WorkshopPLUS – Power Platform – Introduction to Power Apps & Power Automate for Dataverse with Lab

Lab 1 - Module 2: Dataverse Lab

Student Lab Manual

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Contents

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Lab 1: Create a solution and Dataverse table

Introduction

In this lab, you will learn how to create new solution, which will hold the apps and flow you are building today. Moreover, you'll learn how to use the Common Data Model and customize Dataverse tables.

Objectives

After completing this lab, you will be able to:

- Create a new environment, a new solution, and a new publisher.
- Create a new Dataverse database instance.
- Familiarize yourself with the Common Data Model.
- Familiarize yourself with the process of creating a custom table and custom fields.

Prerequisites

- Basic knowledge of platform administration and Dataverse customizations.

Estimated time to complete this lab

30 minutes

Scenario

Contoso is asking their employees to return to the office. They are looking to build a tool for employees to report their office presence and a tool for front-desk employes at the offices to monitor the office presence.

We are developers at Contoso and have been asked to develop an application to allow Contoso employees to share when they are going to be present at the office for the sake of management and their coworkers.

We also need to develop an application for Contoso back-office operators to check on who's coming to the office, approve requests and monitor office presences.

Finally, we are asked to define some automations to make this process smoother.

In this exercise, you will create the solution where you will save all the apps and components that you will create during the labs in this workshop. Then, you will create a custom table with five different columns that we will use in the Back Office (model-driven) app and in the Users' (canvas) app.

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Exercise 1: Create a new solution within your environment

Objectives

After completing this exercise, you will be able to:

- Create a new solution and a new publisher for your solutions.

Prerequisites

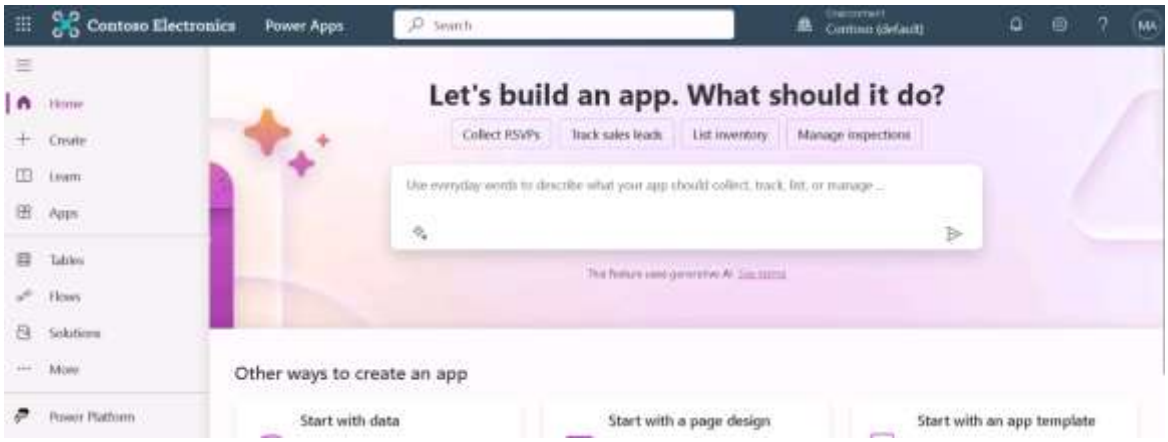
Complete the preparation activity described in the Setup Guidelines. You should have a trial account for this workshop or be working in a lab-in-a-day environment.

Scenario

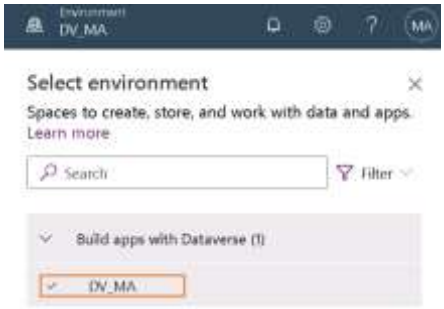
You have been asked to create a solution container to handle all project-related components that could be exported and imported in case there is a business need to move this solution to another environment as part of Contoso's ALM strategy. You need to create a solution to encapsulate all the Power Platform components of your project.

Task 1: Create a new solution and a new publisher

1. Open your browser (an In-Private session is recommended) and go to https://make.powerapps.com. Sign in using your Office 365 credentials (if you created a trial for this lab, please use that *onmicrosoft.com* account and *verify you are not logged into your actual work account*).



2. Ensure that you are in the right environment by clicking the environment button at the top of your screen (the one that you created during the setup process – DV_YOURINITIALS).



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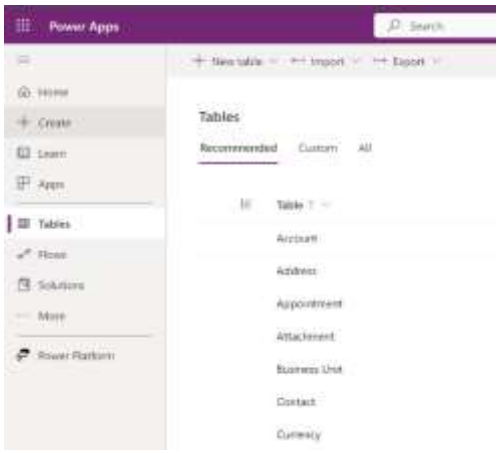
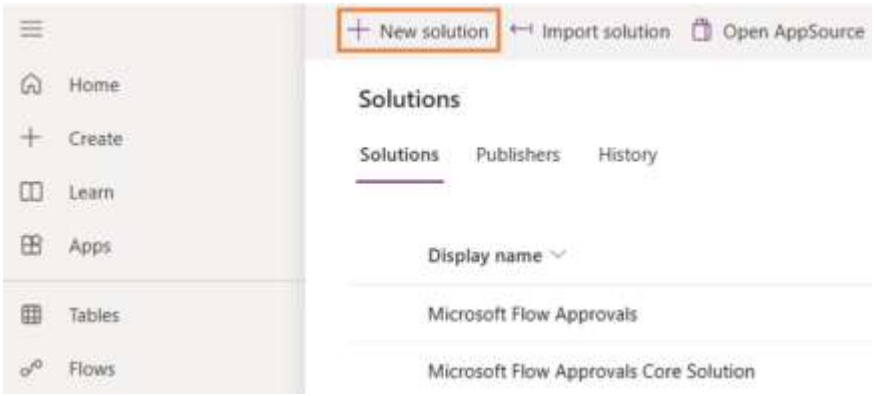
3. In the left pane select **Tables**. In the right pane, check that you see the default list of all tables available in the Dataverse database.



4. In the left pane select **Solutions**.

5. In the toolbar, select **+ New solution** to create a new Dataverse solution.



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6. In the new solution window that pops out on the right side of your screen, enter these values for each field:

    a. Display name: Office Reservation Project

    b. Name: OfficeReservationProject

    c. Publisher: Create your own publisher

    

    Fill the required fields as described below:

    Display Name: Office Reservations Publisher

    Name: OfficeReservationsPublisher

    Prefix: offres

    

    Select **Save**.

    d. Select the new created “Office Reservation Publisher” as Publisher.

    e. Keep the version as 1.0.0.0 and click **Create**.

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Exercise 2: Create a custom table with 5 custom fields

Objectives

After completing this exercise, you will be able to:

- Create a custom table in Dataverse.
- Create custom fields and edit a Dataverse table field.

Prerequisites

Completion of Lab 1 Exercise 1.

Scenario

You have been asked to create a new table to store information on the employees coming into the office.

Task 1: Create a new Dataverse table – Office Reservation

1. Your new solution should still be open on your screen. **If it isn't**:

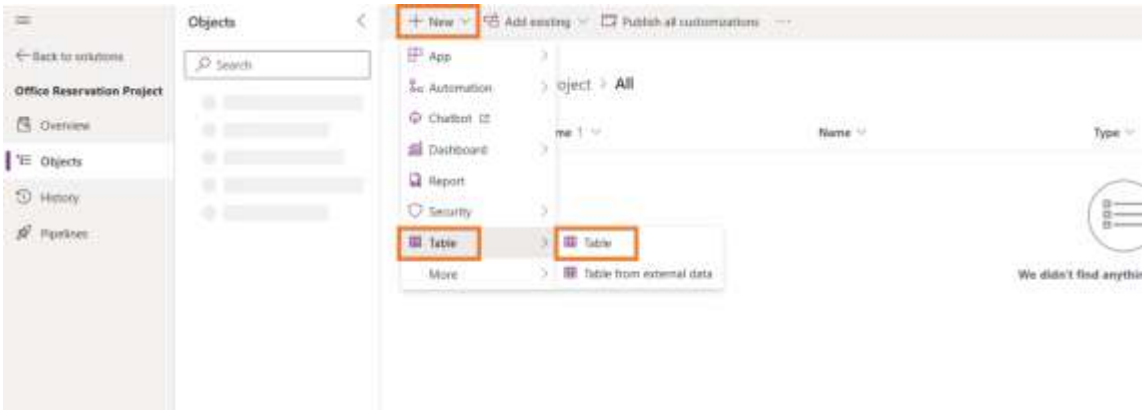
   a. Ensure you are logged into your trial account. If you closed the browser, you could open a new In-Private browser and go to https://make.powerapps.com. Sign in using your Office365 credentials.

   b. Make sure you are still logged into the correct environment where you just built your solution.

   c. In the left pane select **Solutions**.

   d. From the list of solutions in the environment, select **your newly created solution** (Office Reservation Project).

2. At the top bar of the solution, select **"+ New" → Table → Table**.



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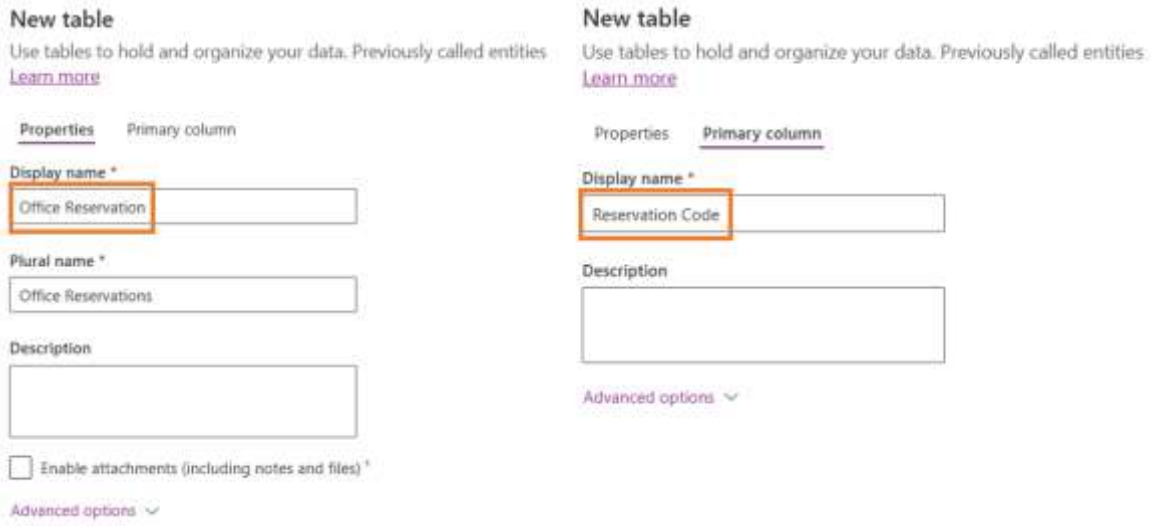
3. In the new table window, enter the display name “Office Reservation”, then navigate to the “Primary column” tab and change the primary column display name to “Reservation Code”.



4. Save the new table selecting **Save**.

5. Your new table should open. On that screen, you will see fields like Created By, Created On, etc. To remove these, click the **+ 13 more** button and unselect all fields. Select **Office Reservation** and **Reservation Code** and click **Save**.

7. For steps 7-11, click the **+** icon from the image above to create new columns. Create the custom column called “**Date**”:

   a. Display name: Date

   b. Data type: Date and time

   c. Format: Date only

   d. Behavior: Simple

   e. Required: Business Required

Keep everything else as their default values and select **Save**.

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8. Create the custom column called "**Location**":

    a. Display name: Location

    b. Date type: Choice -> Choice

    c. Behavior: Simple

    d. Required: Business Required

    e. Sync with global choice? Select **No**.

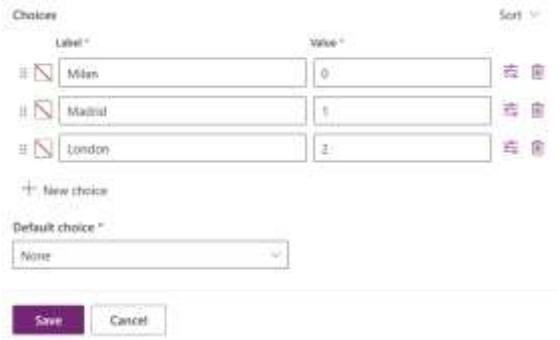
    f. Enter new default choices:

    Label: Milan Value: 0

    Label: Madrid Value: 1

    Label: London Value: 2

    f. Default choice: None



Select **Save**.

9. Create the custom column called "**Attended**":

    a. Display name: Attended

    b. Date type: Choice -> Yes/No

    c. Behavior: Simple

    d. Required: Optional

    e. Default choice: No

Select **Save**.

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10. Create the custom column called "**Approved**":

    a. Display name: Approved

    b. Date type: Choice -> Yes/No

    c. Behavior: Simple

    d. Required: Optional

    e. Default choice: No

    Select **Save**.

11. Create the custom column called "**Notes**":

    a. Display name: Notes

    b. Date type: Text (you may also see "Single line of text")

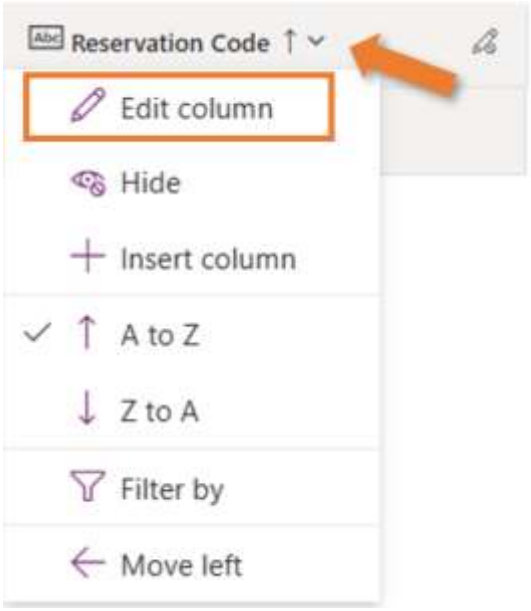
    c. Format: Text area

    d. Behavior: Simple

    e. Required: Optional

    Select **Save**.

12. Edit the Primary Colum "Reservation Code":



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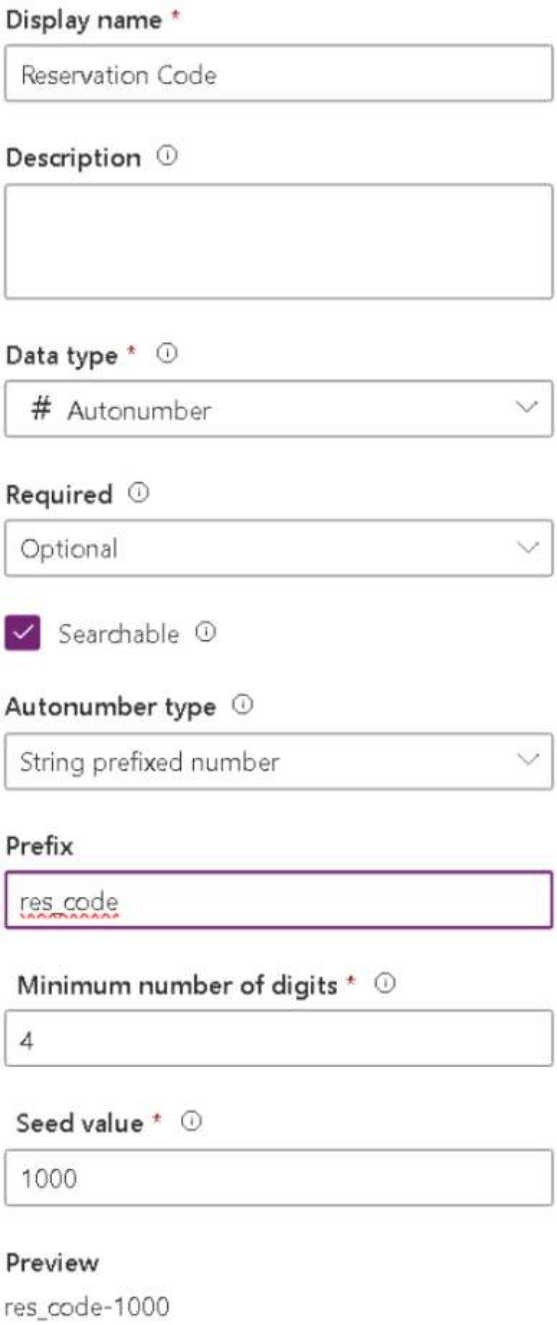
If you cannot find it, click on “Columns” under schema towards the top of your screen, select the Primary Colum “Reservation Code” and click “Edit”.

a. Date type: #Autonumber

b. Required: Optional

c. Autonumber type: String prefixed number

d. Prefix: res_code



Keep everything else as the default values and select **Save**.

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13. Your columns show now look like this:

You have successfully completed Lab 1!

In this lab, you created the solution you will be using to package your table, apps and flows together throughout the day and created a Dataverse table with multiple column types and an auto-incrementing primary column.

If you have additional time, you can explore the solution explorer or the table design studio. If you have any questions about what you find, ask your instructor!

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