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Build a location Check-in App in Power Apps, Power Automate & Power BI and integrate it in Teams

by Michelle Wong

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Speaker

Michelle Wong

- Microsoft 365 Consultant
- MVP Business Applications
- Focus on SharePoint Online, Microsoft Teams and Power Platform
- 365 Power Consulting Services

Let's get connected!



@MichelleWongNL

LinkedIn.com/In/MichelleWongNL



Made by daughter Rochelle,
(aka @LittleArtistRo 😊)

The Business case scenario

- Company want to:
 - Keep track on the users and customers appointments
 - Noticed about type of service(s), location and status report
 - Keep track on new sales opportunities and remarks
 - Get a report overview

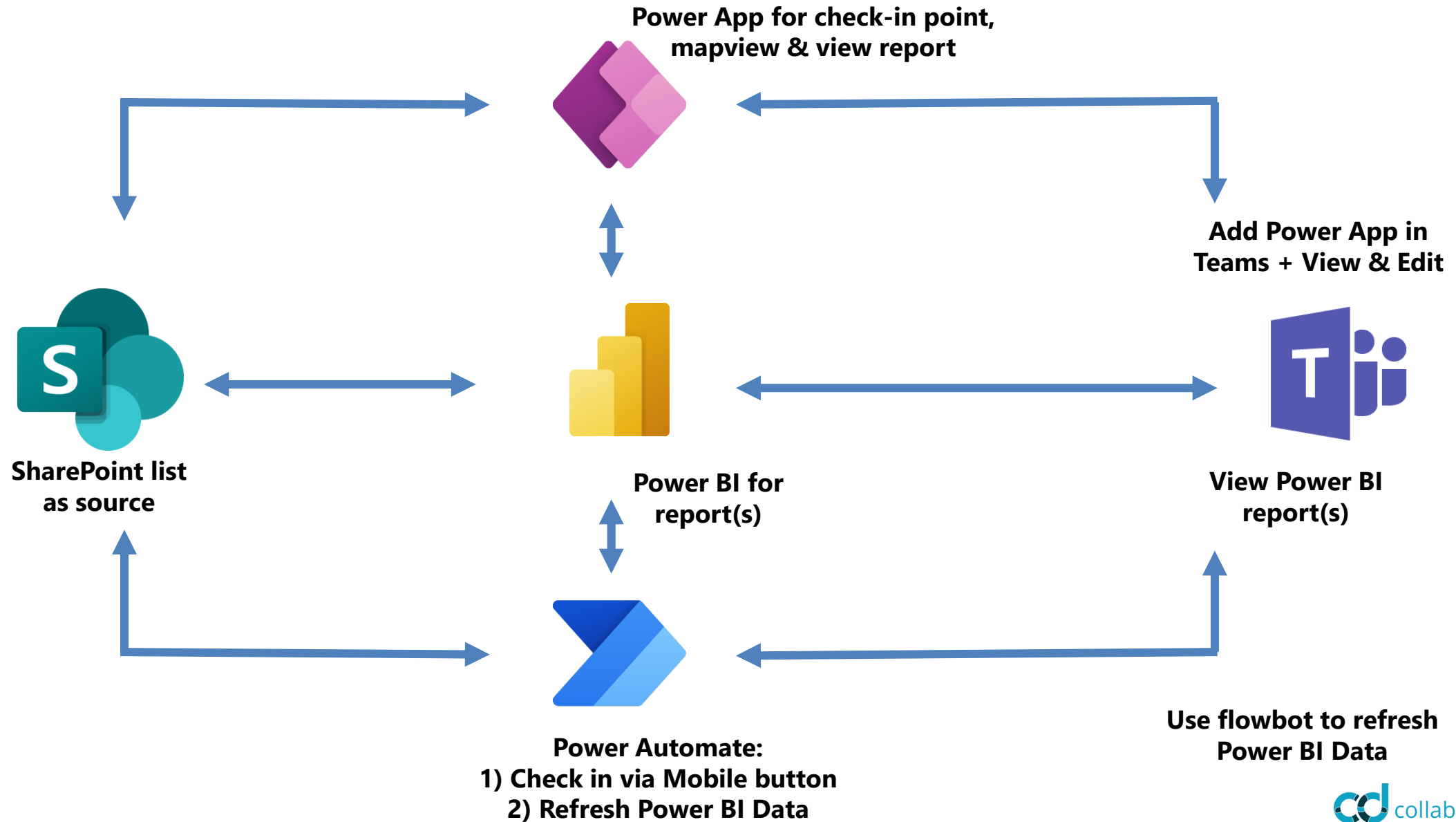


The Business case scenario

- Requirements:
 - Use Power Apps or Power Automate to check in (GPS)
 - Use a SharePoint List as source
 - Use Power BI to generate a simple report
 - Integrate it into Microsoft Teams



The Business 'Flow'





SharePoint setup

Setup

- SharePoint List

 EDIT LINKS

CheckInCheckOutLocations ▸ Settings

List Information

Name:

CheckInCheckOutLocations

Web Address:

https://[redacted].sharepoint.com/sites/PowerPlatform/Lists/CheckInCheckOutLocations/AllItems.aspx

Description:

General Settings

- [List name, description and navigation](#)
- [Versioning settings](#)
- [Advanced settings](#)
- [Validation settings](#)
- [Audience targeting settings](#)
- [Rating settings](#)
- [Form settings](#)

Permissions and Management

- [Delete this list](#)
- [Permissions for this list](#)
- [Workflow Settings](#)
- [Enterprise Metadata and Keywords Settings](#)

Columns






A column stores information about each item in the list. The following columns are currently available in this list:

Column (click to edit)	Type	Required
Title	Single line of text	✓
PersonInCharge	Person or Group	
Service	Choice	
Status	Choice	
Longitudes	Number	
Latitudes	Number	
CheckInDateTime	Date and Time	
Remarks	Multiple lines of text	
Modified	Date and Time	
Created	Date and Time	
Created By	Person or Group	
Modified By	Person or Group	

Setup SharePoint list

- SharePoint List

CheckInCheckOutLocations

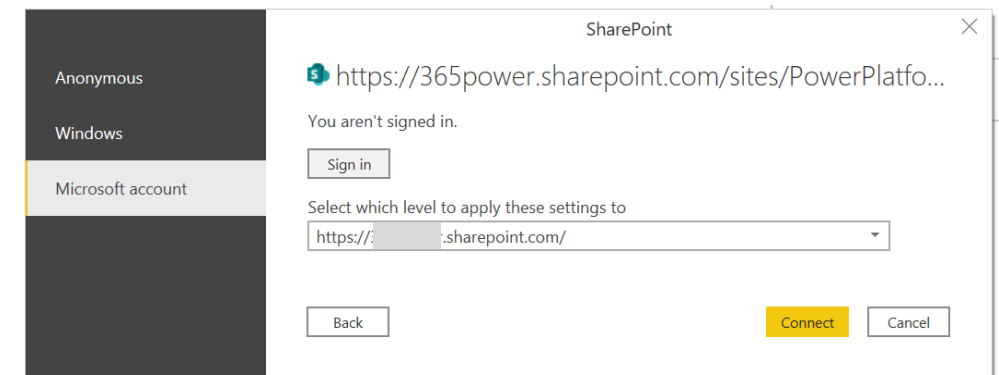
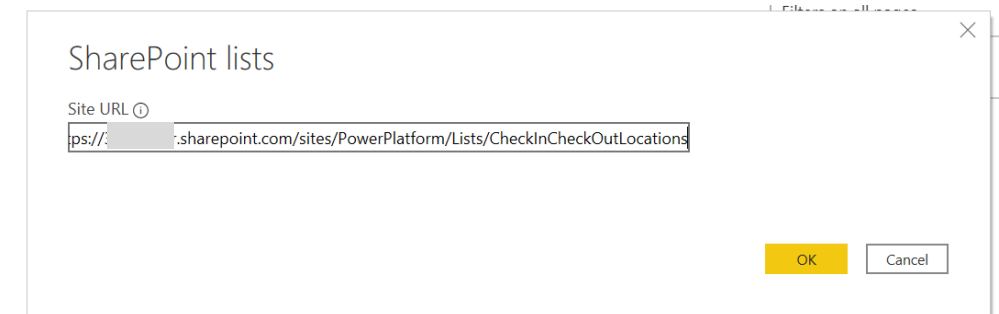
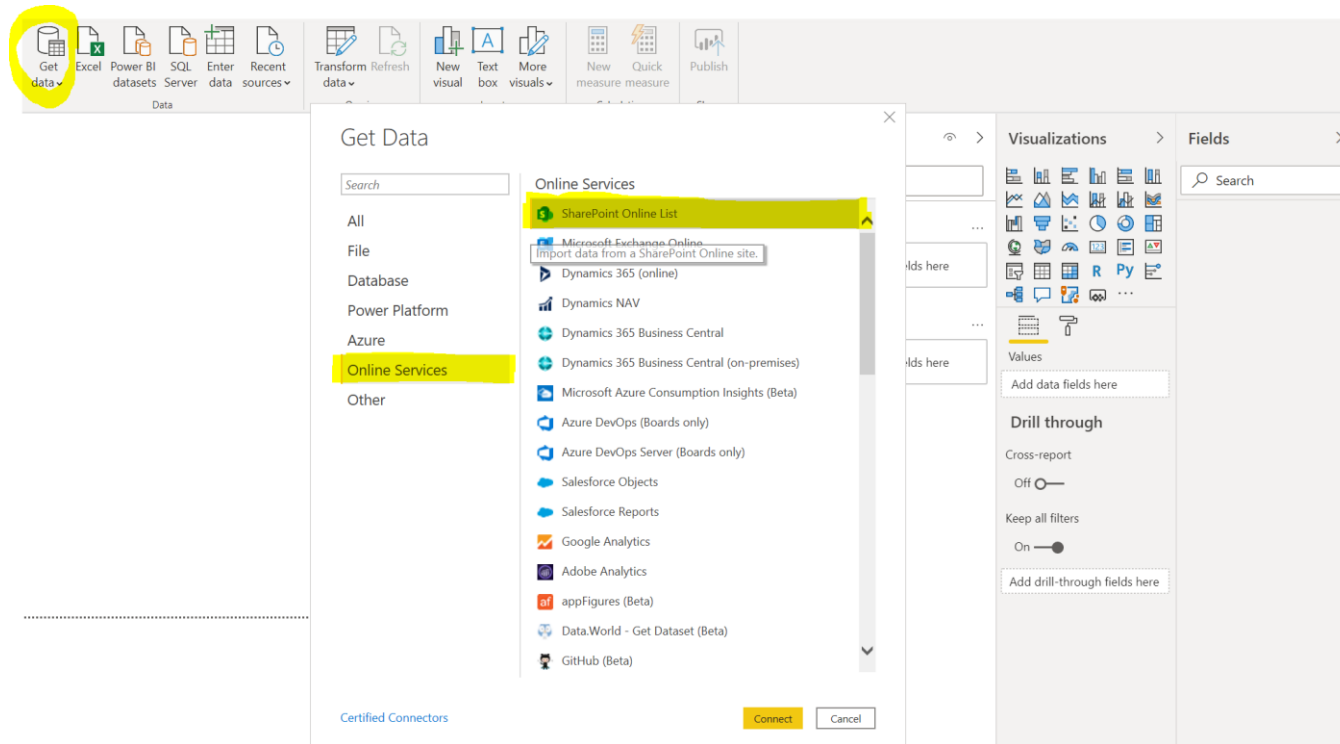
ID ▾	Attachm... ▾	Work description ▾	PersonInCharge ▾	Service ▾	Status ▾	Longitudes ▾	Latitudes ▾	CheckInDateTime ▾	Remarks ▾
11		Review Marketing proposal	Michelle Wong	Sales Opportunity	Started	5.8294272	53.1955712	9/27/2020 2:11 PM	First time call
10		Monthly review check	Michelle Wong	Service Agreement	Completed	5.8294272	53.1955712	9/27/2020 2:43 PM	
9		Review work environment	Michelle Wong	Sales Opportunity	Started	5.8294272	53.1955712	9/27/2020 2:22 PM	Need to preview the environment first
8		Testing services	Michelle Wong	Others	Work in progress	5.8294272	53.1955712	9/27/2020 2:11 PM	
7		Daily maintenance machine	Michelle Wong	Maintenance	Started	4.62124	52.41604	9/23/2020 10:04 PM	
6		Carwash tester	Michelle Wong	Others	Work in progress	5.8294272	53.1955712	9/27/2020 2:09 PM	
5		Test	Michelle Wong	Service Agreement	On hold	5.8294272	53.1955712	9/23/2020 10:19 PM	
4		Headquater project	Michelle Wong	Sales Opportunity	Work in progress	5.8318596	53.1900099	9/27/2020 12:21 PM	testing new opportunities
3		Testing new addin Point	Michelle Wong	Maintenance	Completed	5.8294272	53.1955712	9/27/2020 2:43 PM	
2		Testing and control	Michelle Wong	Service Agreement	On hold	5.8294272	53.1955712	9/23/2020 10:03 PM	Monthly maintenance
1		Talking about Microsoft Teams possibilities	Michelle Wong	Sales Opportunity	Work in progress	6.8714496	52.2125312	9/20/2020 9:39 PM	test



Power BI setup

Setup Power BI

- Power BI Desktop > connect the SharePoint list as datasource



Setup Power BI

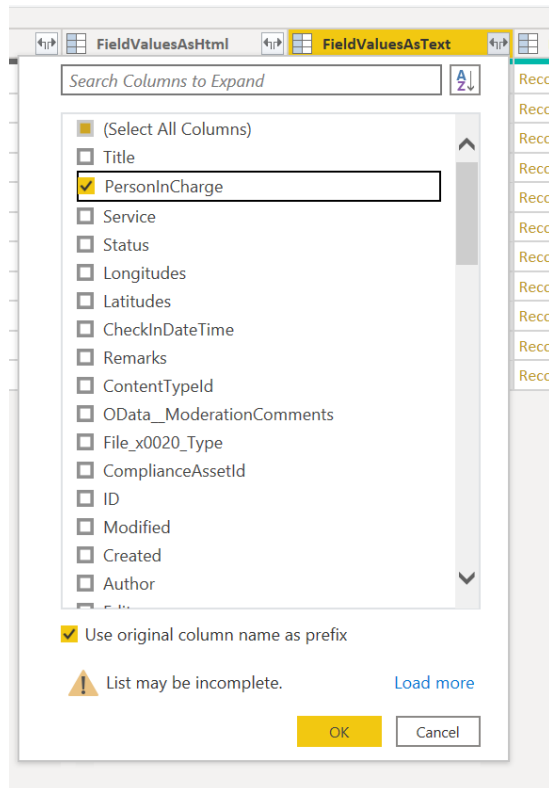
- Power Bi Desktop > Transform data > “PersonInCharge” from Shp people field

In SharePoint list
>
PersonInCharge
column

In Power BI >
PersonInCharge
Id column

PersonInChargeId	PersonInChargeStringId
6	6
6	6
12	12
6	6
29	29
6	6
29	29
6	6
28	28
6	6
6	6

Scroll to right >
FieldValuesAsText > Uncheck all
> Select PersonInCharge

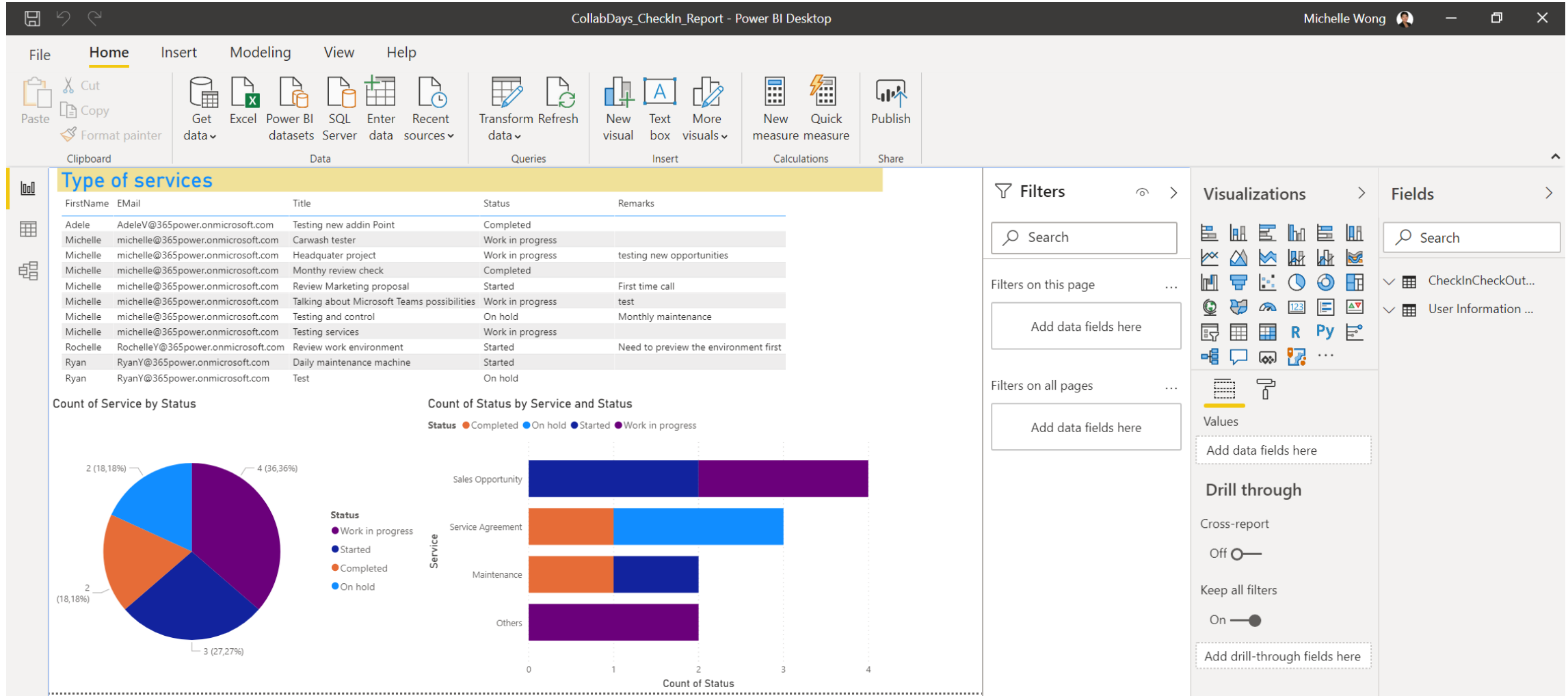


Text field change into 'Display
name' of PersonInCharge field

FieldValuesAsText.PersonInCharge
Michelle Wong
Michelle Wong
Adele Vance
Michelle Wong
Ryan Yue
Michelle Wong
Ryan Yue
Michelle Wong
Rochelle Yue
Michelle Wong
Michelle Wong

Create the Power BI reports & dashboard

- Power BI Desktop > Create your Power BI charts & visuals



Setup Power BI Online schedule Refresh dataset

- Power BI Desktop > Datasets > Schedule refresh > Limit to max. 8 refreshes per 24 hours!

The screenshot shows the Power BI Desktop interface. On the left, the 'My workspace' pane is open, displaying a list of datasets. The dataset 'CollabDays_CheckIn_Report' is selected. A context menu is open over this dataset, with the 'Schedule refresh' option highlighted. A red circle with the number '2' is placed next to this option. In the main area, the 'Settings for CollabDays_CheckIn_Report' pane is visible. The 'Scheduled refresh' section is expanded, and the 'Scheduled refresh' option is highlighted with a yellow background. A red circle with the number '3' is placed next to this section. The settings for the scheduled refresh are configured as follows: 'Keep your data up to date' is turned 'On', 'Refresh frequency' is set to 'Daily', 'Time zone' is set to '(UTC+01:00) Brussels, Copenhagen, Madrid, Paris', and 'Time' is set to 8:00 AM. The 'Send refresh failure notifications to the dataset owner' checkbox is checked. The 'Email these users when the refresh fails' field contains the name 'Michelle Wong'. The 'Apply' button is highlighted with a yellow background.

Power BI My workspace

CollabDays_CheckIn_Report

Tijdslot_Azuur_rapport

Analyze in Excel

Create report

Delete

Get quick insights

Security

Refresh now

Rename

Schedule refresh

Settings

Download the .pbix

Download the .rdl

Manage permissions

View related

Settings for CollabDays_CheckIn_Report

Last refresh succeeded: Sun Oct 04 2020 17:18:44 GMT+0200 (Central European Summer Time)

[Refresh history](#)

Gateway connection

Data source credentials

Parameters

Scheduled refresh

Keep your data up to date

☒ On

Refresh frequency: Daily

Time zone: (UTC+01:00) Brussels, Copenhagen, Madrid, Paris

Time

8:00 AM

1:00 PM

[Add another time](#)

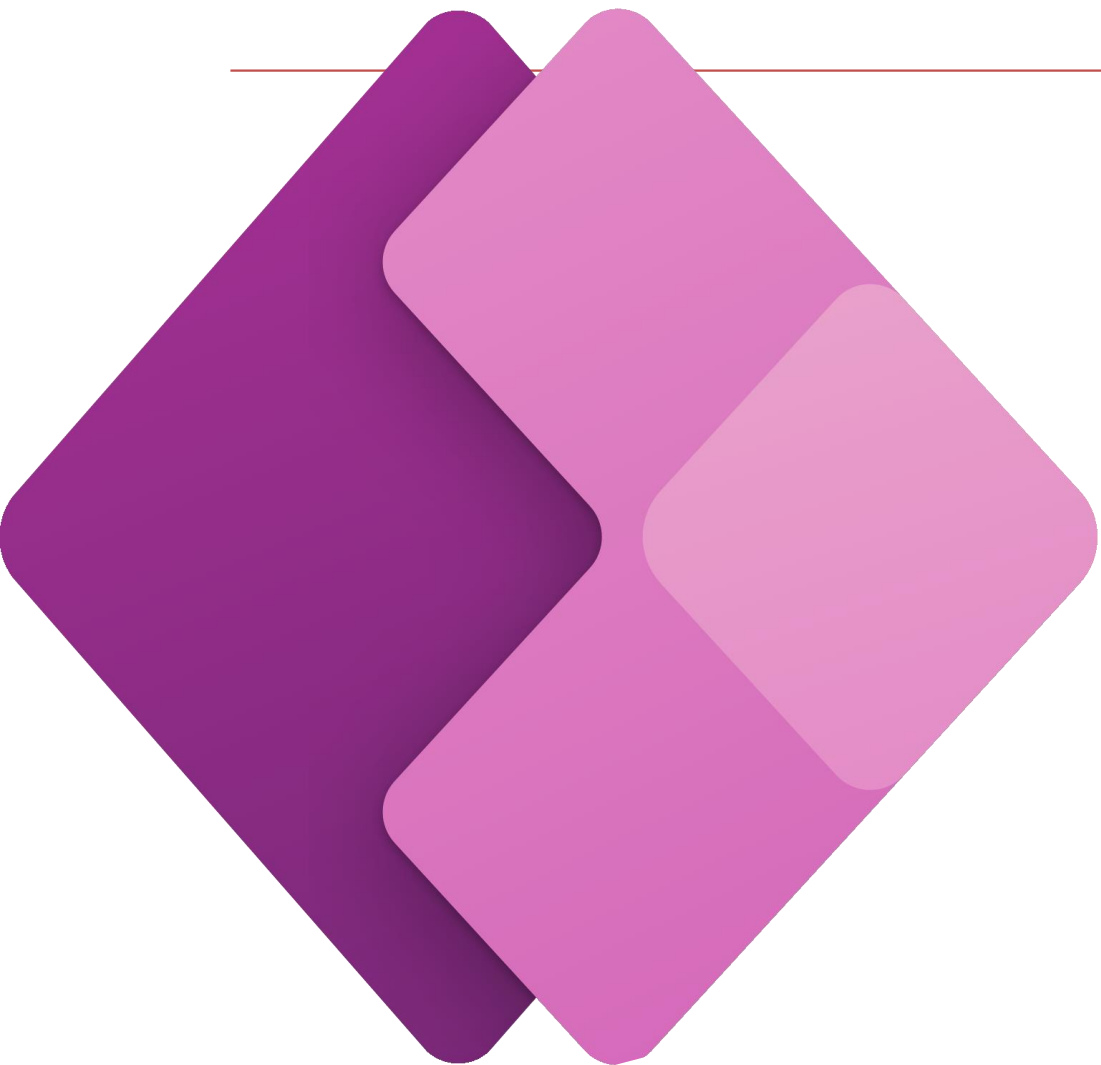
☒ Send refresh failure notifications to the dataset owner

Email these users when the refresh fails

Michelle Wong

Enter email addresses

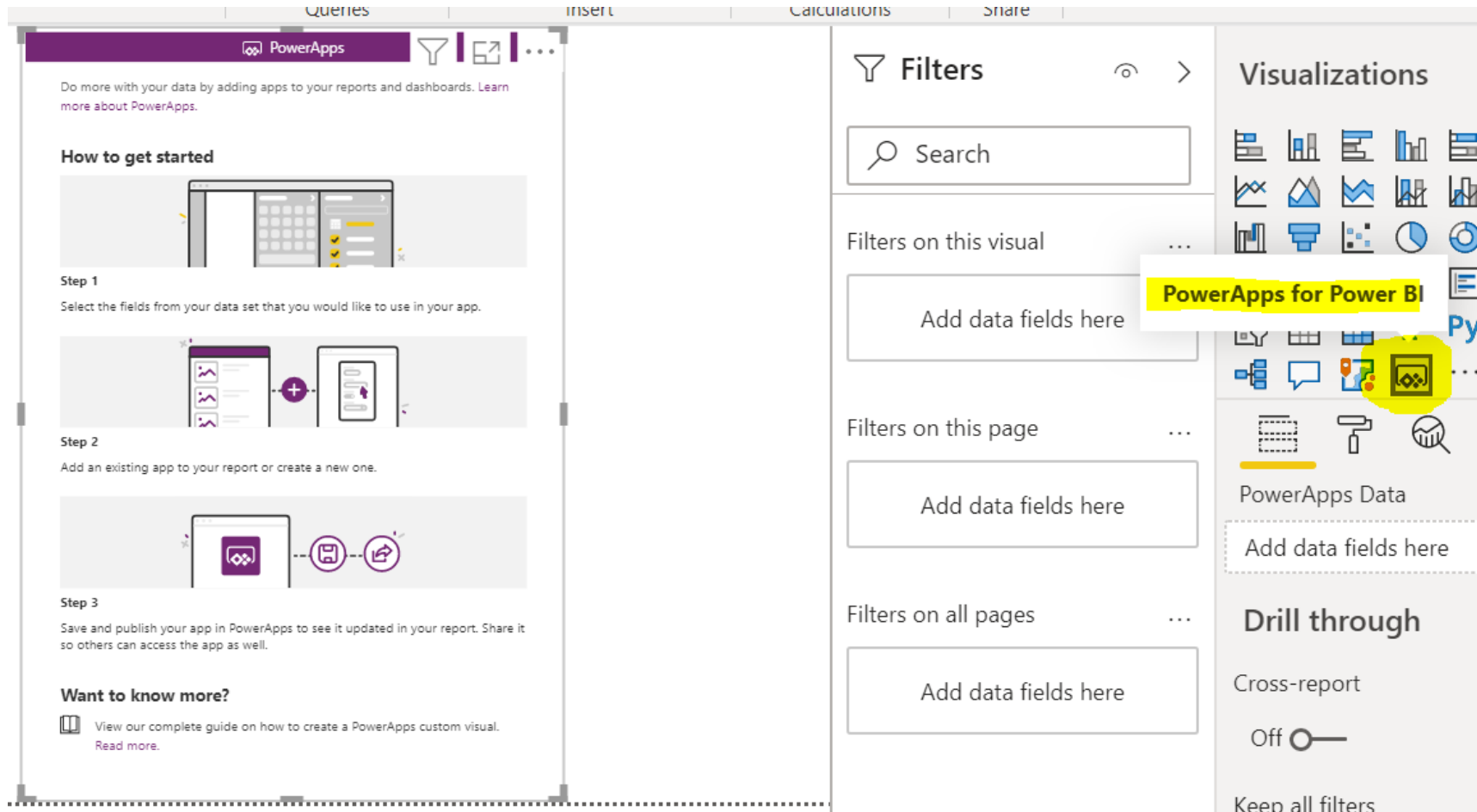
Apply Discard



Power Apps setup

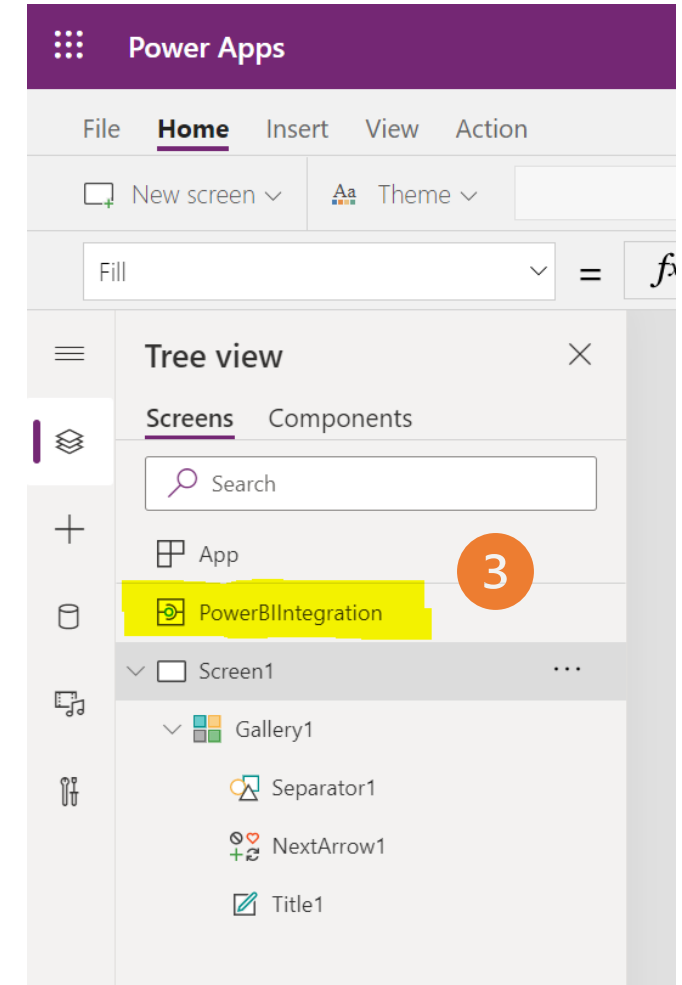
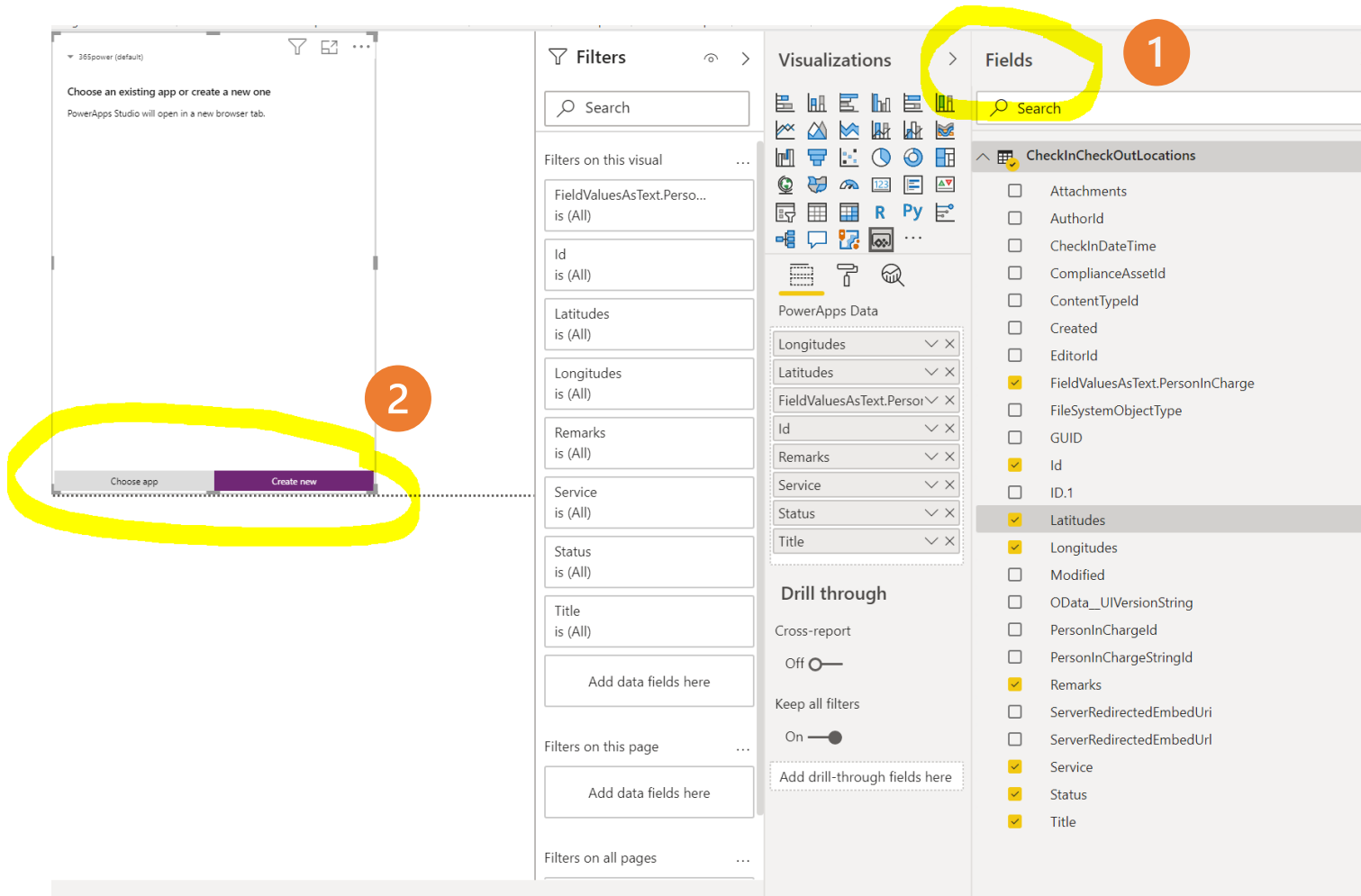
Setup Power BI & Power Apps

- Power BI Desktop > Create your Power BI charts & PowerApps for Power BI



Setup Power BI & Power Apps integration

- Power BI Desktop > Create your Power BI charts & PowerApps for Power BI



Create the canvas Power App

- Power Apps > Create the Power App as you wish

The screenshot displays the Microsoft Power Apps canvas editor interface. The top navigation bar includes 'File', 'Home', 'Insert', 'View', and 'Action' tabs. Below this is a ribbon with options like 'Navigate', 'Collect', 'Remove', 'On visible', 'On hidden', and 'Power Automate'. A formula bar shows a fill color property set to `RGBA(232, 232, 232, 1)`.

On the left, the 'Tree view' pane shows the app's structure under 'Screens' and 'Components'. The 'Home Screen' is selected, containing a 'grpViewMap_1' container with various UI elements like 'Label4', 'Button1_4', 'Button1_3', 'Button1_2', 'Button1_1', 'Button1', 'Icon1', 'Title3', 'RectQuickActionBar2', and 'TemplateGalleryList1'.

The main canvas area displays a preview of the 'My Check-in Points' app. It features a dark blue header with 'View Report' and 'View Map' buttons. Below the header is a filter bar with buttons for 'All', 'Started', 'Work in Progress', 'On hold', and 'Completed'. The main content is a list of check-in points, each with a 'Work description', 'Type of service', and 'Status'.

Work description	Type of service	Status
Review Marketing proposal	Michelle Wong	Started
Monthly review check	Michelle Wong	Completed
Review work environment	Michelle Wong	Work in progress
Testing services	Michelle Wong	Work in progress
Daily maintenance machine	Ryan Yue	Started
Carwash tester		



Power Automate setup

Create the canvas Power App

- Power Automate > Create Power Automate flow as you wish

The screenshot displays the Microsoft Power Automate web interface. On the left is a navigation pane with options: Home, Action items, My flows (selected), Create, Templates, Connectors, Data, AI Builder, Solutions, and Learn. The main area shows a flow named 'DEMO - CheckInLocation + extra info' with a green status bar indicating 'Your flow ran successfully.' Below this, the flow canvas is visible, showing a sequence of steps: 'Manually trigger a flow' (0s), 'Compose' (0s), 'Add a row into a table' (1s), 'Get my profile (V2)' (0s), 'Condition' (1s), and 'Send me a mobile notification' (1s). Each step has a green checkmark icon. On the right, a 'Run flow' panel is open, showing the flow name, owner (Michelle Wong), and a description: 'Track your work hours and work location. Each button tap logs the current time and location to an Excel table. You'll get a push notification for succ ...'. It includes a 'key-button-timestamp' input field, a 'Service' dropdown menu, a 'Work description' text area, and a 'Remarks' text area. At the bottom of the panel are 'Run flow' and 'Cancel' buttons. A footer note states: 'This flow uses Excel Online (Business), Notifications, SharePoint, and Office 365 Users. [Review connections and actions](#)'.

Power Automate Search for helpful resources

← DEMO - CheckInLocation + extra info

✓ Your flow ran successfully.

My flows

- Manually trigger a flow 0s
- Compose 0s
- Add a row into a table 1s
- Get my profile (V2) 0s
- Condition 1s
- Send me a mobile notification 1s

Run flow ×

DEMO - CheckInLocation + extra info

Owner: Michelle Wong

Track your work hours and work location. Each button tap logs the current time and location to an Excel table. You'll get a push notification for succ ...

[See more](#)

key-button-timestamp *

Service *

Select a service

Work description *

Please enter your work description

Remarks

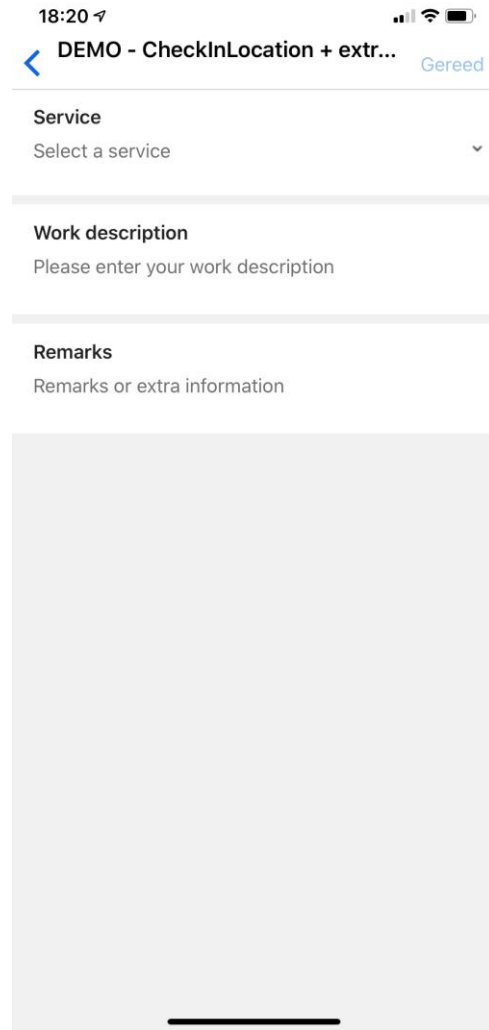
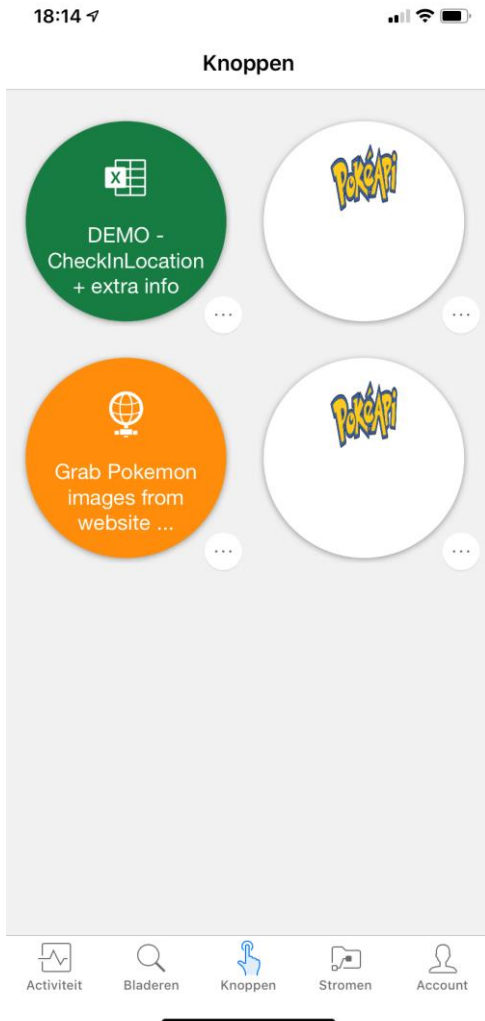
Remarks or extra information

This flow uses Excel Online (Business), Notifications, SharePoint, and Office 365 Users. [Review connections and actions](#)

Run flow **Cancel**

Create the canvas Power App

- Power Automate > Power Automate button via mobile button



Setup Power Automate to Refresh dataset

- Power Automate > Use Power BI trigger > Refresh a dataset (preview)
Limit to max. 8 refreshes per 24 hours!

The screenshot displays the Power Automate web interface. On the left, a navigation pane includes links to Home, Action items, My flows, Create, Templates, Connectors, Data, AI Builder, Solutions, and Learn. The main workspace is titled 'PowerApps button'. A 'PowerApps' connector card is shown with a downward arrow pointing to a 'Power BI' connector card. A search bar for connectors and actions is visible, with a list of actions including 'Add rows to a dataset (preview)', 'Export To File for Paginated Reports (preview)', 'Export To File for Power BI Reports (preview)', and 'Refresh a dataset (preview)'. A tooltip for 'Add an action for Power BI' is present. Below the list, there is a section for 'Don't see what you need?' with a feedback link. A second window titled 'PA - Refresh dataset CollabDays_CheckIn_Report' is overlaid, showing the configuration for the 'Refresh a dataset (Preview)' action. It includes fields for 'Workspace' (set to 'My Workspace') and 'Dataset' (set to 'CollabDays_CheckIn_Report'). At the bottom of this window are buttons for '+ New step' and 'Save'.



Microsoft Teams setup

Setup add Power App into Microsoft Teams

- Power Apps > Add to Teams > Download app

Power Apps

Home Learn Apps

+ Create Data Flows Chatbots AI Builder Solutions

New app Edit Play Share Export package Add to Teams Monitor Analytics

Apps Component libraries (preview)

Name	Modified
Check in Point	42 min ago
CheckIn-Test	
PokeBubbles Game_V2	
Pokemon Memory Game	
Demo_PlayWithImage_P4K	
BEPAFUG_Demo	
PokeBubble Game	
PA_3Dmodels_Demo	
RotomDex PokeDex	
Pokemon3DApp V2	2 mo ago

Add to Teams

To add your app to Teams:

1. Review and download your app (.zip file)
2. Upload your app as a custom app to Teams

Review app details

App details can't be changed in Teams once added.

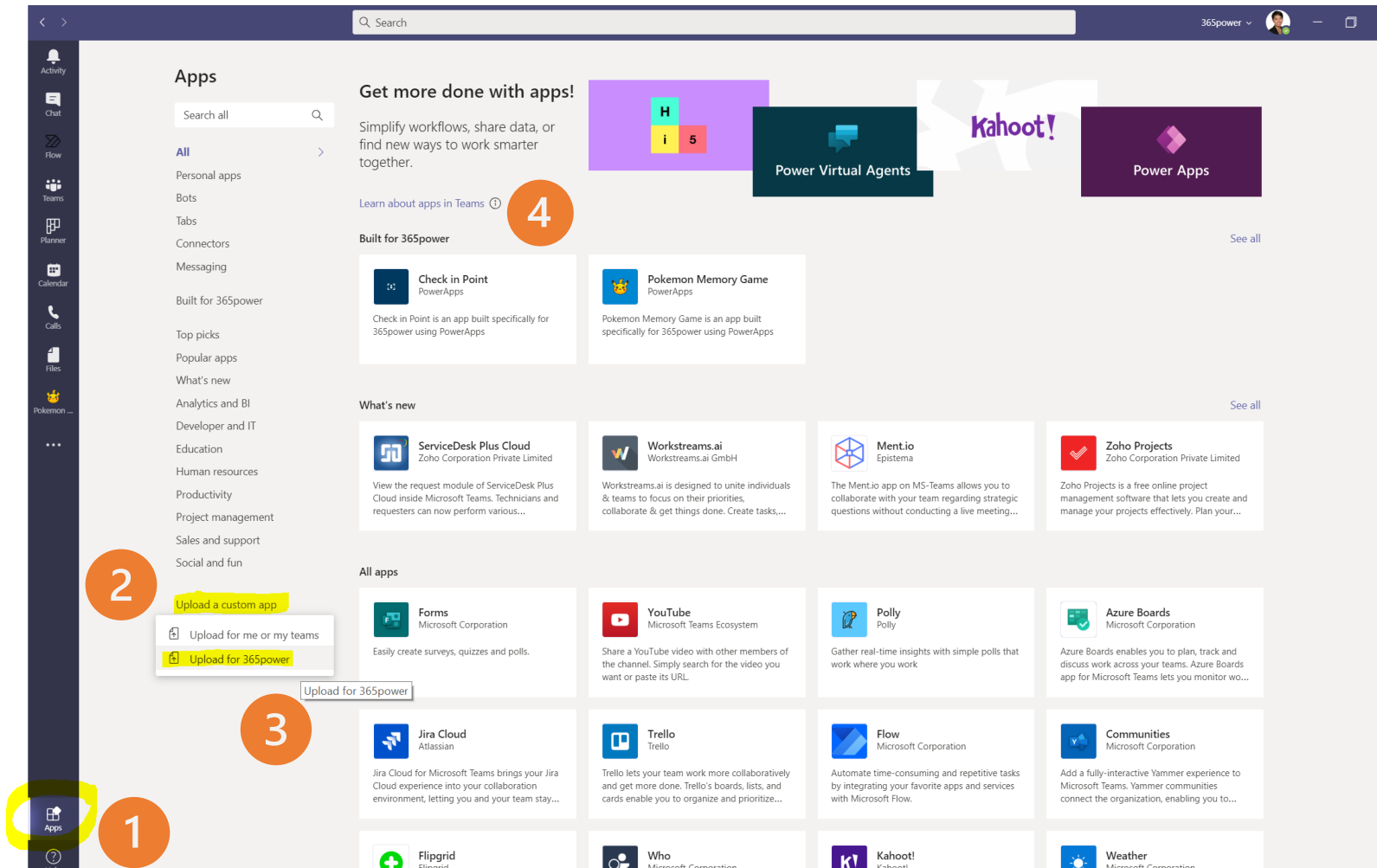
Description

Your app doesn't have a description, optionally add one in app settings.

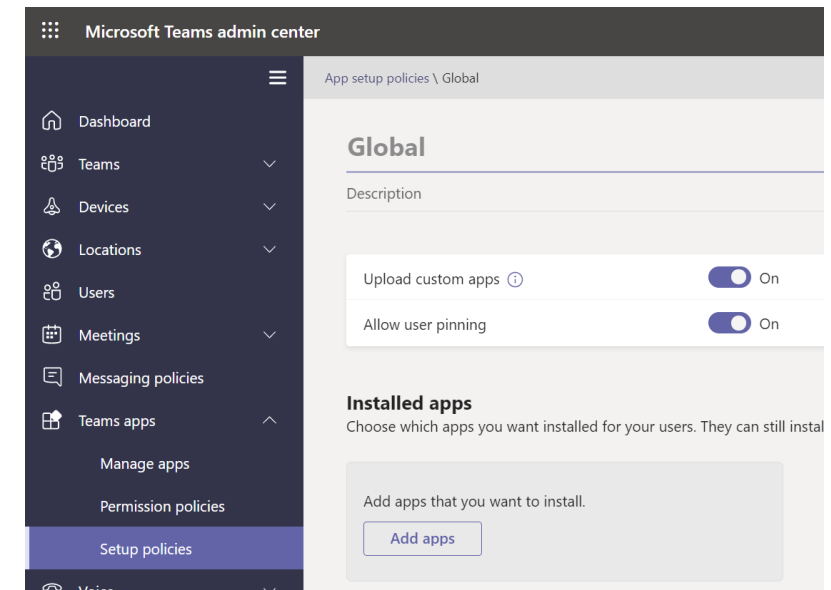
Download app

Setup add Power App into Microsoft Teams

- Microsoft Teams > Apps > Upload a custom app



- Requirements:
Admin needs to enable
Upload custom apps



Setup add Power App as a menu icon

- Microsoft Teams admin center > Teams apps > Setup policies

The screenshot shows the Microsoft Teams admin center interface. On the left, the navigation pane has 'Setup policies' highlighted with an orange circle labeled '1'. The main content area shows the 'Pinned apps' section with a table of apps. An orange circle labeled '2' points to the '+ Add apps' button. On the right, the 'Add pinned apps' dialog is open. An orange circle labeled '3' points to the 'Global' dropdown menu, and another orange circle labeled '4' points to the 'Add' button in the dialog. The dialog shows a search for 'check' and a result for 'Check in Point PowerApps'.

Microsoft Teams admin center

Pinned apps
Choose the order of apps that are pinned in the Teams app navigation bar.

+ Add apps | Move up | Move down | Remove | 9 items

✓	Name	App ID	Publisher
	Activity	14d6962d-6eeb-4f48-8890-de55454bb136	Microsoft Corporation
	Chat	86fcd49b-61a2-4701-b771-54728cd291fb	Microsoft Corporation
	Power Automate	c3a1996d-db0f-4857-a6ea-7aabf0266b00	Microsoft Corporation
	Teams	2a84919f-59d8-4441-a975-2a8c2643b741	Microsoft Corporation
	Planner	com.microsoft.teamspace.tab.planner	Microsoft Corporation
	Calendar	ef56c0de-36fc-4ef8-b417-3d82ba9d073c	Microsoft Corporation
	Calling	20c3440d-c67e-4420-9f80-0e50c39693df	Microsoft Corporation
	Files	5af6a76b-40fc-4ba1-af29-8f49b08e44fd	Microsoft Corporation
	Pokemon Memory Game	08a221df-dafc-4d98-9325-4d568492ba18	PowerApps

Add pinned apps

Search based on this app permission policy ⓘ

Global

Search for apps you want to add or to see a list of apps go to [Manage apps](#).

check

Check in Point
PowerApps

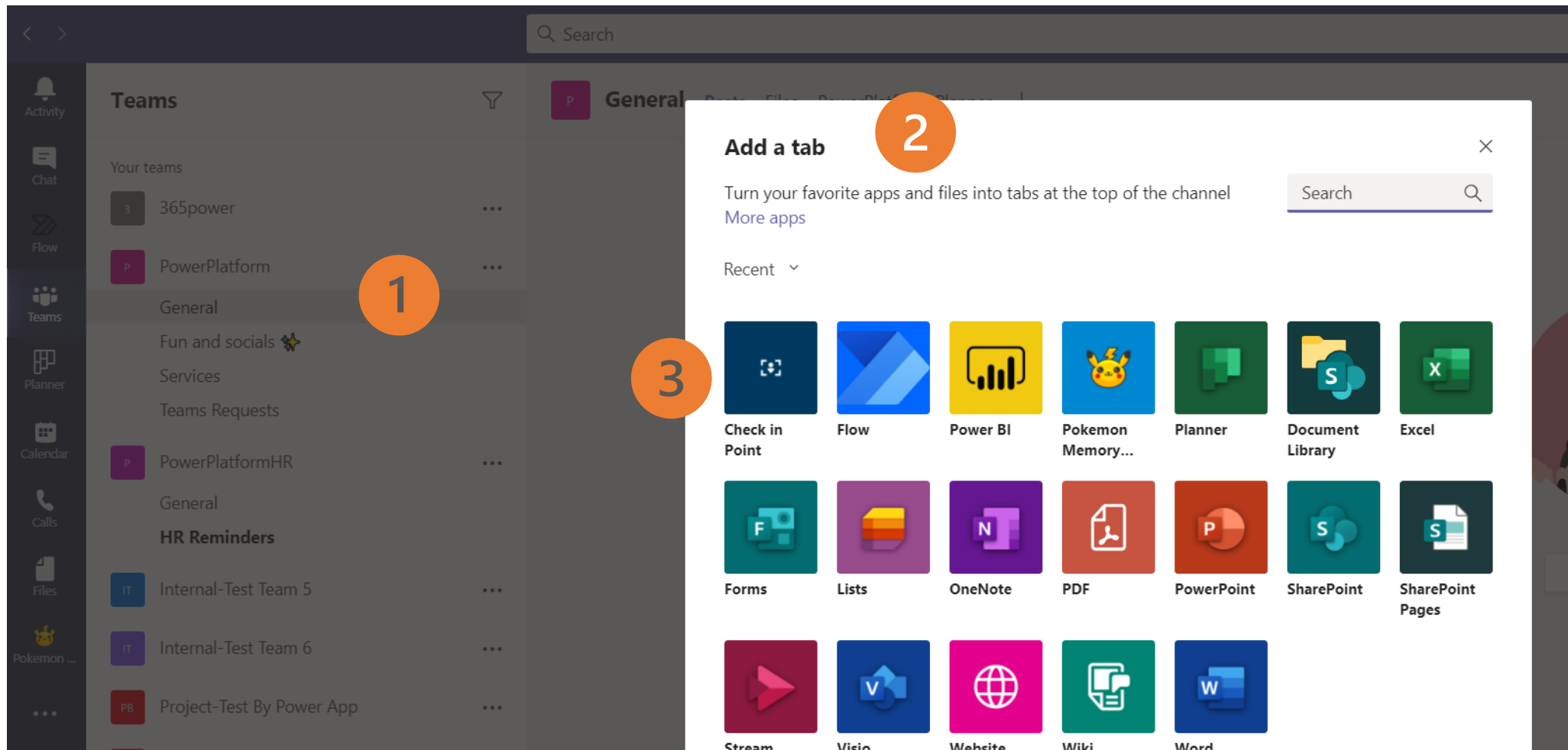
Add

To add apps, search by their name above.

Add Cancel

Setup add Power App in a Teams tab

- Microsoft Teams > Go to a Team Channel > Add a tab > Choose Power App or Power BI



Demo Time



Any questions?



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COMMUNITY



Thank you for attending

Michelle Wong

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