P15: Managing Connection Roles in Power Platform and Dynamics 365

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Context

Item	Detail
Tag	Vertical Patterns | Power Platform Admin Center
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Version Control	V1.0
Application Use Case	Manage connection roles to define relationships between records in Power Platform and Dynamics 365
Reference Usage	Establishing flexible record relationships for collaboration and automation

Story Behind The Pattern

Item	Detail
The Problem	Creating formal table relationships for every type of record linkage is rigid and impractical for dynamic or non-hierarchical relationships, leading to collaboration and data management challenges.
The Solution	Use connection roles in Power Platform and Dynamics 365 to define flexible, named relationships between records, enabling better collaboration, data enrichment, and automation.
Dependencies	Power Platform Admin Center access, a solution in the environment, tables enabled for connections, permissions to manage solutions and connection roles.

Introduction to Connection Roles

Connection roles in Power Platform and Dynamics 365 are used to define and describe relationships between records (rows) without creating formal table relationships. They provide a flexible way to link records and describe the nature of their relationships, such as friend, sibling, spouse, attendee, or stakeholder. Connection roles can also be reciprocal, like parent-child or doctor-patient.

The Pattern

Method: Managing Connection Roles in Power Platform and Dynamics 365

Here's a step-by-step guide to manage connection roles, including creating new roles, enabling them for tables, and linking records:

1. Access the Power Platform Admin Center
    - Log in to the Power Platform Admin Center (admin.powerplatform.microsoft.com) using your admin credentials.
    - Ensure you have the necessary permissions to manage solutions and connection roles.

2. Navigate to Solutions
    - Use the navigation menu on the left sidebar to go to the Solutions section.
    - Select the solution where you want to manage connection roles (e.g., a custom solution or the default solution).

3. View Connection Roles

    - In the selected solution, click Add existing > Connection Role.
    - Review the list of available connection roles (e.g., predefined roles like "Stakeholder," "Attendee," or custom roles previously created).
    - Note the details of each role, such as the associated tables and reciprocal relationships.

4. Create a New Connection Role
    - Click New to create a new connection role.
    - Configure the new role:
        - Name: Enter the name of the connection role (e.g., "Manager").
        - Table Types: Specify the table types this role will apply to (e.g., "Lead," "Account," "Competitor"). You can select multiple tables if the role applies broadly.
        - Matching Connection Role (Reciprocal): Optionally, configure a reciprocal role to describe the relationship (e.g., for "Manager," create a reciprocal role "Employee"; for "Father," create "Daughter" or "Son").
        - Description: Add a description to clarify the role's purpose (e.g., "Links a manager to their direct reports").
        - Additional Fields: Optionally, add fields like start/end dates or notes to enrich the relationship.
    - Save the new connection role.

5. Enable Connection Roles for Tables
    - Ensure the tables you want to use with connection roles have the "Can have connections" property enabled:
        - Go to Power Apps (make.powerapps.com) and navigate to the environment.
        - Open the Solutions area and select the solution containing your tables.
        - Select the table (e.g., "Account" or "Lead"), go to its Properties, and enable the Can have connections setting.
        - Repeat for all relevant tables (e.g., "Contact," "Competitor").
    - Save and publish the changes to the tables.

6. Add Connection Roles to Records
    - Open a record in Dataverse (e.g., an Account record) that supports connections.
    - Navigate to the Connections tab (or a similar section depending on your customization).
    - Click New Connection to link the record to another record.
    - Specify the Source Record (the current record) and Target Record (e.g., a Contact record).
    - Assign the appropriate connection role to describe the relationship (e.g., "Manager" for the Account and "Employee" for the Contact).
    - Add any additional details (e.g., start date, notes) if applicable.
    - Save the connection to link the records.

7. Test and Validate Connections
    - Query the records to verify the relationships:
        - Open the source record (e.g., the Account) and check the Connections tab to see the linked record and assigned role.
        - Open the target record (e.g., the Contact) and confirm the reciprocal role (e.g., "Employee").
    - Test related functionality, such as workflows that use connection roles (e.g., notifying a "Manager" when an "Employee" record is updated).
    - Ensure the connections and roles are correctly established and functioning as expected.