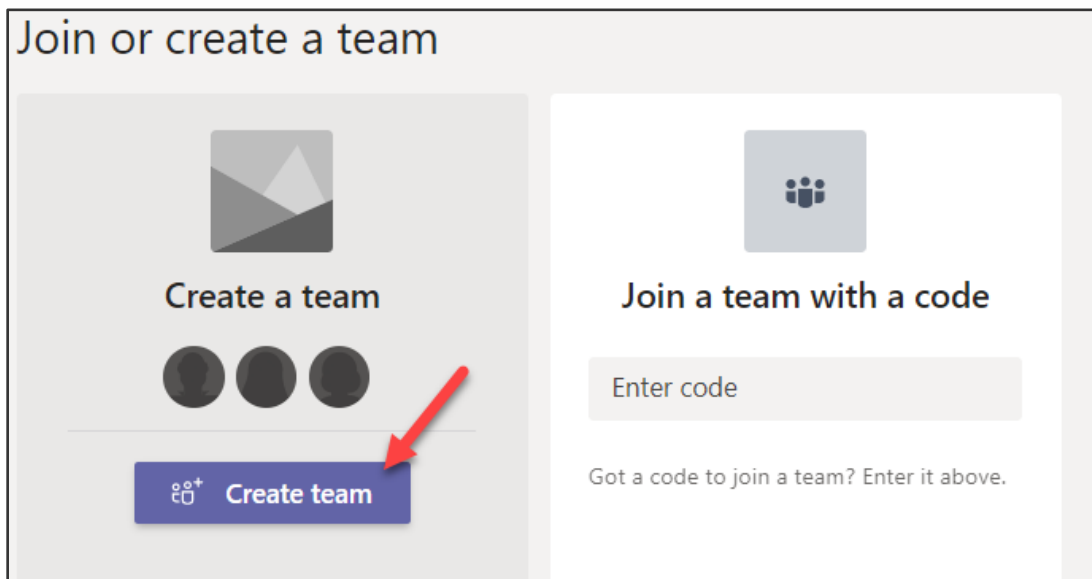
# Task 3: Create new Teams

Remember, you are likely in a shared classroom environment.  If your Teams names show errors or duplicates, simply add a unique identifier like your name to the Teams name to resolve this.

1.  Click on the **Join or create a team** button located on the bottom left.
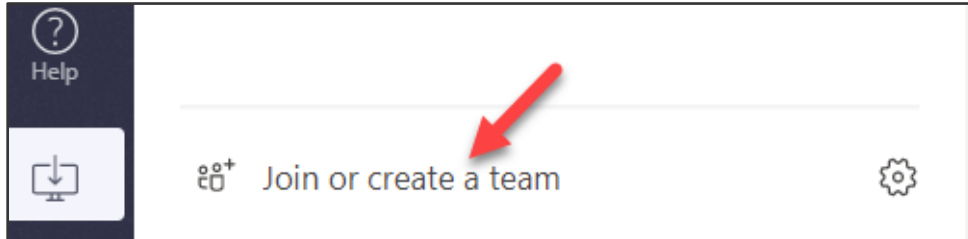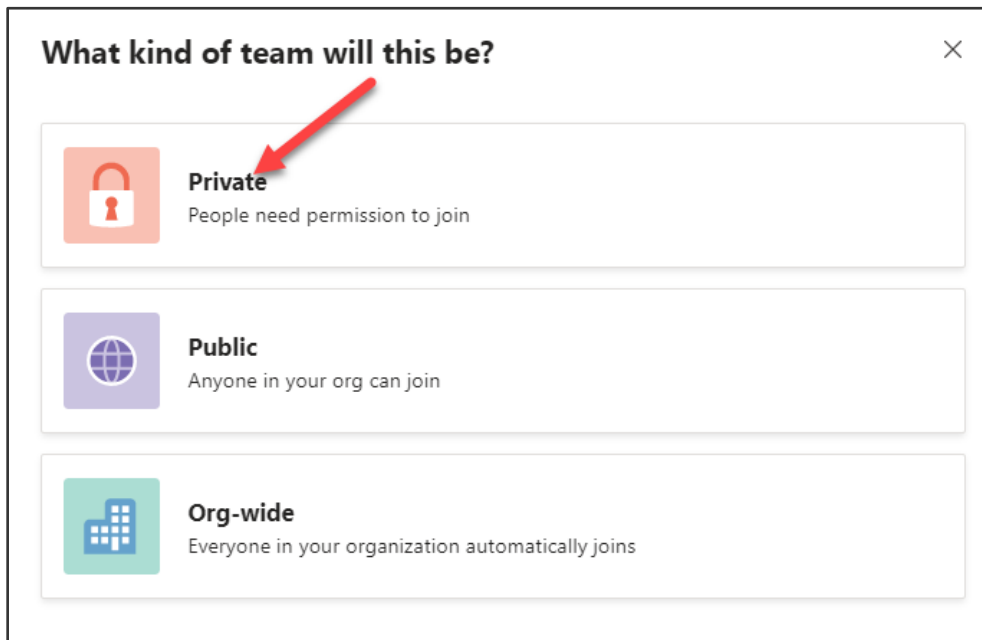


2.  Hover over the **Create a team** tile and select **Create team**.



3.  Select **Build a team from scratch** (you can quickly add large groups to Teams by using Office 365 groups, but today we will show you how to add members to Teams).



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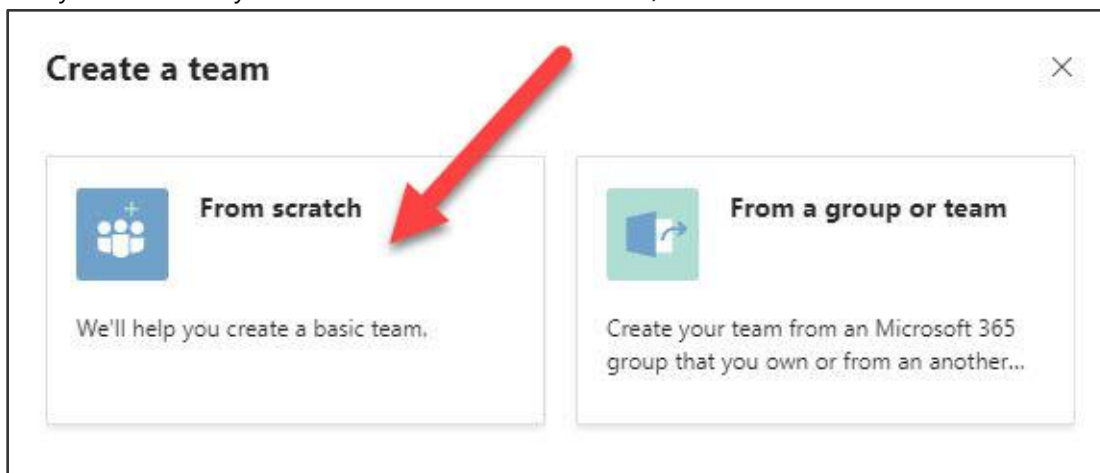
4.  Select Private. Only group admins can add new members of the group with this setting.
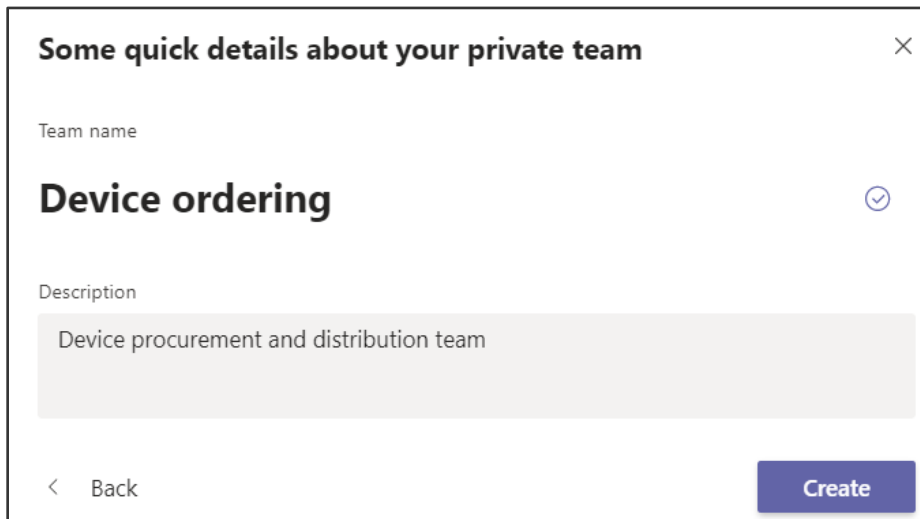


5.  Enter **Device ordering** for **Team name**, enter **Device procurement and distribution team** for **Description**, and click **Create**.



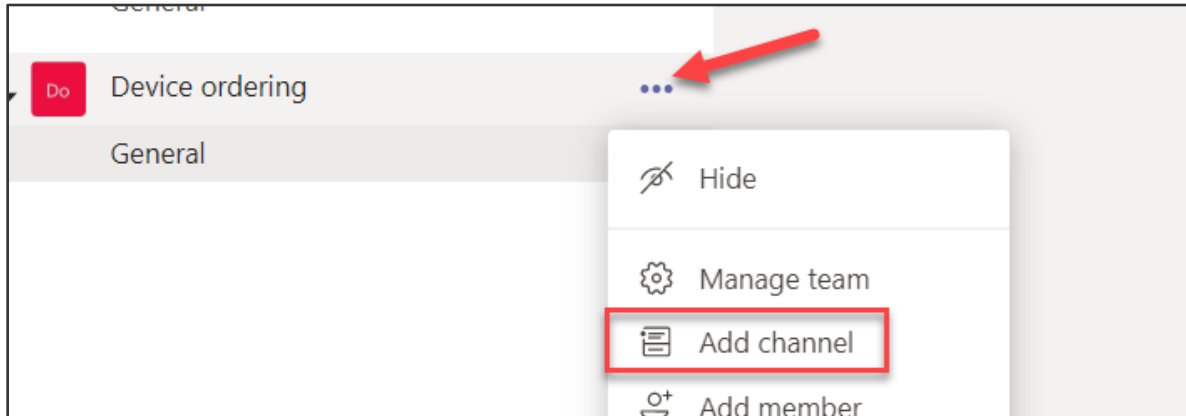6.  You are given the option to add members, you will add members after adding channels. Click **Skip**.

# Task 4: Add channels

Now that your team is created, let us add some channels where different groups can find the information they need and take care of their work.

1. Click on the **… More options** button of the **Device ordering** team and select **Add channel.**



2. Enter **Employee orders** for **Channel name**, **Channel for employee orders** for **Description**, select **Standard** for **Privacy**, check the **Automatically show** checkbox, and click **Add**.

3.  Click on the **... More options** button of the **Device ordering** team and select **Add channel** again.
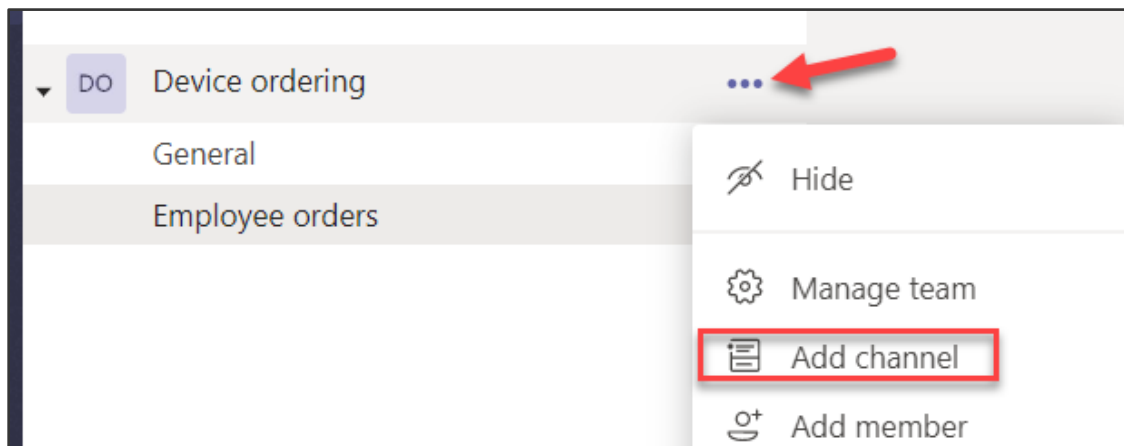


4.  Enter **Purchasing managers** for **Channel name**, enter **Procurement managers team** for **Description**, select **Private** for **Privacy**, and click **Next**.



5.  Click **Skip**. You will add members in the next task.

6. You will notice when you are back on the main Teams canvas that there is a lock symbol next to this channel. This means the channel is private, and it is only visible and accessible to members of that channel.
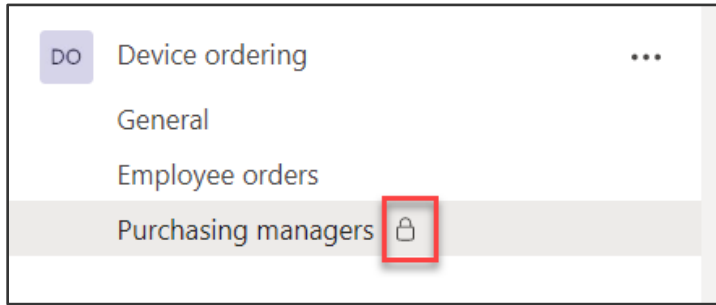


# Task 5: Add users to your team and channels

Now, you will learn how to create and manage new Teams by adding different groups of users to the created channels.

The exact usernames in your tenant might vary based on the classroom set up.  You should still be able to add users to your Teams using the following method by simply adding the fictitious names in your tenant.
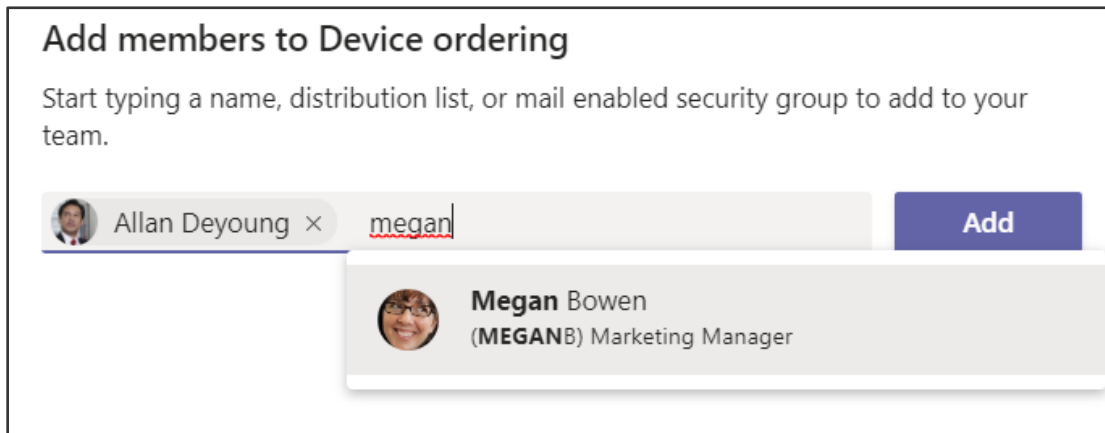
1. Click on the **... More options** button of the **Device ordering** team and select **Add Member**.
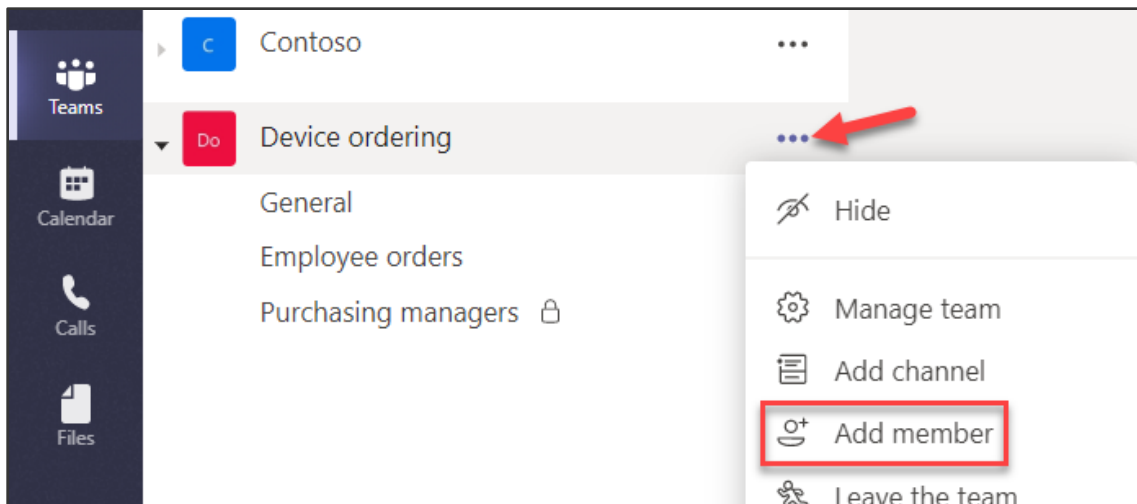


2. Search for **Allan** and select **Allan Deyoung.**
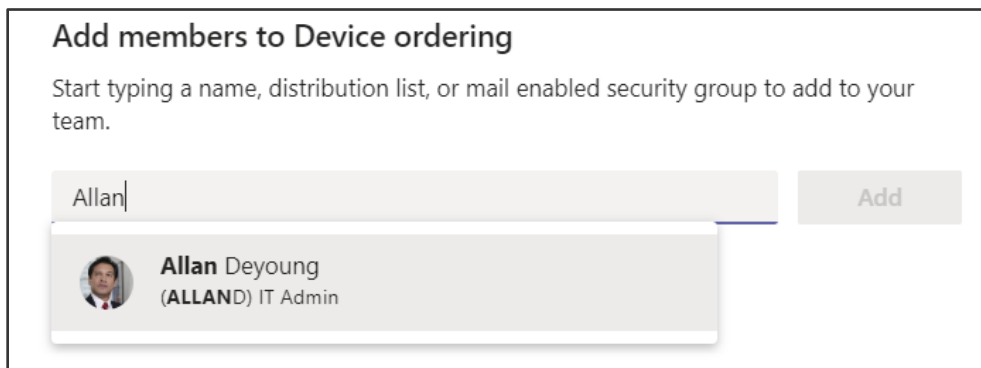
3. Search for **Megan** and select **Megan Bowen**.



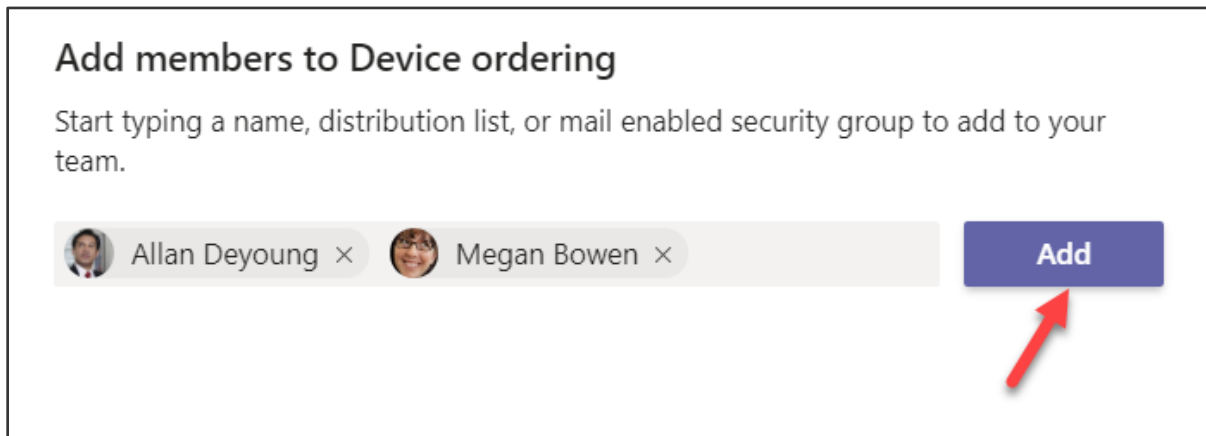Note: You can also use email addresses to add to Teams, including guests if your tenant admins allow guest access.

4. Click **Add.**



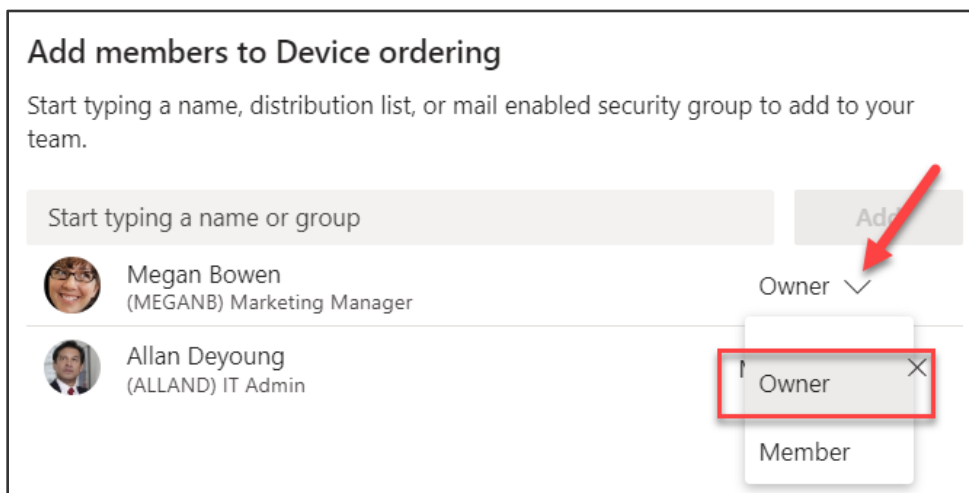5. After the members are added, select the dropdown next to Megan, and make her a team **Owner**. This will give her more control over the team.
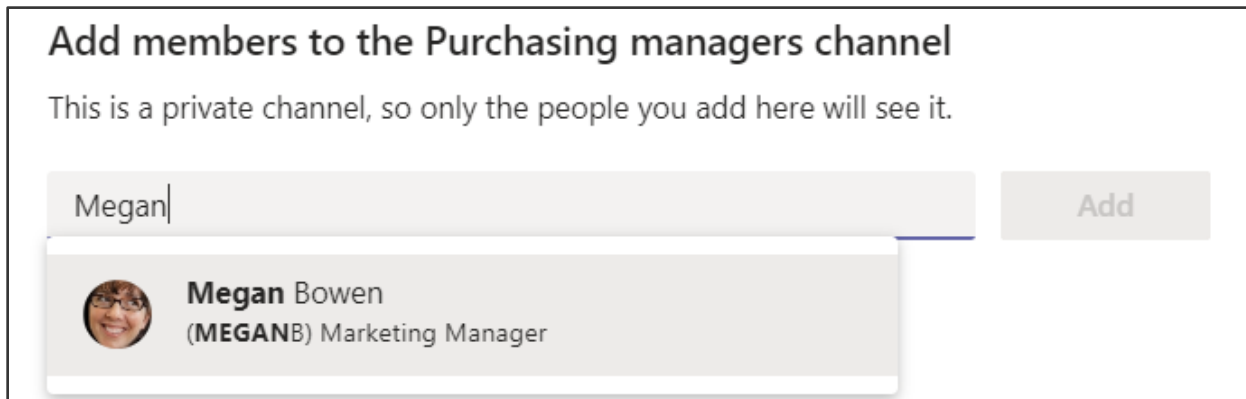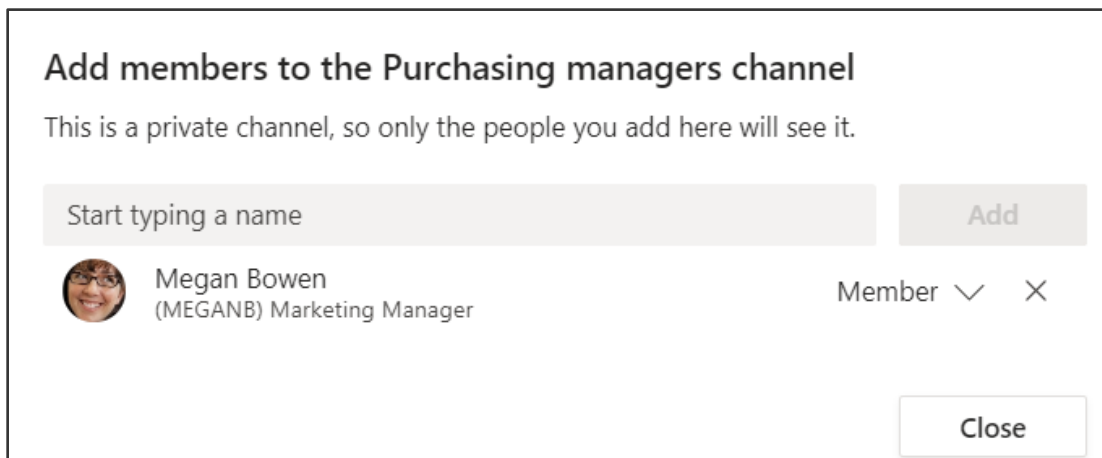


6. Click **Close**.

7. Select the **... More Options** button of the **Purchasing Management channel** and select **Add members**.
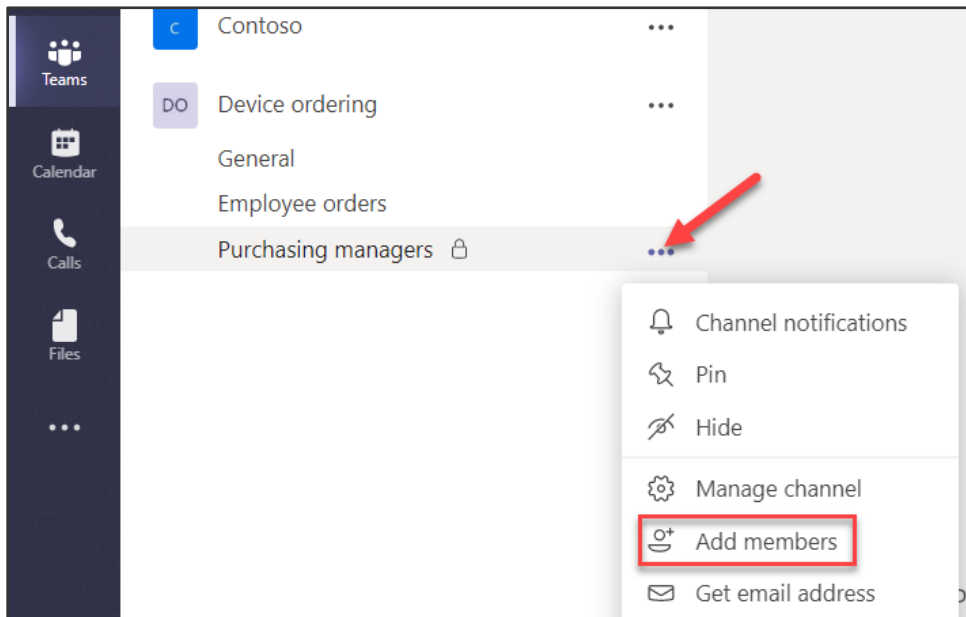


8. Search for **Megan** and select **Megan Bowen**. Only team members can be added to channel.



9. Click **Add**.

10. Click **Close**.

# Exercise 2: Import your Power App

In this section you will see how easy it is to download and integrate the Power App you already built into Teams. You will see that there are multiple ways to embed this app in your Teams experience and share it with your colleagues.

## Task 1: Download the app package

1. In a private browser session, navigate to Power Apps Maker Portal and make sure you are in the correct environment.

2. Select **Apps**, select the **Device Ordering App**, and click **Add to Teams.**
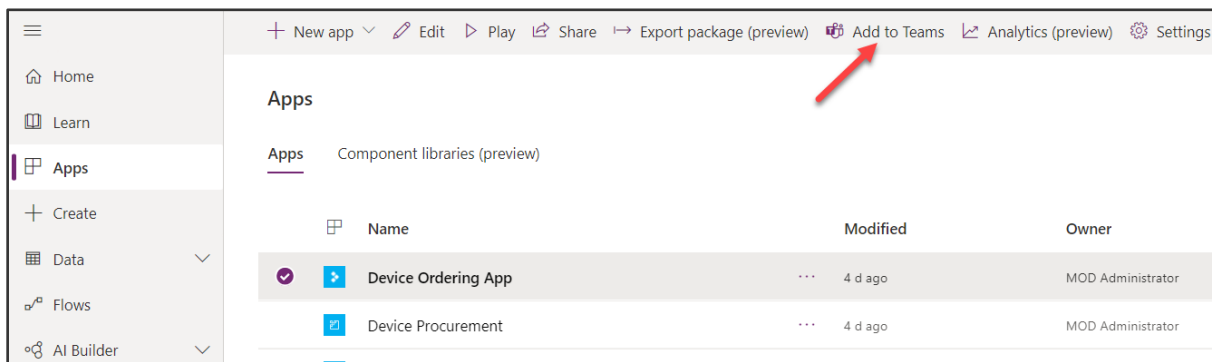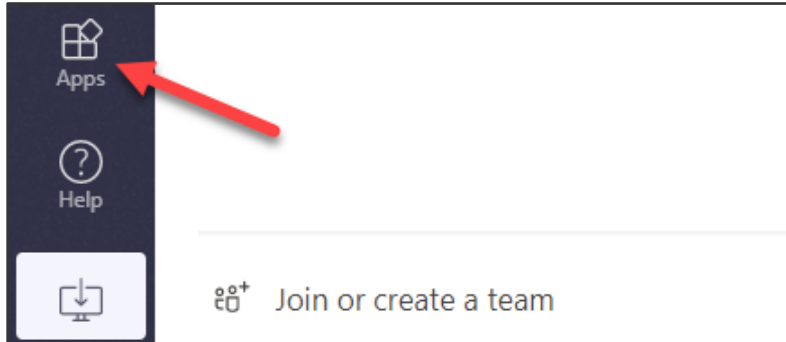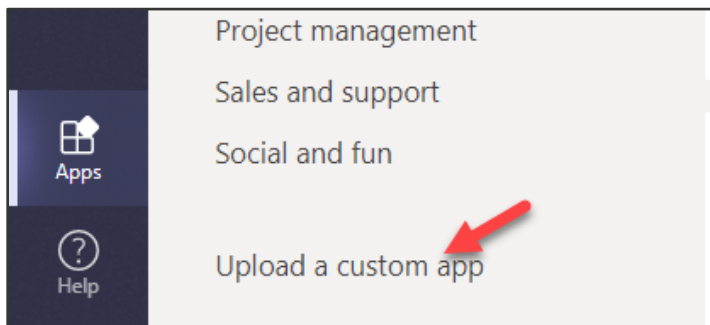


3. Click **Download app**.
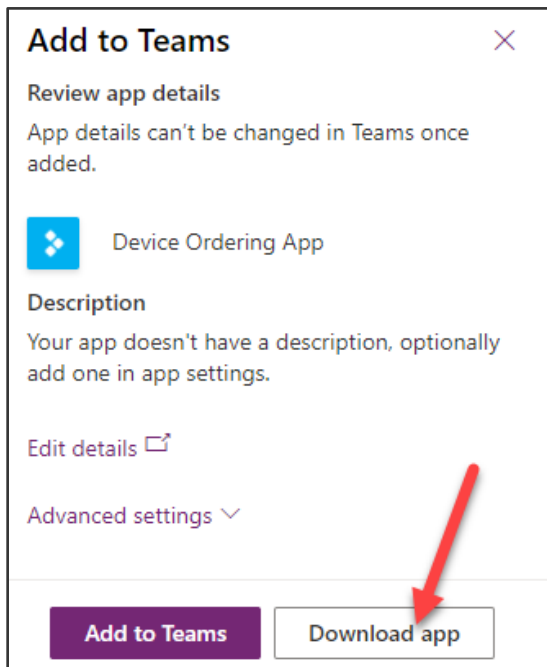


4. **Save the app package** somewhere convenient (e.g. your desktop)

## Task 2: Add to Teams app store

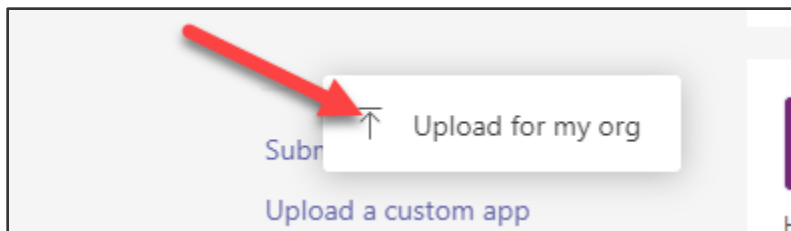1. Go back to your Microsoft Teams

2. Select **Apps** in the bottom left of the window to open the App store.
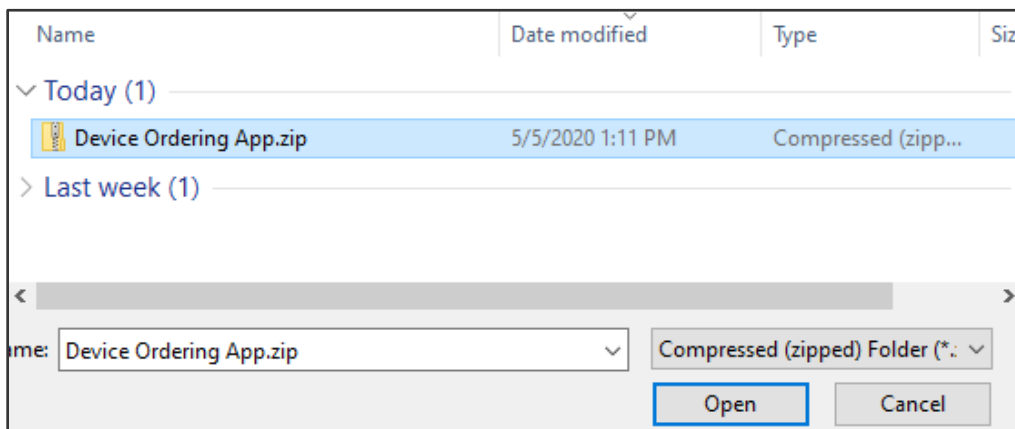
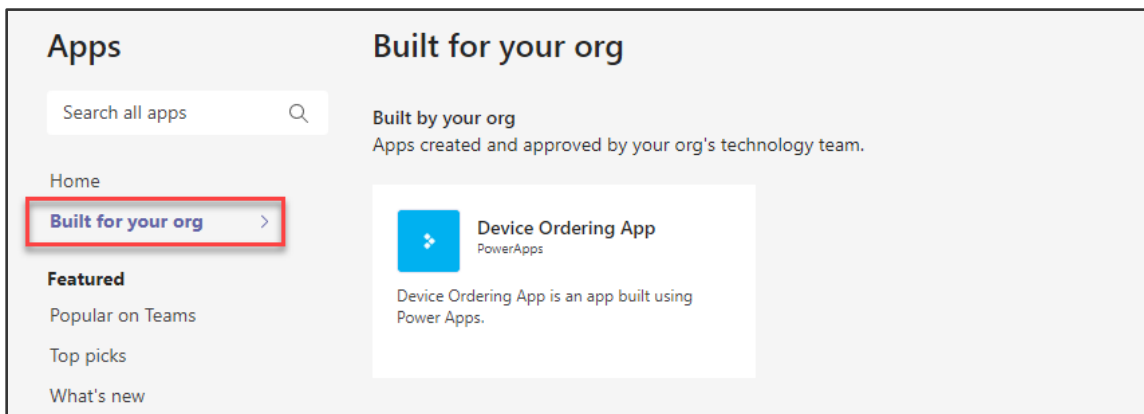3. Click on **Upload a custom app** at the bottom of the window.

4. Select **Upload for my org**.

5. Browse to the location you saved the app you downloaded, select the app package, and click **Open**
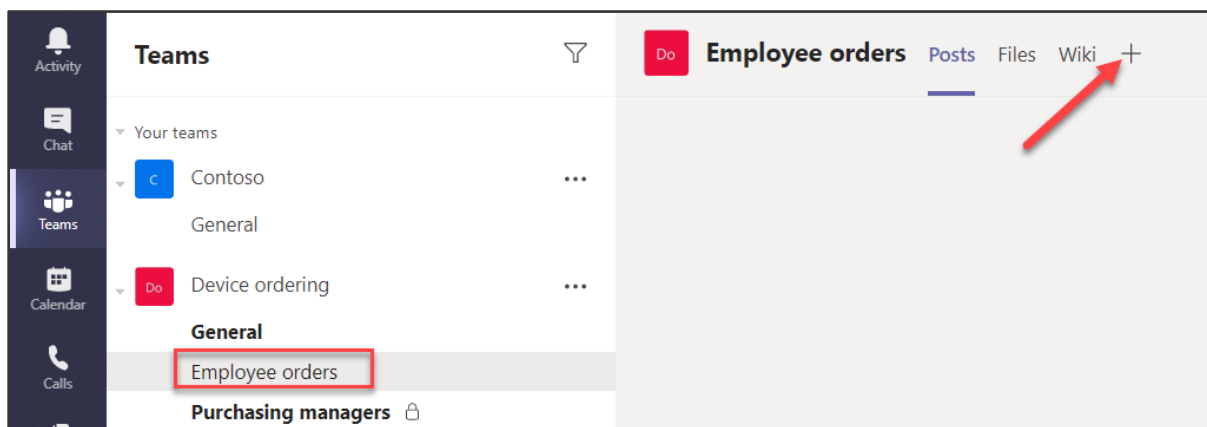
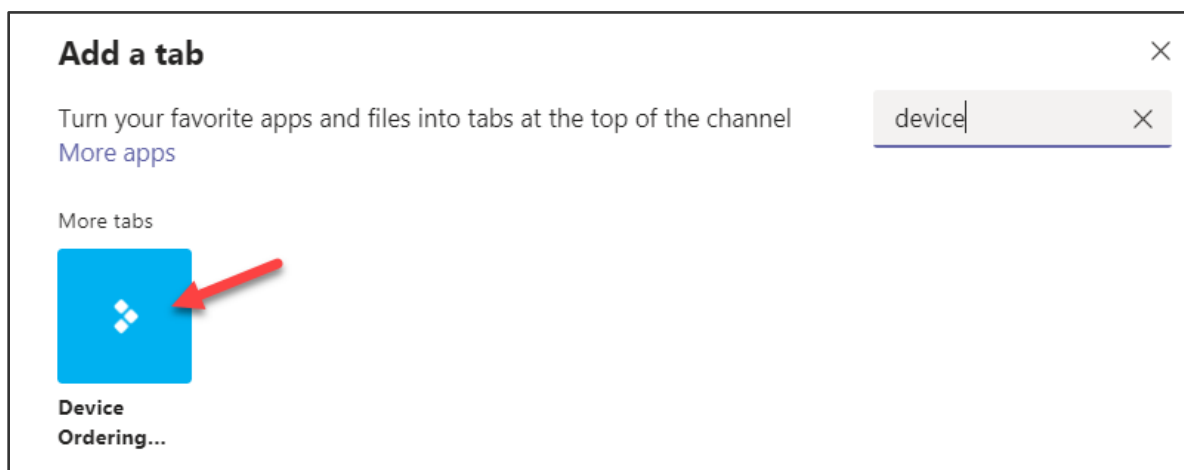6.  Select **Built for my org**. The app should now appear.
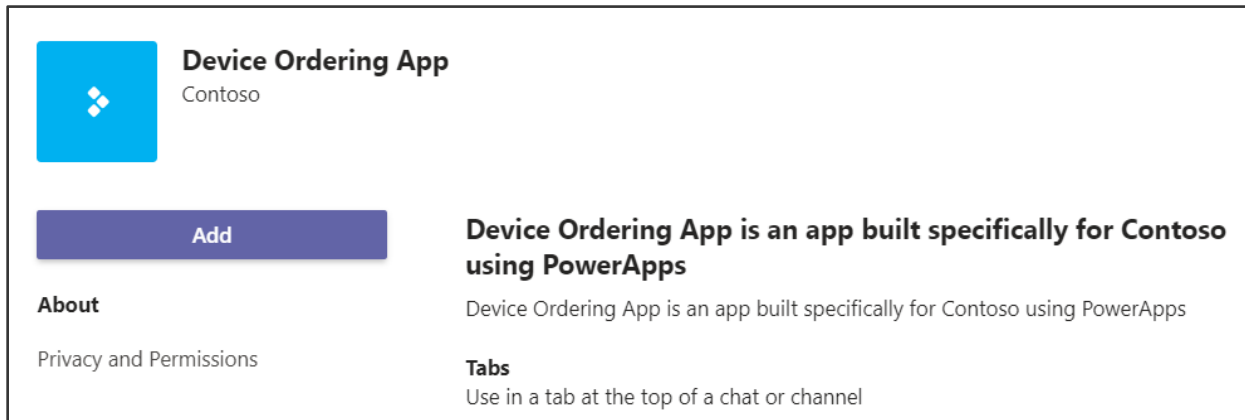


## Task 3: Add app to a tab

1.  Go back to your Microsoft Teams

2.  Select **Teams**, expand the **Device Ordering** team, select the **Employee orders** channel, and click **+ Add a tab**.
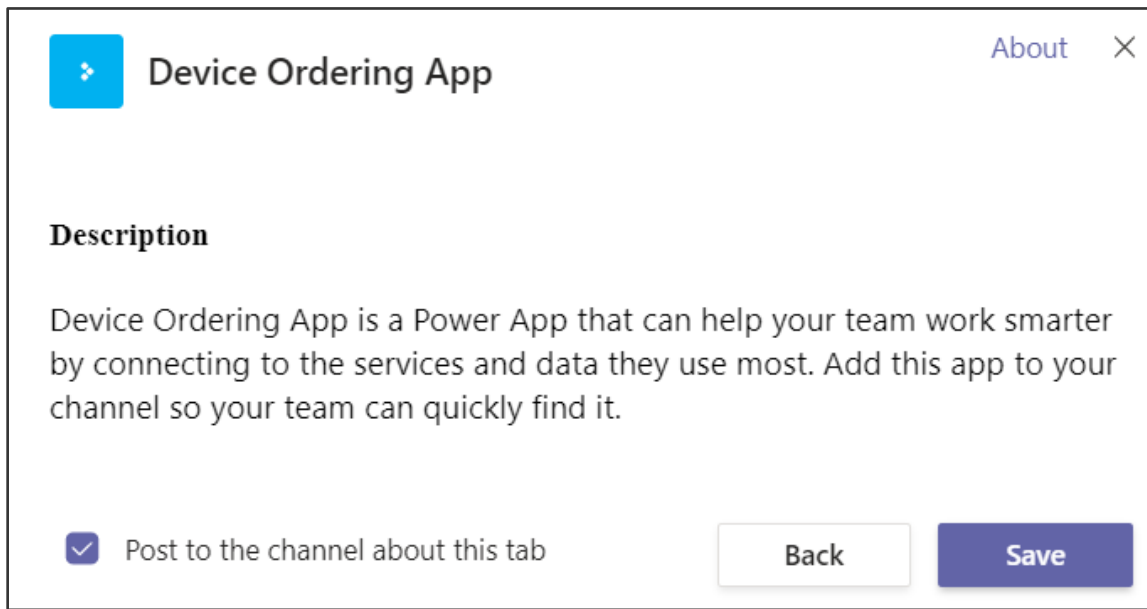


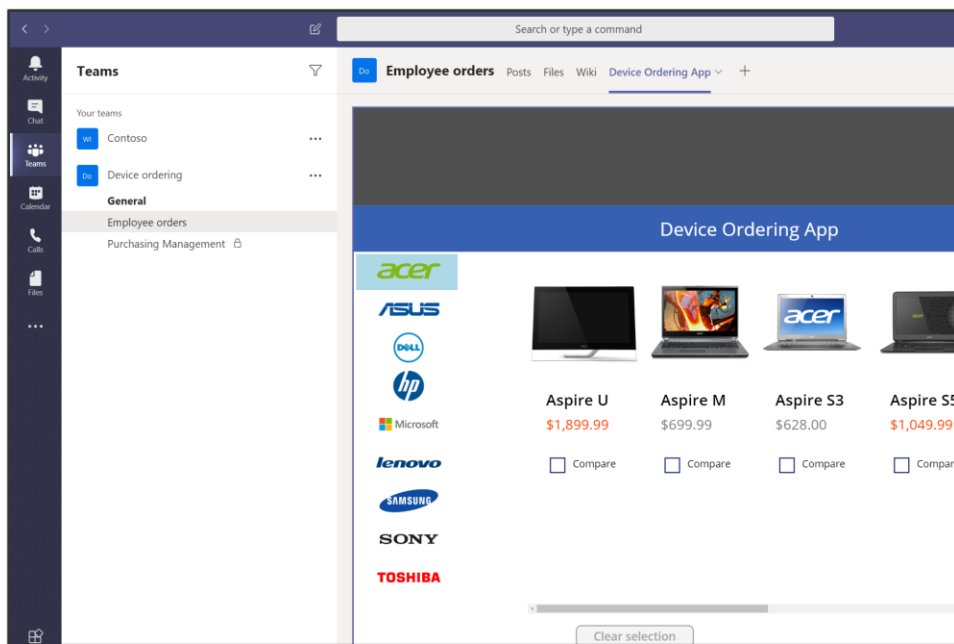3.  Search for **device** and select the **Device Ordering App**.



4.  Click **Add**.

5.  Check the **Post to channel about this tab** checkbox and click **Save**.  This will ensure others in the team are aware that the app is added.
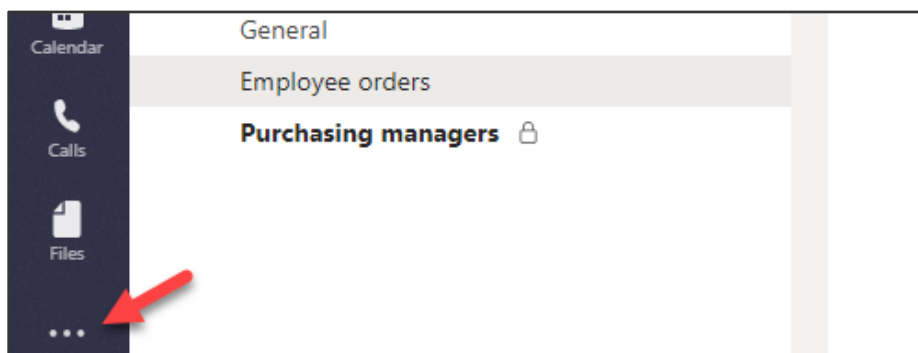


6.  Check to ensure that you can access the app by clicking on the newly added tab for the **Device Ordering App**.
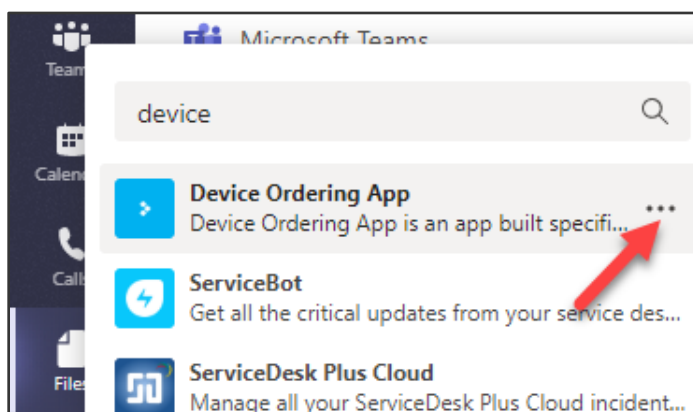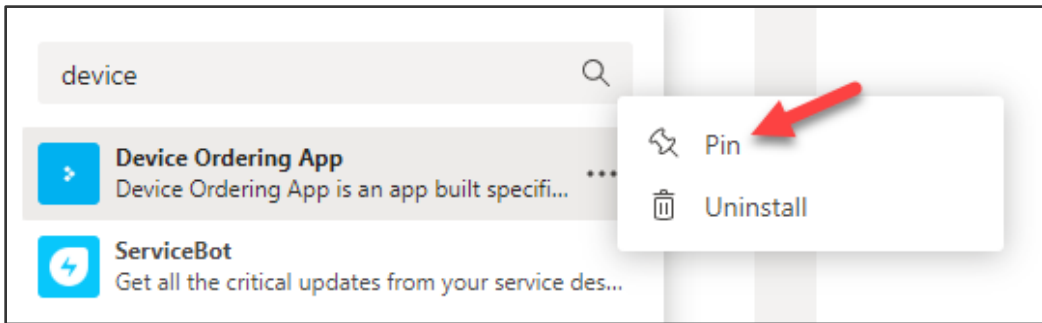
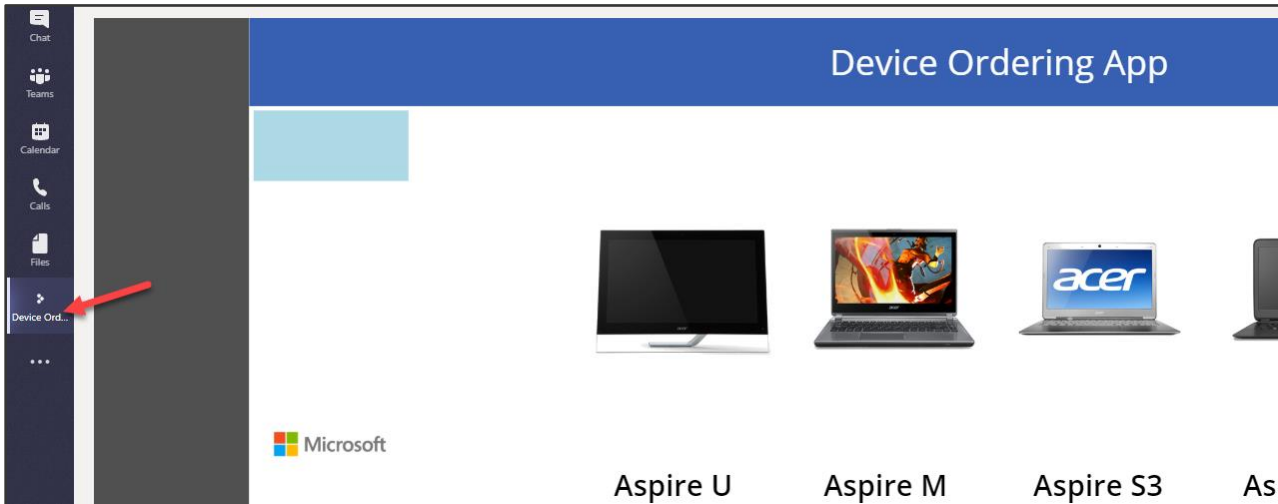# Task 4: Pin app to app bar

1. Click **... More added apps.**



2. Search for device and click on **...** button of the **Device Ordering App**. If the **...** button does not appear then you can find the selections by right clicking on the **Device Ordering App image**.



3. Select **Pin**. You can also right click and then pin.

4. The tab should now be pinned. Click on the tab and the app should load.

# Exercise 3: Update automations for Teams

This section will guide you through modifying the approval flow you made earlier to send all the approvals in Teams, making it easier and faster to access and track. Approval workflows are very useful to add to Teams. The Power Automate app in Teams allows you to easily track approvals in one place. Also, having approvals in Teams allows approvers to quickly reply to a request just like a chat. Having all your work and processes in one place streamlines how work gets done and makes these tasks easier for everyone to complete.

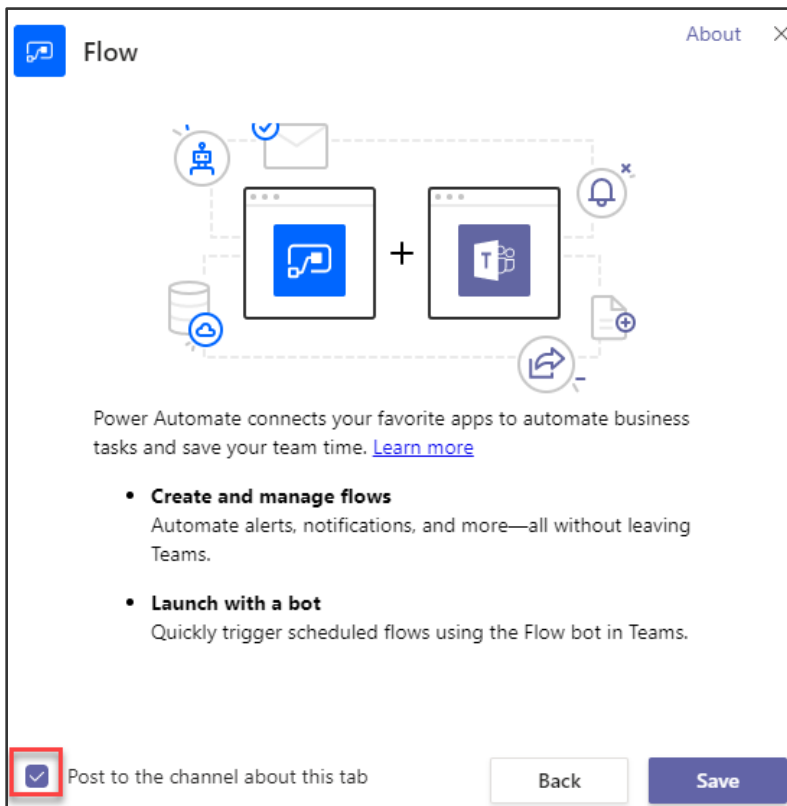## Task 1: Add Power Automate app to channel

1.  Navigate to the **Purchasing Management channel**

2.  Click the **+ Add a tab** button.
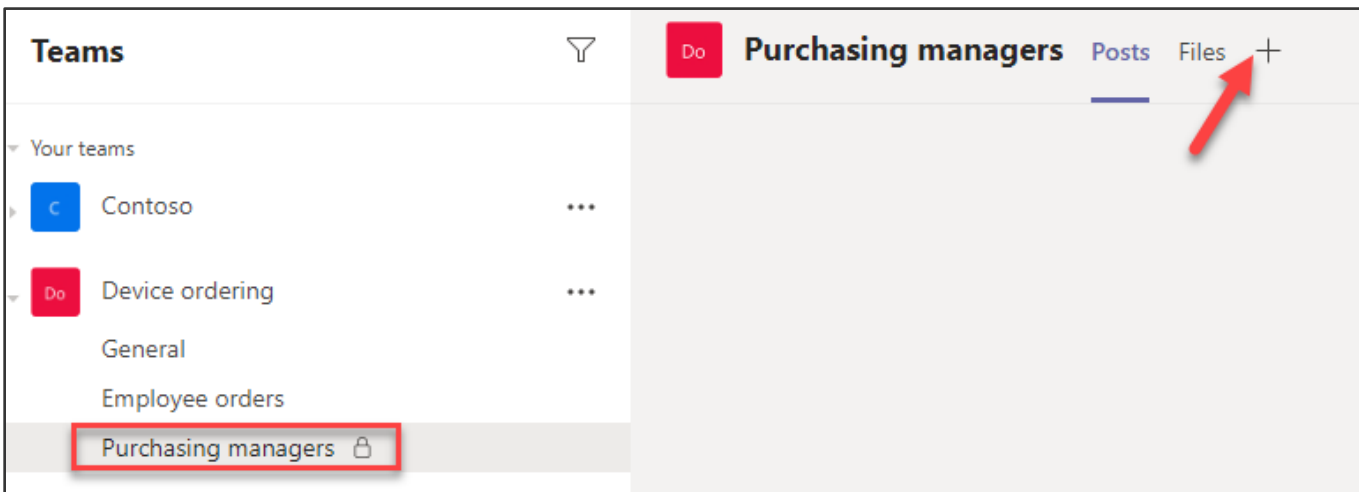


3.  Search for flow and select **Power Automate**.
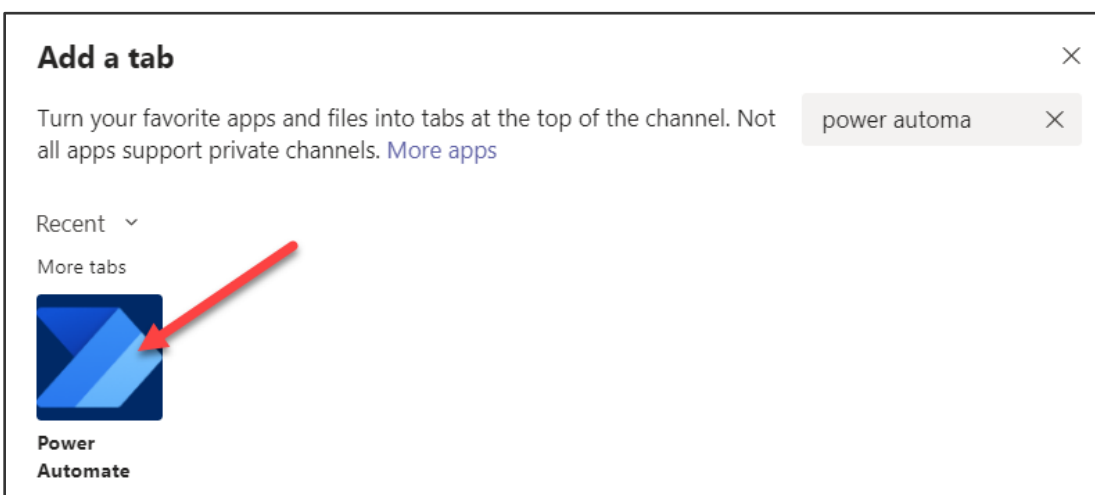


4.  Click on the **Add** button.

5.  Check the **Post to the channel about the tab** checkbox and then click **Save**.

## Task 2: Modify existing automations for Teams

1. Navigate [Microsoft Power Automate](#)  and sign in.

2. Make sure you are in correct environment, select **My Flows**, and click to open the **New device approval request** flow.

*Note: If you imported the Module 4 Completed Solution, then you will find this flow by selecting Solutions and opening the Module 4 Completed Solution file in PowerApps.*

3. Then select **Edit**
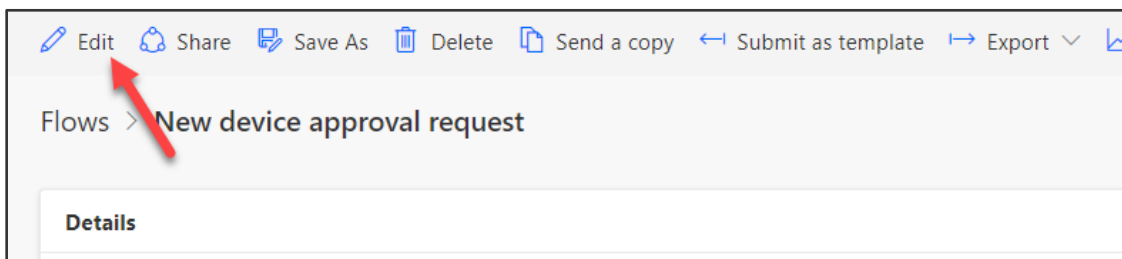


4. The flow should look like the image below.
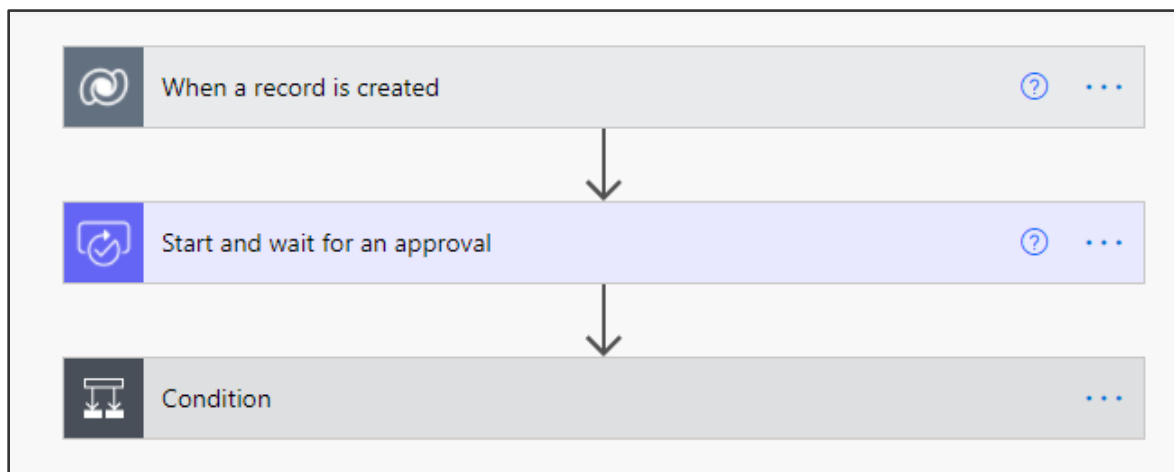
5.  Click to expand the **Start and wait for an approval** step. You will copy the information in this step to a new create an approval step.



6.  Click **Insert a new step** after the Start and wait for an approval step and select **Add an action**.
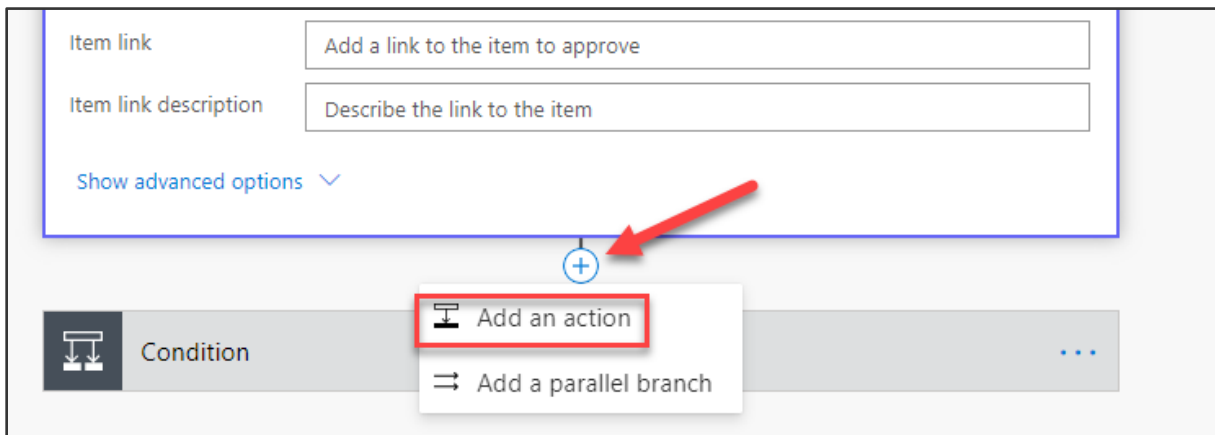
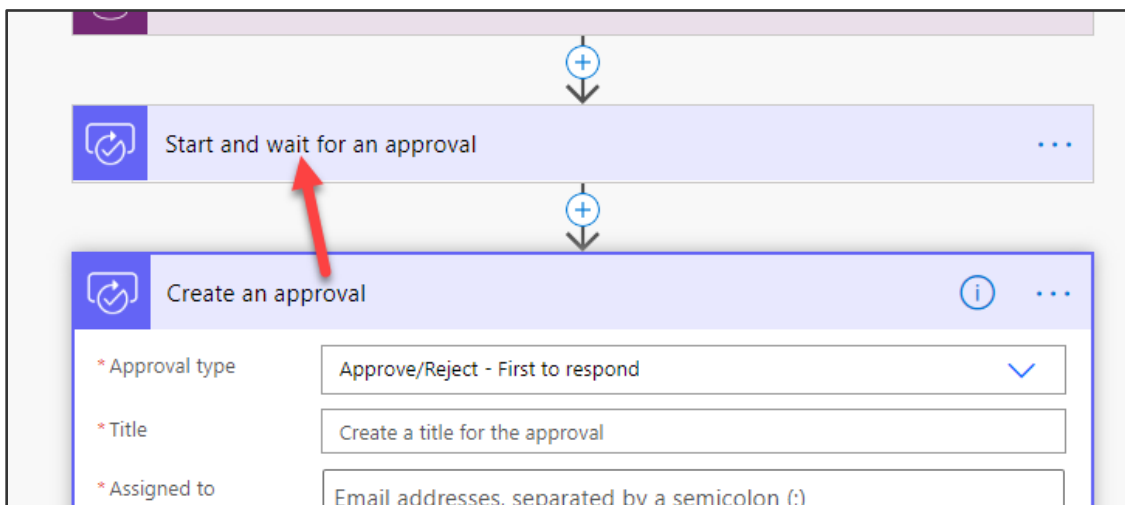7.  Search for approvals and select **Create an approval**.
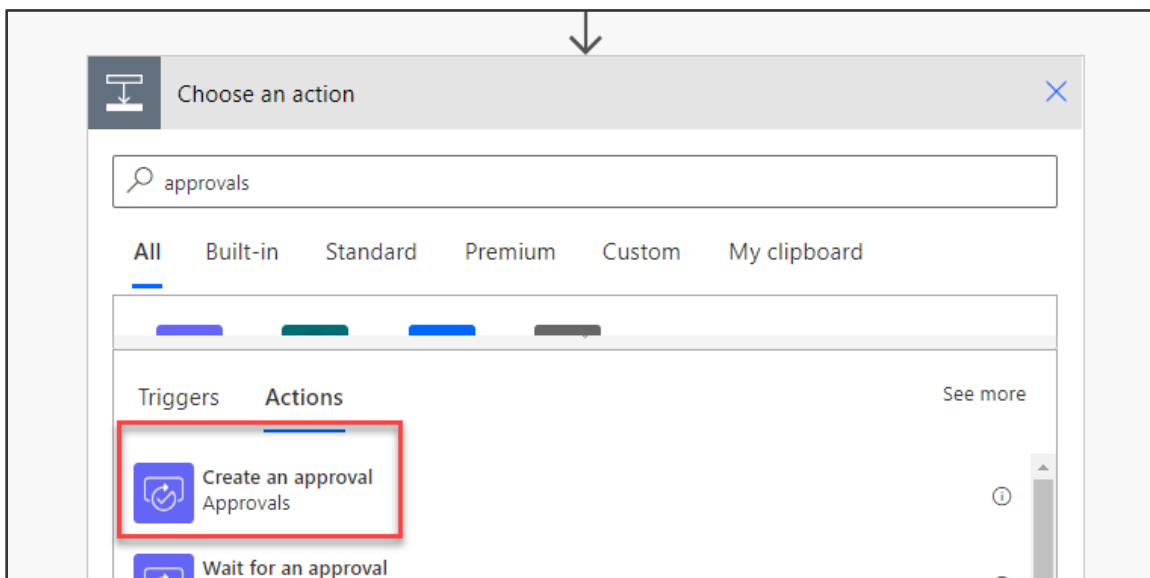


8.  Select **Approve/Reject – First to respond** for **Approval type**.

9.  Click to expand the **Start and wait for an approval** step.



10. Select the content in the **Title** field, right click, and select **copy**. Or use **[CTRL C].**

11. Go to the step you added and paste the content you copied in o the Title field. Right click paste or **[CTRL V]**



12. Go back to the **Start and wait** step and copy the content of the **Details** field.

13. Go back to the Create an approval step and paste the content you copied to the **Details** field.



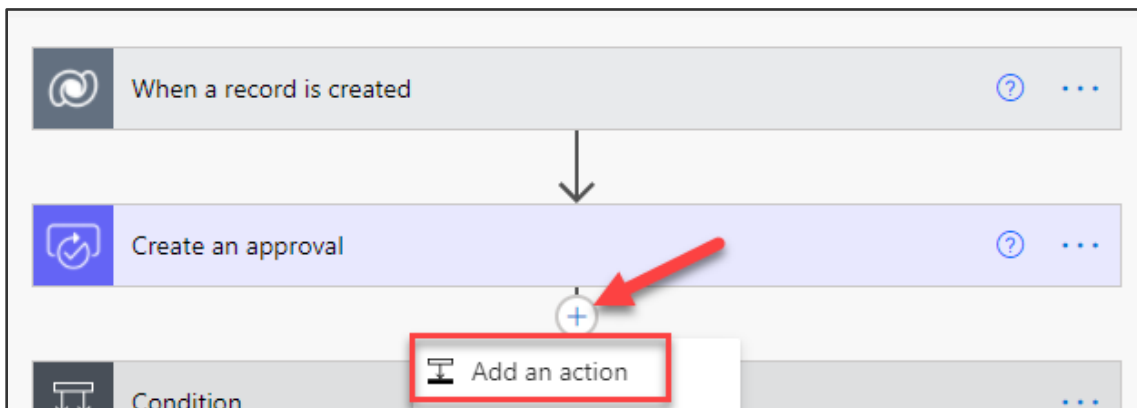14. Click to select the **Assign to** field and select **Approver** from the dynamic content pane.

15. Go to the Start and wait for an approval step, click on the **... Menu** button and select **Delete**.



16. Click **OK**.

17. Click **Insert a new step** and select **Add an action**.



18. Search for **adaptive card** and select **Post you own adaptive card as Flow bot to user Microsoft Teams**.
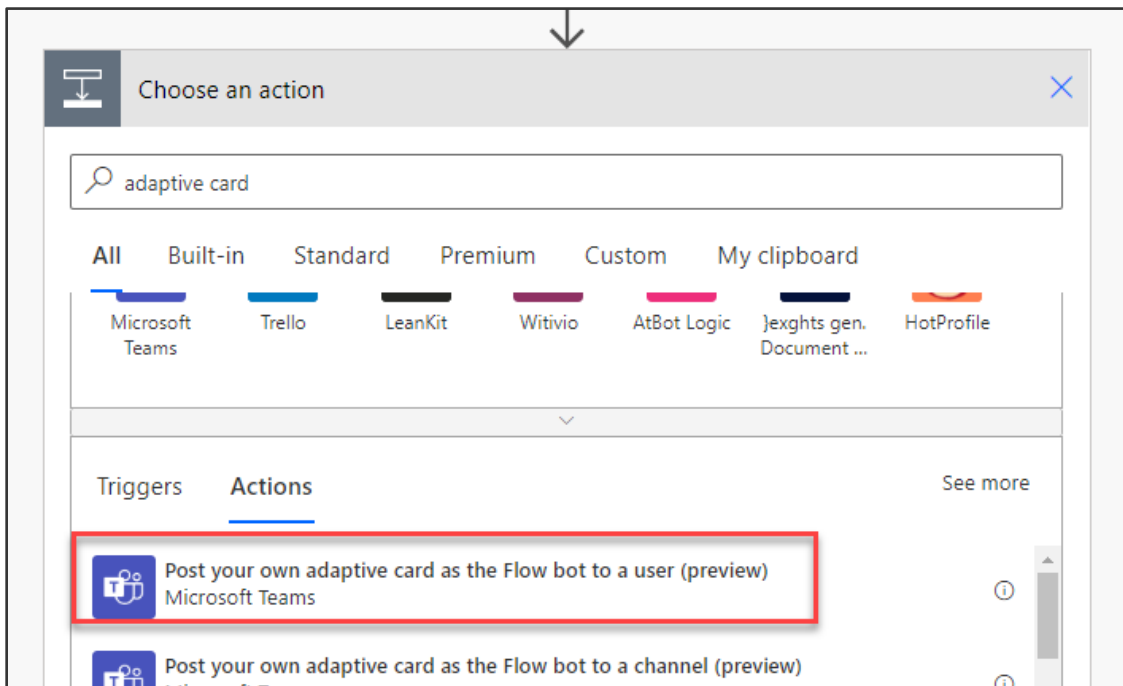
19. Click to select the **Recipient** field and select **Approver** from the dynamic content pane.



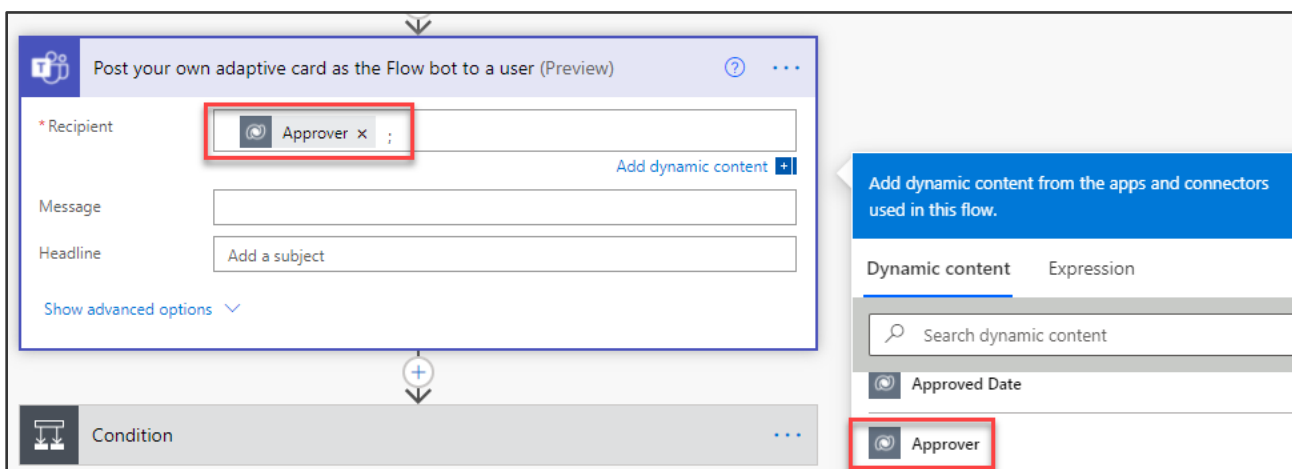20. Click to select the **Message** field and select **Teams adaptive card** from the dynamic content pane.
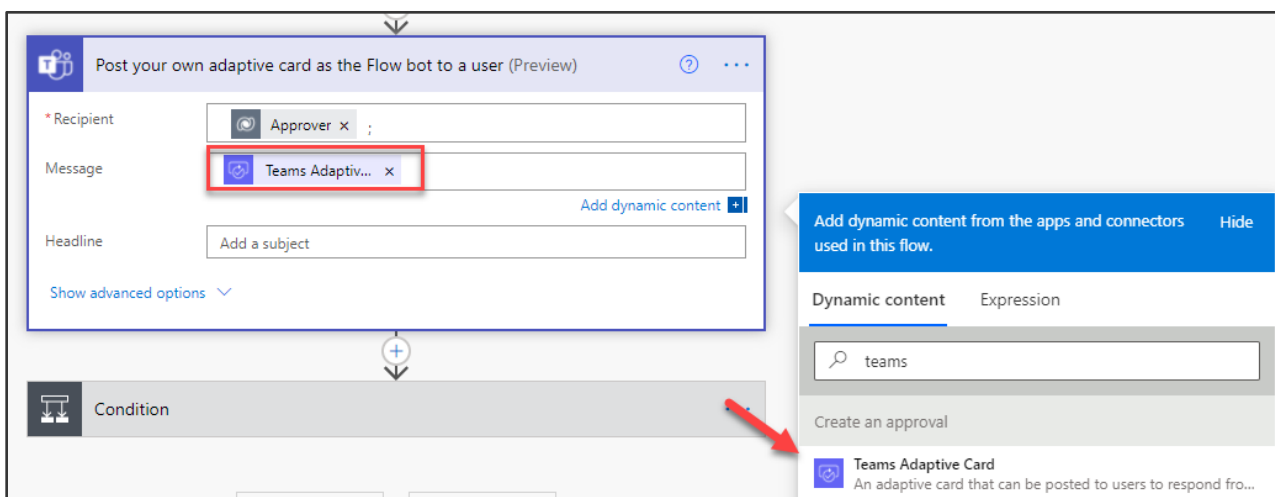
21. Enter **Approval request** for **Headline**, click **Insert step**, and select **Add an action**.
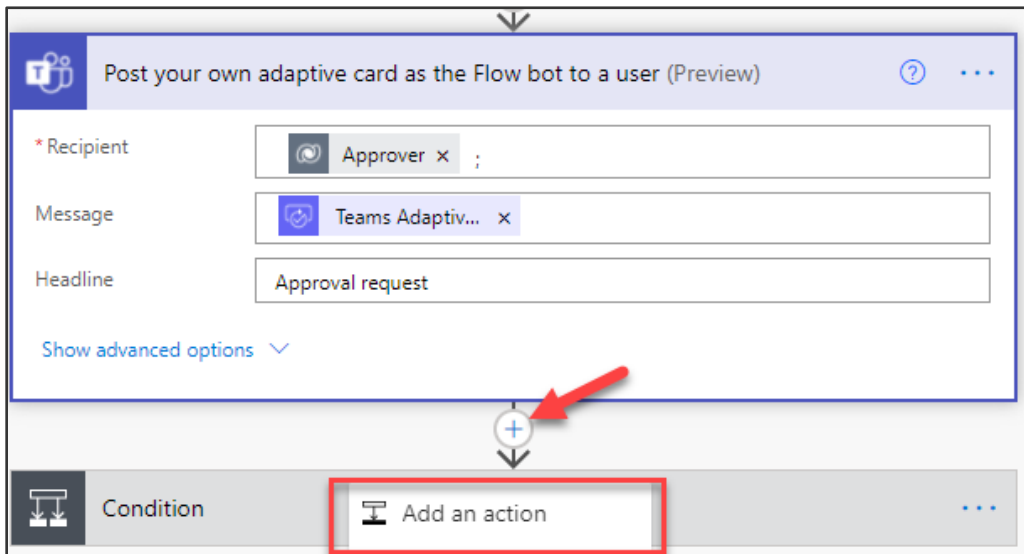


22. Search for wait and select **Wait for an approval**.
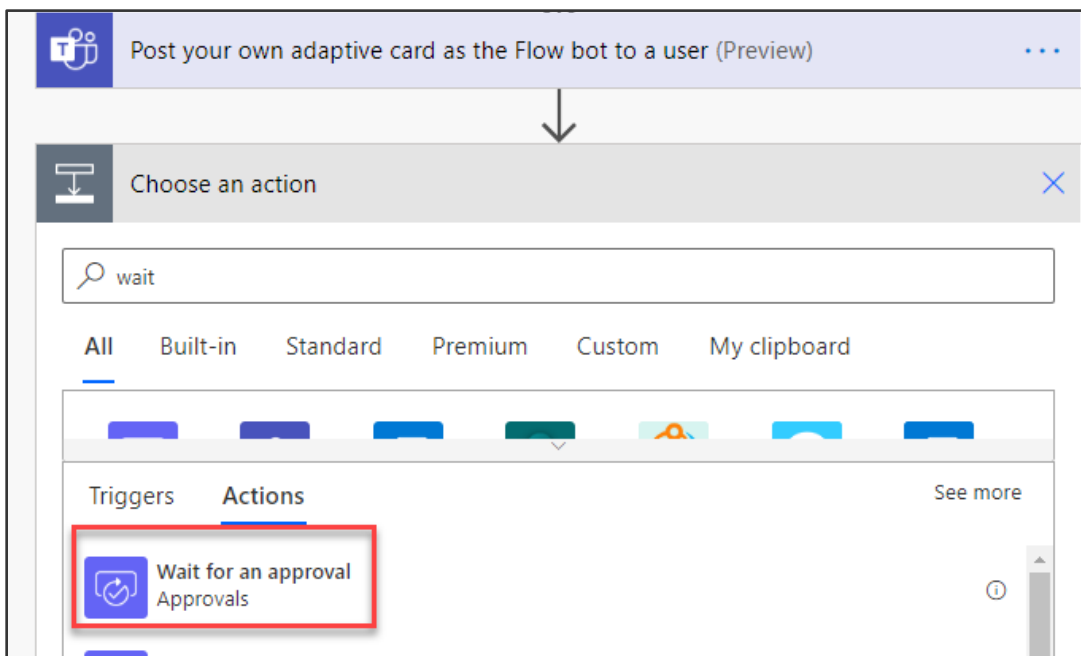


23. Click to select the **Approval ID** field and select **Approval ID** from the dynamic content pane.
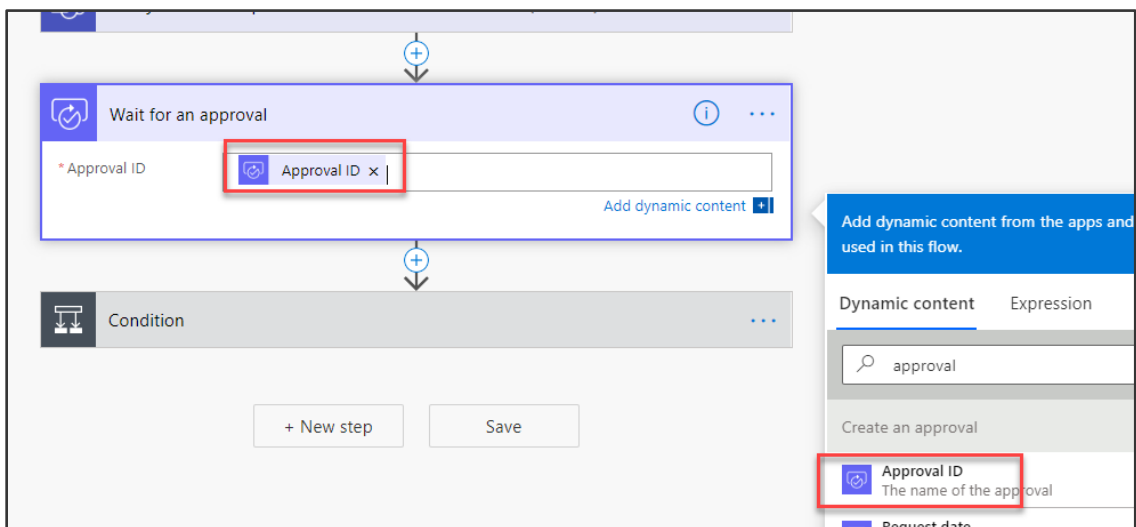
24. Click to expand the condition step.



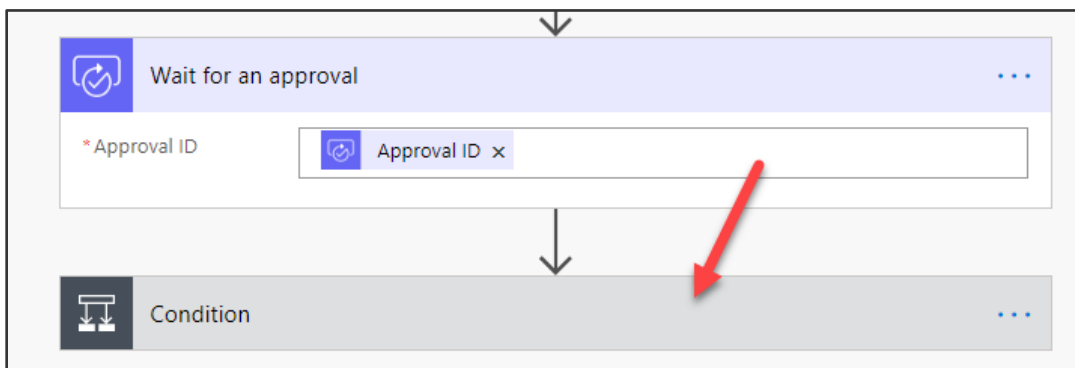25. Click to select the **Choose value** field and select **Outcome** form the dynamic content pane.
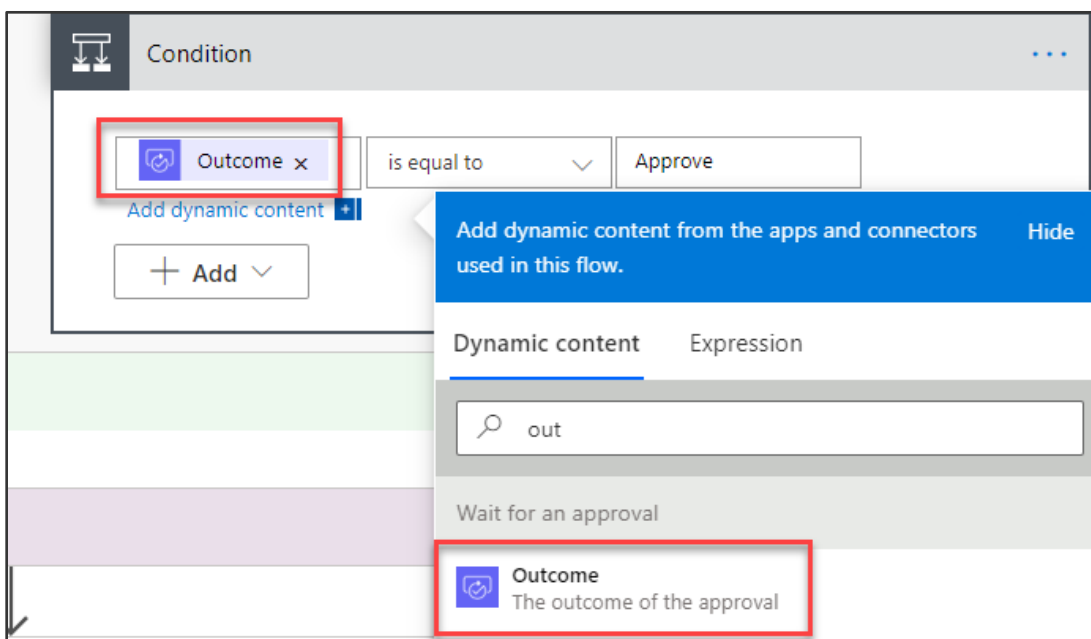


26. Click **Save** to save your changes.

27. Click the **Back** button top leave the edit screen
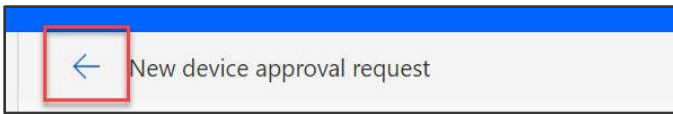
28. Make sure the flow is turned on.
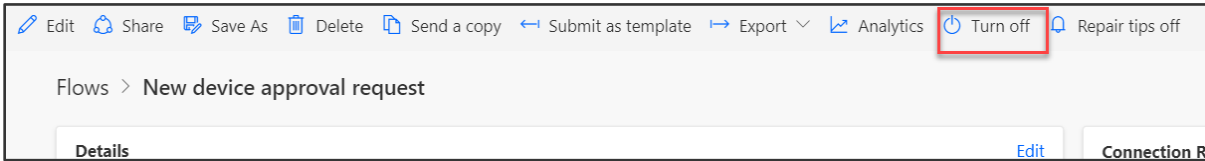


# Task 3: Test your Flow

Now that the flow has been modified, you are ready to test it. To test the flow, run the device ordering app you added to Teams either in the channel or the app bar.
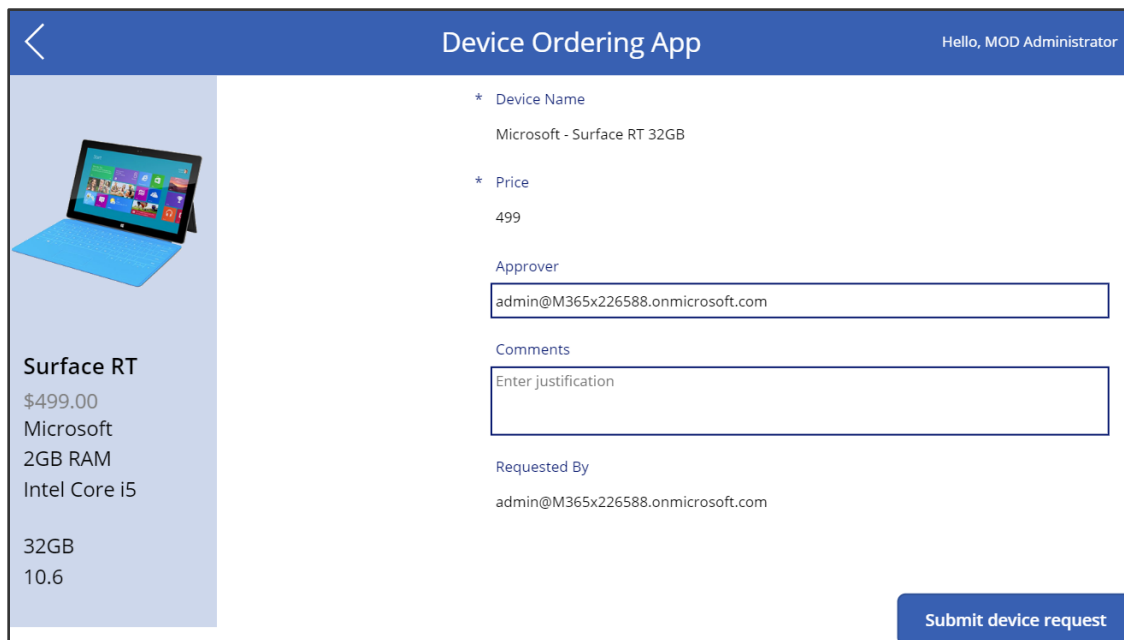
1. Navigate to Microsoft Teams and select the **Device Ordering App** tab.
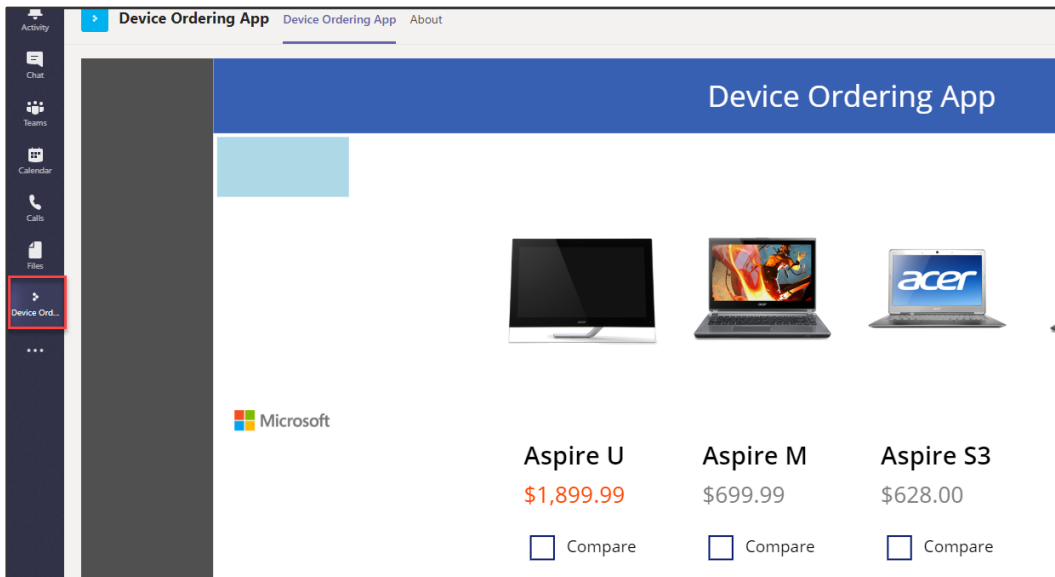


2. Select **Microsoft**, select a device, and click **Compare**.
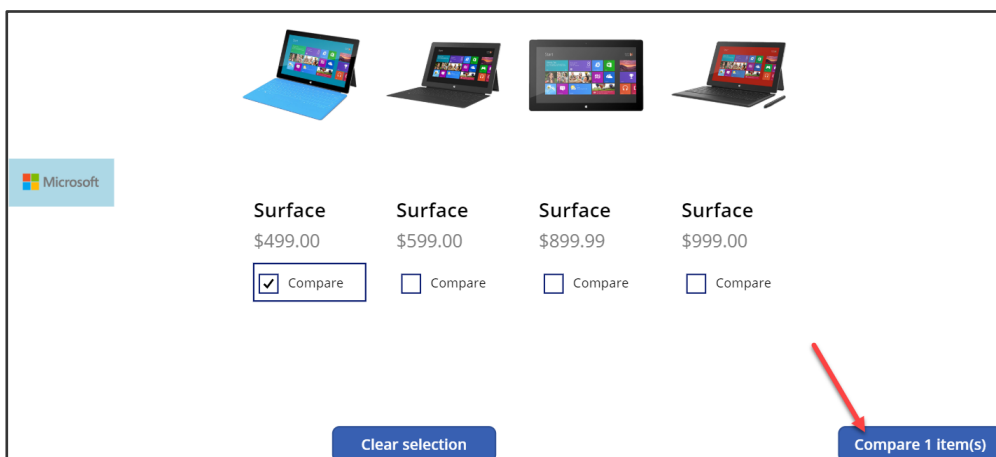
3. Make sure the approver email is your email (for test purposes) and click **Submit device request**.



4. Click **OK**.

5. Shortly after hitting submit, you should see a message and a notification in the Chat tab on your app bar – this is from the Flow Bot. Click to open the chat. Wait a moment if it doesn't appear immediately.
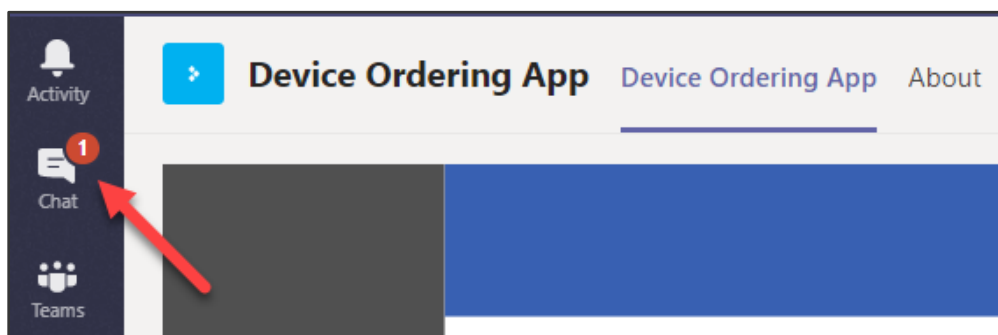


6. When clicking on the Flow bot in your chat window, you will see an approval card. Click **Approve**.
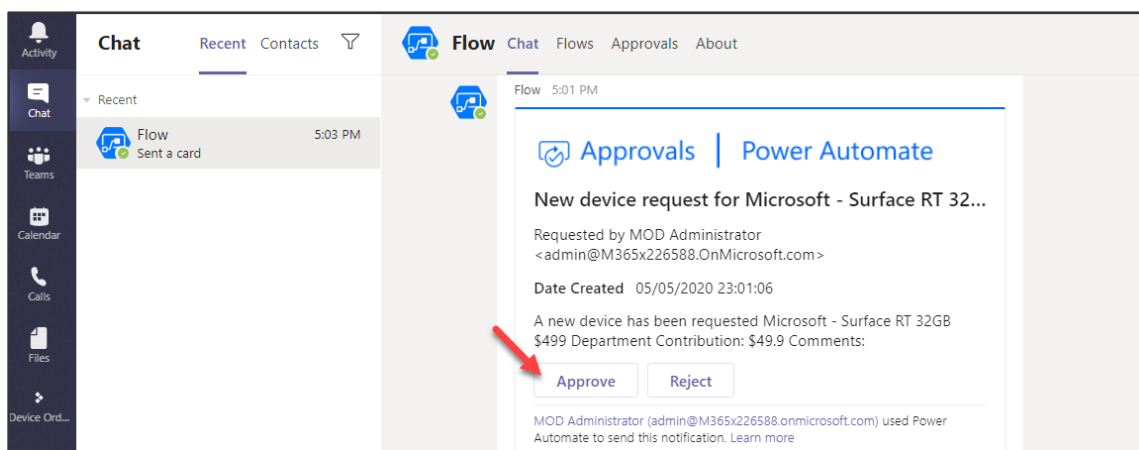


7. Provide a comment and click **Submit**.

8. You should see the approval of the request. In a normal scenario the approver and approval requestor would not be the same, but this allows you to test the flow to see that all steps are working!



# Exercise 4: Add Power BI report to Teams

**This exercise requires you to have completed the Module on Power BI.**

In this exercise you will learn how to add Power BI reports and dashboards to Teams. Having your data in Teams and channels allows users to quickly find the data they need and in the context of the team where they are working. The conversational nature of Teams also amplifies the ability to collaborate on data and turn it to action.

## Task 1: Add Power BI app to Teams tab

1. Navigate back to Teams. Select the Purchasing managers channel in the Device Ordering Team.
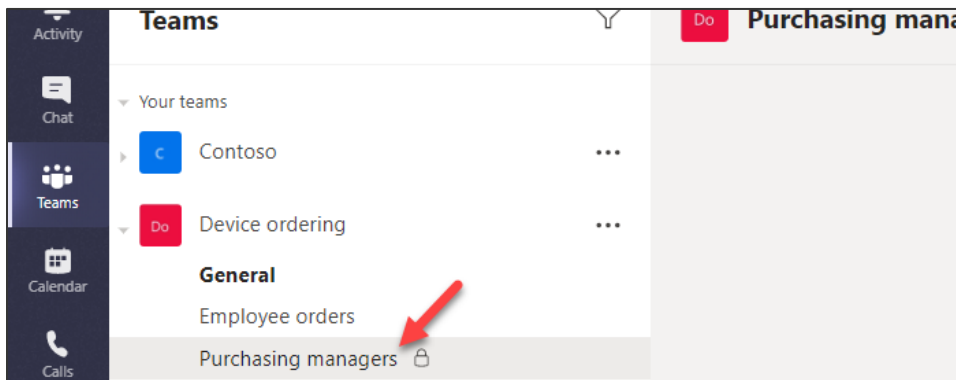
2. Click **+ Add a tab** again.
3. Search for Power BI and select the Power BI app.
4. In the Power BI window, expand **My workspace** and select the **Device Order Report** that you build earlier.
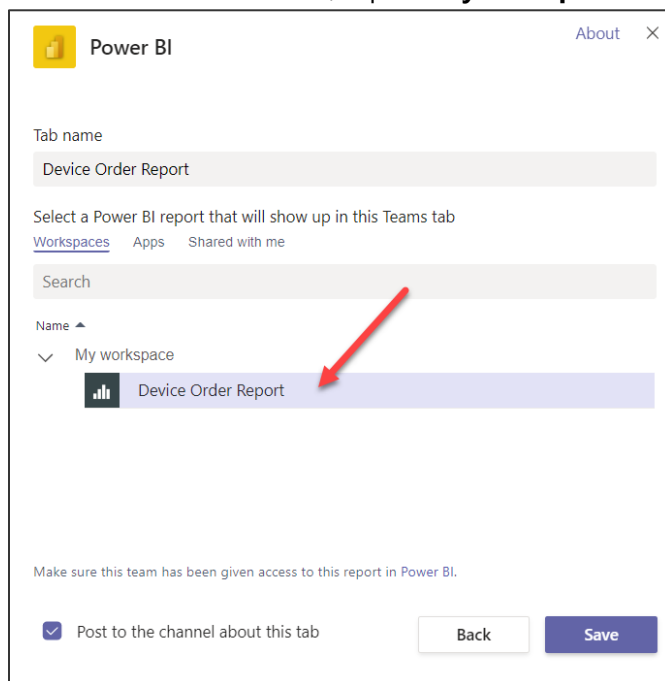


5. Make sure you select **Post to the channel about this tab** and click **Save**.
6. The Power BI tab should load.
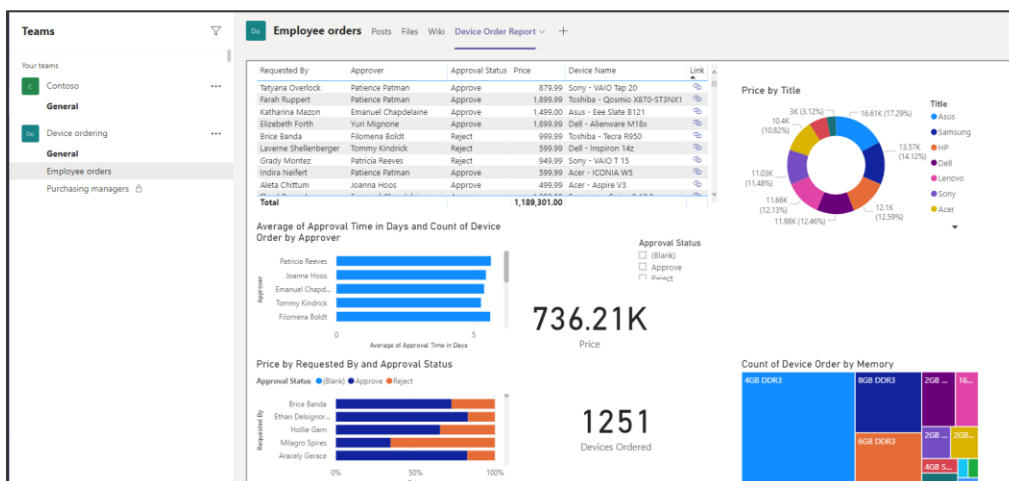
# Task 2: Start chat in Power BI

1. Click into the New Power BI report tab that you just created. In the top right, you'll see a chat bubble icon – **click the chat icon**
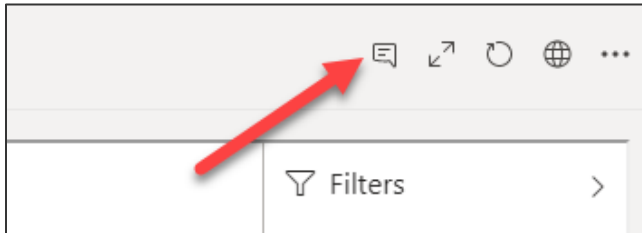
2. A chat window should open on the right side of the screen. In the chat window, type @Megan, and hit tab. Then type a message to Megan and click **Send**. This will send her a notification and allow her to come right to the report.
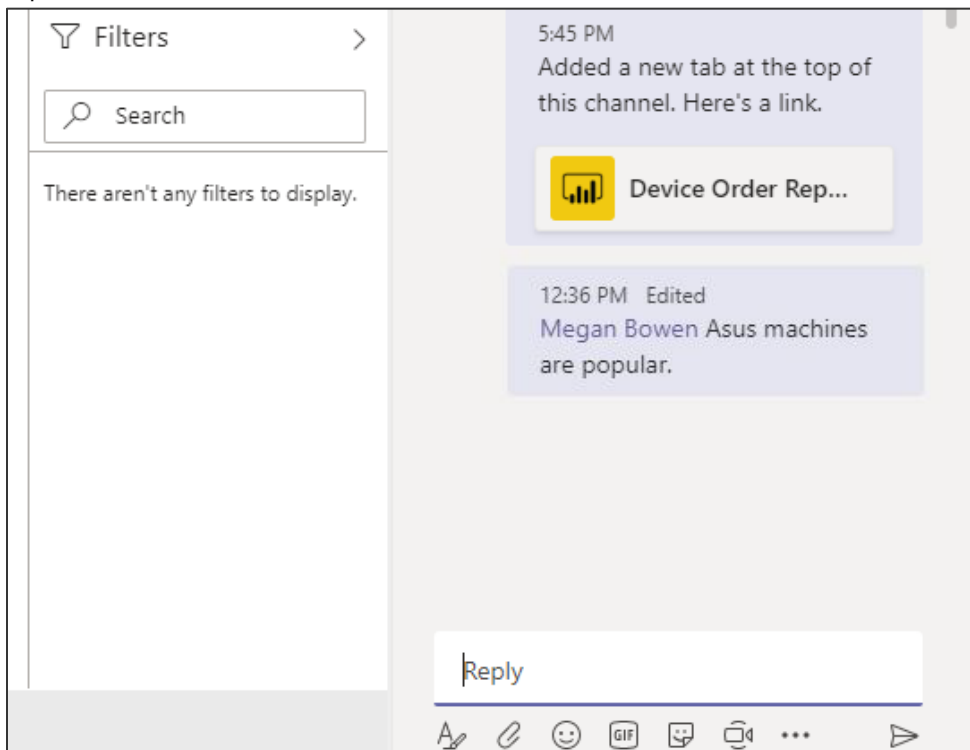
# Exercise 5: Add Power Virtual Agents bot to Teams

**This exercise requires you to have completed the Module on Power Virtual Agent.**

Chatbots in Teams are another great addition to the Teams experience. The conversational nature of Teams makes the transition to chatbots simple and allow users to quickly find the information they need without having to switch to a new experience to interact with the bot. Like other components of Power Platform, Power Virtual Agents bots are easier for users to find in Teams and easy for makers to share with their teams.

Note that with the addition of Project Oakdale, it is possible to author a Power Virtual Agent bot inside of Teams. However, doing so will create a new environment and will not work for the purpose of this class.

## Task 1: Load app studio into Teams

1.  Click the **Apps icon** on the left side of the screen.



2.  Search for app studio and select the **App Studio** app.
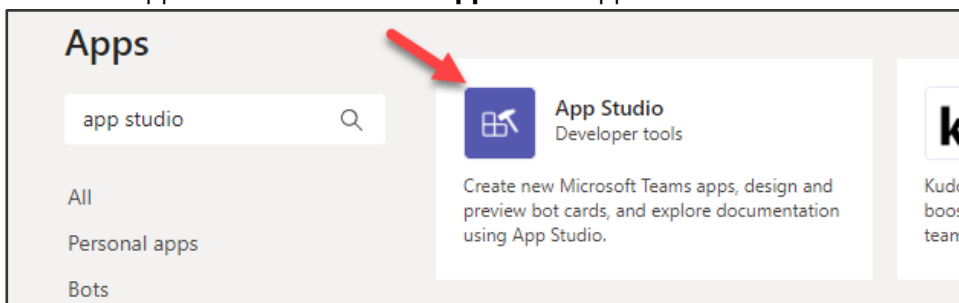


3.  Click Add.
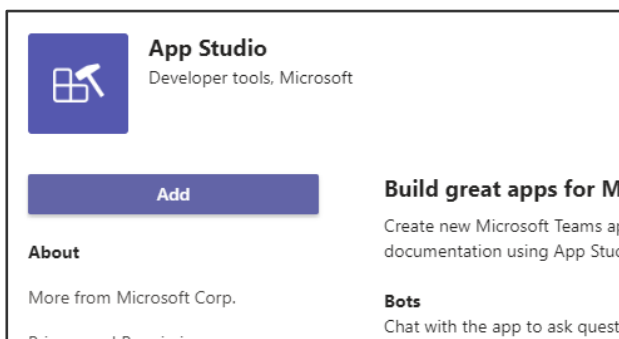
# Task 2: Collect the app information

1. Open a new web browser tab and navigate to Microsoft Power Virtual Agents and click **Sign in**.

2. Find the **Contoso Bot** you created (make sure you are in the correct environment).
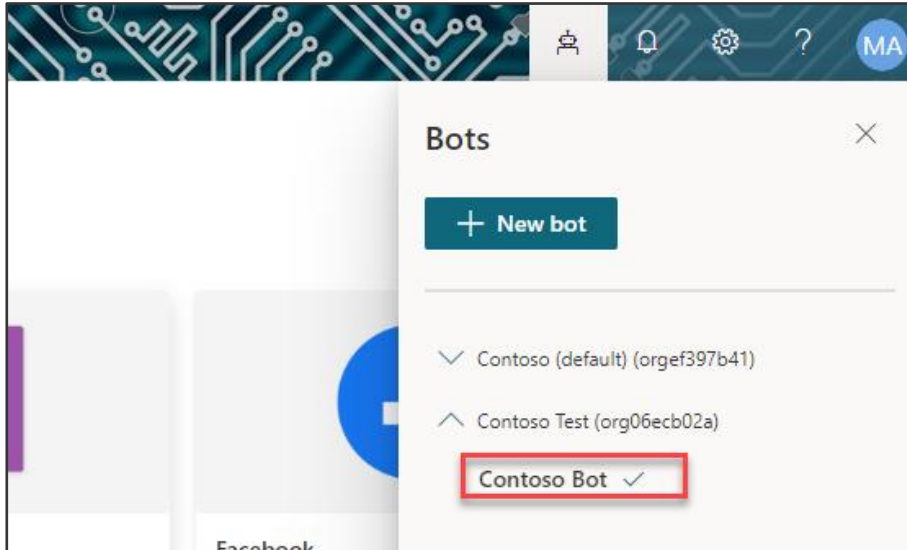


3. On the left-hand menu, select **Manage** and expand the list, and then select **Channels**.
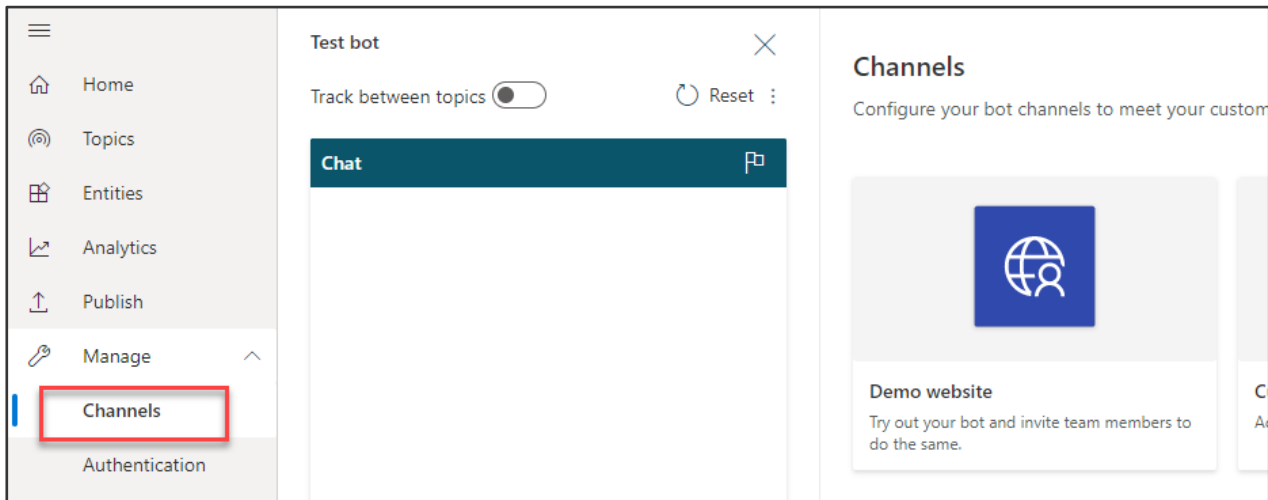


4. Under channel, you will see a number of options on where to publish your bot. Select the **Microsoft Teams** card.
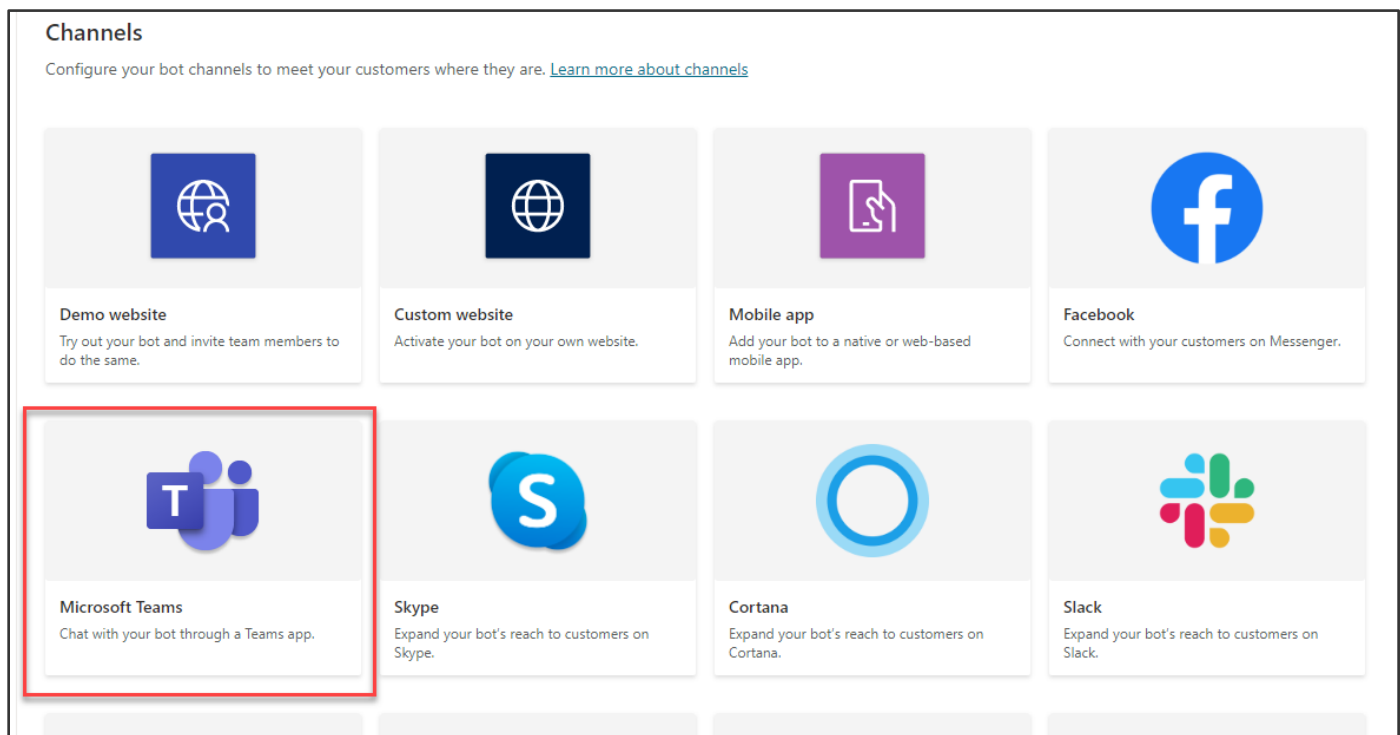
5.  Click the **Turn on Teams** button
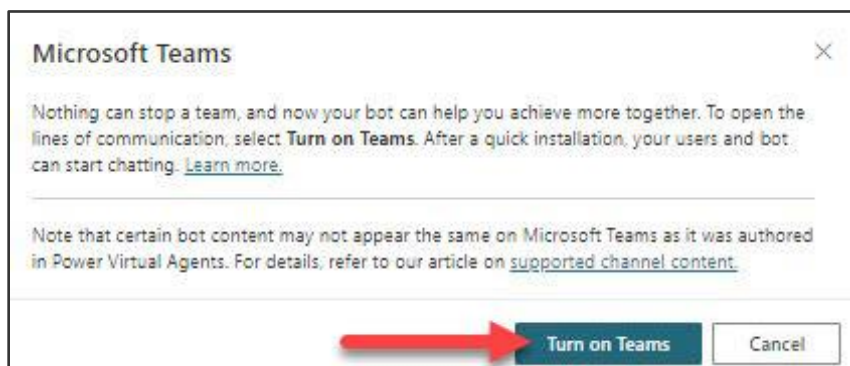


6.  Click **Submit for Admin Approval**

7. Click **Submit for Admin Approval** again



8. Click **Yes**

# Task 3: Approve the app and load it to the studio

1. Navigate to Microsoft Teams Admin Center

2. Click on **Teams Apps** and select **Manage Apps**.
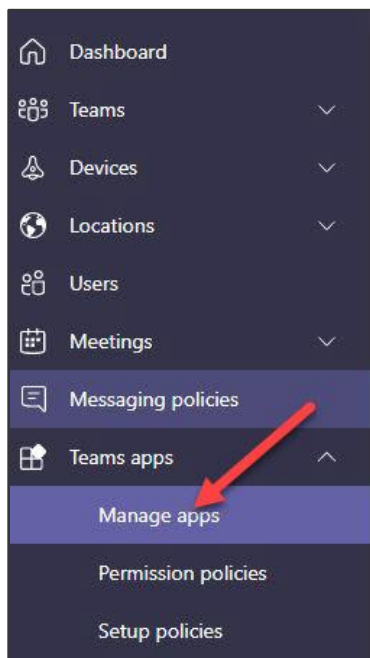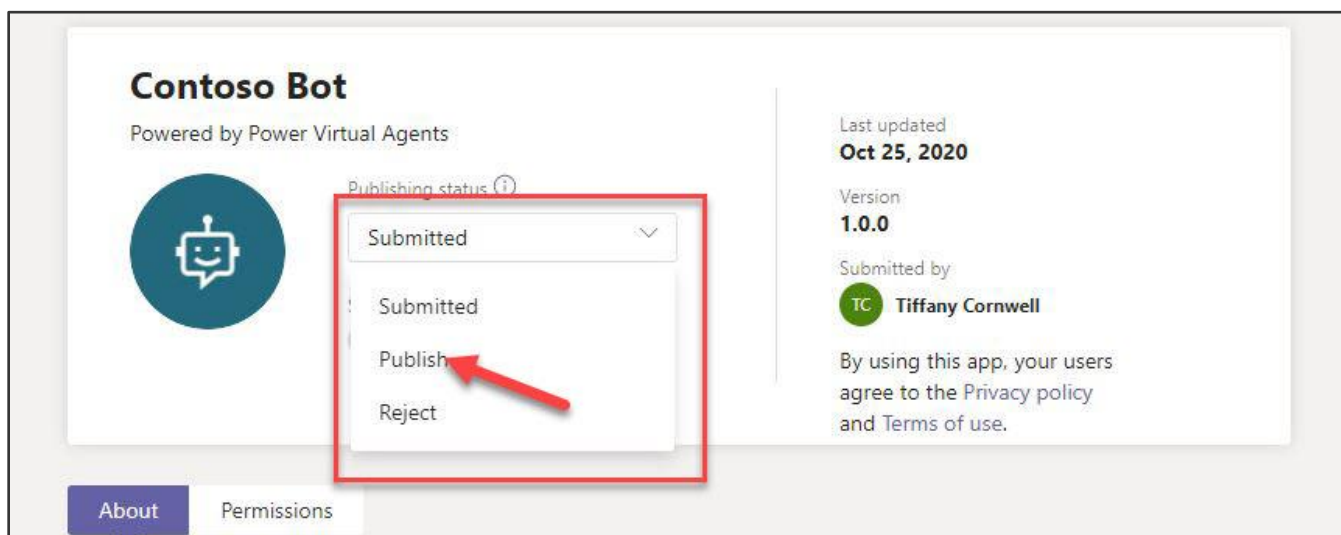
3. Search for and **select the bot** you just built. You'll notice that its status is listed as **Blocked.**



4. Once the next screen loads, select the **Publishing Status** dropdown and change the status to **Publish.**



5. Click **Publish**

# Task 4: Add bot to teams

1. Navigate to Microsoft Teams.

2. Click on Apps
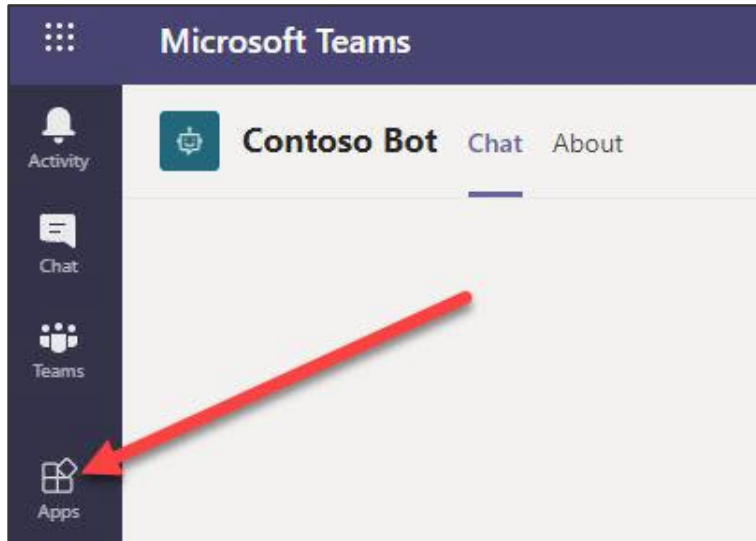


3. Your bot should appear under the **Built for Your Environment** header. If it does not, wait a few minutes for it to finish publishing.
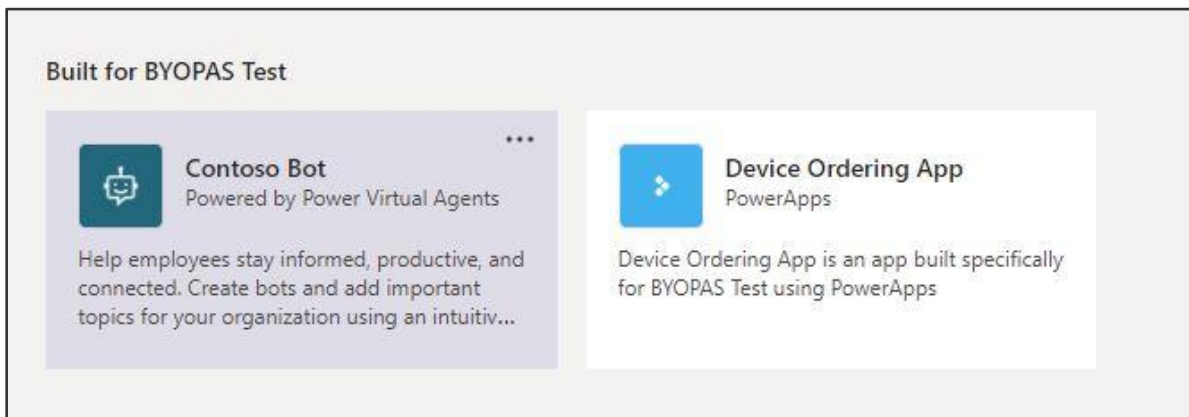


4. Select your bot.

5. Click **Add**
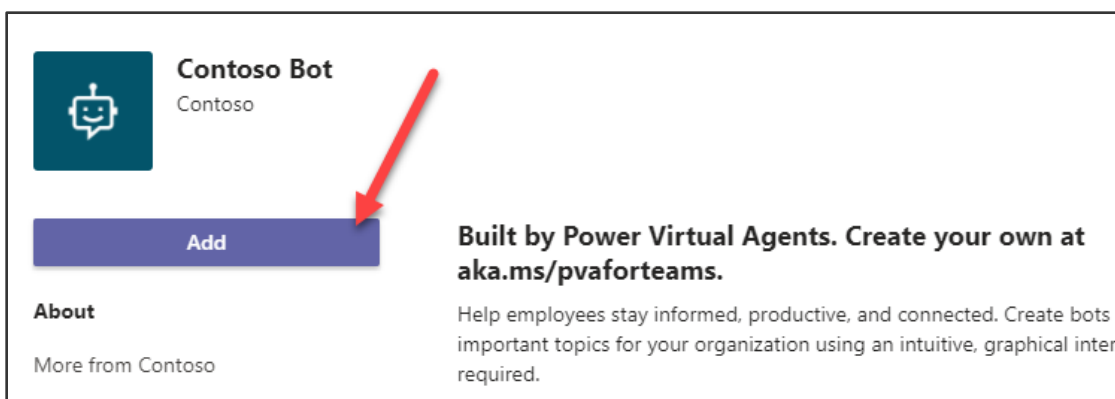
# Task 5: Test bot

1. Type **Hello** to start a conversation with the bot. The bot should greet you.
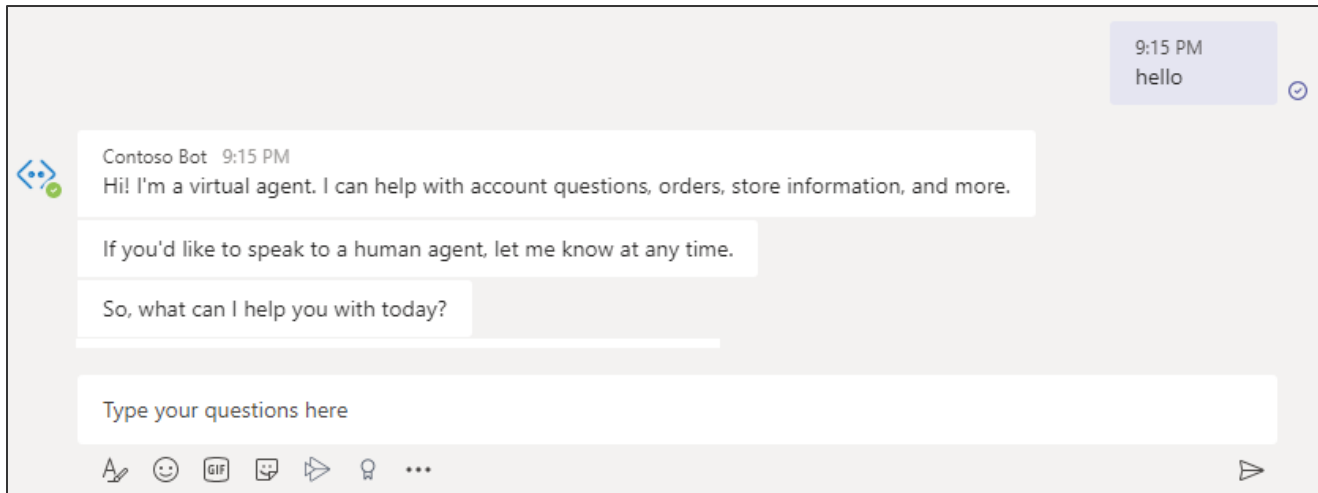


2. Type **where is my order** and send. The bot should ask if you have an order number, click *Yes*
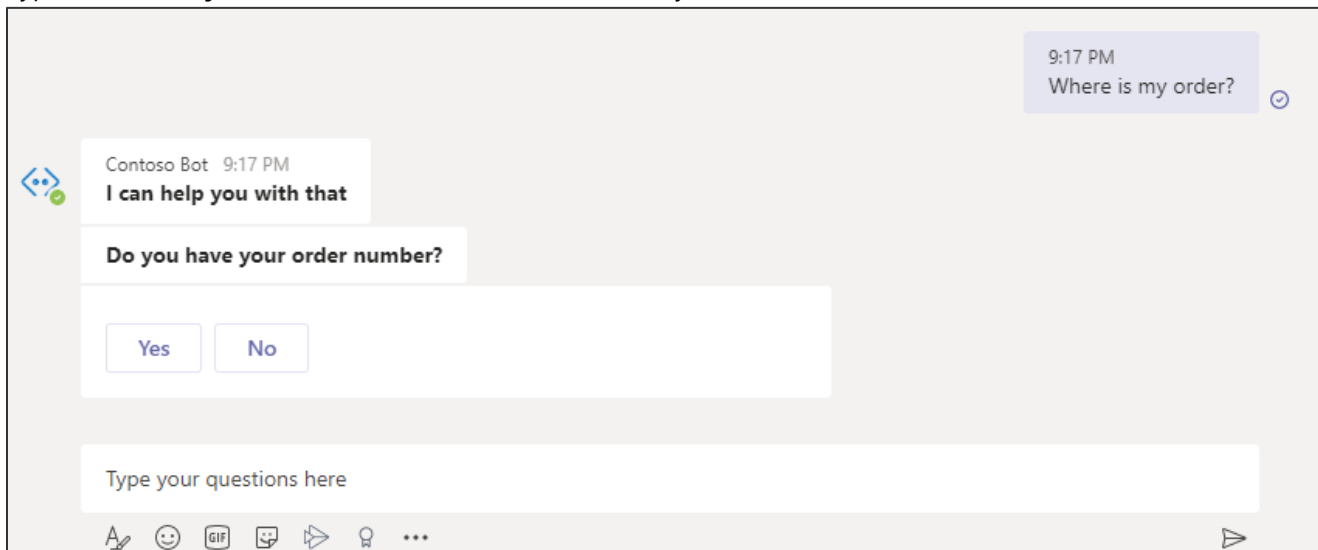


3. Type **1234** (this order was created in the Power Virtual Agent lab) and send. The bot should ask if the order you provided is correct, click **Yes**.
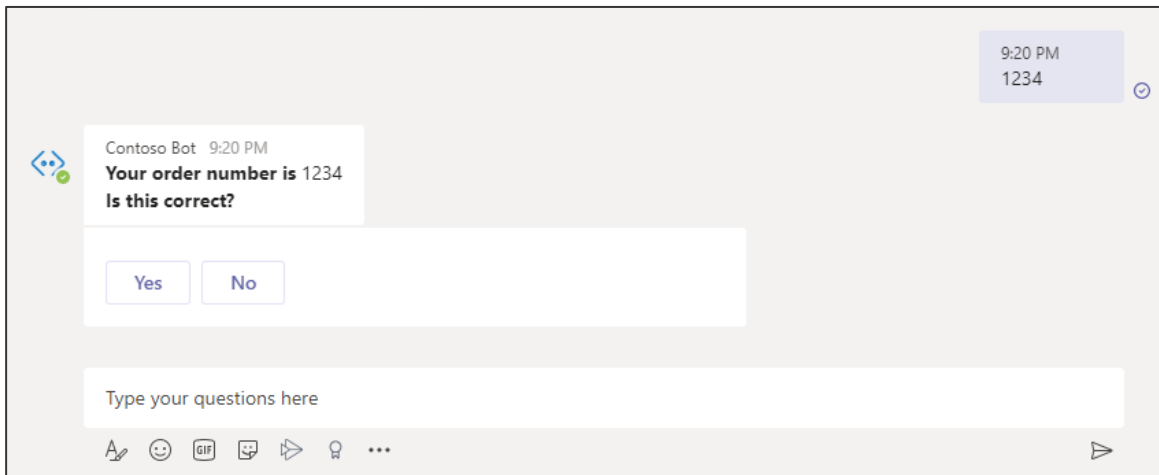
4. The bot should show you the status of the order. Click Yes.
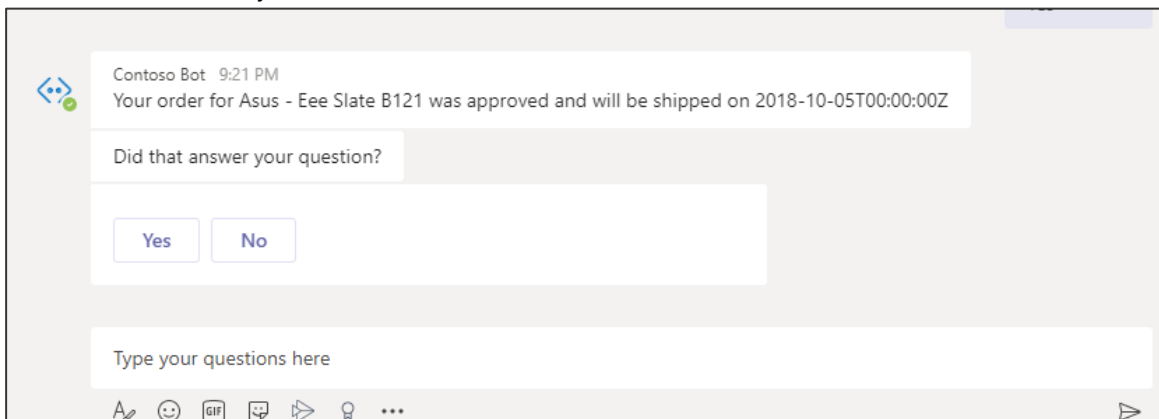


5. The bot should conclude the conversation.

# References

Build your own Power Apps introduces some of the key functionalities available in Power Apps, Power Automate, Power BI and the Dataverse. For an up to date list of learning references, see Power BI, Microsoft Teams, Power Virtual Agent, and Power Apps Portals

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