

P10: Configuring Scale with Options Form Metadata for Power Pages

Wednesday, March 12, 2025 12:11 PM

Context

| Item | Detail |
|----------------------|--|
| Tag | Vertical Patterns Power Apps |
| Contributors | Vincent Kimiti |
| Version Control | V1.0 |
| Application Use Case | Enhance form functionality in Power Pages by configuring metadata for multistep or basic forms |
| Reference Usage | Customizing form fields with metadata in Power Pages portals |

Story Behind The Pattern

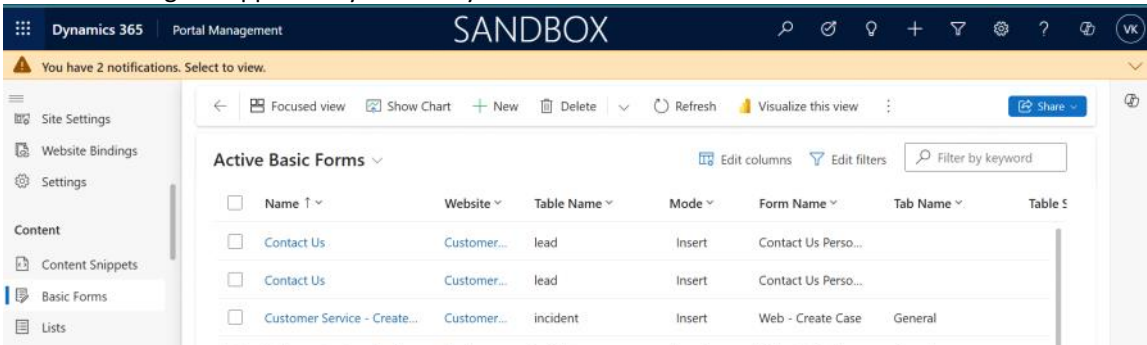
| Item | Detail |
|--------------|---|
| The Problem | Native form editing in Power Pages lacks the flexibility to apply advanced behavior modifications (e.g., custom styles, grouped controls) to form fields. |
| The Solution | Use form metadata to augment or override default field behavior, enabling custom labels, control styles, and grouped options. |
| Dependencies | Power Pages environment, Portal Management app, access to multistep/basic forms, permissions to edit metadata. |

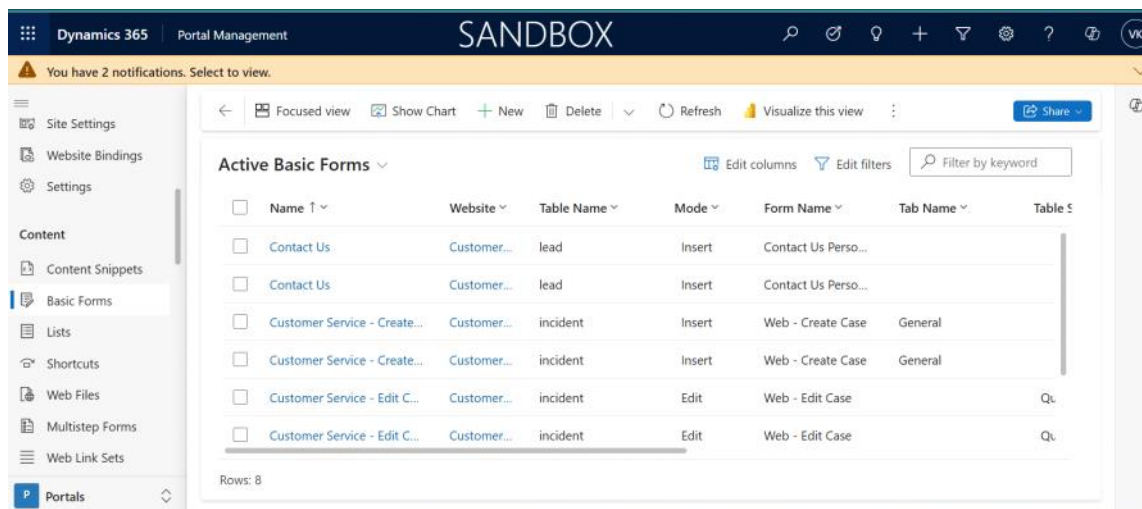
The Pattern

Method: Configuring Scale with Options Form Metadata for Power Pages

Here’s a step-by-step guide to configure form metadata for multistep or basic forms in Power Pages to enhance field behavior and styling:

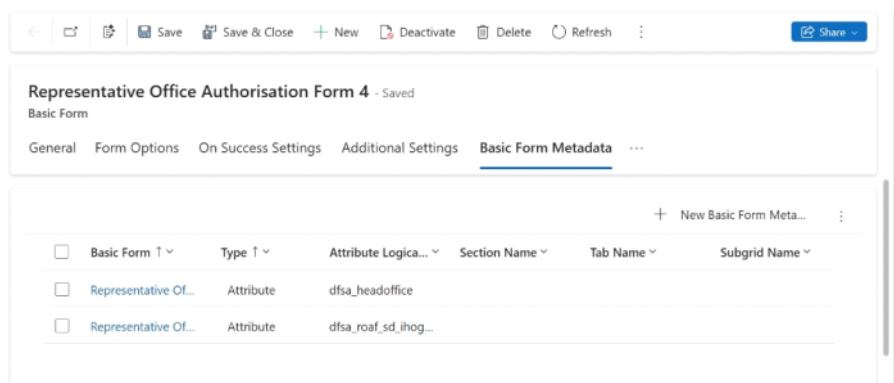
1. Understand Why Use Metadata
 - Metadata in Power Pages allows additional behavior modification logic to augment or override the native capabilities of form fields.
 - This is particularly useful for applying custom styles (e.g., vertical or horizontal radio button lists), grouping controls, or adding descriptions with HTML, which are not possible with basic form editing.
2. Open the Portal Management App
 - Log in to your Power Pages site.
 - Navigate to the Portal Management app from the Power Pages admin center or by accessing the app directly via the Dynamics 365 environment.





3. Locate Your Multistep Form or Basic Form

- In the Portal Management app, go to the Content section.
- Select Multistep Forms or Basic Form (depending on your form type) from the sitemap.
- Find and select the specific multistep form or basic form you are working with (e.g., "Authorised Individual Form").



4. Access Metadata for Each Step

- For the selected form, navigate to the Related tab.
- Click Metadata to view a list of metadata records associated with each step of the multistep form or the entire basic form.
- Each metadata record corresponds to a field or control within the form step.

5. Setup Metadata Properties

- Select a metadata record to view and edit its properties, which include:
 - Attribute Logical Name: The internal name of the field being modified (e.g., "new_status").
 - Label: A custom label to display for the field (e.g., "Current Status").
 - Control Style: The visual style applied to the field (e.g., "Option Set as Vertical Radio Button List" or "Horizontal Radio Button List").
 - Group Name: A name to group related controls together (e.g., "StatusGroup" for related option sets).
- Ensure the associated table column in Dataverse contains the choice values in its option set (e.g., verify "new_status" has predefined options like "Active," "Inactive").

6. Navigate to the Form Metadata Option

- Within the metadata record, locate the option to set up or edit metadata (e.g., click "Edit" or "New Metadata Record").
- This opens the configuration interface for defining metadata properties.

7. Setup the Metadata for the First Option

- Configure the first metadata option as follows:
 - Attribute Logical Name: Set to the target field (e.g., "new_status").
 - Label: Enter a custom label (e.g., "Select Status").
 - Control Style: Choose a style (e.g., "Option Set as Vertical Radio Button List").
 - Group Name: Assign a group name (e.g., "StatusGroup") to associate related options.
 - Add Description Option: Enable the description field and add HTML to enhance the display (e.g., for a scale with options).
8. Add HTML to the Description for Scale with Options
- In the description field, insert HTML code to enable a scale or styled options. Example sample HTML code:
 - This HTML creates a vertical radio button list with a description, aligning with the control style.
9. Setup the Second Metadata for the Next Option
- Add a new metadata record for the next option (e.g., a follow-up field like "Priority").
 - Configure only the Group Name (e.g., "StatusGroup") to link it with the first option's configuration.
 - Leave other properties (e.g., Label, Control Style) as inherited from the first option unless specific changes are needed.
10. Save and Test the Configuration
- Click Save or Save & Close in the Portal Management app to apply the metadata changes.
 - Navigate to the Power Pages site, open the form, and verify that the metadata modifications (e.g., styled radio buttons, grouped controls) are displayed as expected.
 - Test each step to ensure the behavior aligns with the intended outcome.