Power Platform App in a Day

Module 2: Microsoft Dataverse

Hands-on Lab Step-by-Step

August 2022

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Microsoft Dataverse

Lab Prerequisites

This is the second lab in a series covering Power Apps Canvas Apps, Microsoft Dataverse, Power Apps Model-driven Apps, and Power Automate. The assumption is that you have successfully completed the initial part of setting up an environment as described in the overview document – "**00-AppInADay Lab Overview.pdf**".

If you have not completed building the Power Apps Canvas App in Module 1, you can use the partially completed version of the lab package in the "\Completed\Module1" folder. Follow the instructions in the document "Importing Contoso Coffee" before proceeding with this module.

Before you begin

You must be connected to the internet.

1. **Have a Test Environment with permission to create a Microsoft Dataverse database:** You should have gone through the steps to create a new environment using the Admin center. In this lab, you will create a database in this environment, if you haven't already created one.
2. **Sign-in to Power Apps:** Go to Power Apps and **sign in** with the same account you used to complete the first lab**.** Make sure you switch to the environment where you created the app.

Overview

Microsoft Dataverse adds data storage and modeling capabilities to Power Apps that is scalable and easy to provision. In this module, you will be using Microsoft Dataverse to model and store the data from the machine ordering canvas app that you built in module 1. In the next module, you will be building a model-driven application using the same data that will be used by the back-office staff to process the machine orders. These apps that you build on Microsoft Dataverse use the same technology framework (Microsoft Dataverse) that Microsoft Dynamics 365 apps are built-on.

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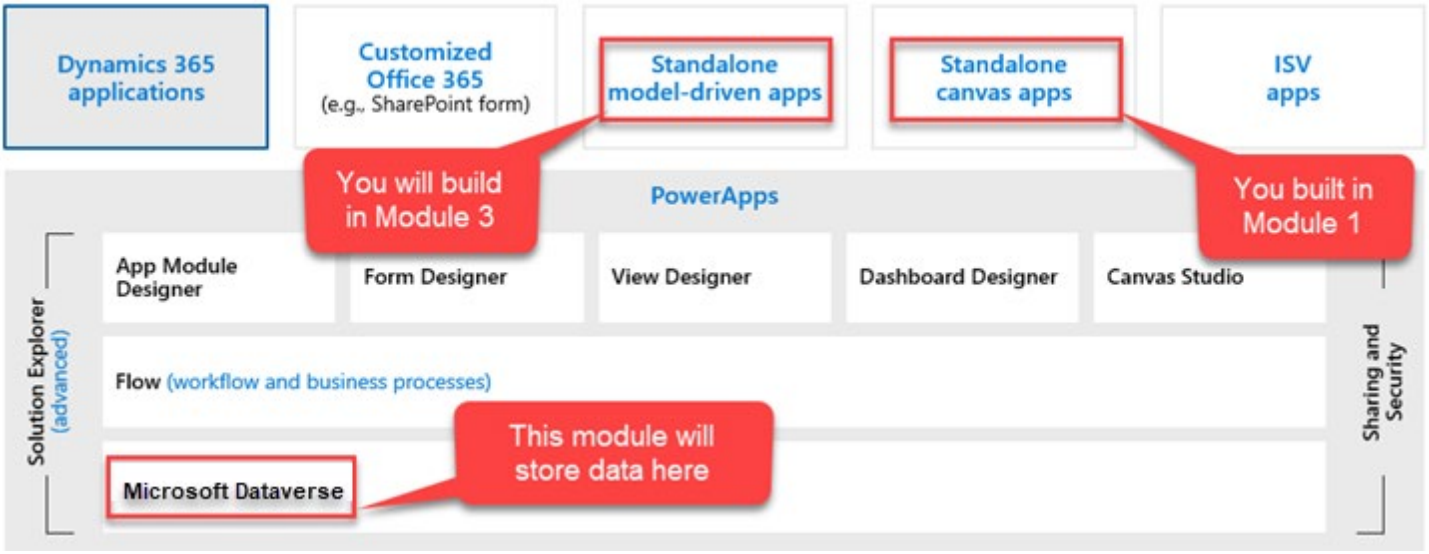

Goals for this lab

After this lesson you will be able to: • Provision a Microsoft Dataverse database • Create a custom table and add custom columns to it • Use the Power Apps Form control to populate the table • View the table data • Create a calculated column • Implement a server-side business rule	The time to complete this lab is [60] minutes.

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Exercise 1: Exploring Microsoft Dataverse

In this exercise, you will explore Microsoft Dataverse standard tables. Tables in Microsoft Dataverse are like tables in a database or worksheets in Microsoft Excel. Tables can be connected together with relationships that model real world interactions between the data. Each table contains multiple Rows (Records), each having data columns. For example, a "Project" table may have columns such as Name, Due Date, Status, etc. and it may be related to a "Project Owner" table which might have columns such as Name, Email, etc.

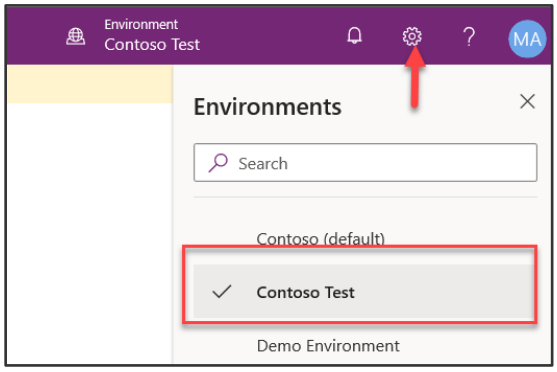
Microsoft Dataverse abstracts a lot of the typical low-level database management work to make it easier for you to configure a custom data model that fits your application.

In addition to allowing for the creation of custom Tables, Microsoft Dataverse contains a Common Data Model (CDM) consisting of hundreds of standard table definitions. You can find the current CDM schema at Github Microsoft CDM and you can browse the CDM using the CDM Visual Table Navigator located here Github CDM. You can read more about the CDM here Common Data Model Overview .

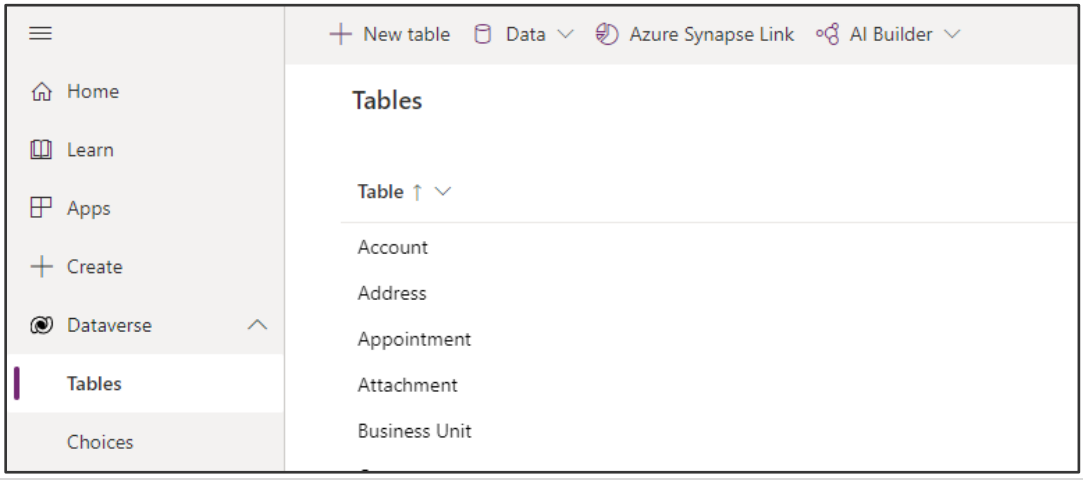
Task 1: Explore standard Tables

In this task, you will explore Microsoft Dataverse standard Tables.

Before beginning the exercises, navigate to Make Power Apps and confirm that you are in the desired environment for the labs.



1. In the left pane, expand **Dataverse** and select **Tables**.



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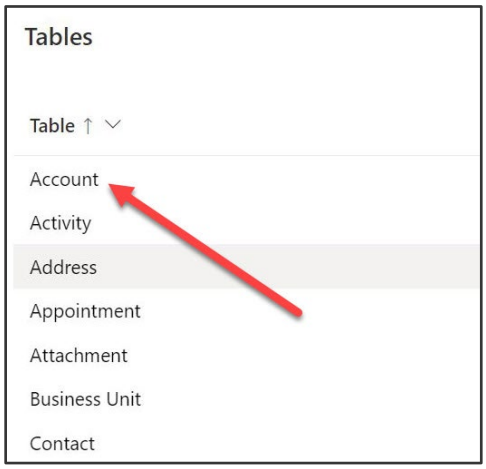
2. This will bring up the list of tables in this environment. Click on a few of the standard Tables (for example, **Account**) to get familiar with some of the features of a table.



For detailed documentation on Microsoft Dataverse Tables, see https://docs.microsoft.com/en-us/powerapps/developer/common-data-service/reference/about-entity-reference

Table properties:

Here, you can find the table name, table type, table primary column, and table description. You can also copy table set name, schema name, or logical name via the tools button.

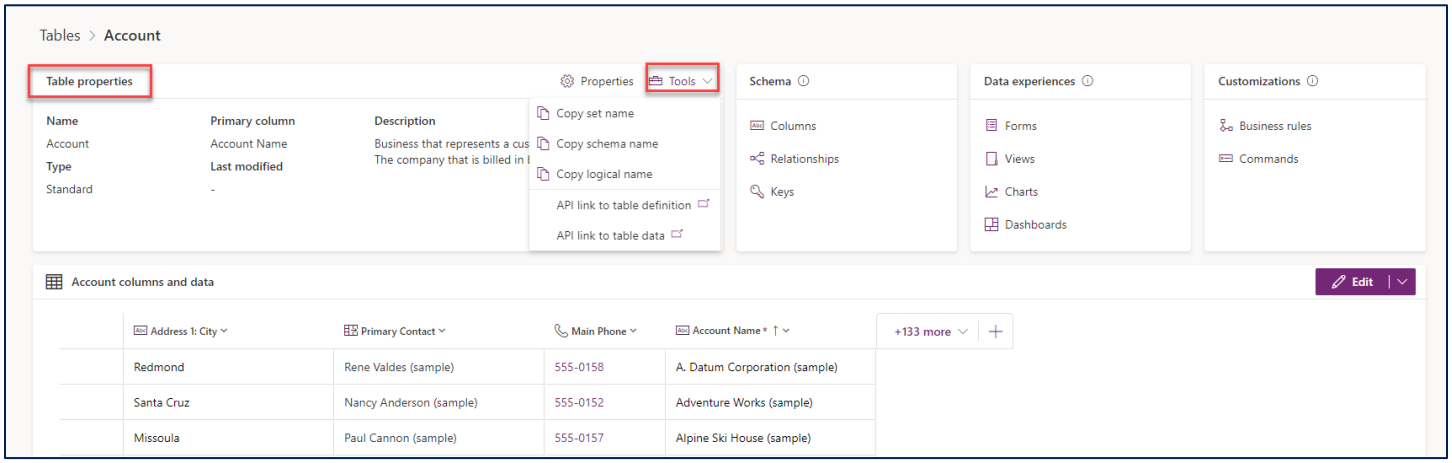


Table schema:

Here, you can navigate to the table columns, relationships, and keys. Select Columns.

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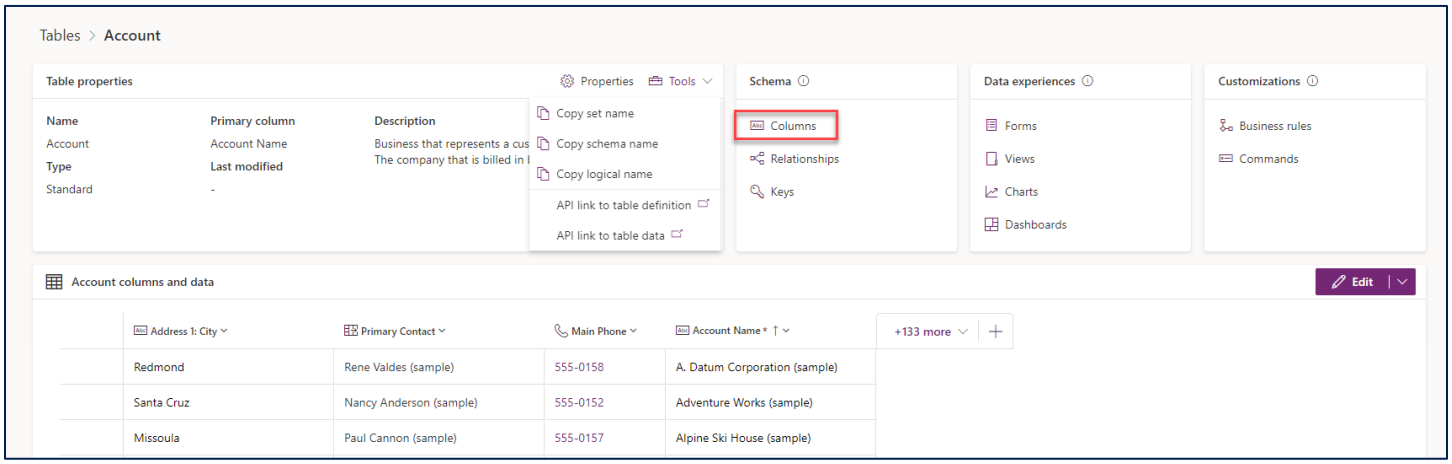
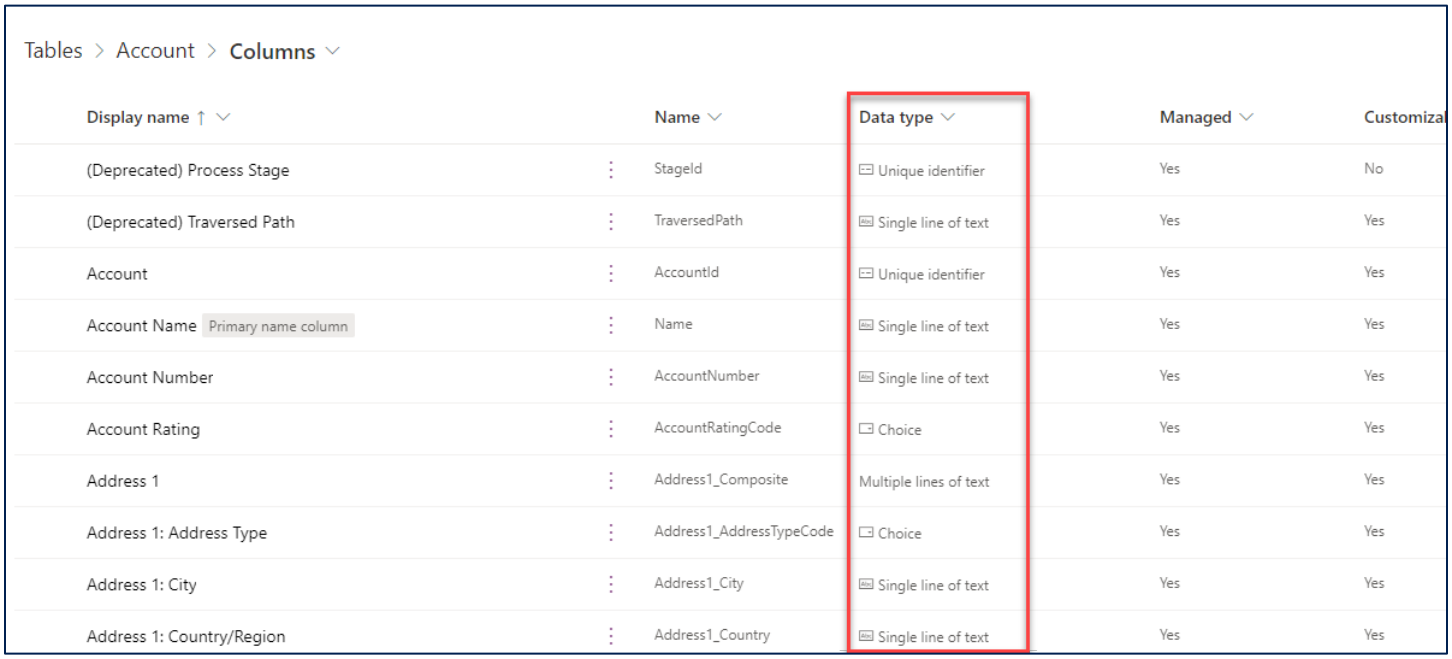


Columns:

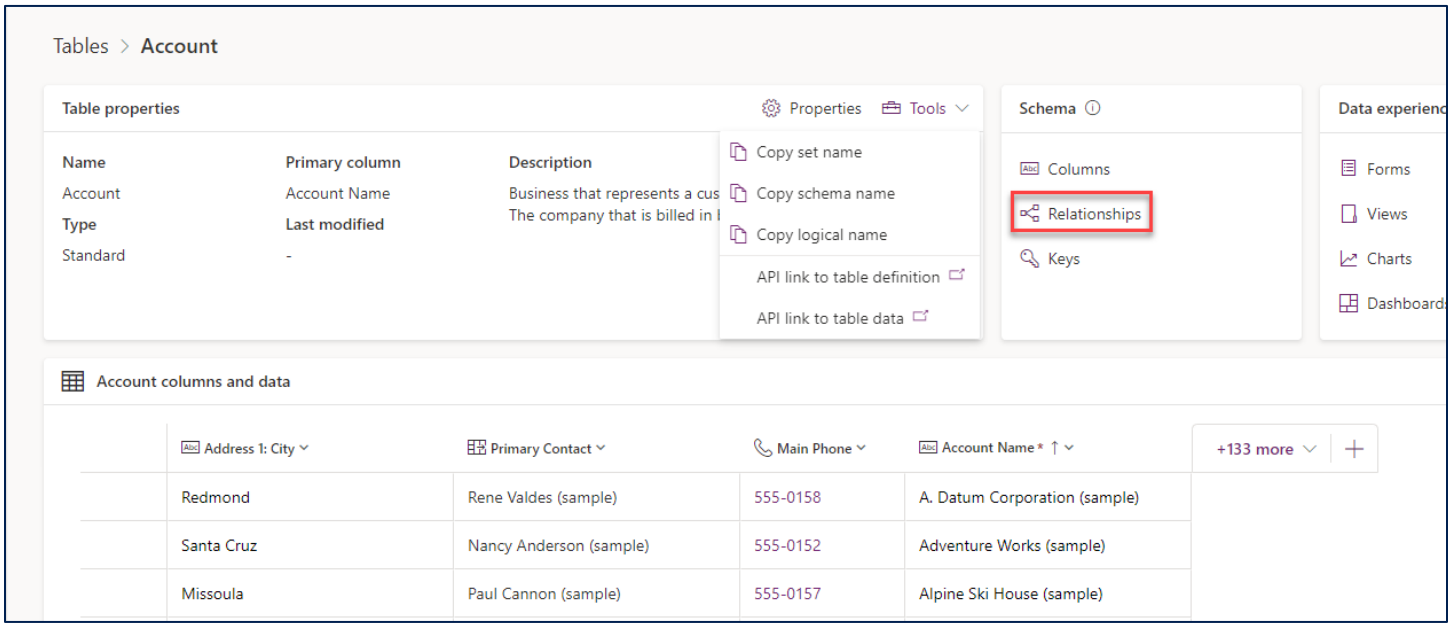
A table has a list of columns. In the example below, the "Account" table has columns such as Account Name, Account Number, etc. Each column has a data type, such as Text, Number, etc. The data type is chosen when you create a column and is not changeable. The data type also defines many of the characteristics and behaviors of the column when your application runs. For example, a Choice column allows you to have a pre-defined list of values for use in your application. When this column is used on a form in a model-driven application the visual presentation is a drop-down control. The column helps to ensure data consistency and allows for built-in support for multi-language applications.



For a list of supported data types, see [Microsoft Dataverse Supported Data Types]

Go back to the table by clicking on the browser back button.

Select **Relationships**.



Relationships:

Relationships allows you to manage relationships between Tables. Relationships supported are One to Many (1:N), Many to One (N:1) and Many to Many (N:N). Relationships also define the behavior that happens when actions occur on the primary Row in a 1:N relationship. For example, if the parent Row is deleted you can configure the relationship behavior so that all child Rows are also deleted or simply remove the reference.

Go back to the table by clicking on the browser back button.

Select **Keys**.

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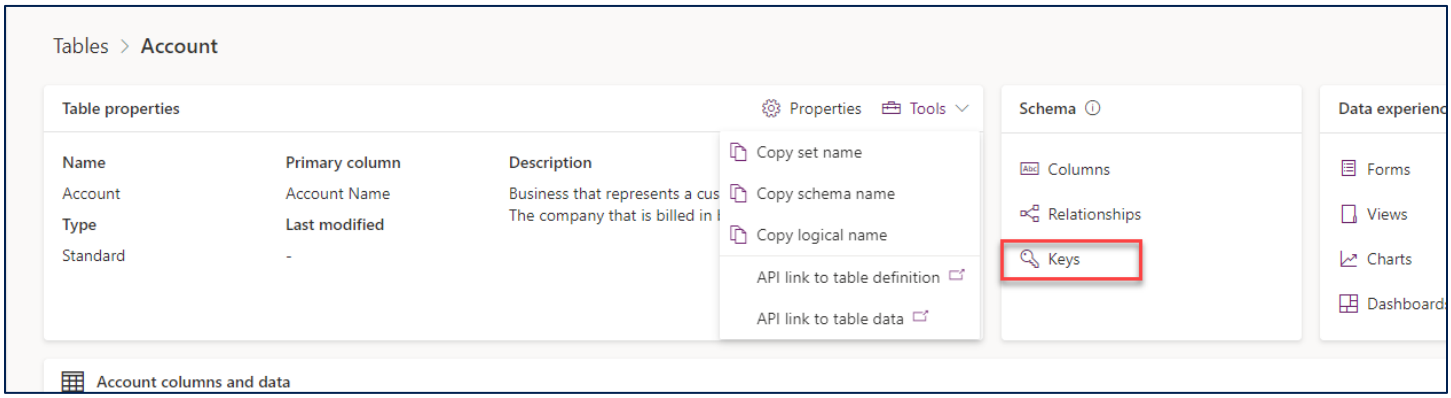
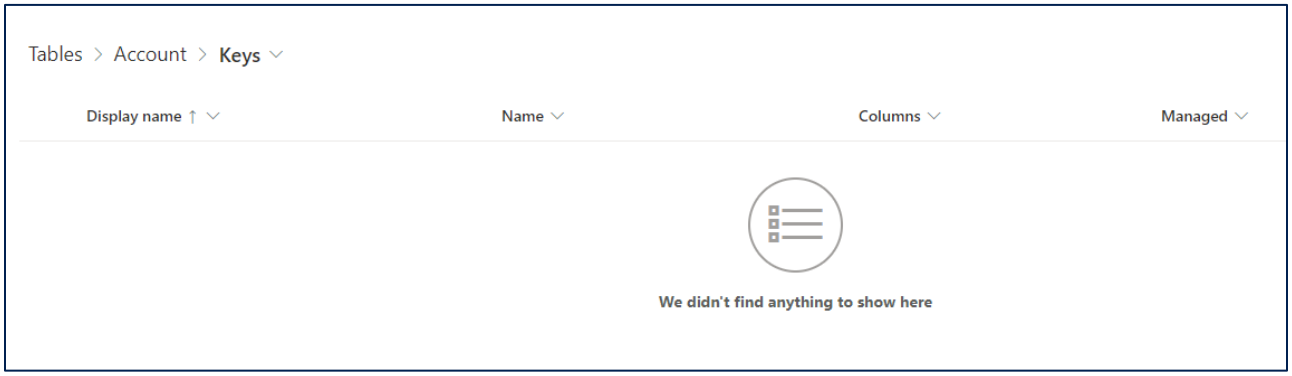


Keys:

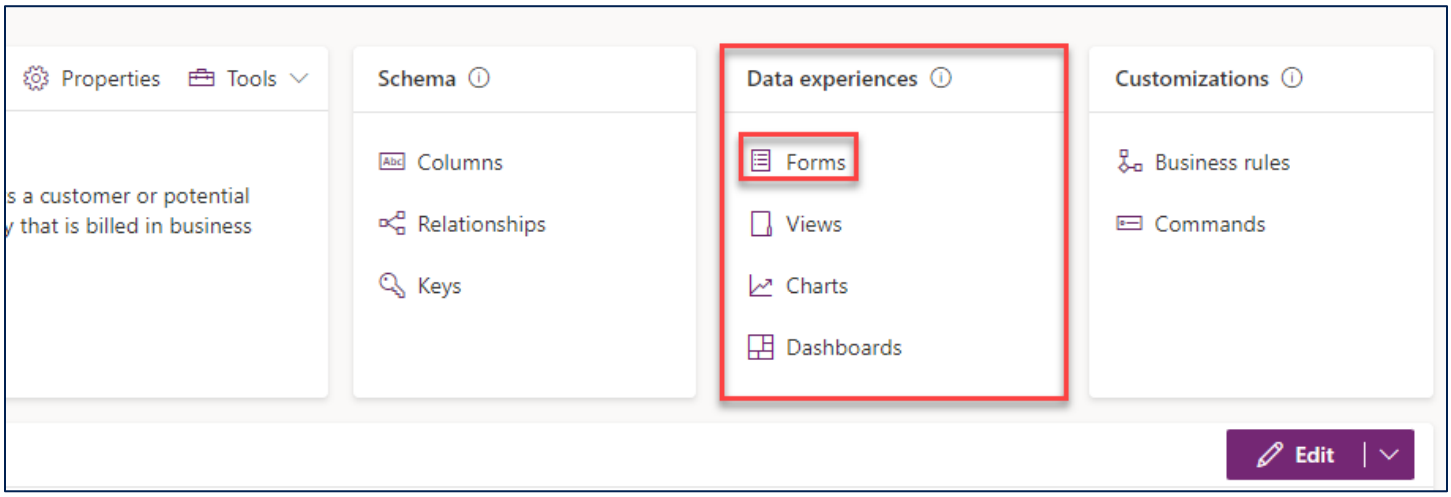
Allows you to view the lookup keys for the table. Keys can contain multiple columns to define a composite key. Keys enforce uniqueness, so they should not be used when there is a need to store duplicate values of columns used.



Go back to the table by clicking on the browser back button.

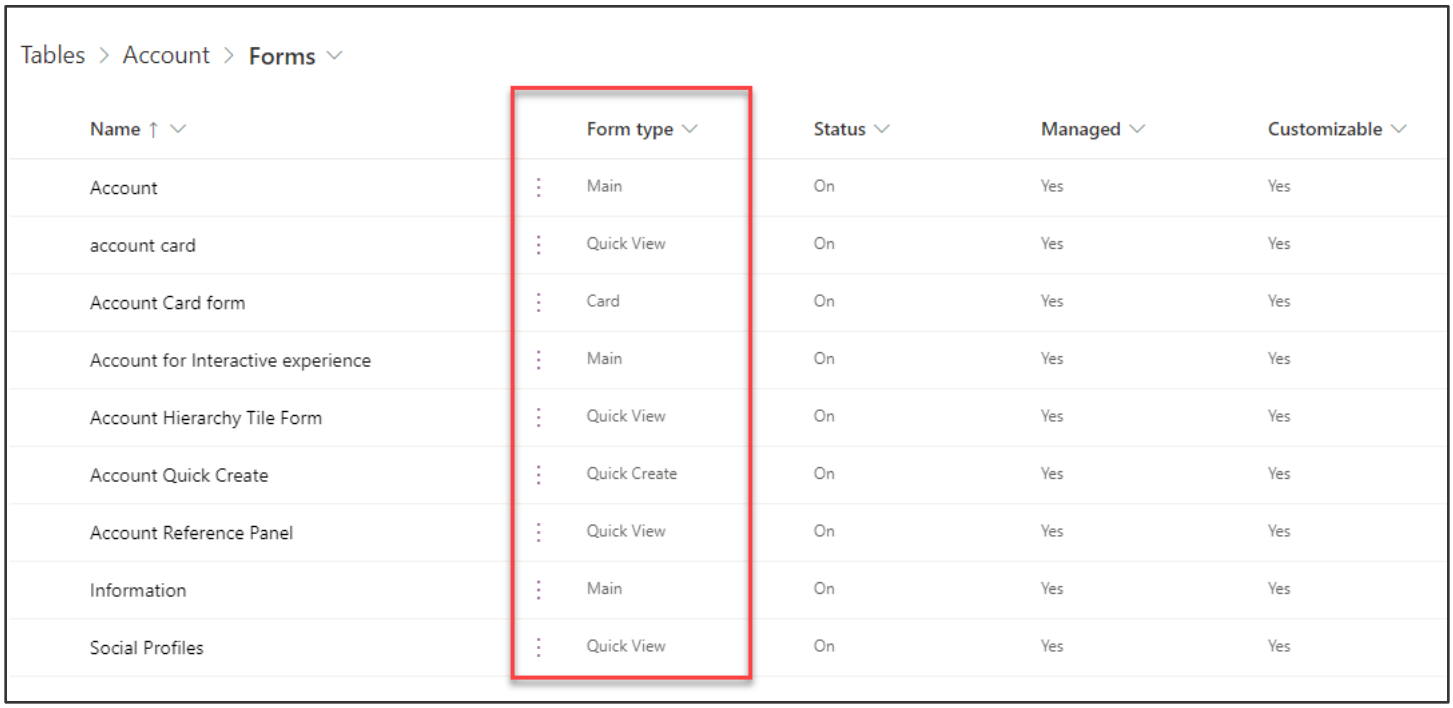
Table Data experience:

Here, you can navigate to the table forms, views, charts, and dashboards. Select **Forms**.



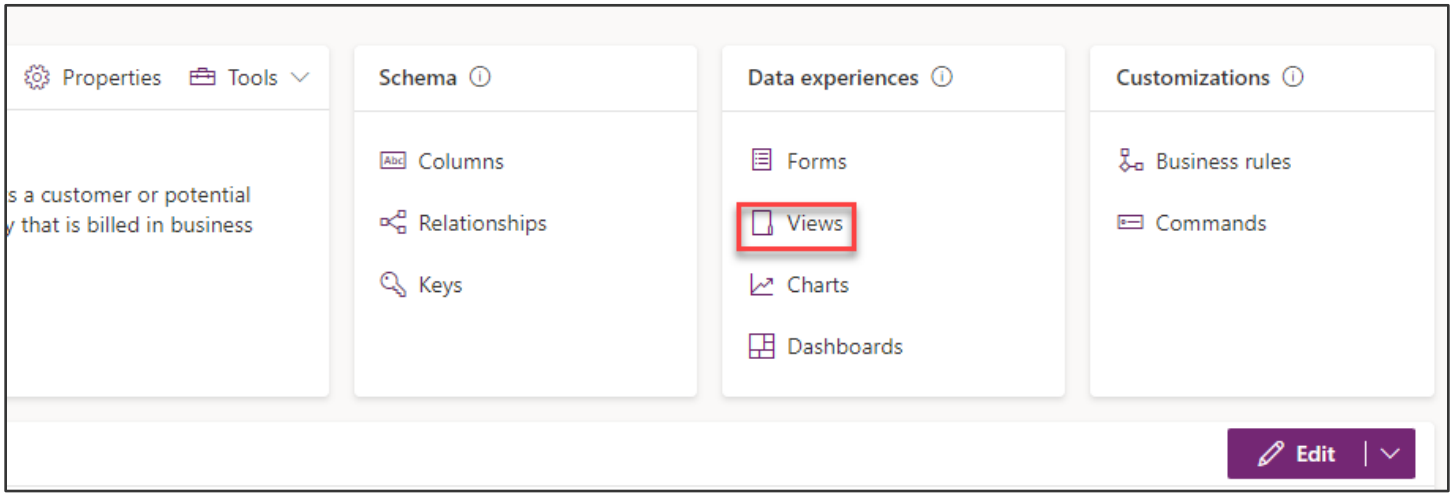
Forms:

Forms provide the user interface that people use to interact with the data they need to do their work. It's important that the forms people use are designed to allow them to find or enter the information they need efficiently. You can create different types of forms like Quick Create, Quick View, Card, and a Main form. For some of these forms you can have more than one version, to accommodate for different user roles within your organization.



Go back to the table by clicking on the browser back button.

Select **Views**.



Views:

Views will let you define how a list of Rows are shown in the app. You can create multiple custom views, each having their own filtering and sorting criteria. For example, you could create a view to see only the Rows created in the last week and

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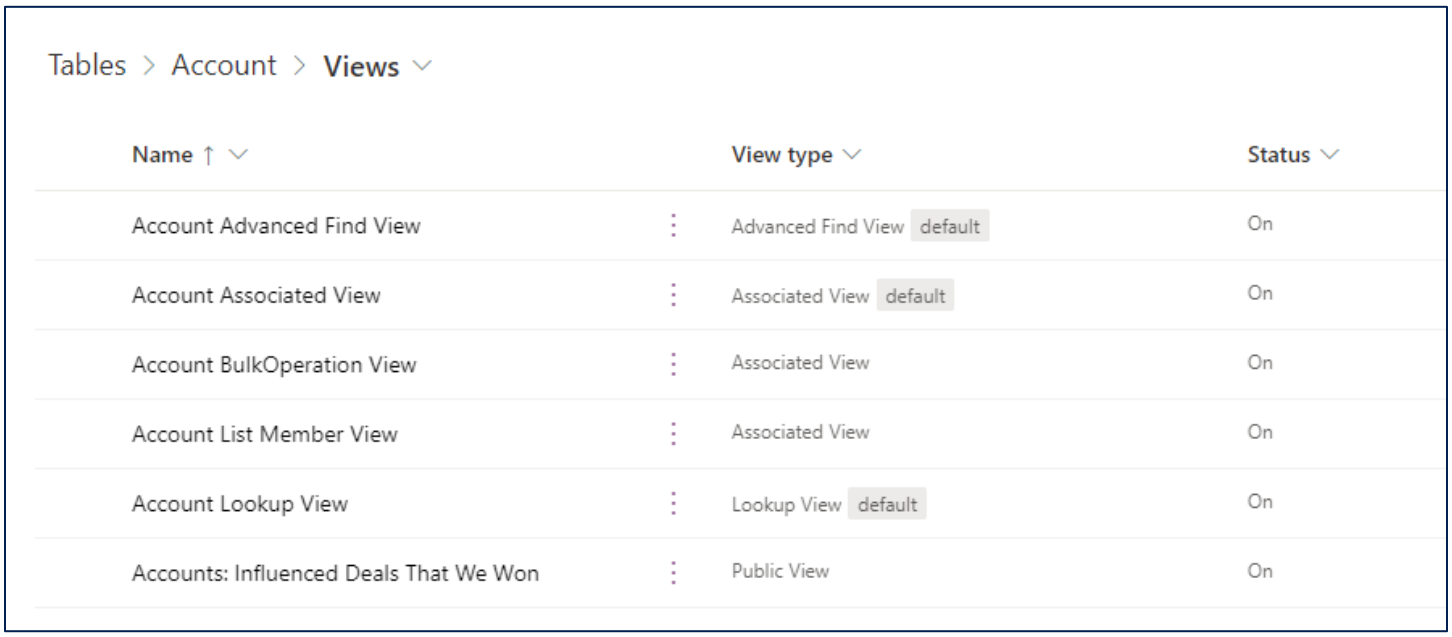
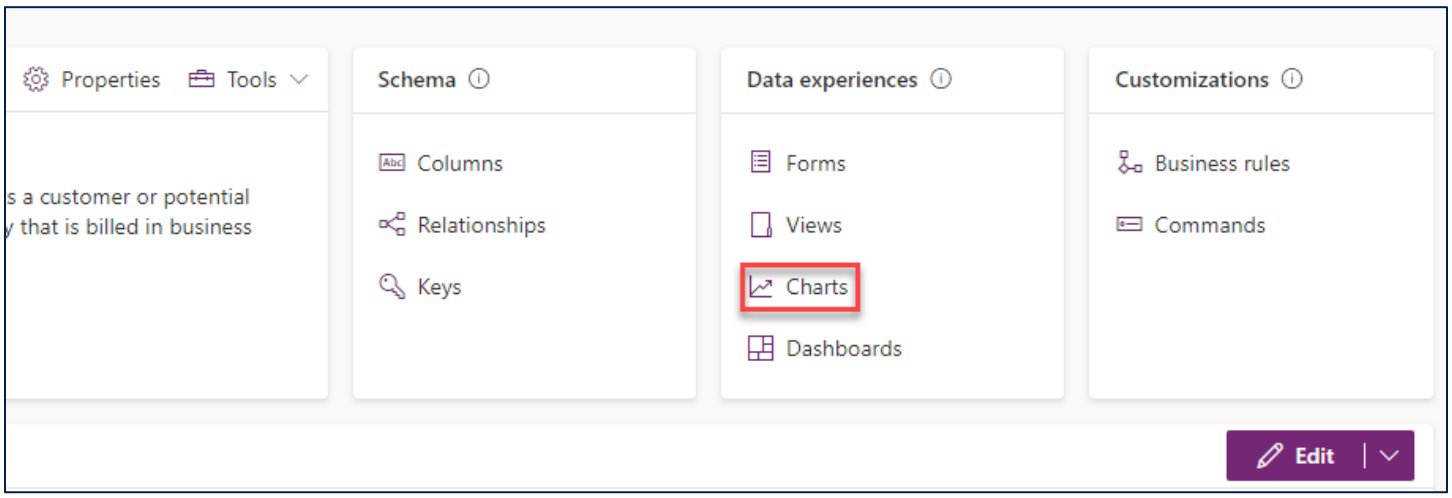
another one to see Rows that haven't been updated in a year. Create views to make the application users more productive in filtering their data.



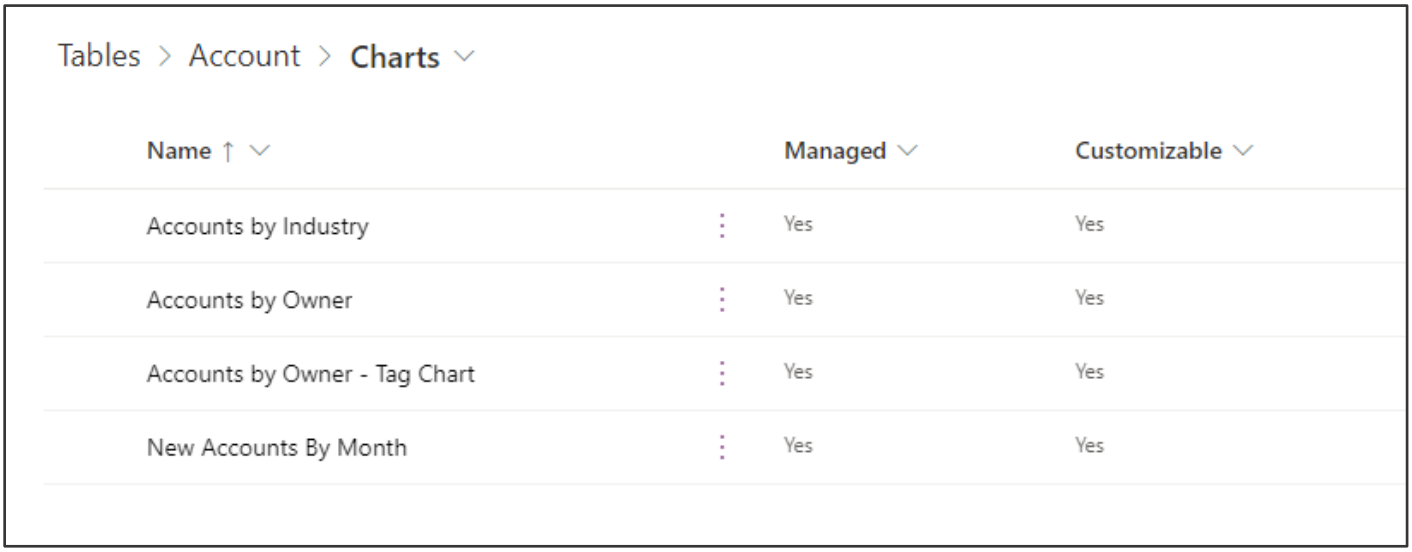
Go back to the table by clicking on the browser back button.

Select **Charts**.



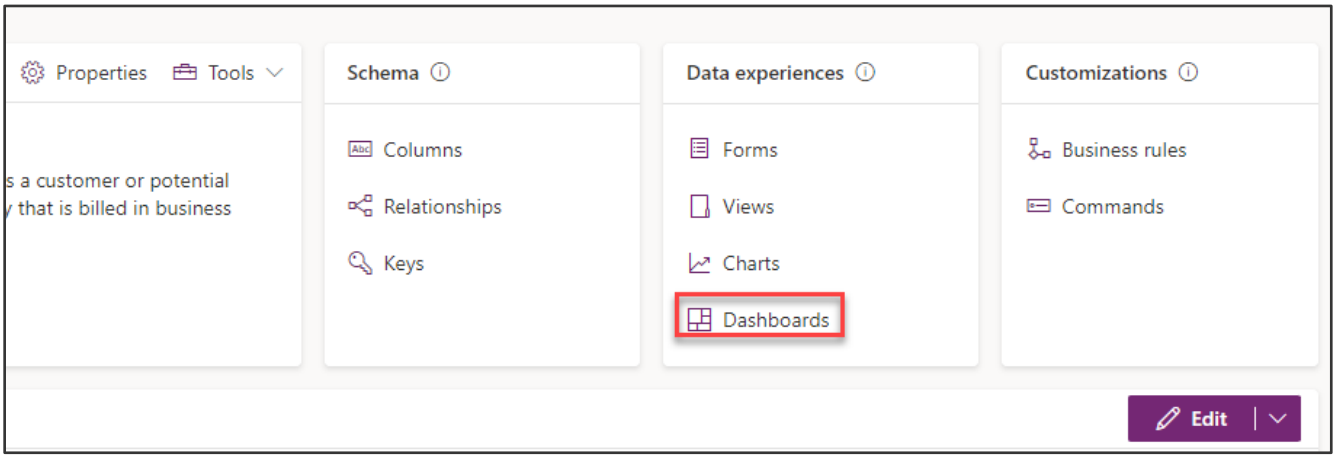
Charts:

Use Charts to display high-level view of your data in insightful and graphical ways.



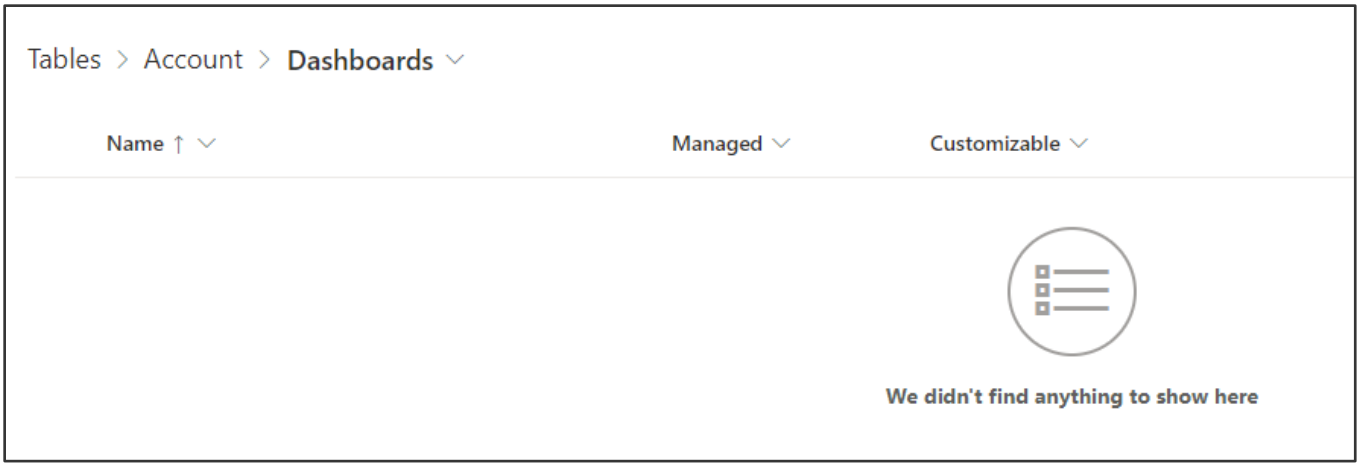
Go back to the table by clicking on the browser back button.

Select **Dashboards**.



Dashboards:

Dashboards helps you bring your views, charts, and web resources together in one place.



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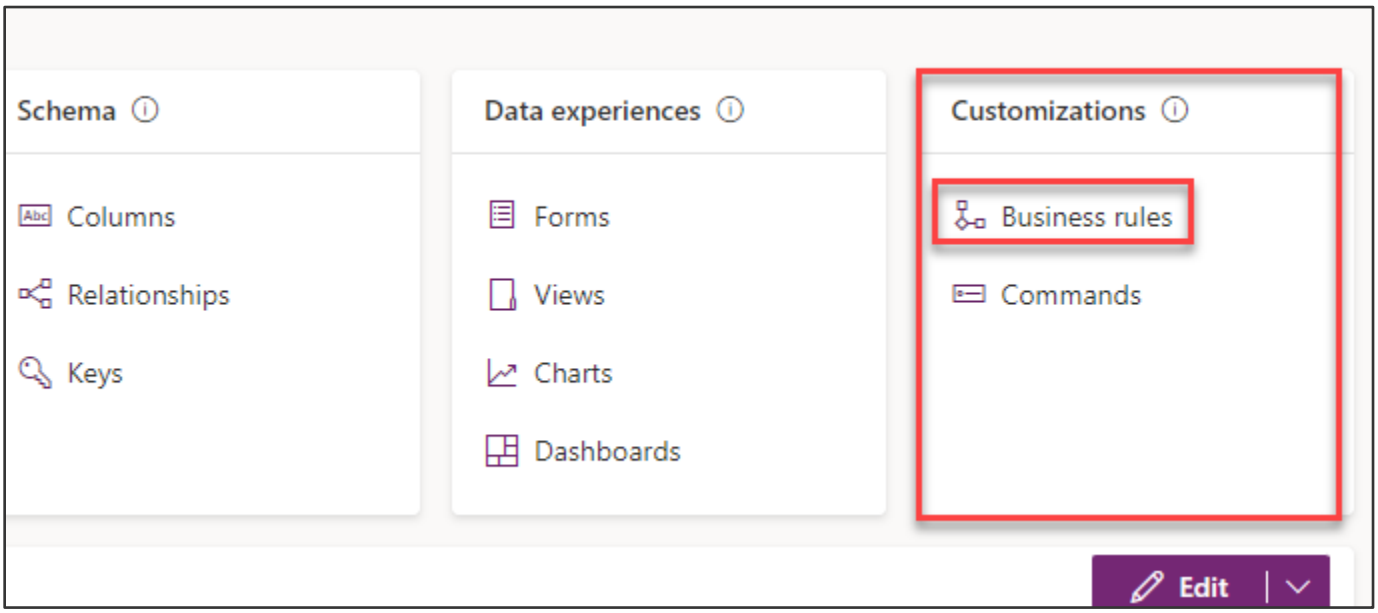
Go back to the table by clicking on the browser back button.

Table Customizations:

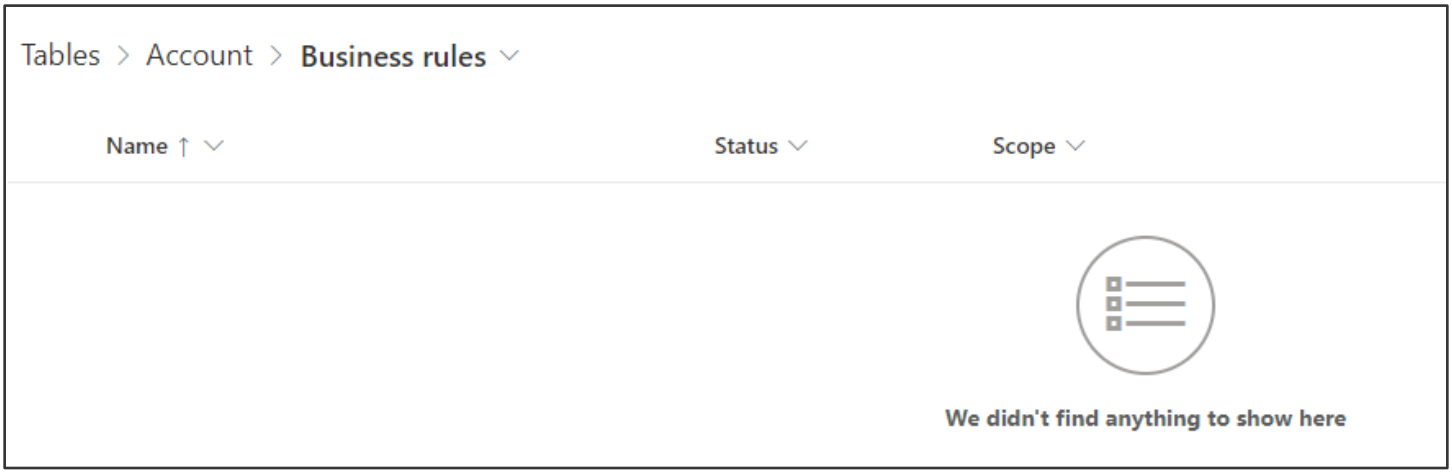
Here, you can navigate to the table business rules and commands. **Select Business rules**.



Business rules:

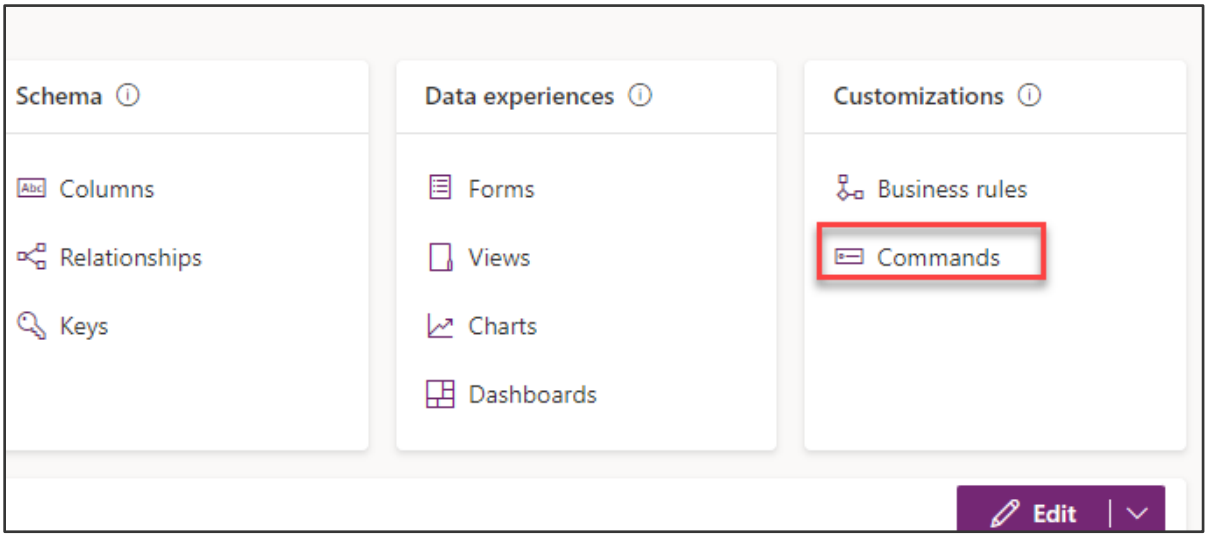
Building a Business Rule is like building a flowchart where you can define conditions and actions. You can learn more about Business rules in the link below.

Business Rules Recommendations: Business Rules Recommendations



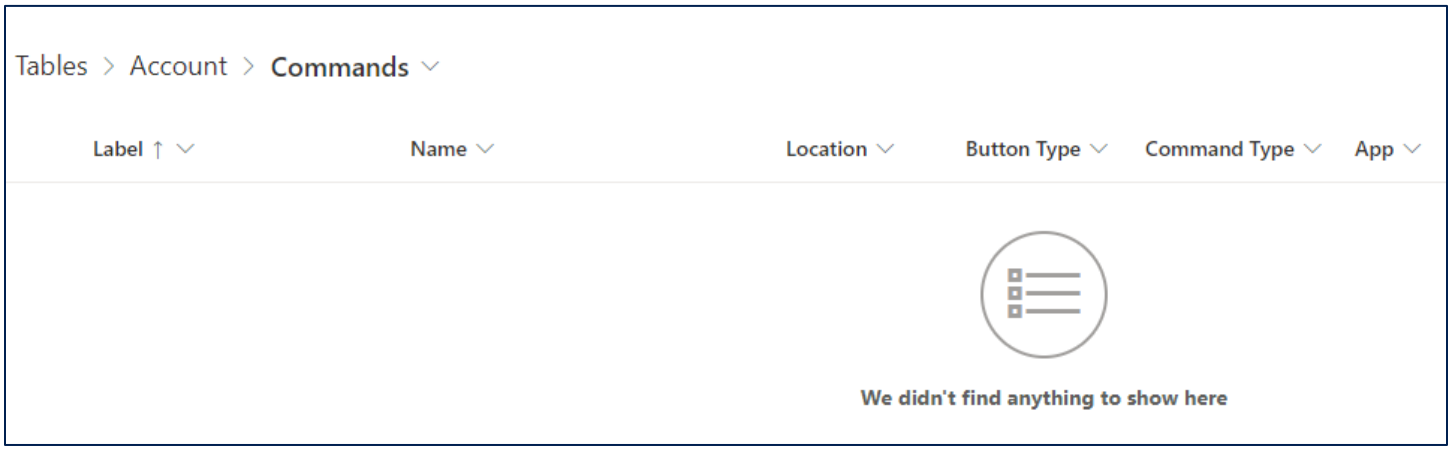
Go back to the table by clicking on the browser back button.

Select **Commands**.



Commands:

Microsoft Dataverse allows you to create your own command bar buttons. The commands added to this table will be listed here.



Go back to the table by clicking on the browser back button.

Table columns and date:

Here, you will see the first 10 rows of the table data. You can also see more columns via the show existing columns button, add new column via the + new column button, edit table data via the edit button, and order columns to your liking by dragging and dropping columns.

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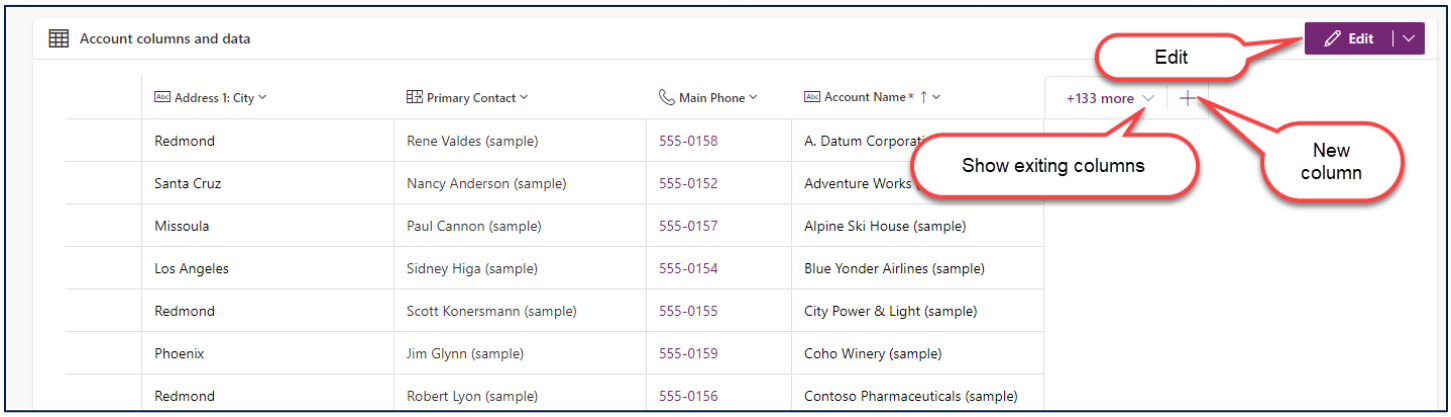
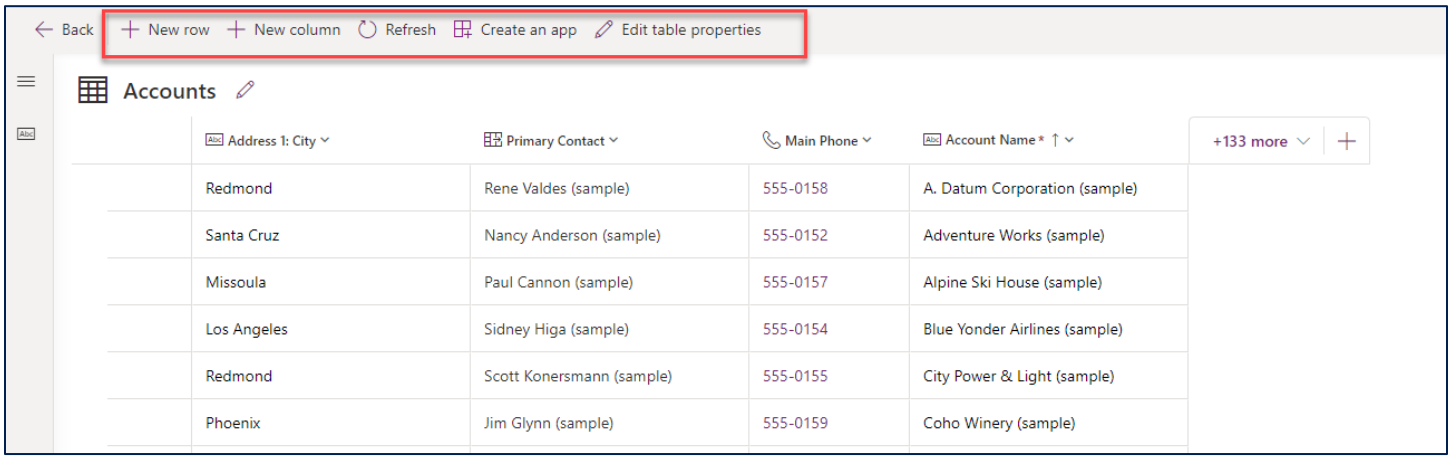


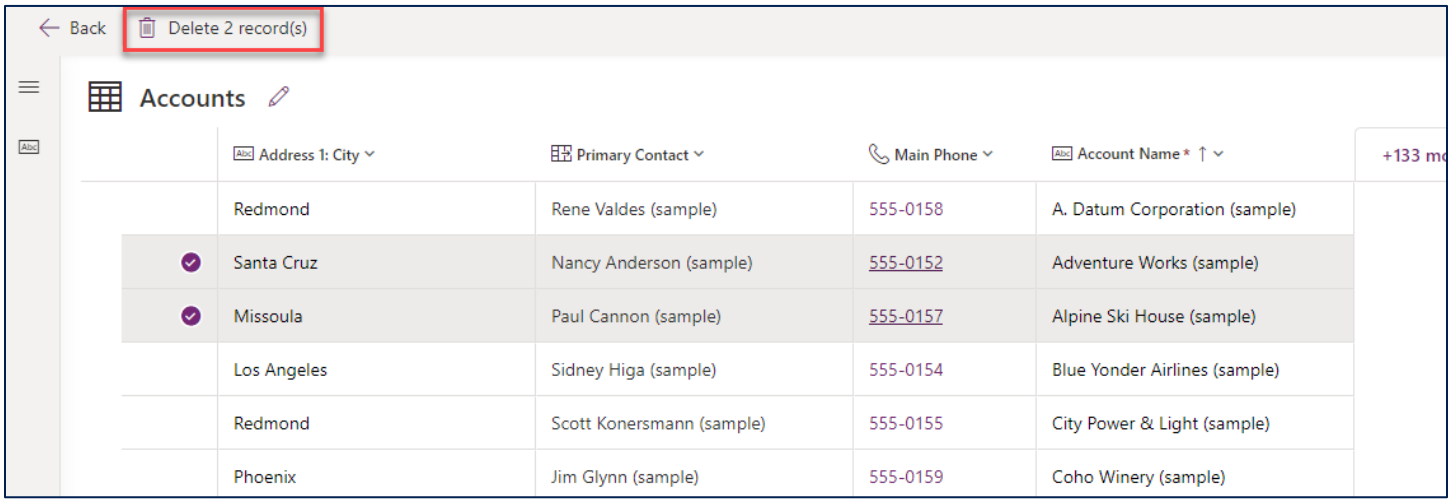
Select the **Edit** button.

Table Edit:

Here you can create e new row, create a new column, refresh the data to see the latest rows, create an app from the data, and edit the table properties.



You can delete one or more rows by selecting the row/s you would like to delete. DO NOT delete rows.

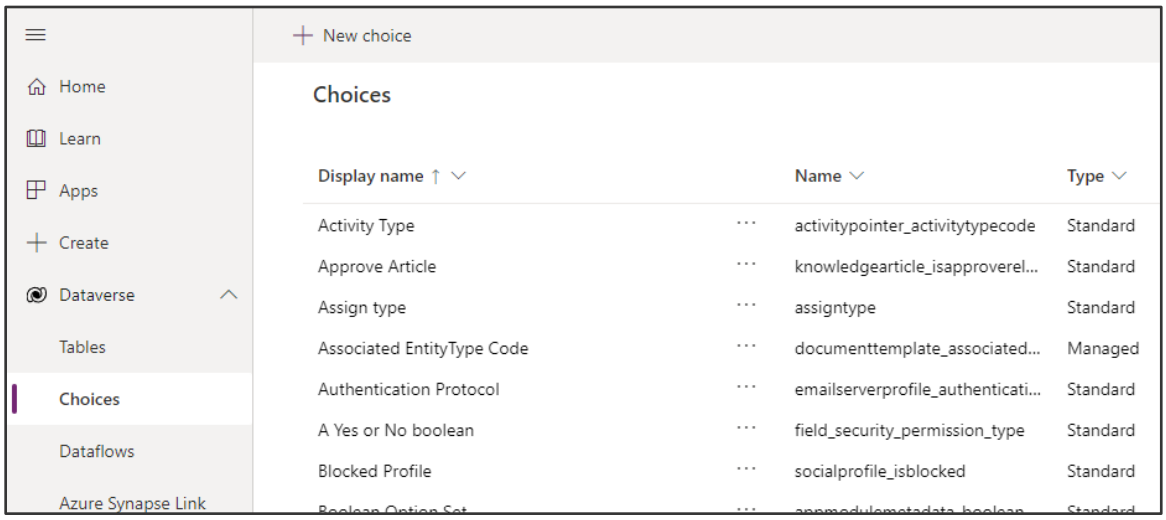


Click on the ← Back button.

Task 2: Explore Standard Choices

Just like standard tables, the Microsoft Dataverse includes a set of standard **Choices**. You can also create custom **Choices**. Later in this lab, we will create a custom **Choice** called **ApprovalStatus** to set the approval status of a machine order.

1. Select **Choices** from underneath the expanded **Dataverse.**



2. Examine the standard **Choices.**

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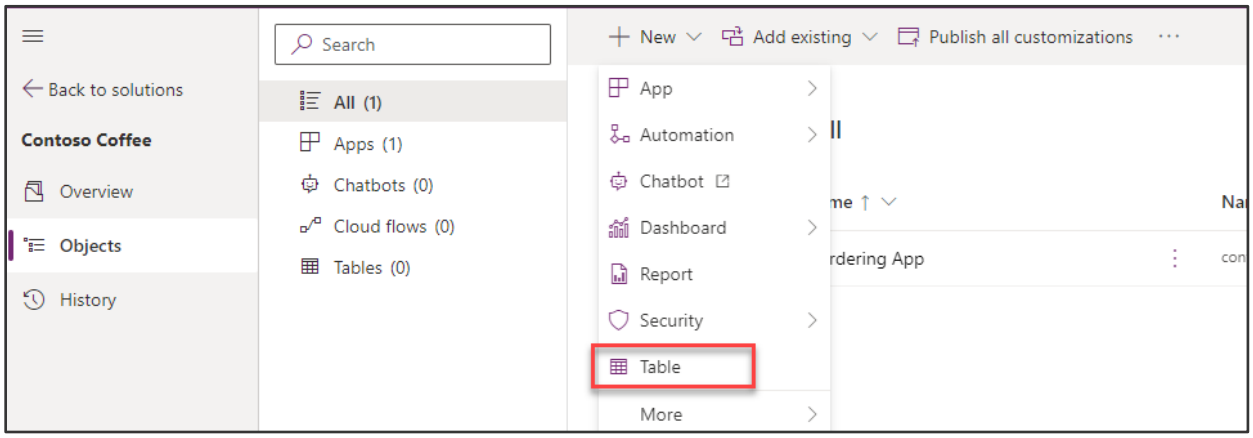
Exercise 2: Custom Tables and Columns

In this exercise, you will create a new custom table named Machine Order and add columns necessary to track the machine requests. You will also create a server-side Business Rule that will default the estimated ship date.

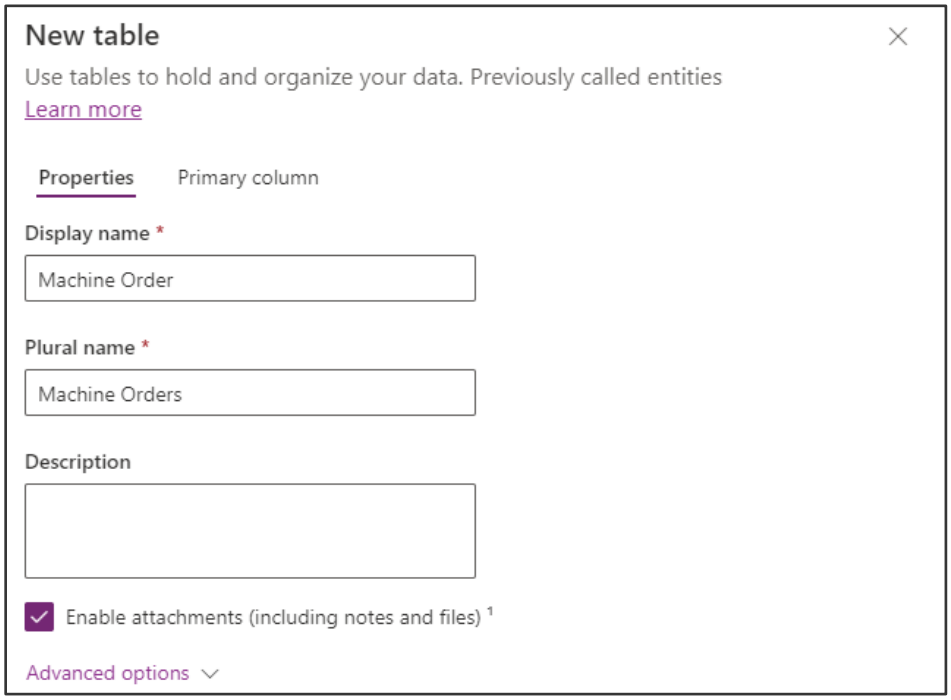
Task 1: Create a custom table

In this task, you will create a custom table to store machine order requests.

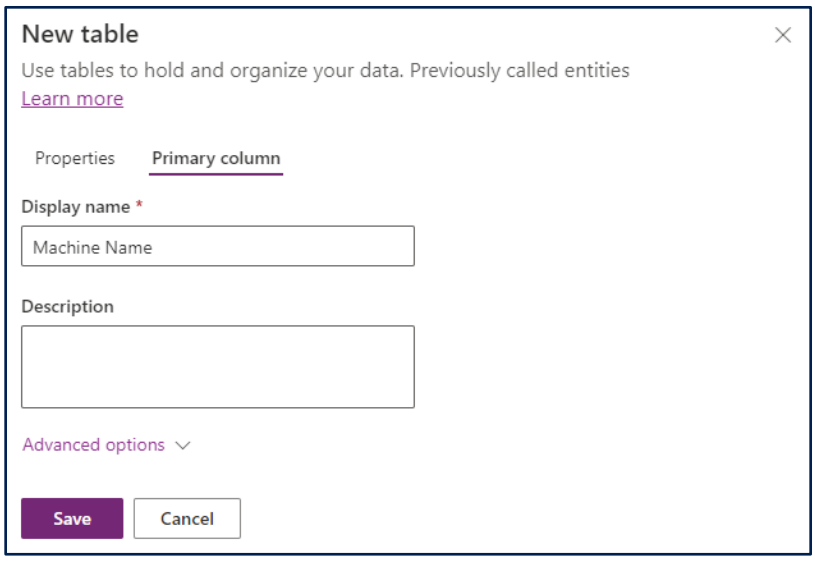
1. Select **Solutions** and click to open the **Contoso Coffee** solution.
2. Click **+ New** and select **Table**.



3. Enter **Machine Order** for Display Name. The Plural name will automatically populate based on your entry. These are editable in case you need to make any changes. The plural name is used by the system by default anytime a set of the Rows are shown. Check the **Enable attachments** since this will allow creating notes on the machine order.



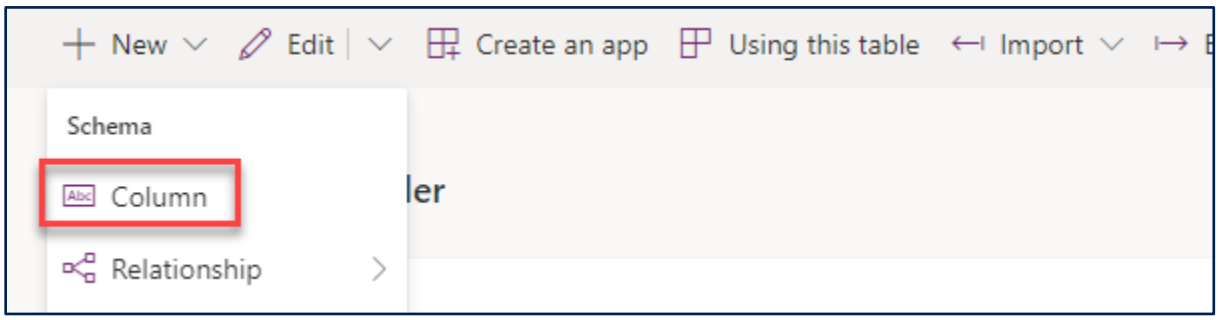
4. Select the **Primary column** tab.
5. Change the **Display Name** to **Machine Name**. The primary column defaults to being named Name, for some scenarios that might not be the best label and you can customize it if needed. The primary column however is always a Text column, that is not changeable.
6. Click **Save**.



Task 2: Create custom columns

In this task, you will create custom columns for the Machine Order table. It may take a few minutes for your new Machine Order table to provision. Begin these steps once it has finished.

1. Click to open the **Machine Order** table you created.
2. Click **+ New** and select **Column**.



3. Enter **Price** for **Display Name**, type **Machine Price** for description, select **Currency** for **Data Type**, make the column **Business Required** and **Searchable** and click **Advanced Options**.

   Note: Currency is a special data type that allows you to build multi-currency solutions. For each currency column you add, another currency column is added with the prefix "_Base" on the name. This column stores the calculation of the value of the currency column you added and the base currency. For additional information on using the Currency column, see here.

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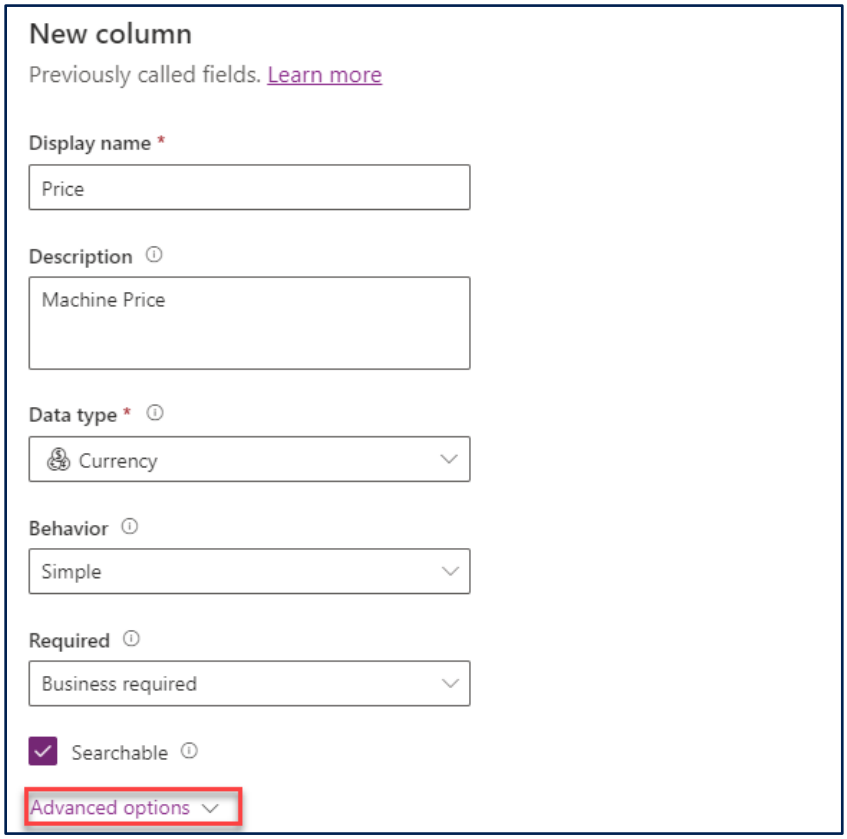
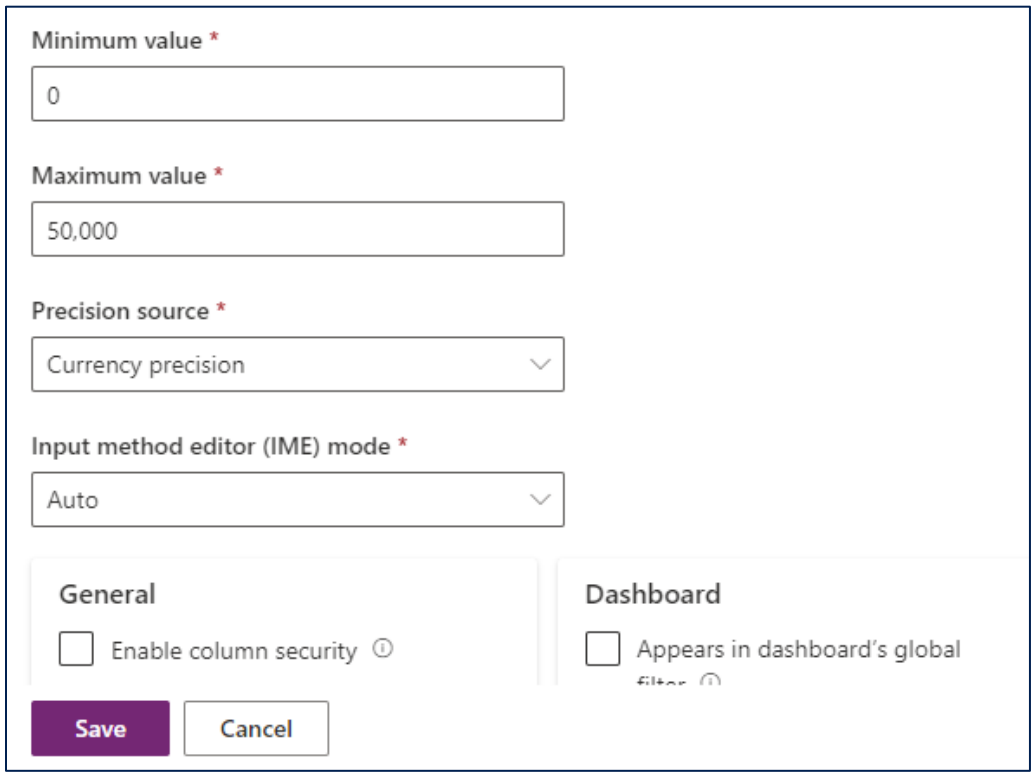
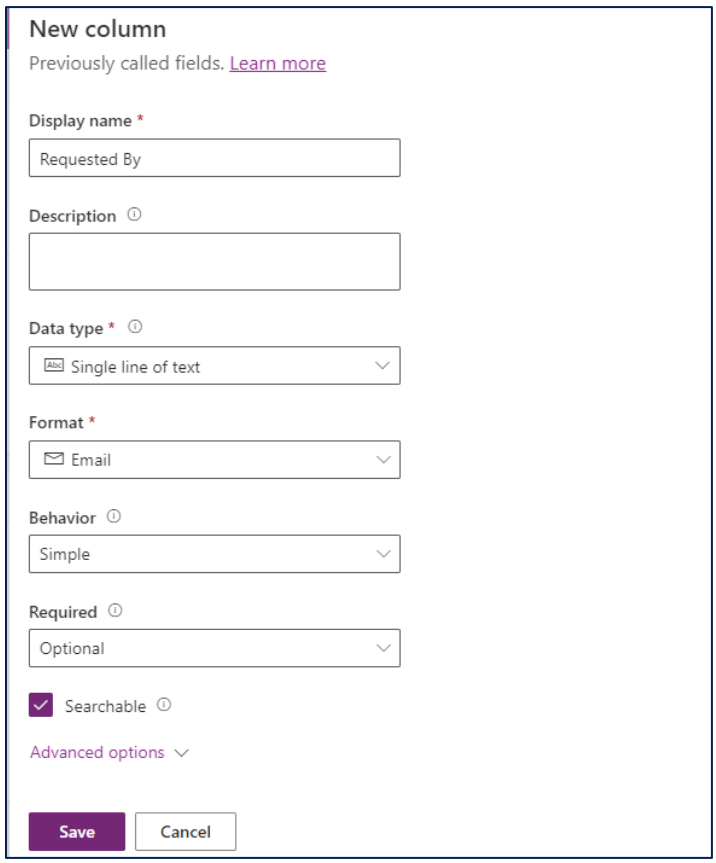


4. Enter **0** for **Minimum Value**, **50000** for **Maximum Value**, and click **Save**.



5. Click **+ New** and select **Column** again.
6. Enter **Requested By** for **Display Name**, **Single line of text** for **Data type**, **Email** for **Format**, make the column **Searchable** and click **Save**.



7. Now repeat the Add Column process and add the following columns

Display Name	Data type	Format
Request Date	Date and time	Date only
Approver	Single line of text	Email
Comments	Multiple lines of text	Text
Estimated Ship Date	Date and time	Date only
Approved Date	Date and time	Date only

8. Now we are going to create the **Approval Choice**. We are adding this as a Choice (as opposed to a two option) because it is likely in the future there will be more than Yes/No for users to choose from. Click **+ New** and select **Column**.
9. Enter **Approval Status** for **Display Name**, select **Choice** for **Data Type**, select **No** for Sync with global choice, enter **Approve** for Label and click **+ New choice**.

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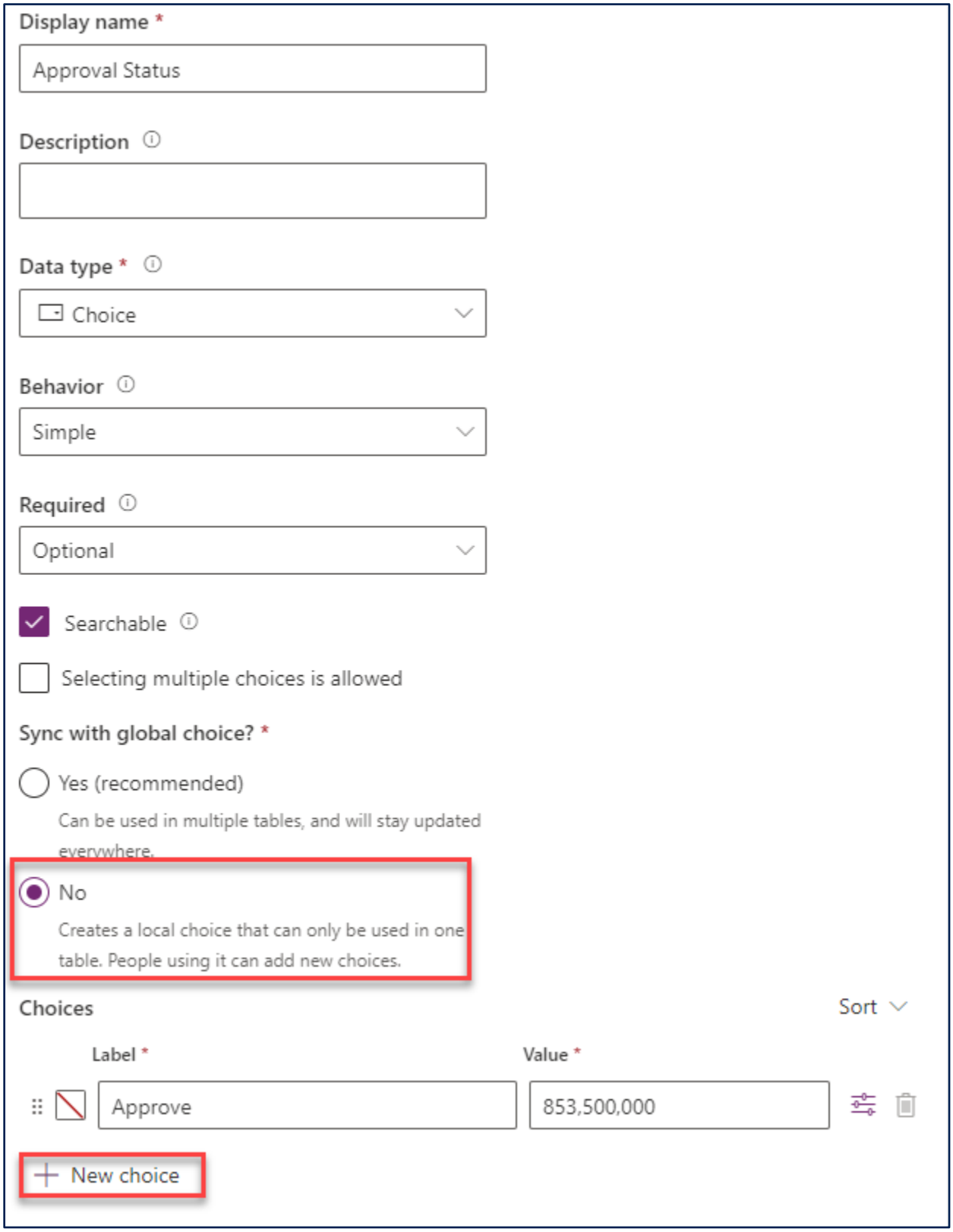
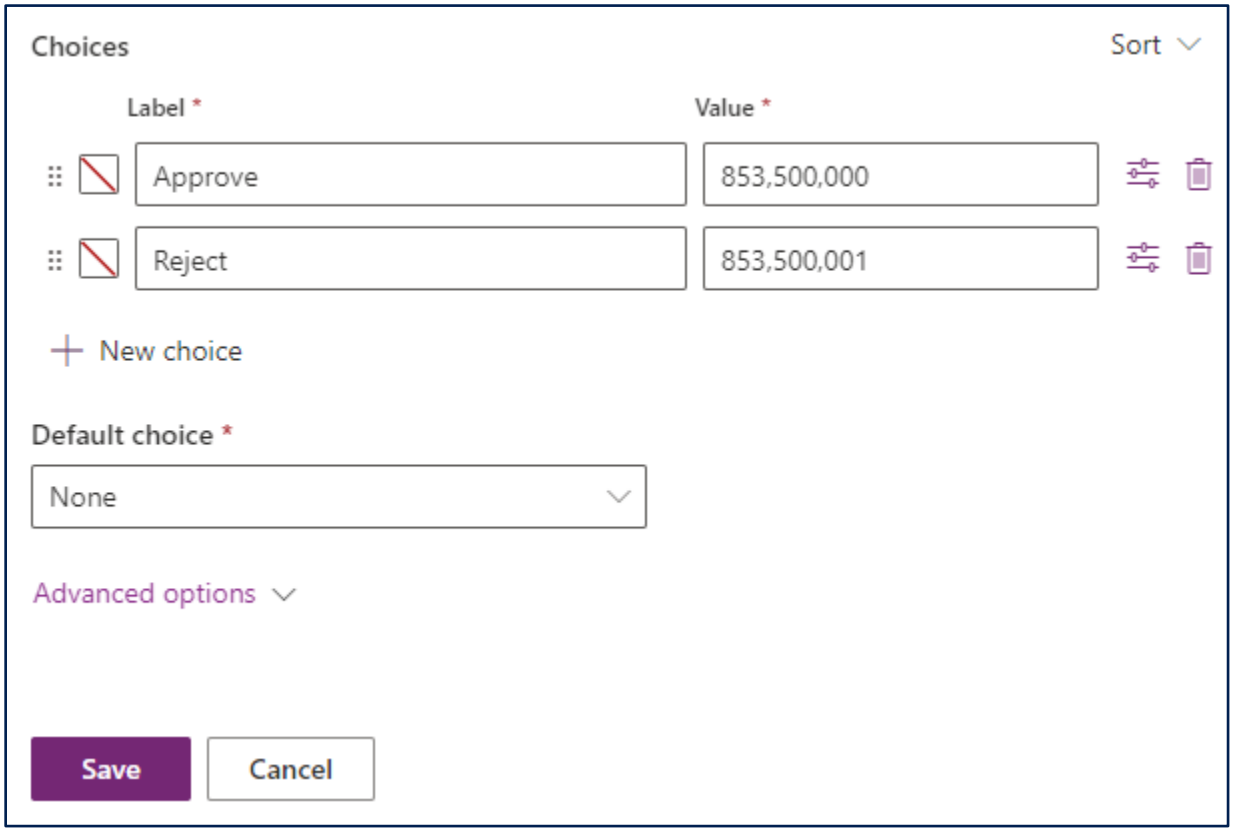


10. Enter **Reject** for Label and click **Save**.



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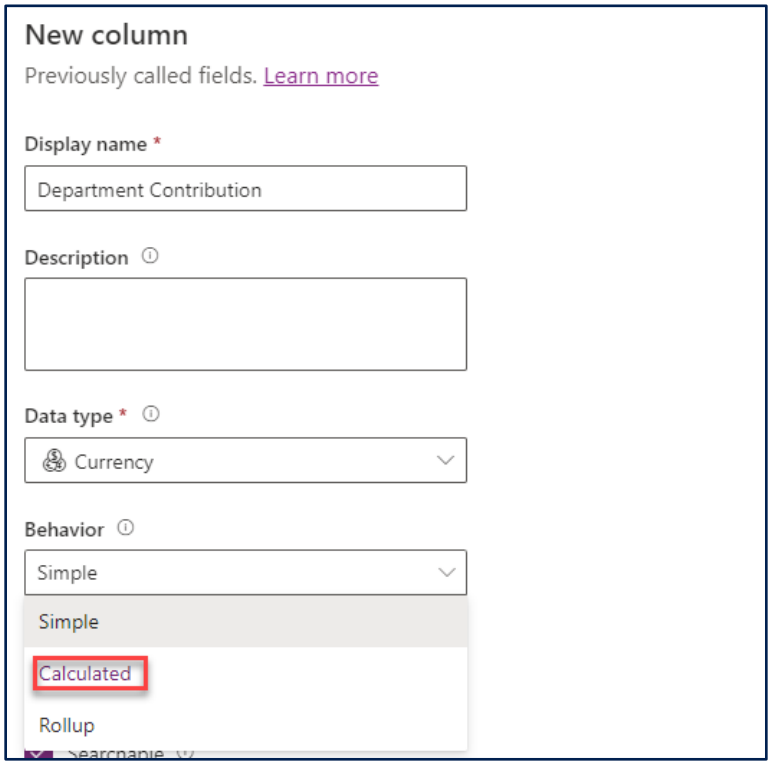
Task 3: Create a calculated column

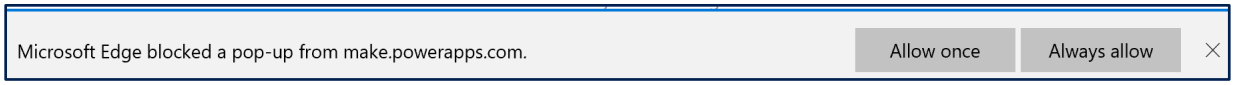
In this task, you will add a Department Contribution column and set its value to 10% of the price. In our scenario, this is the amount that will come from the department manager's budget. Calculated columns are special columns that automatically perform the calculation when the data is retrieved. When you create or modify a calculated column you set the formula used in the calculation.

1. Click **+ New** and select **Column**.
2. Enter **Department Contribution** for **Display Name**, **Currency** for **Data Type**, and select **Calculated** for **Behavior**.

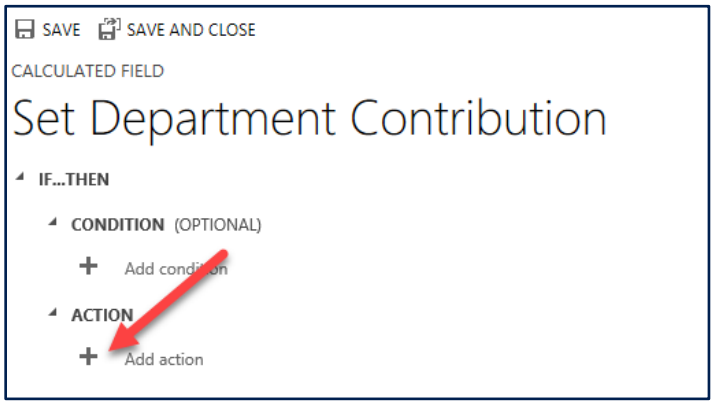


3. Click **Save and Edit**.

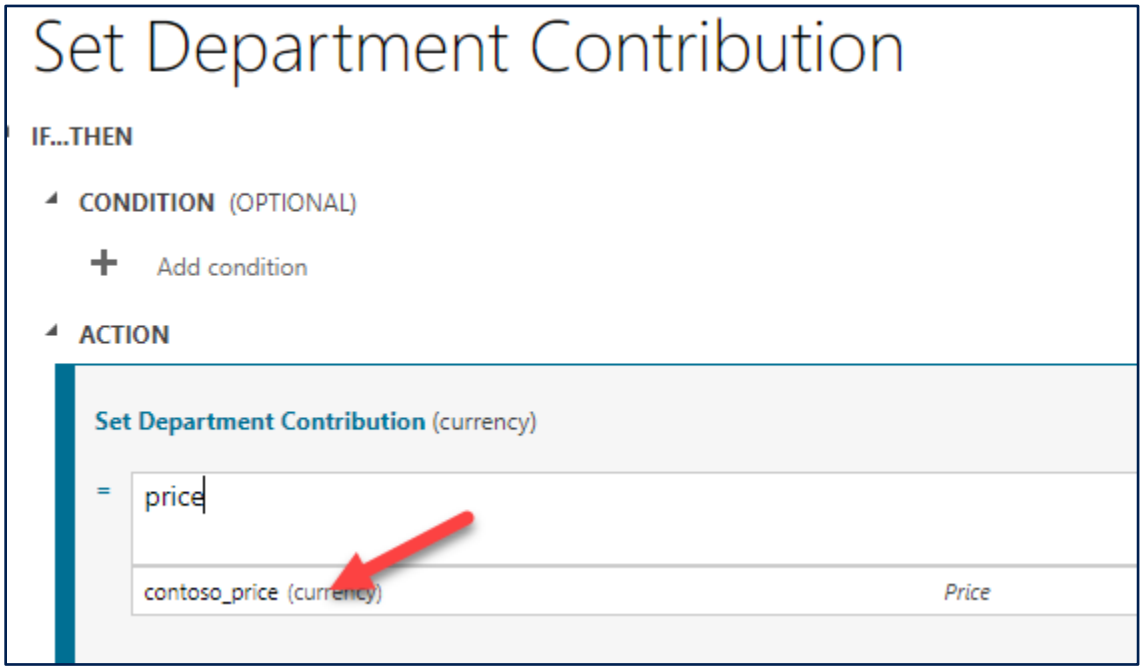
4. If you have not yet allowed popups from Power Apps, you will be prompted to do so now.



5. Click **Add Action**.



6. Type price and select the **Price** column you created.



7. Add *** 0.1** and click the **Check Mark** button.

8. Click **Save and Close.**

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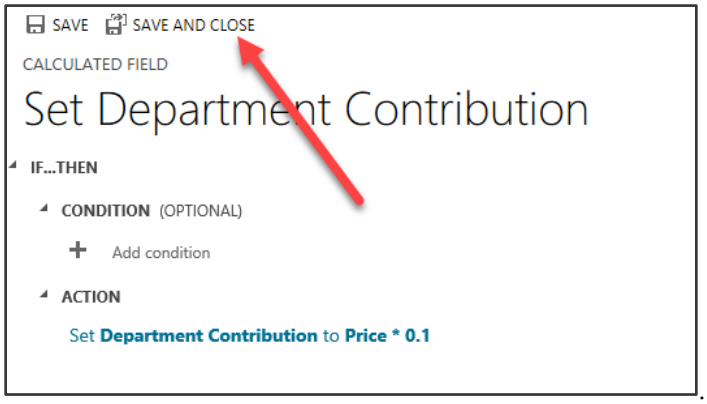
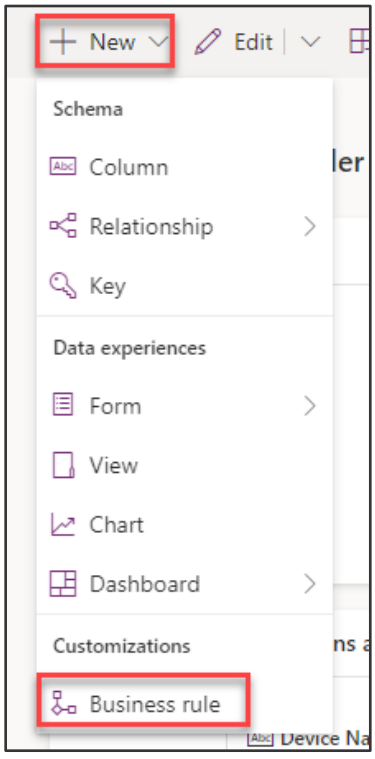


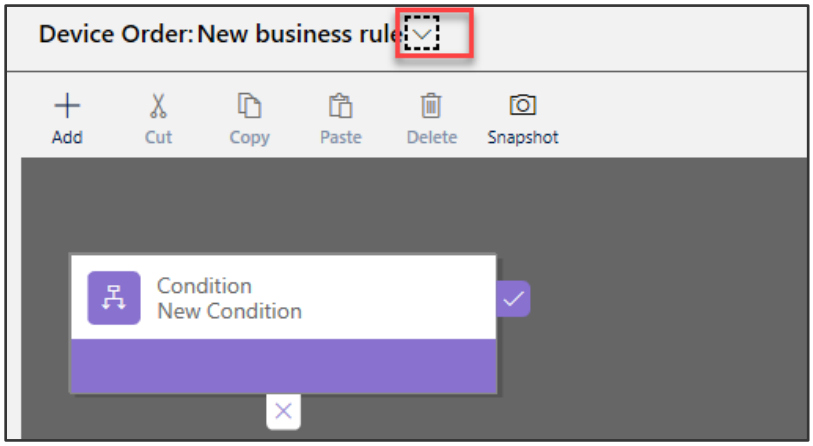
Task 4: Create a business rule

In this task, you will create a **Business rule** that will set the Estimated Delivery Date to 14 days after approval of the order.

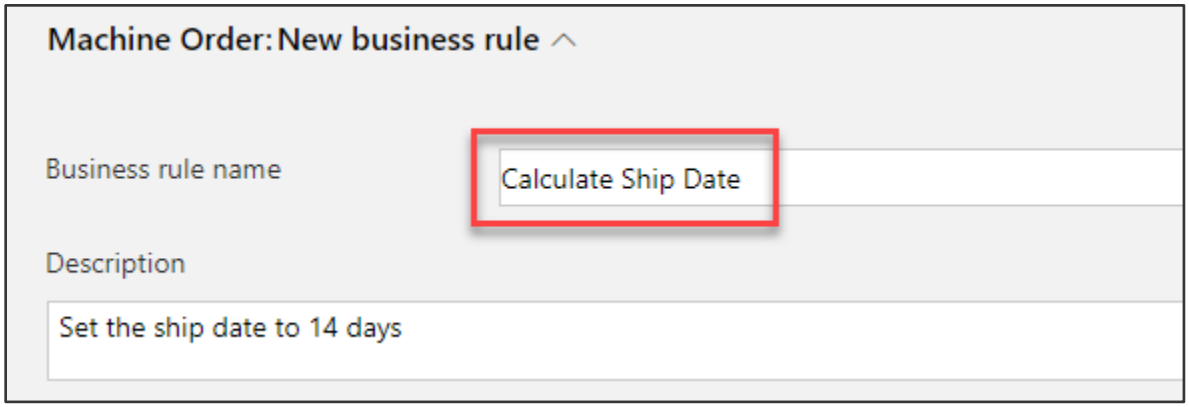
1. Click **+ New** and select **Business rule**.



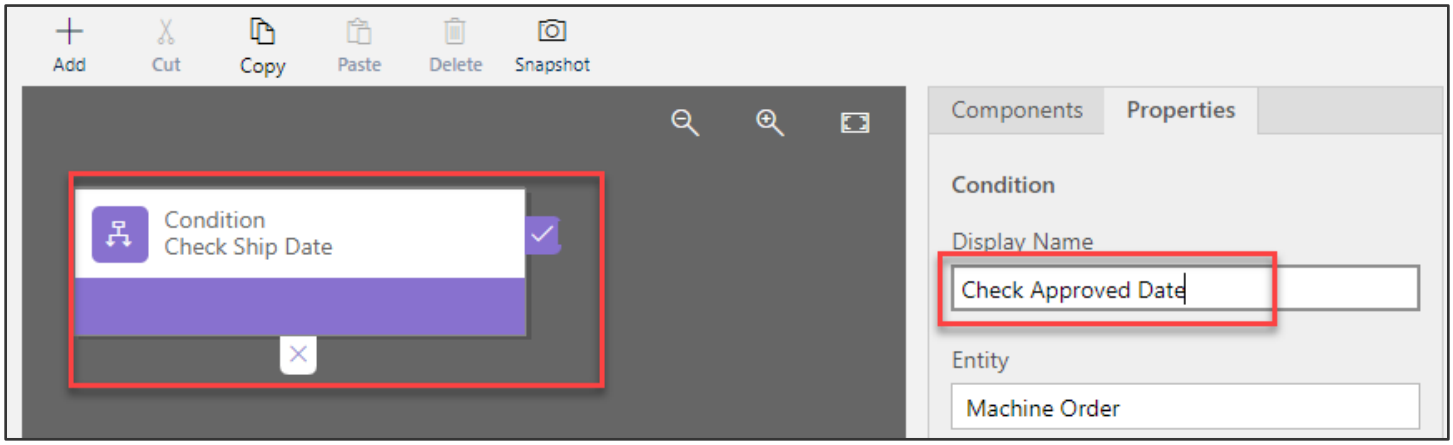
2. Click the arrow to **Show Details**.



3. Change the **Name** to **Calculate Ship Date** and click the arrow to **Hide Details**.



4. Select the **Condition**, change the name to **Check Approved Date**.



5. In the **Rule 1** section select **Entity** for **Source**, **Approved Date** for **Field**, **Contains Data** for **Operator** and click **Apply**.

Note: *You may need to scroll down to the bottom of all scroll bars to see the Apply button. You must click Apply after any change to the properties otherwise they will revert to the prior value. The Business Rule (Text View) will automatically update after you hit apply when you are done modifying the rule.*

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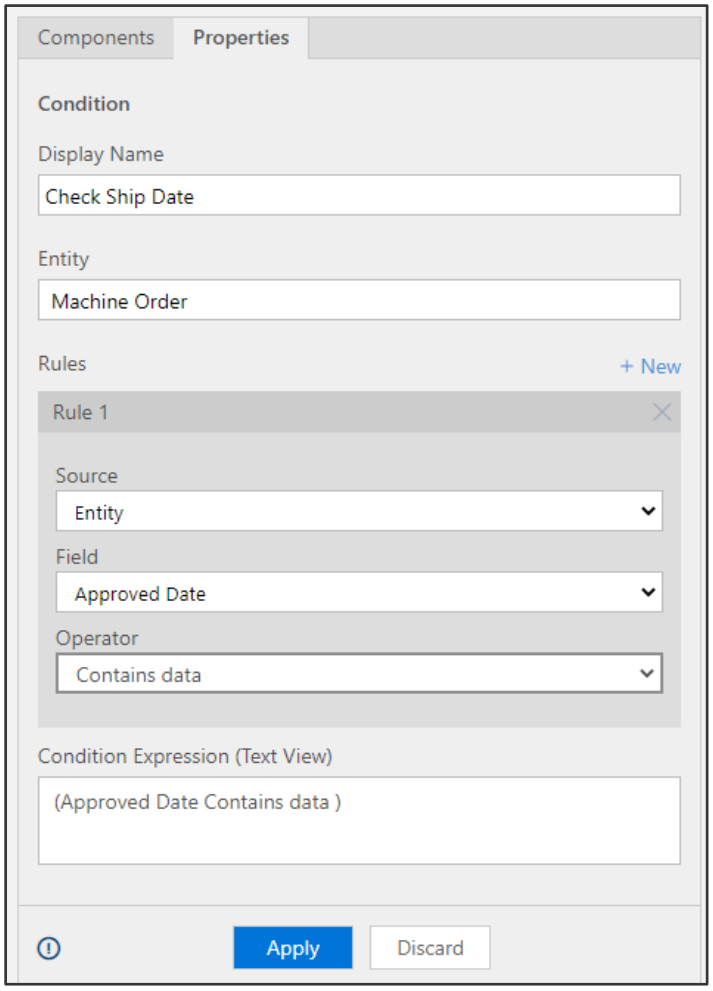
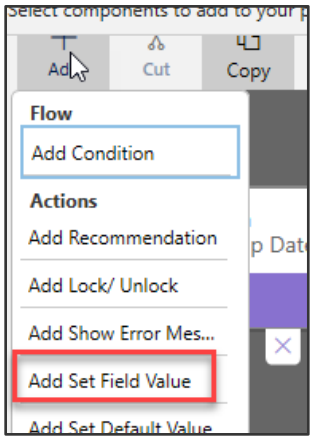
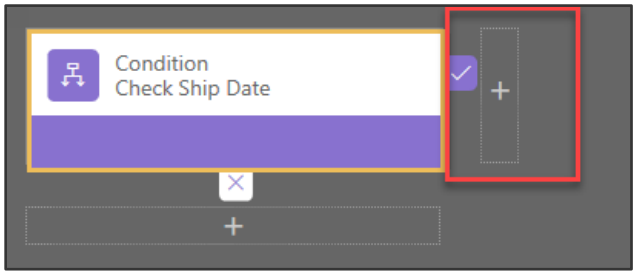


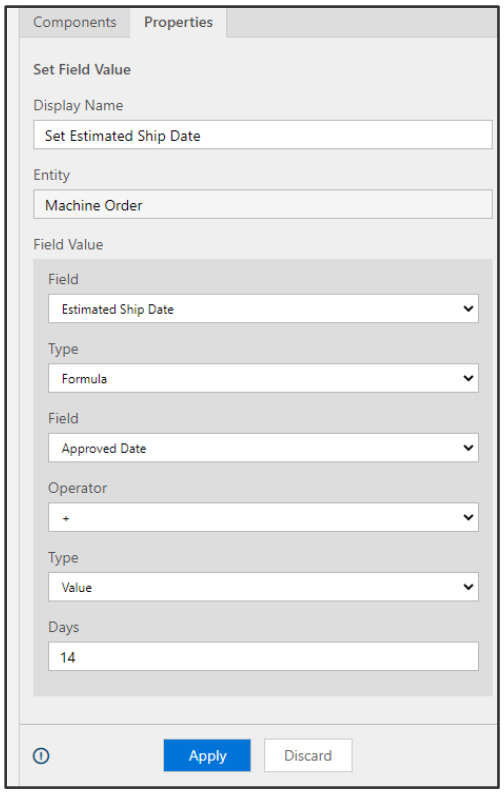
6. Click **Add**, select **Add Set Field Value**.



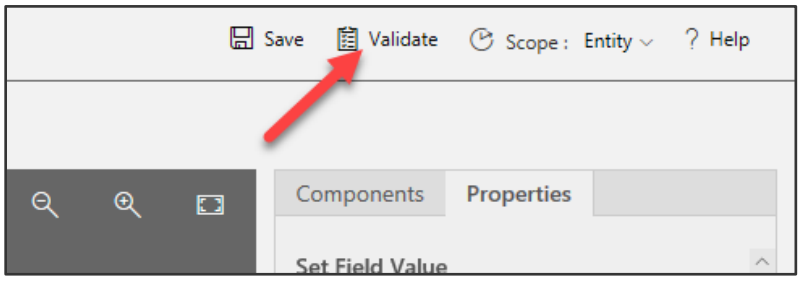
7. Select the True side of the condition.



8. Enter **Set Estimated Ship Date** for **Display Name**, select **Estimated Ship Date** for **Field**, **Formula** for **Type**, **Approved Date** for **Field**, **+** for **Operator**, **Value** for **Type**, **14** for **Days**, and click **Apply**.



9. Click **Validate**.



10. Make sure validation succeeds.

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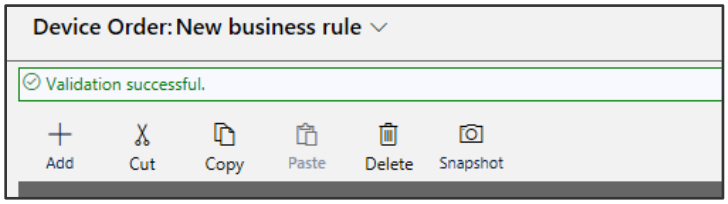
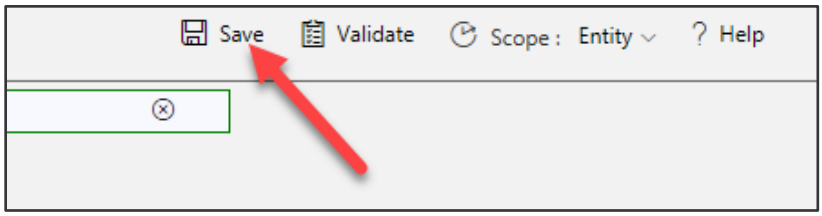
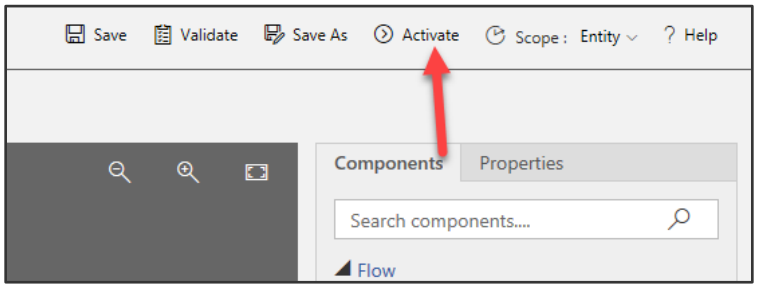


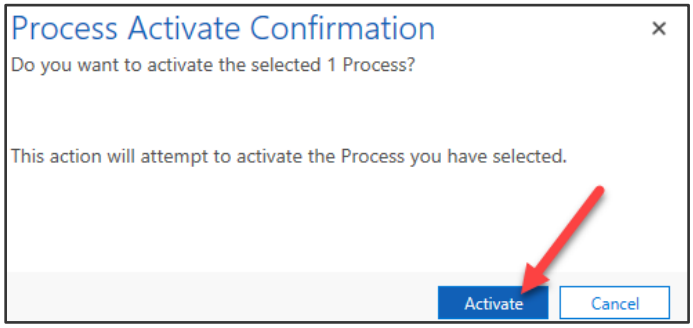
11. Click **Save**.



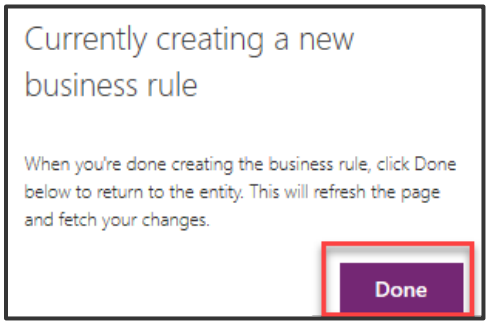
12. Click **Activate**.



13. Confirm activation. Business rules only execute when they are activated. In the future to make changes to rules you deactivate them, make the change, and then re-activate the rule.



14. Close the process editor browser window or tab.
15. Click **Done**. The list should refresh showing the Business Rule you just created.



16. Do not navigate away from this page

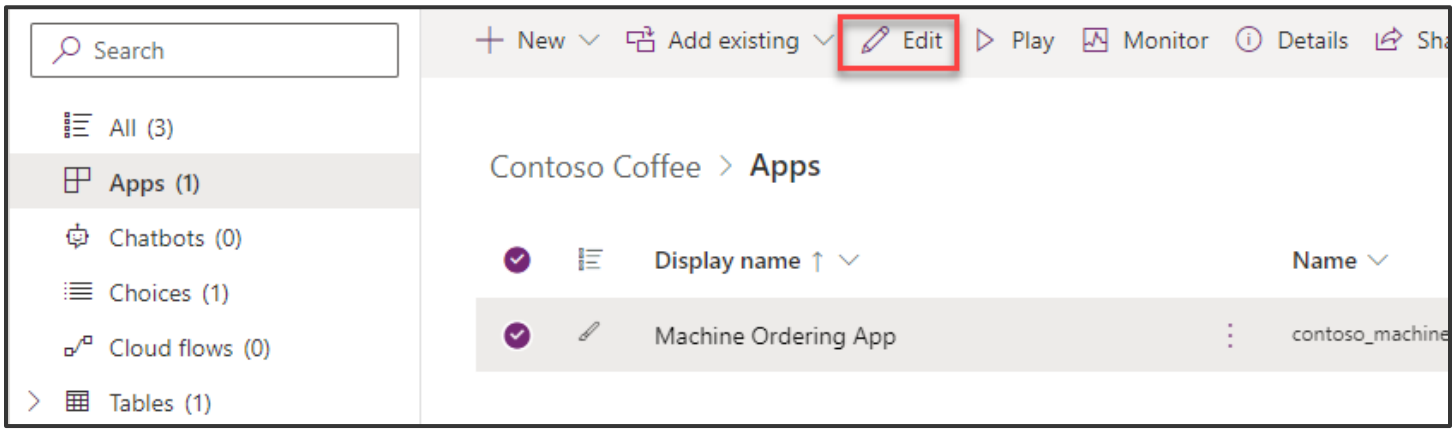
Exercise 3: Connect the data from the Canvas App

Now that you have created the table to store machine order requests let's connect your Machine Ordering Canvas app to this table and add a form to submit machine approval requests.

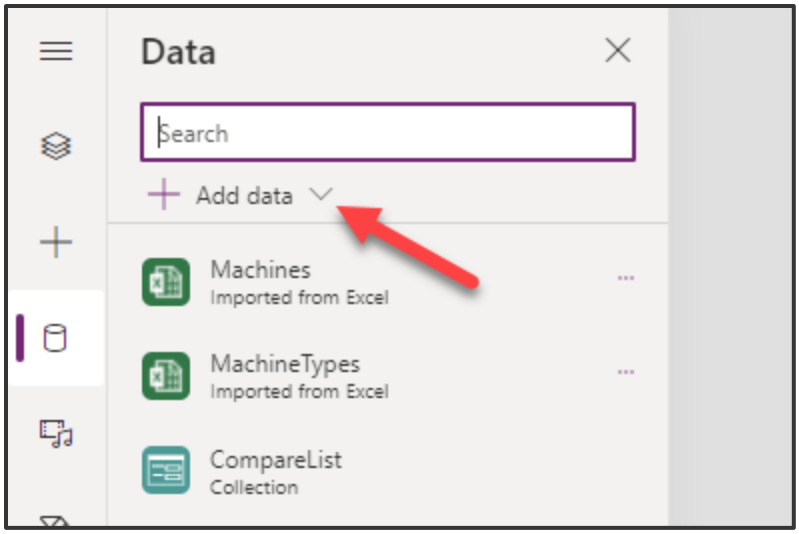
Task 1: Add Microsoft Dataverse table as a data source to the app

Open the machine ordering app. Make sure you are opening the version of the app that is in the newly created environment that has the Microsoft Dataverse database instance.

1. Select **Apps**, select the **Machine Order App** you created in Module 1, and click **Edit.**



2. Select the **Data sources** to display the current sources. Select **+ Add Data.**



3. Click on **Machine Orders** from the table list to include it as a data source for our app.

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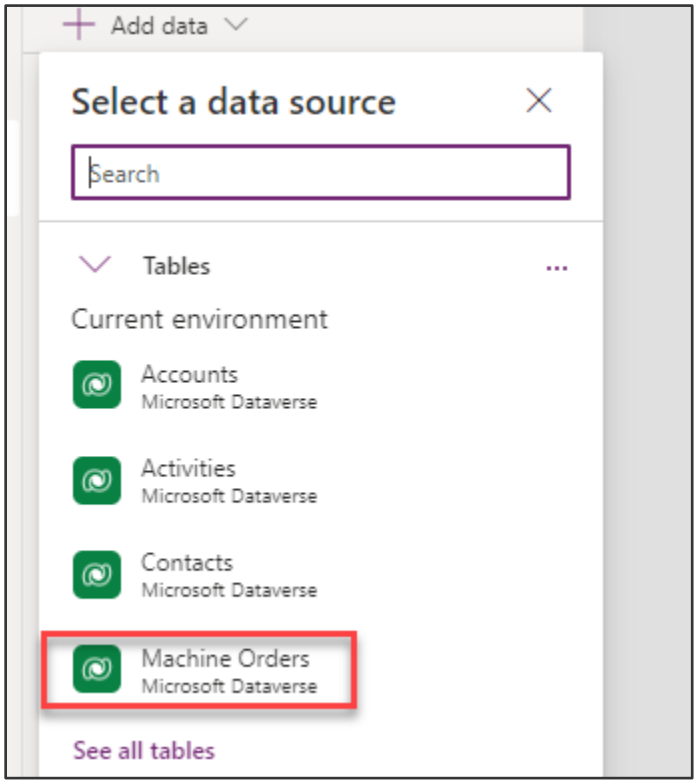
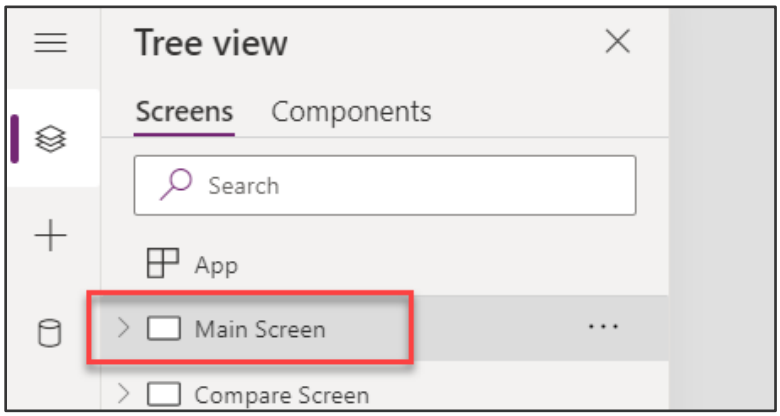
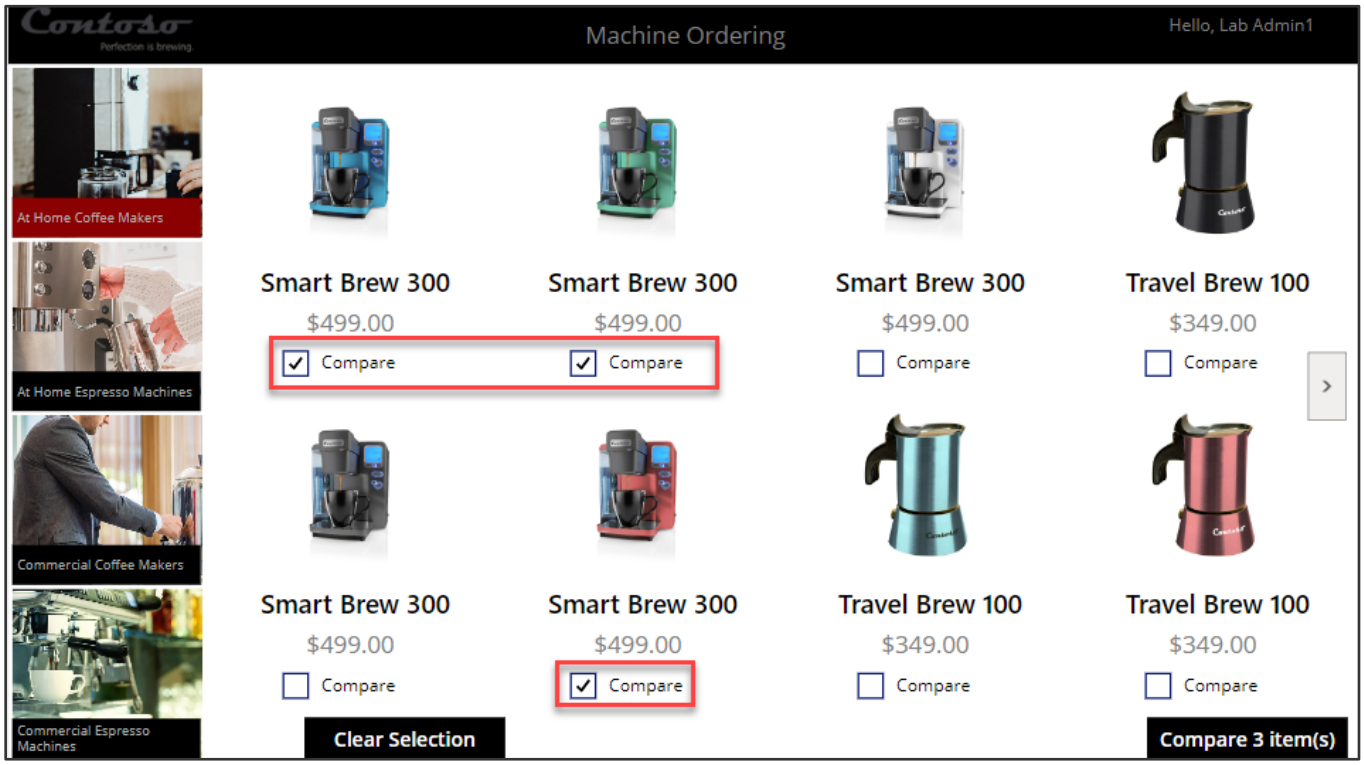


Task 2: Create the edit form

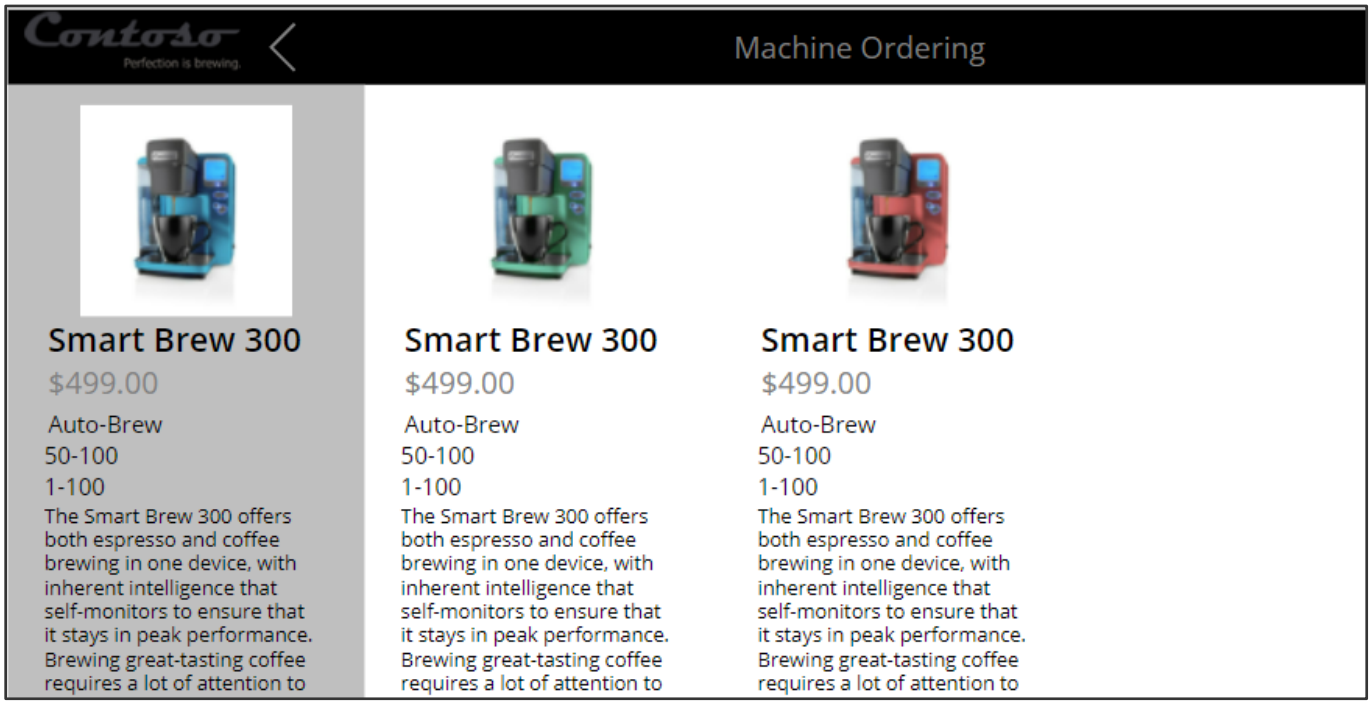
1. Switch to the **Tree view** and select the **Main Screen**.



2. Select few machines. Hold the "Alt" key, and then it will allow you to check the compare check box.



3. Select the **Compare Screen**. You should now have the selected machines.



4. Select the **Insert** tab, click **Forms**, and select **Edit**.

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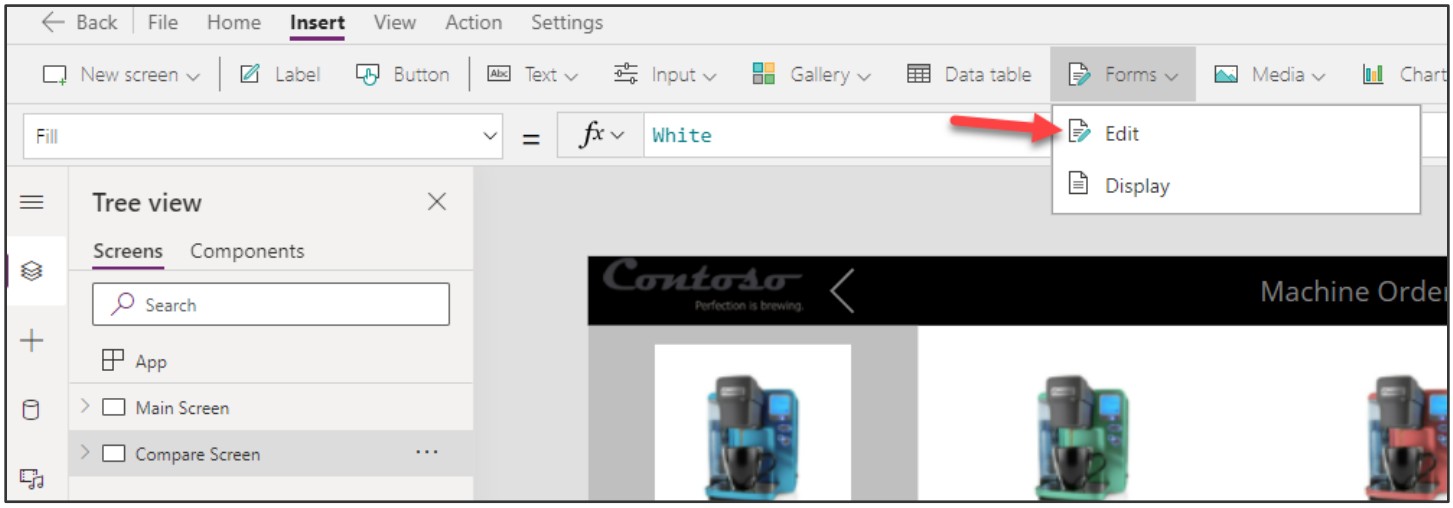
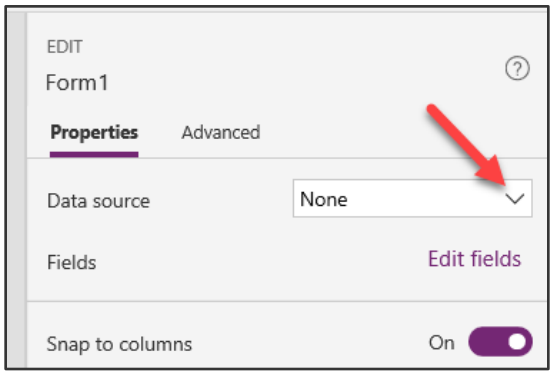
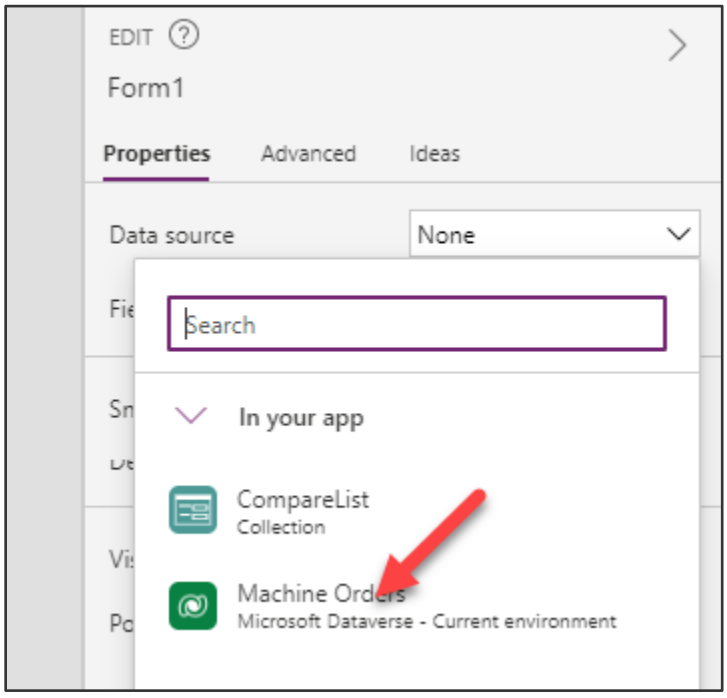


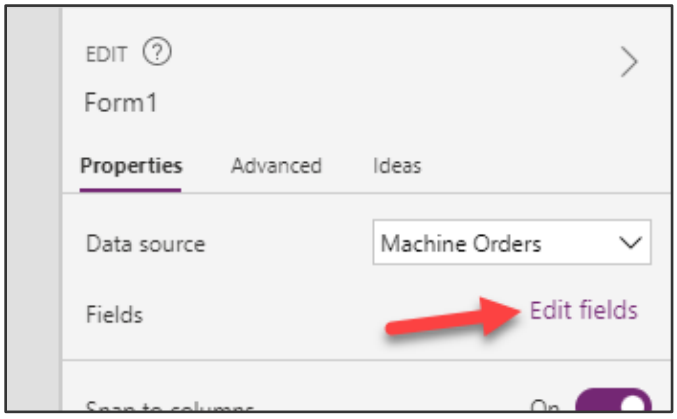
5. Click the **Data Source** drop-down in the Data pane on the right.



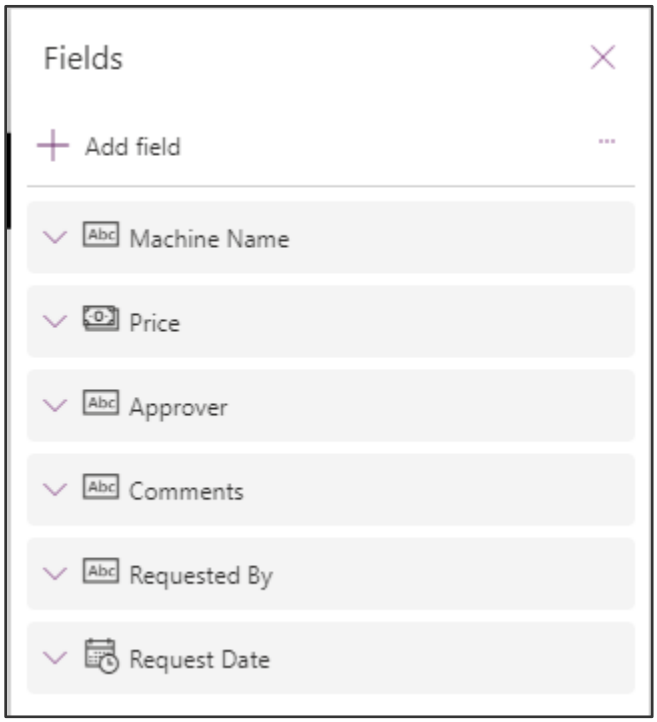
6. Select the **Machine Orders** table as the data source.



7. Click **Edit Fields**.



8. Add, remove, and order fields like the list below. The fields are added using the plus sign and can be reordered by dragging the field to the desired placement.
    a. Machine Name
    b. Price
    c. Approver
    d. Comments
    e. Requested By
    f. Request Date



9. Close the **Fields** pane.
10. Rename the form **Machine Order Form**.

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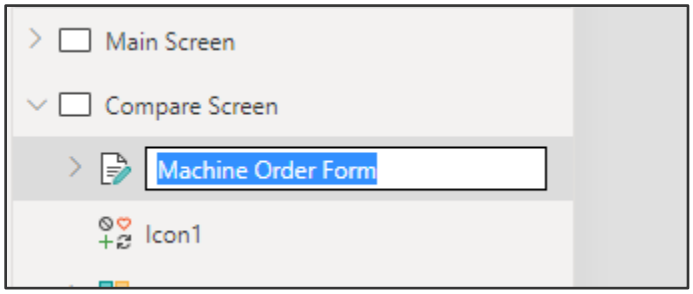
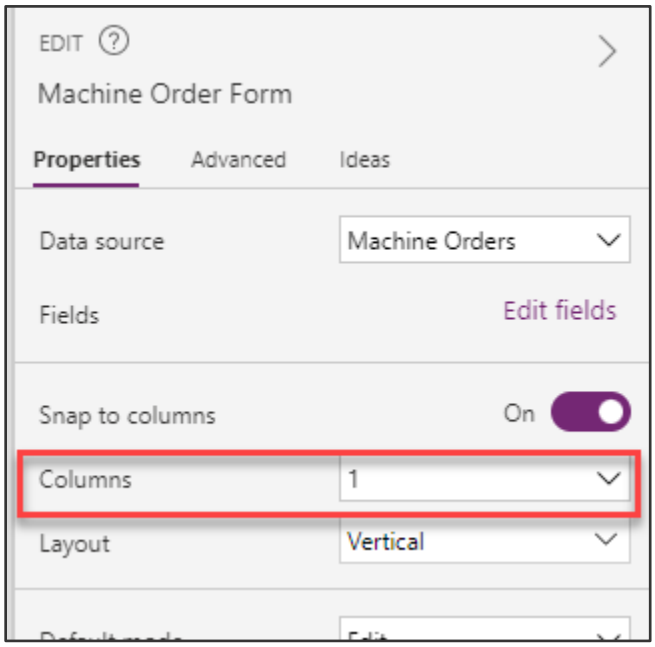


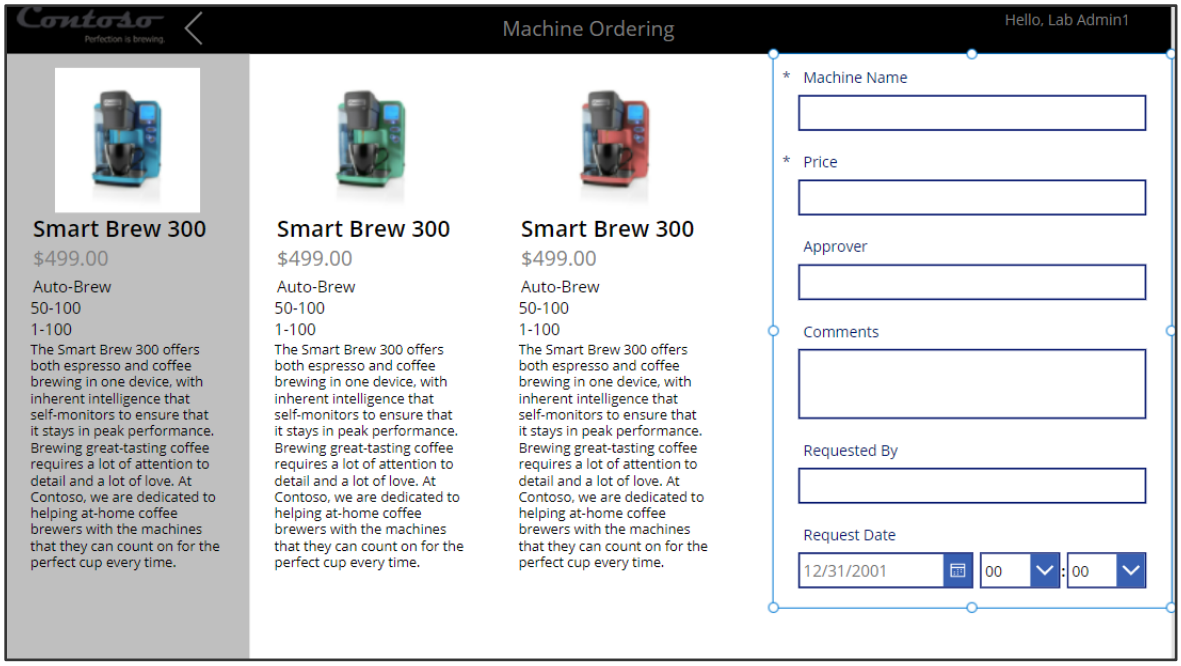
11. Select the **Machine Order Form**.
12. Set the **X** value of the **Machine Order Form** to **840**.
13. Set the **Y** value of the **Machine Order Form** to **60**.
14. Set the **Width** value of the **Machine Order Form** to **520**.
15. Set the **Height** value of the **Machine Order Form** to **650**.

```
Parent.Height - 'Header Label_1'.Height - 60
```

16. Change the **Snap to columns** setting from 3 to 1. This will modify the layout of the edit form to be single column.



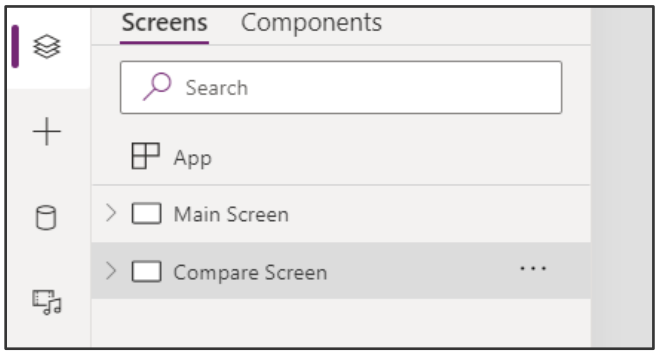
17. The form should now look like the image below.



Note: You can always select controls, such as the Form1 control, from the tree view on the left to make sure you are selecting the correct control. To move it make sure you select the Form and not a control within the form.

For more info on working with multi-column form layouts, see [Working with forms layout](#).

18. To create a new instance of the form when the screen is loaded. Click **Compare Screen** in left tree view pane.



19. Select the **OnVisible** property of the screen, enter: `NewForm('Machine Order Form')`

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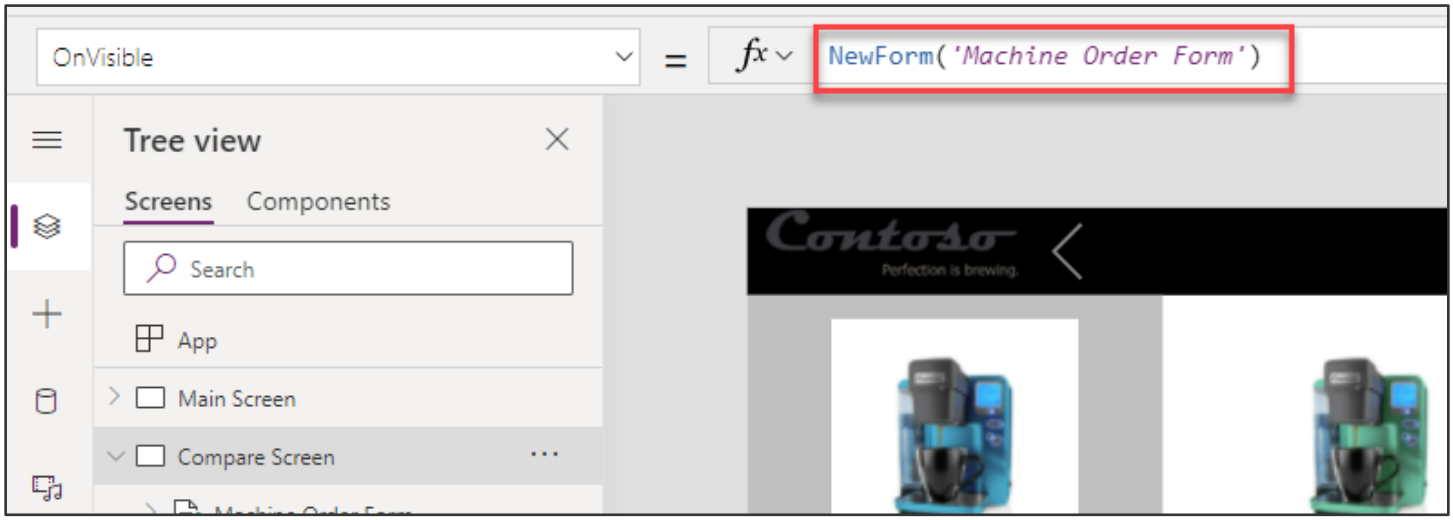
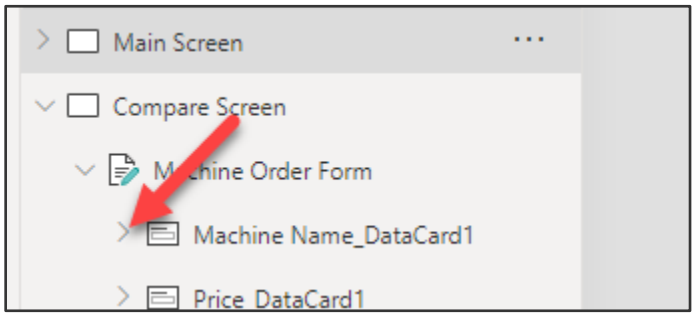


Task 3: Configure the title column

In the next few steps, you will configure each of the form Fields.

Let's start by configuring the Title to display the machine type and machine name for the selected machine. For example, if the user selects the Smart Brew 300 coffee makers, we want the machine order to have the title: "At home coffee makers – Smart Brew 300".

1. Expand the **Machine Name**.



Notice that the default card contains a few controls:

StarVisible1: This is a label control that has an asterisk (*) which has its Visible property set to true or false depending on whether the Field is Required or not. Since the Title Field was marked as Required when you configured the table, its Required property is set to true.
ErrorMessage1: This is a label that is just below the main data entry Field which displays error messages.
DataCardValue1: This is the text input control where you can enter the Title. For this scenario, we will set the title based on the selected machine.
DataCardKey1: This is the label that displays the title of the Field.

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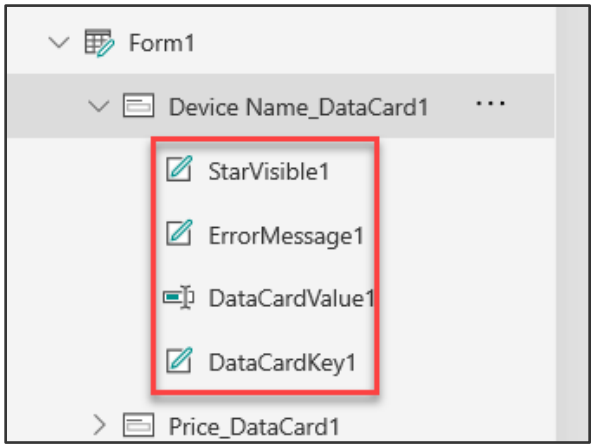
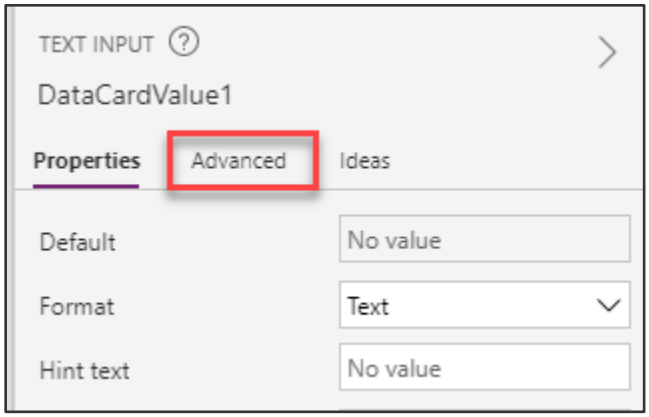
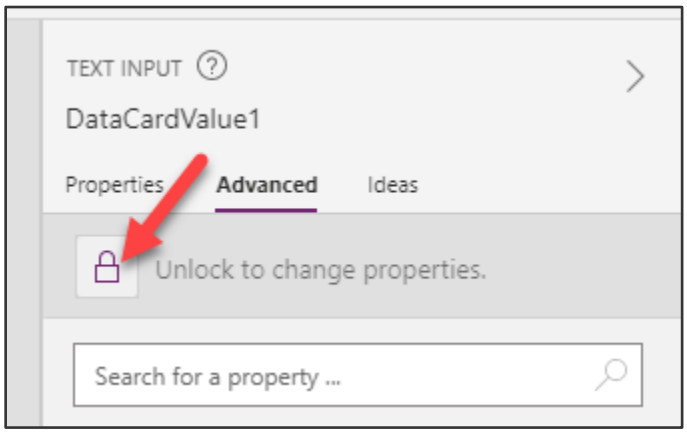


2. Select **Machine Name DataCardValue** in the tree view. Then, open the **Advanced** tab in the right-hand pane.



3. Click **Unlock** so you can customize the card.



For the next few steps, we will use the Advanced pane to customize control properties within the form, note that you can perform the same customizations using the property drop-down and formula bar in the top left of the studio.

4. Go to the **Data** section and set the **Default** property to.

```
'Compare List Gallery'.Selected.'Machine Type' & " - " & 'Compare List
Gallery'.Selected.'Machine Name'
```

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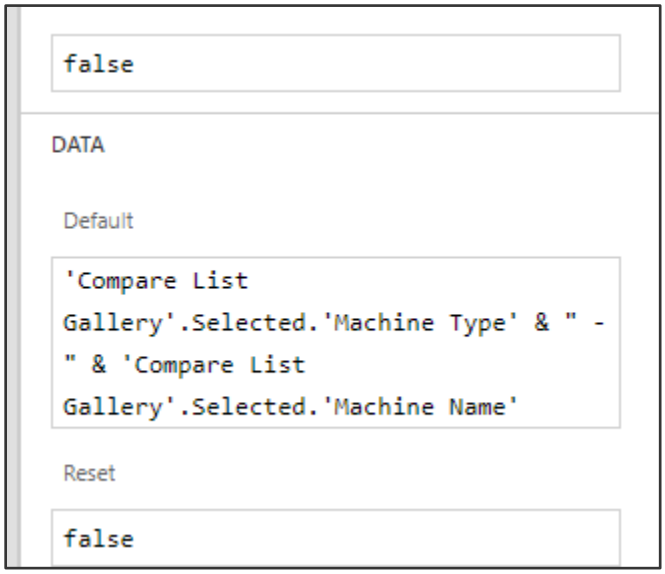
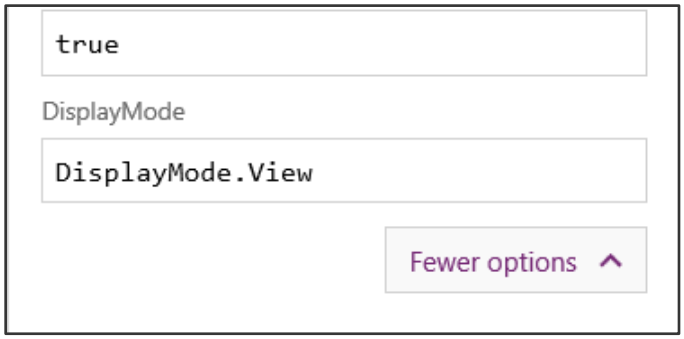


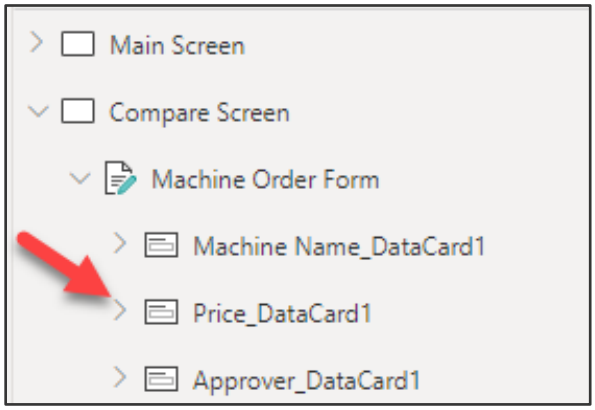
5. Change the **DisplayMode** to **DisplayMode.View.** This will prevent users from changing the value within the text box.



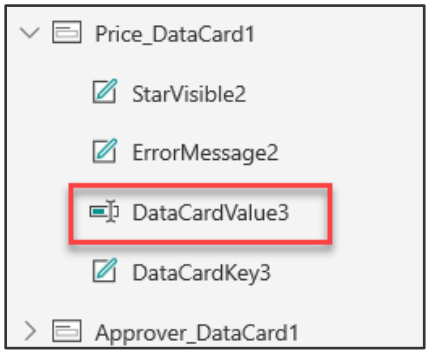
Task 4: Configure the price Field

In this task, we are going to set the price to the price of the item and then make it read-only.

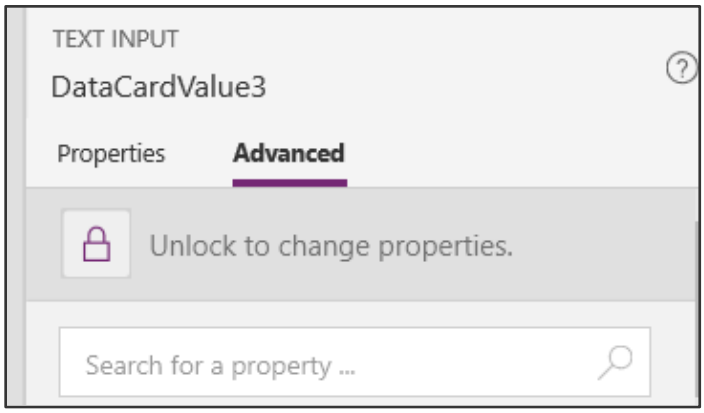
1. Expand **Price data card**.



2. Select the **Data Card Value**.

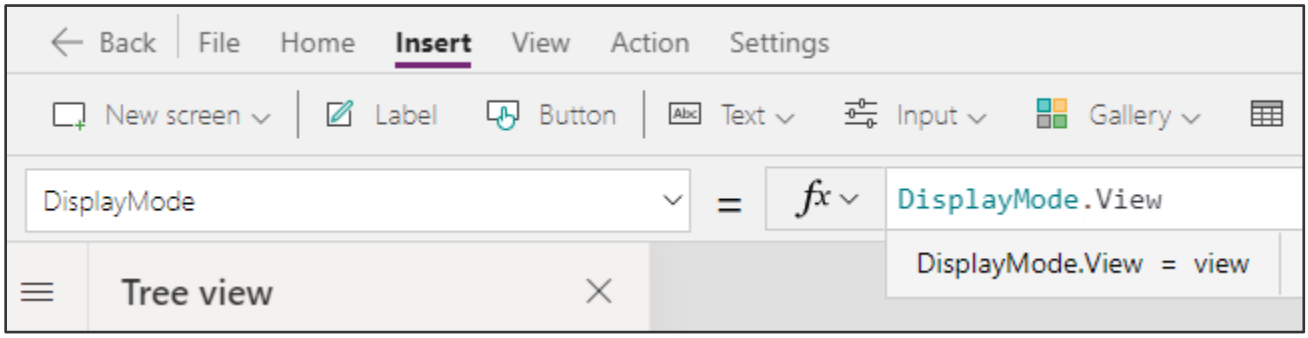


3. Select the **Advanced** tab and click **Unlock**.



4. Change the **Default** property in the Data section to: `Text('Compare List Gallery'.Selected.Price,"$##,###.00")`

5. Select the Price Field and change the **DisplayMode** property to **`DisplayMode.View`**.



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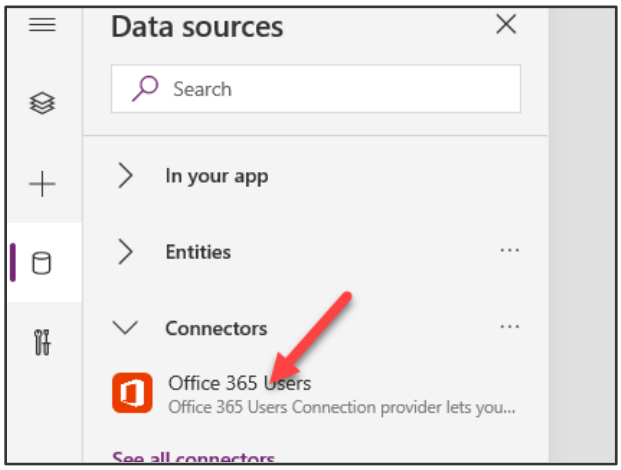
Task 5: Configure the Approval Field

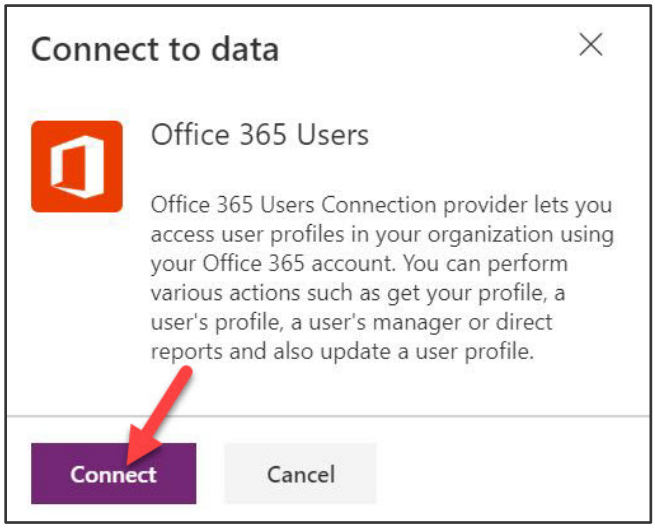
Let's set the **default** value for the Approver to be the email address of the **logged in user's manager**.

You will use the **Office 365 graph** to retrieve the manager's email. You can find more about the Office 365 Users Connection provider here [Office 365 Users Connection Provider]

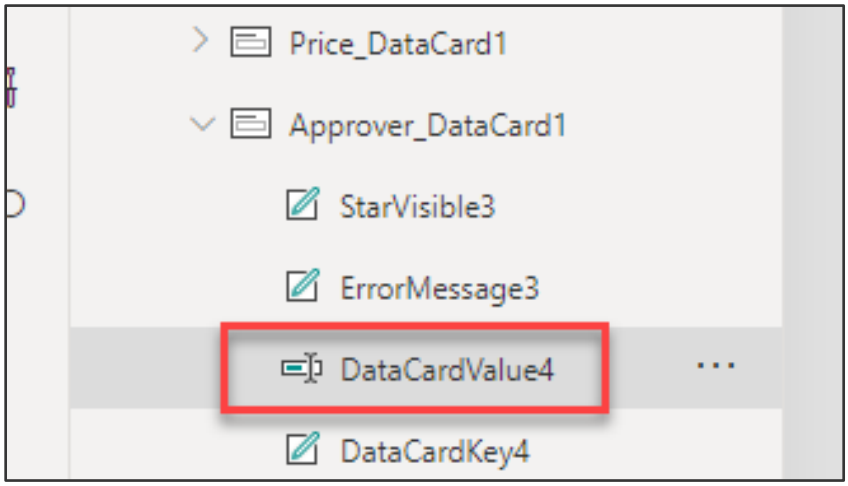
1. Select **Data sources**. Click **+ Add data**, then expand Connectors. Select **Office 365 Users**.



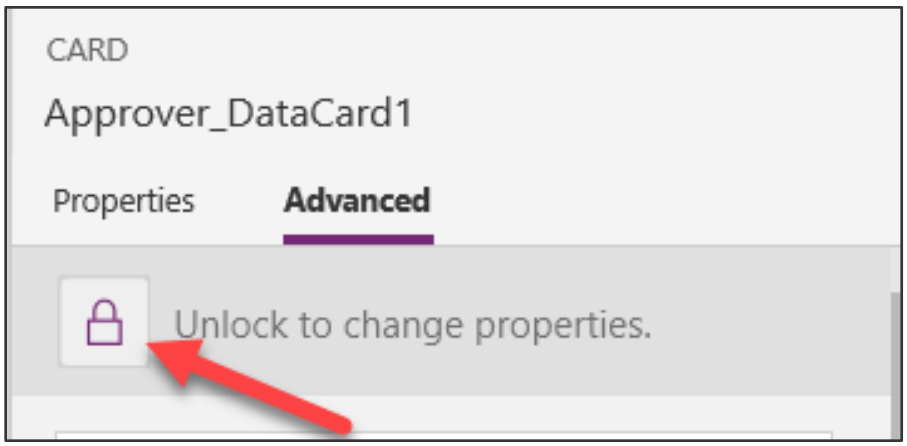
2. When prompted, click **Connect**



3. Select the **Approver Data Card Value** from the Tree view.



4. Go to the **Advanced** pane and **Unlock**.



5. Set the **Default** value to: `User().Email` This expression will use your user's email, so you won't accidentally e-mail your manager to approve your testing.

   In a real application or if you wanted to try the expression to use your managers email would be `Office365Users.Manager(User().Email).Mail` This would make an API call at runtime to get the manager's email address of the logged-on user. *If you try this and hit an error when calling the Office365Users.Manager() function, this may be because a manager is not set up in the system for the logged in Office 365 user. In that case, you can simply go back go User().Email.*

6. Save your work and return to the continue editing the app.

   The Office 365 User connector has access to many other valuable types of information you can learn more about the other actions and data available here Office 365 users Connector

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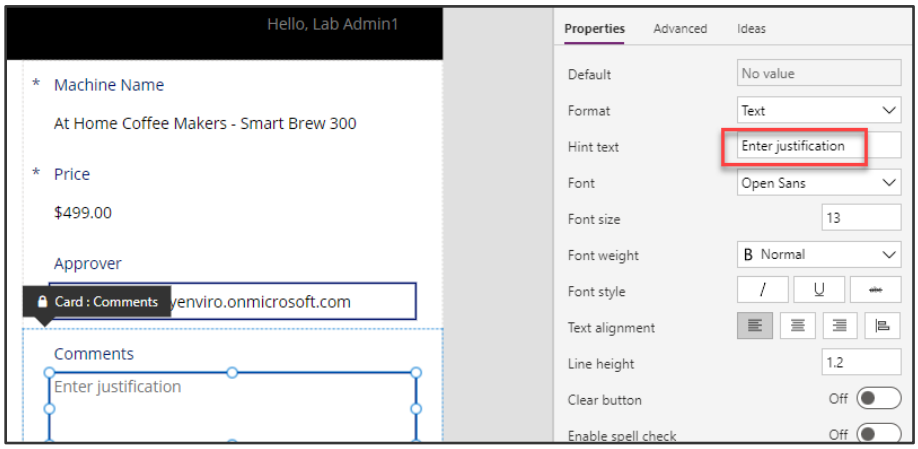
Task 6: Configure the Comment Field

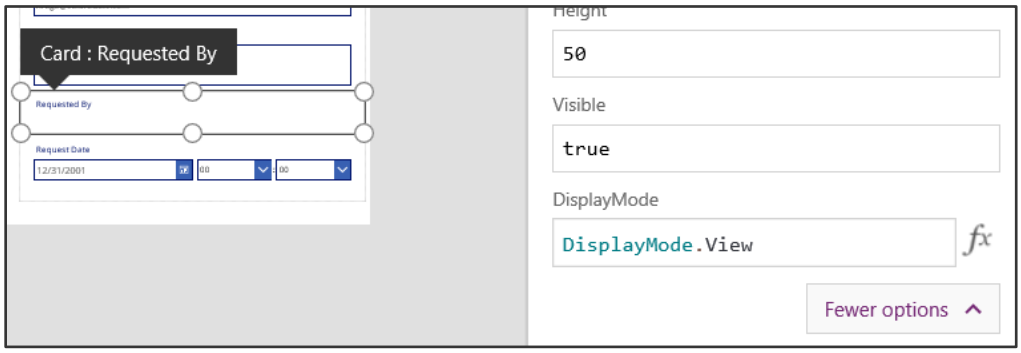
1. Expand the **Comments** Field and select the **DataCardValue**
2. Set its **HintText** property to: "Enter justification."



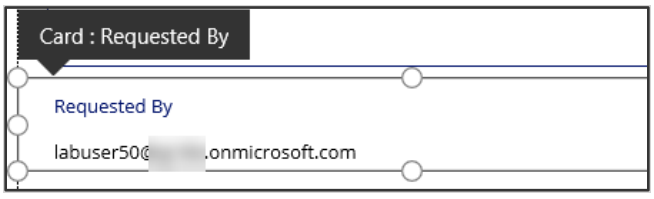
Task 7: Configure the Requested By Field

Let's set the Requested By Field to be the current logged on user's email and disable the control so the user cannot change this value.

1. Expand the **Requested By** card.
2. Select the **DataCardValue.**
3. Go to the **Advanced** pane and **Unlock** the card.
4. Change the **DisplayMode** property to: `DisplayMode.View`



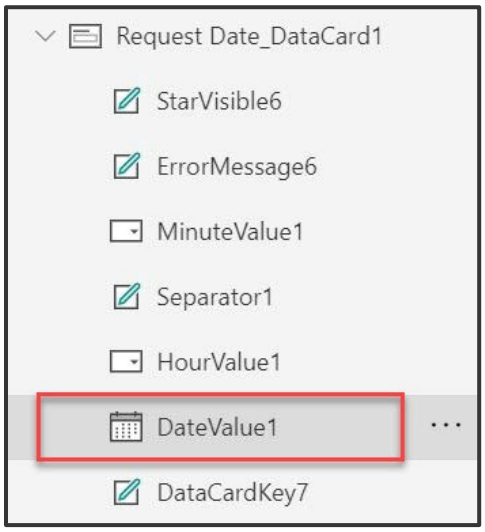
5. Set the **Default** value to `User().Email`
   This is the email of the currently logged in user.



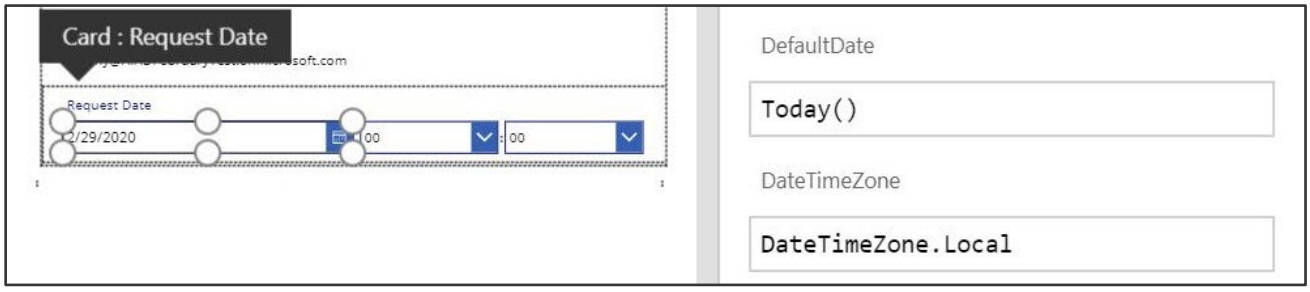
Task 8: Configure the requested date Field

Let's set the Request Date to be today's date.

1. Expand the **Request Date** card.
2. Select the **DateValue** card.

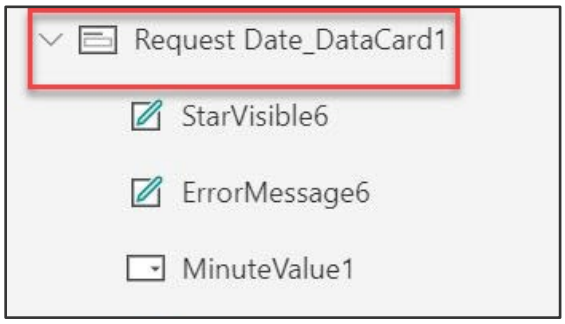


3. Go to the **Advanced** pane and **Unlock** the card.
4. Change the **DefaultDate** property to `Today()`



Notice that the date in the calendar control will change to today's date.
Now we will hide the Request Date card. We don't need to show this Field to the user. Since we have included it as part of the form the Field will get updated as part of the form submit.

5. Select the **Request Date DataCard**



6. Go to the **Properties** pane.

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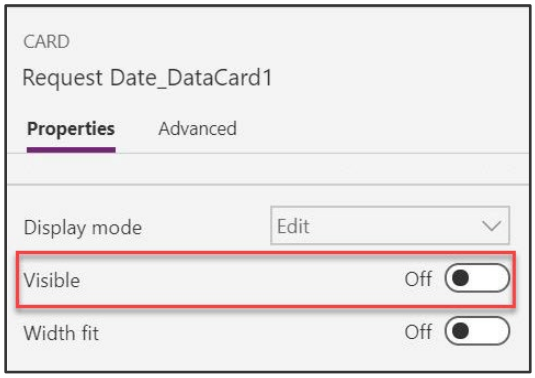
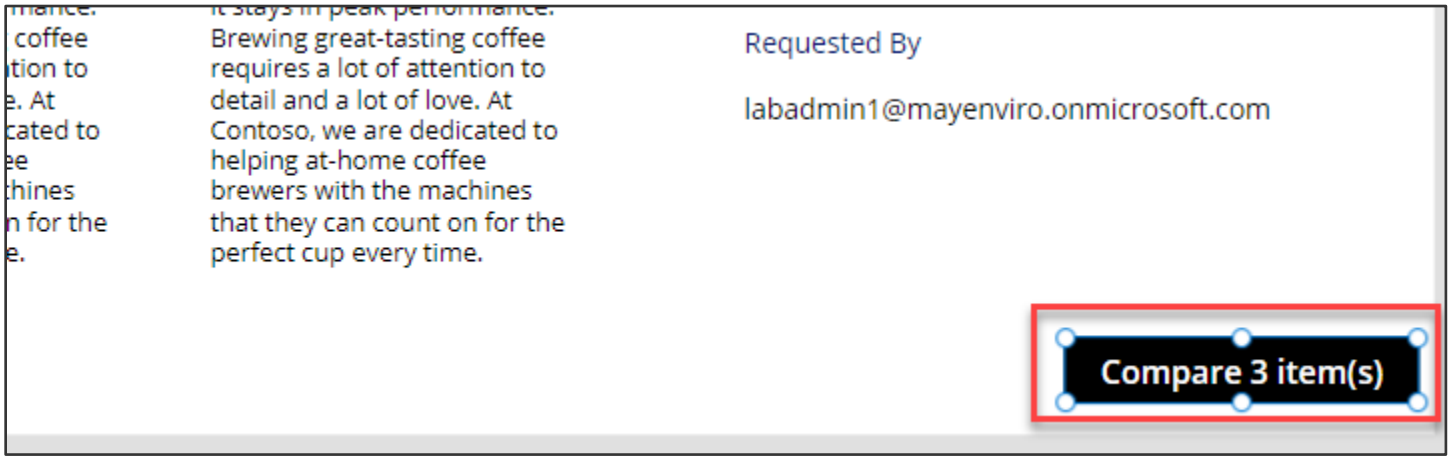
7. Set the **Visible** toggle to **Off**.



Task 9: Add a button to submit the form

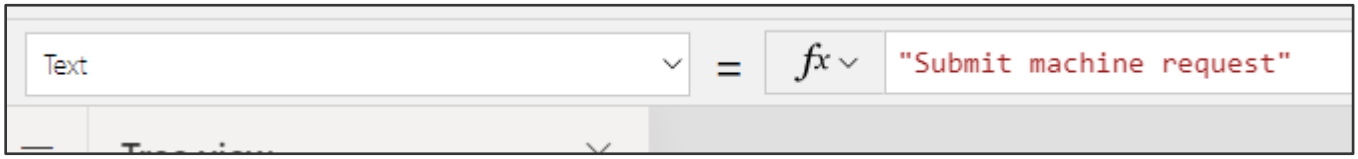
1. Select the **Main Screen**.
2. Copy (Ctrl-C) the **Compare button** from the first screen which has the correct color values.

3. Go back to the **Compare Screen** and paste (Ctrl-V) the button.

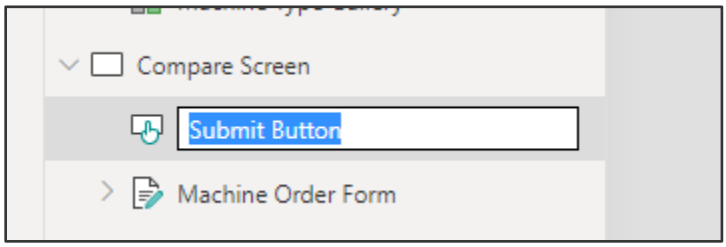


4. Make sure the button is larger – you can resize to **260** x **40** using the Properties pane on the right.

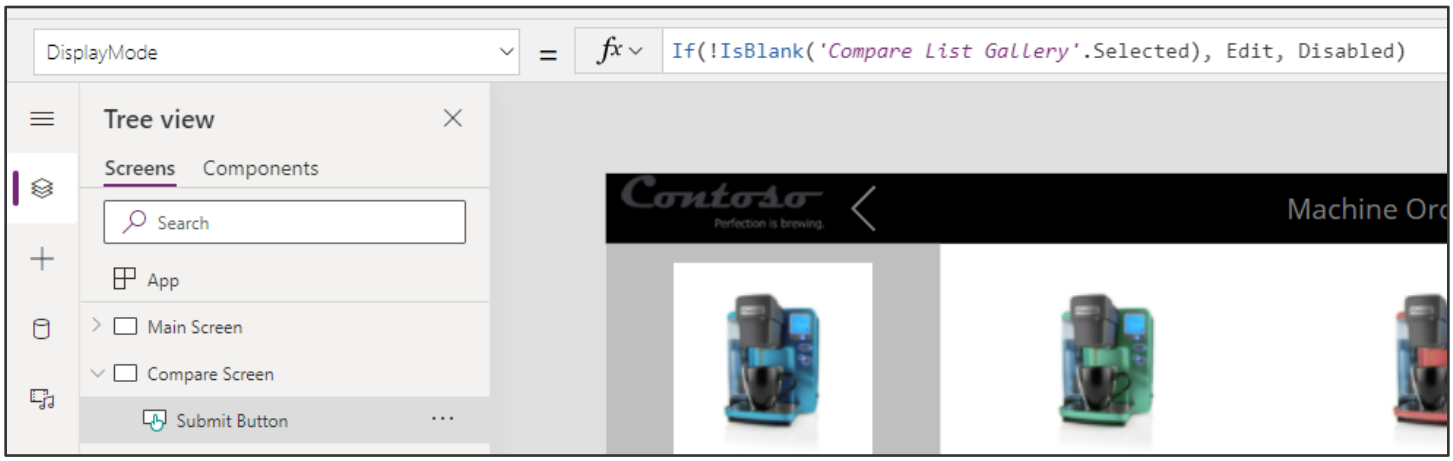
5. Set the button's **Text** property to **"Submit machine request".**



6. Rename the button to **Submit Button**.



7. The button should be enabled only if a machine is selected. To do this, change the button's **DisplayMode** property to: `If(!IsBlank('Compare List Gallery'.Selected), DisplayMode.Edit, DisplayMode.Disabled)`



Note: You might notice the exclamation mark (!) in the formula `!IsBlank()` Normally if you just have `IsBlank()` the check is for blank. Adding the exclamation mark (!) in front of it changes it to check if it is NOT blank.

8. Next, we are going to configure what we want to happen when the button is clicked. Set the **OnSelect** property to `SubmitForm('Machine Order Form')`

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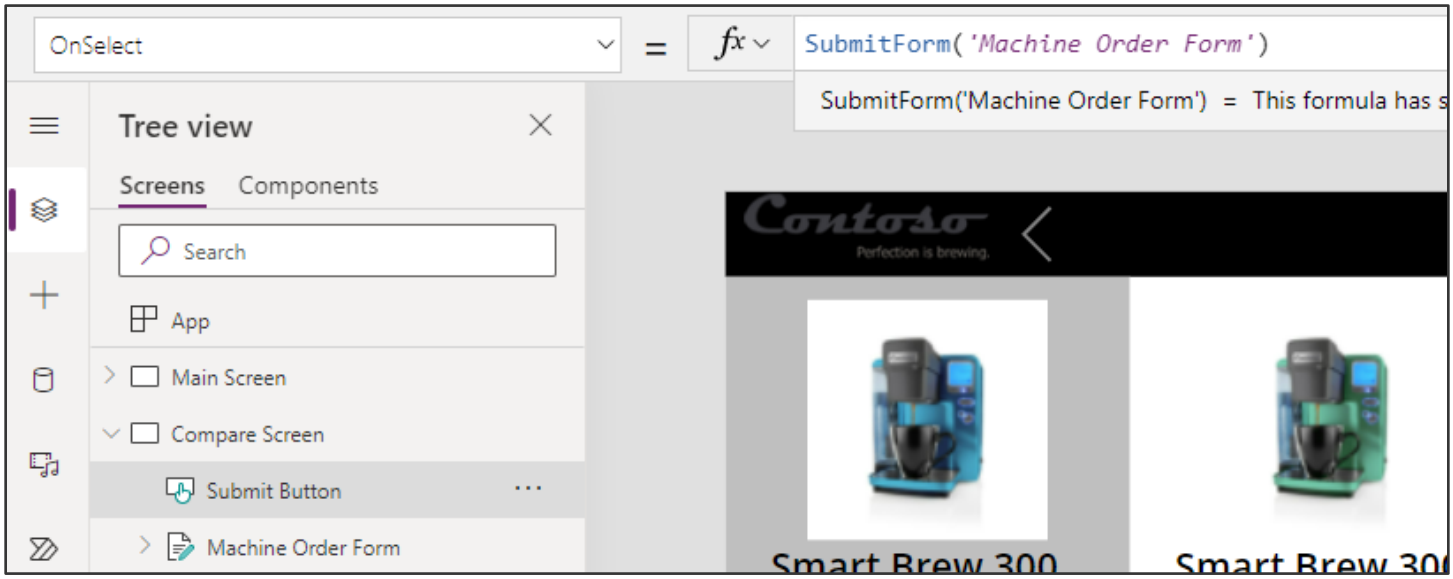


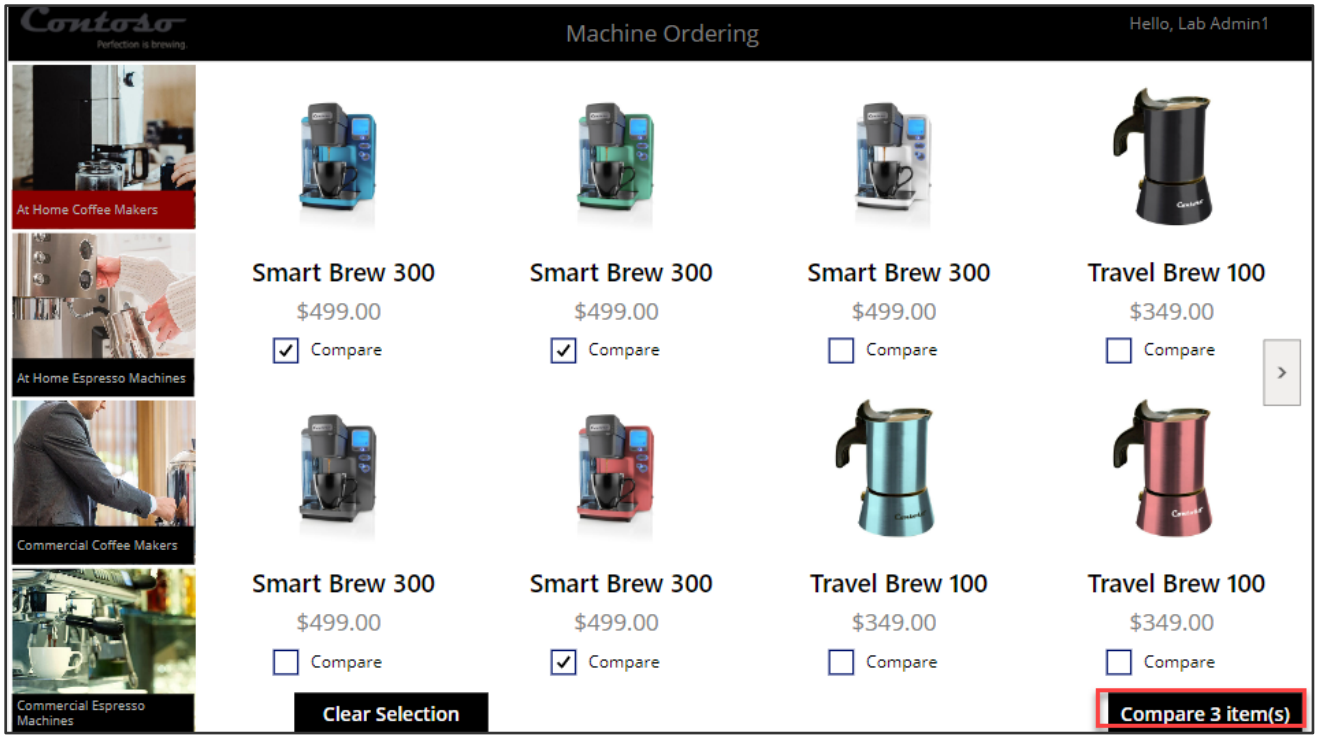
When the button is pressed, the form data will be submitted to the Microsoft Dataverse.

9. Save your work and return to continue editing the app.

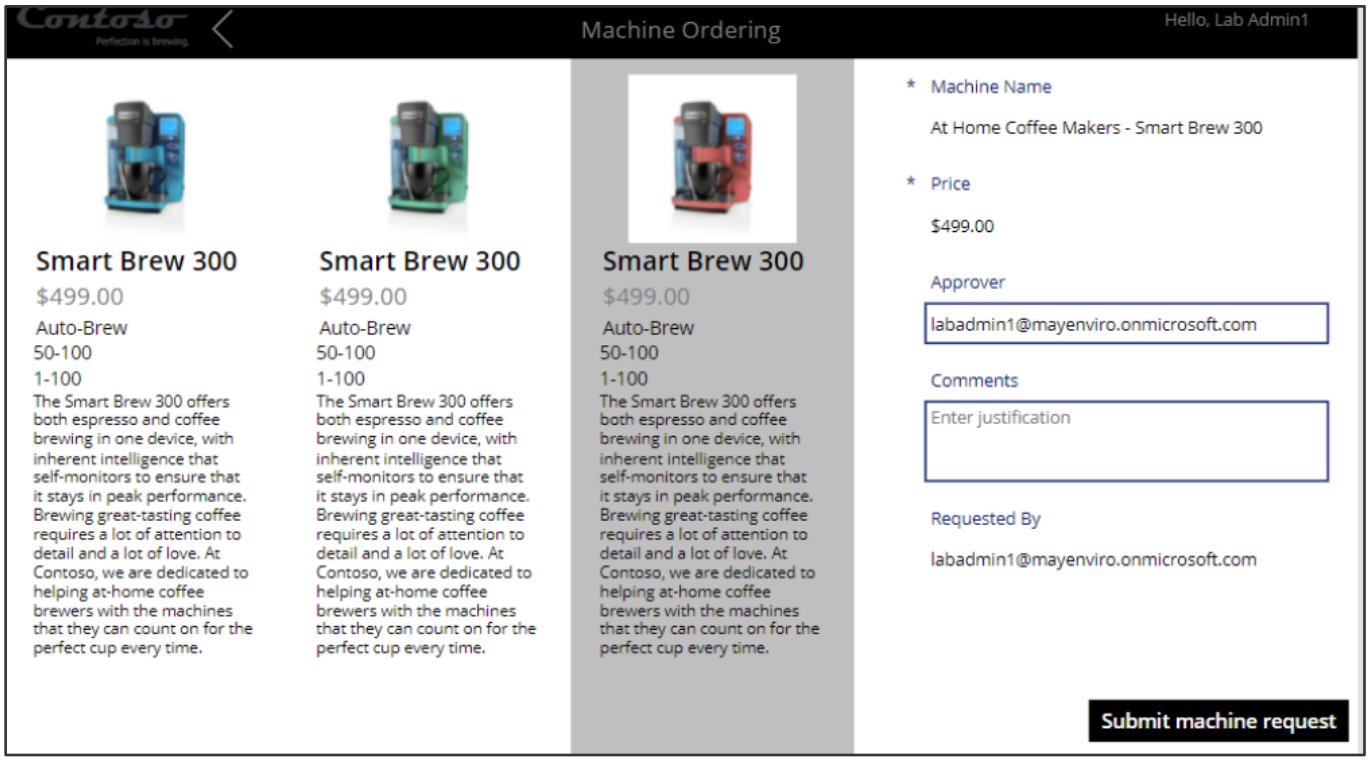
Task 10: Test the form

1. Select the **Main Screen** in the left side tree navigation and click **Play**.

2. Select a few machines to compare. And click **Compare**.



3. Select one of the machines.



Notice that the Title, Price, Approver, and Requested By Fields are already filled in.

4. Add some **Comments**, such as: "This machine will satisfy our needs."
5. Click **Submit machine request.**

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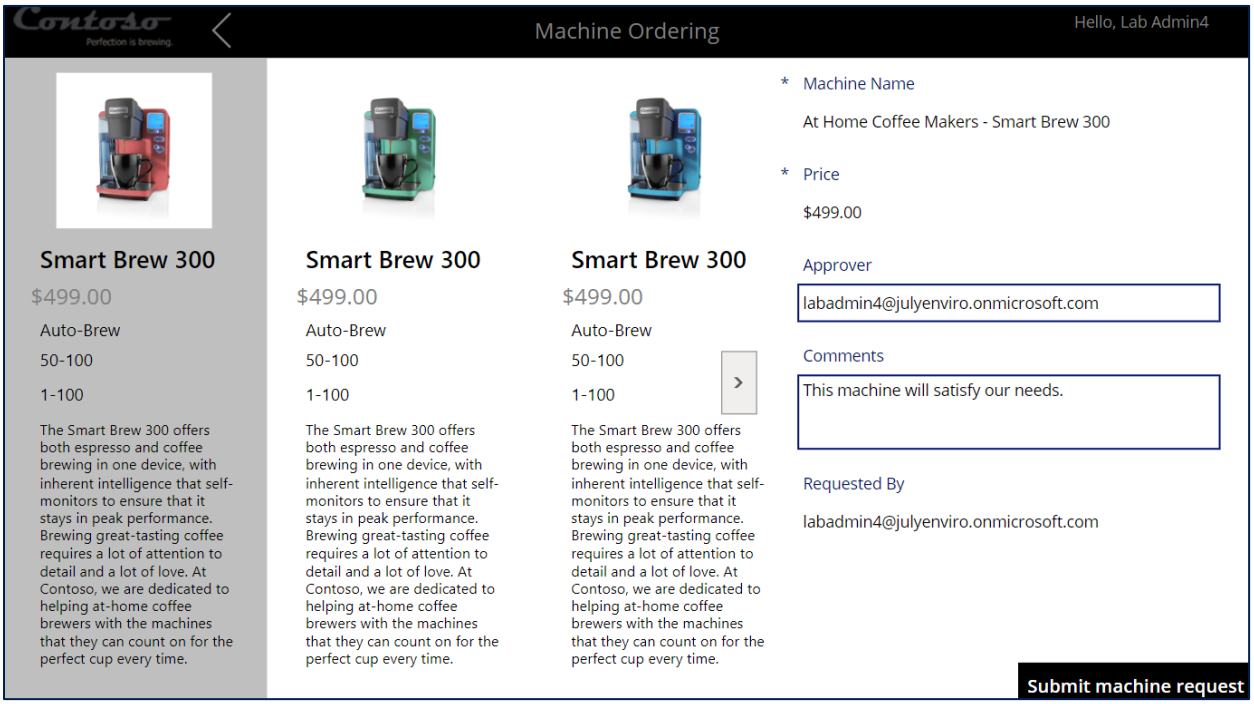
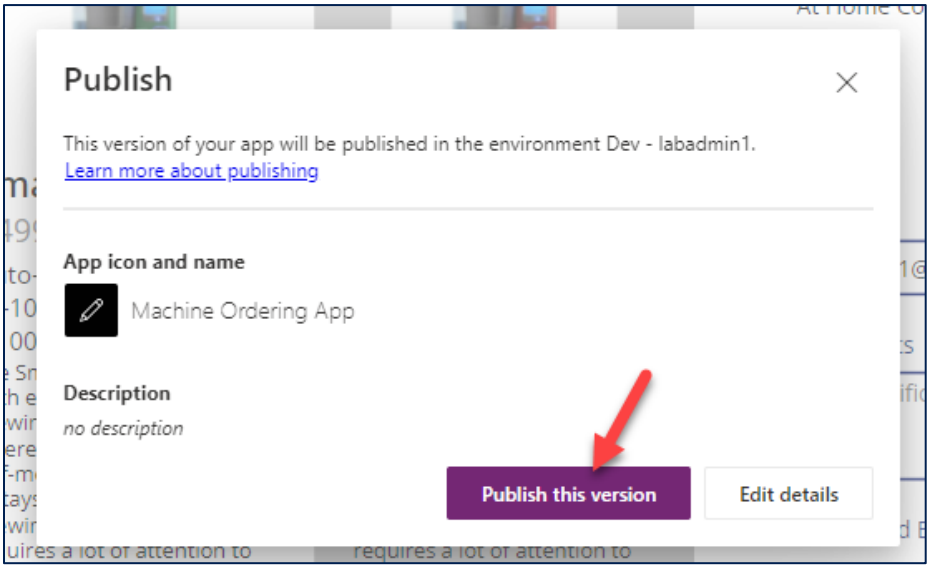


The button should turn disabled (gray) for a few seconds while it's submitting the request. If it does not do this there is likely an error. Click the X in top right to get back to the design mode.
If there is an error, you will see a yellow error icon next to the Submit button, hover over it to check the error.

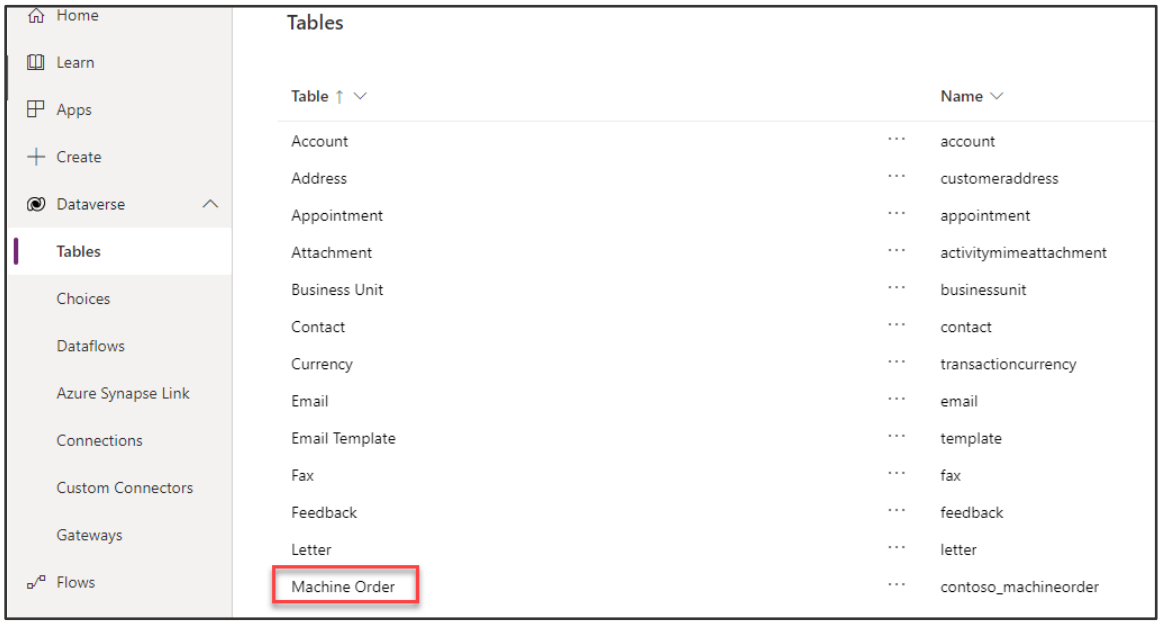
6. Exit the preview mode ('X' in top right).
7. Save the Application and Publish.



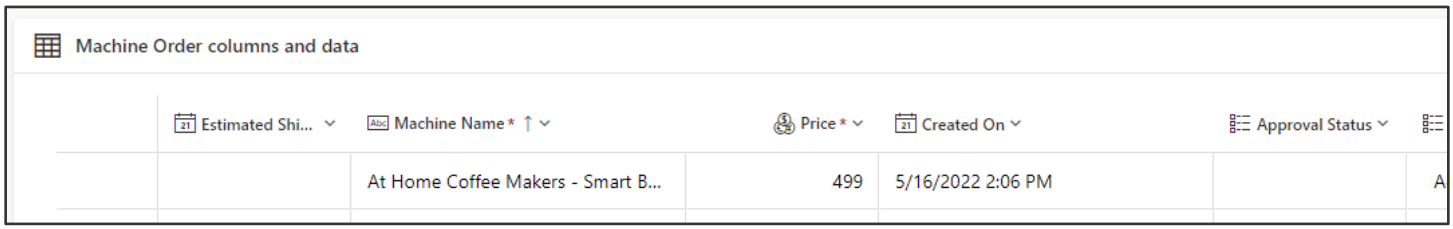
Task 11: Verify a new item was added to the Machine Order table

1. Open a browser window, go to Make Power Apps.
2. Click on **Dataverse** -> **Tables**.

3. Select the **Machine Order** table.



4. You should see a newly added row with your machine order details. This may take a few seconds to load.



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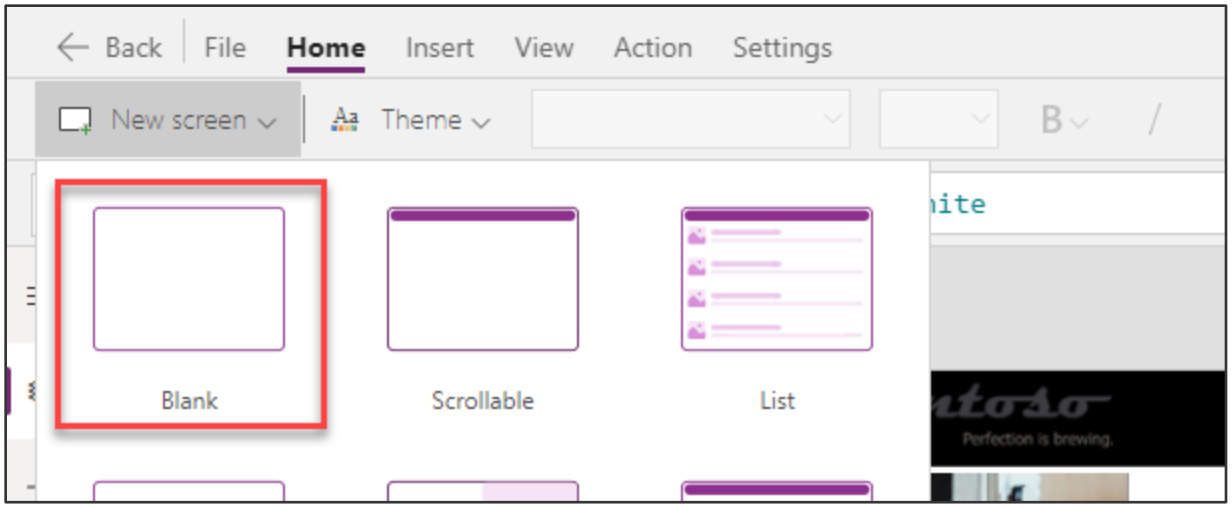
Task 12: [Optional] Navigate to confirmation screen after the Form submit is successful

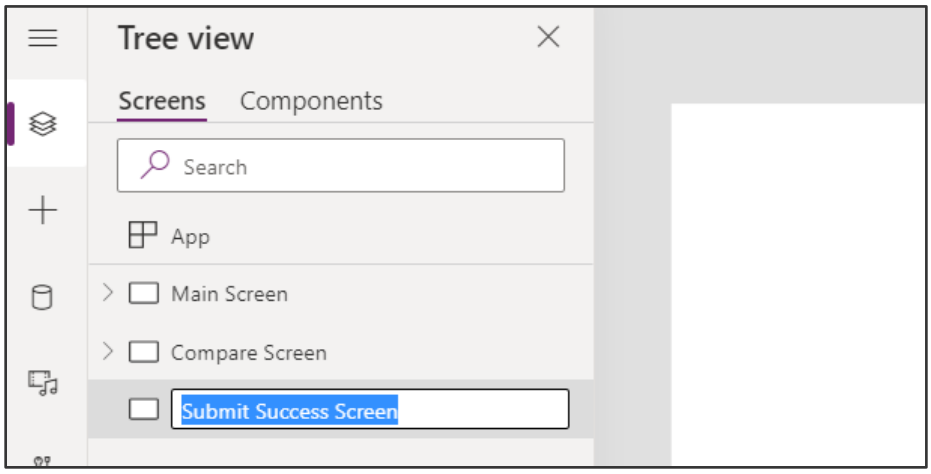
This step is optional, if you're short on time you may skip it and continue to the next module.

Once the Form has been successfully submitted, it's a good idea to show a confirmation screen and allow the user to navigate back to the main screen.

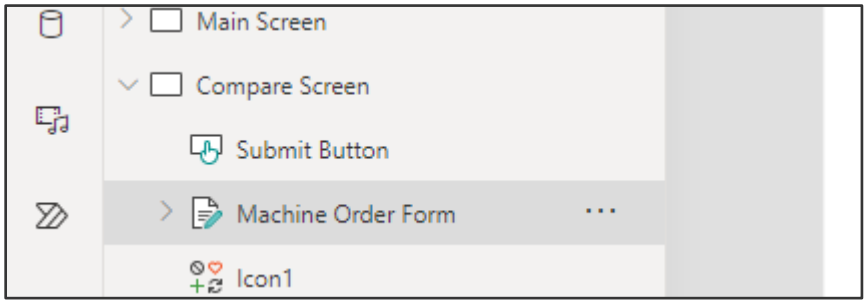
1. Open a browser window, go to Make Power Apps.
2. Select **Apps**, select the **Machine Ordering App**, and click **Edit**.
3. Select **Home** -> **New screen** -> **Blank.**



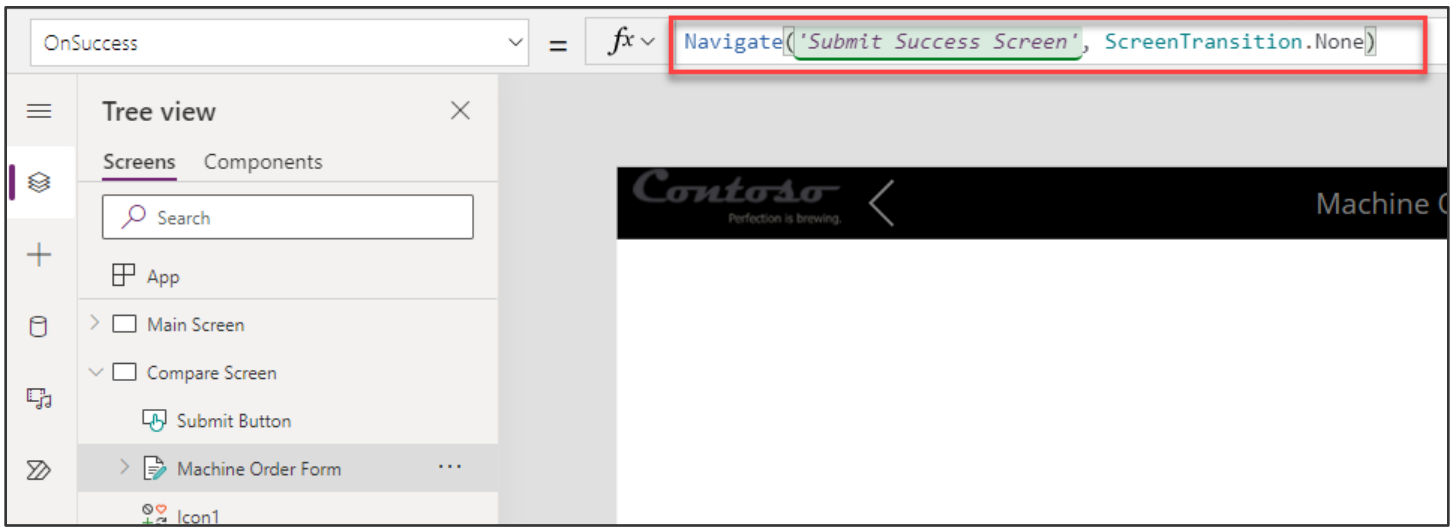
4. Rename the screen to **Submit Success Screen.**



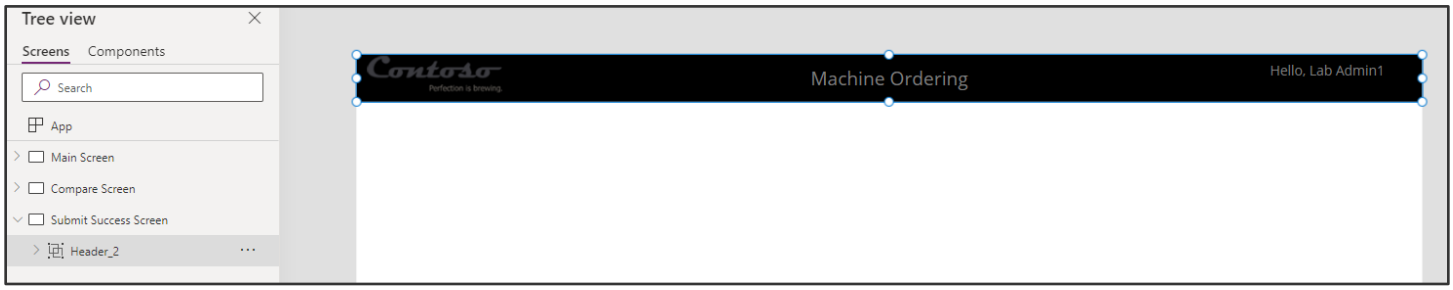
5. Expand the **Compare Screen**.
6. Select the Form – you can use the tree view on the left to select **Machine Order Form**.



7. Set the **OnSuccess** property to: `Navigate('Submit Success Screen', ScreenTransition.None)`



8. Copy (Ctrl-C) the **Header** from the Compare Screen.
9. Go to the to the **Submit Success Screen** and paste the header.



10. **Insert** another **label** in the middle of the screen and set the **Text** to: **"Your machine request has been successfully submitted. Thank you."**
11. Increase the font size, the size of the label and center the text.

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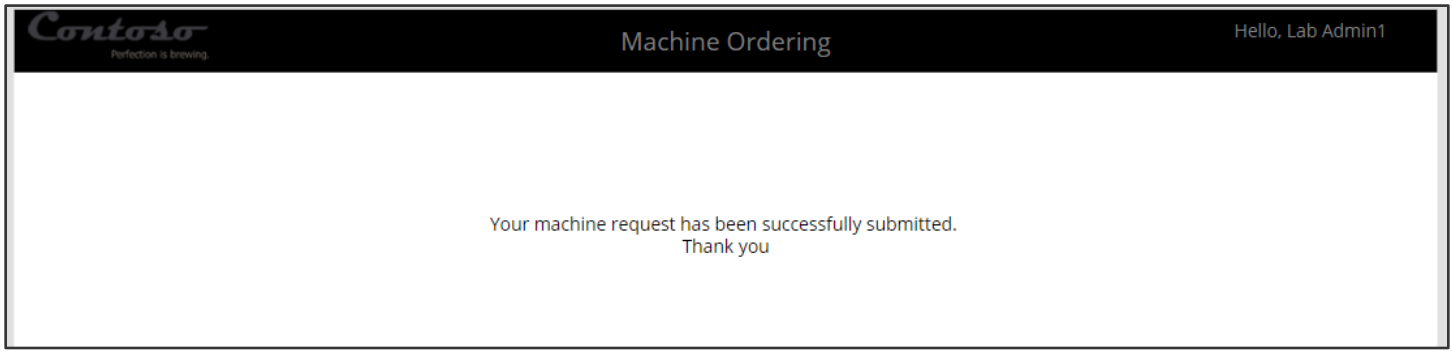
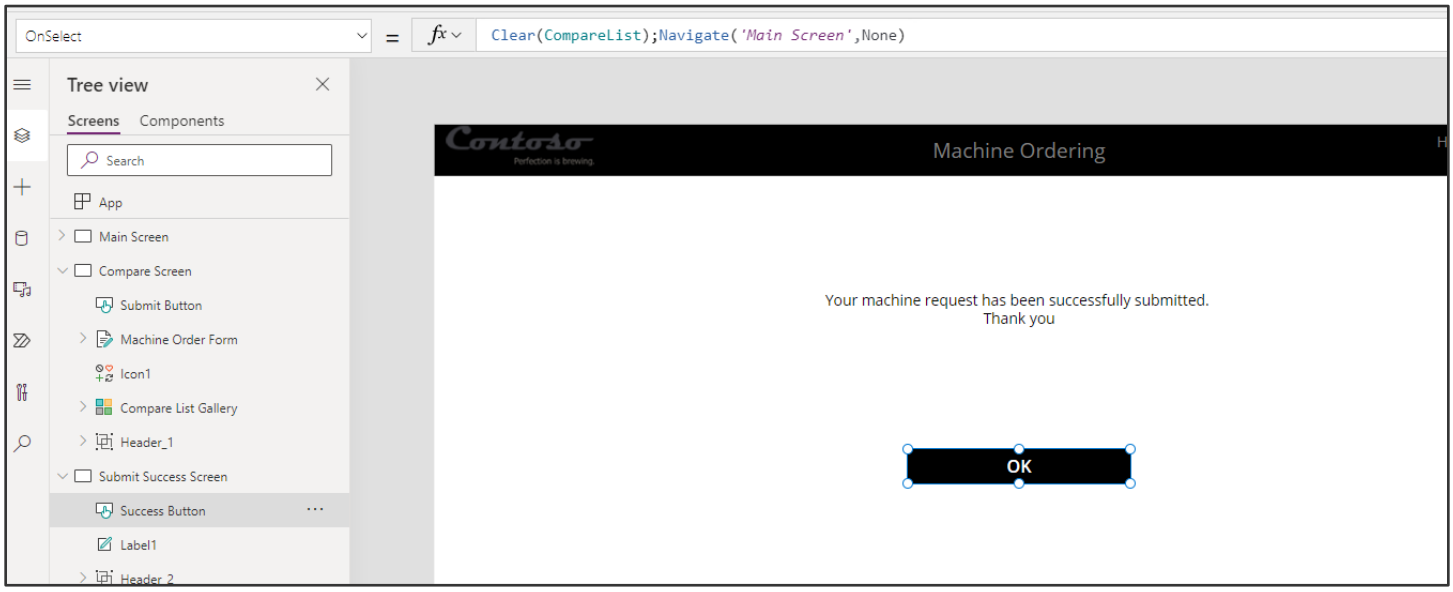


12. Copy the **Submit Button** from the Compare Screen and paste it in the **Submit Success Screen**.
13. Rename the button **Success Button**.
14. Change the **Text** of the Success Button to **OK**.
15. Change the Display Mode of the Success Button to `DisplayMode.Edit`.
16. Move the Button to middle of the screen.
17. When pressed, the button should remove items from the CompareList collection and navigate to the main screen.
18. Set the **OnSelect** property of the button to:

```
Clear(CompareList);Navigate('Main Screen',ScreenTransition.None)
```



Note: ';' is used a separator when multiple functions are called one after the other. If you are in a locale where ';' is used as a comma-separator, then use a double ';' here (without the single-quotes).

19. Move the label up and add a Display Form: **Insert** -> **Form** -> **Display.**

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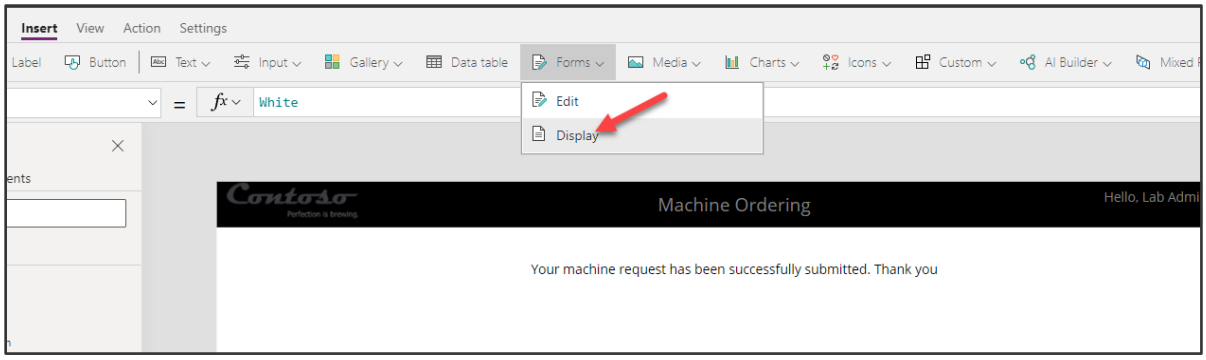
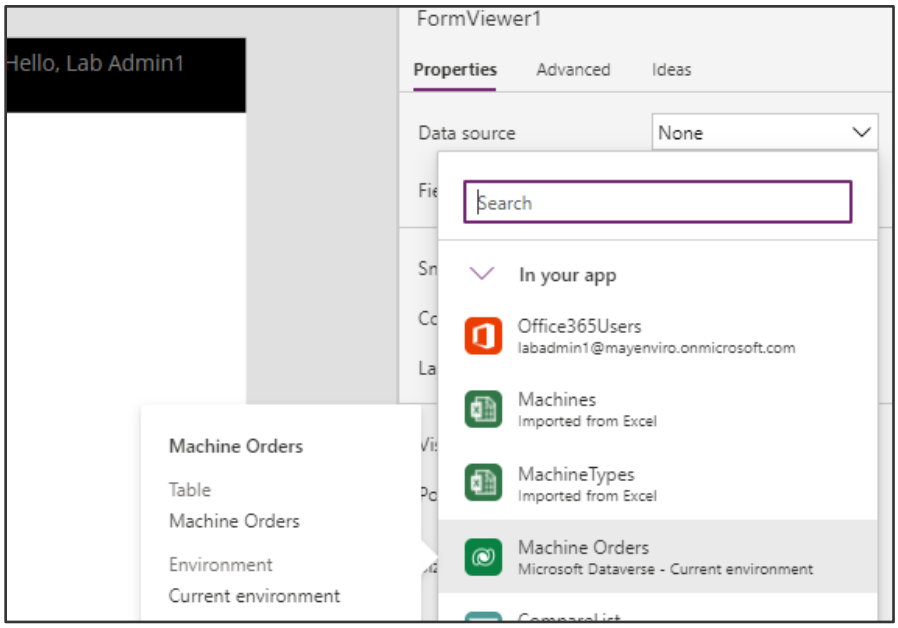


20. Configure its **data source** to point to the **'Machine Orders'** table.



21. Select the Fields to display: Machine Name, Price, Comments, Approver, Requested By, Request Date. Rearrange and remove any additional Fields.

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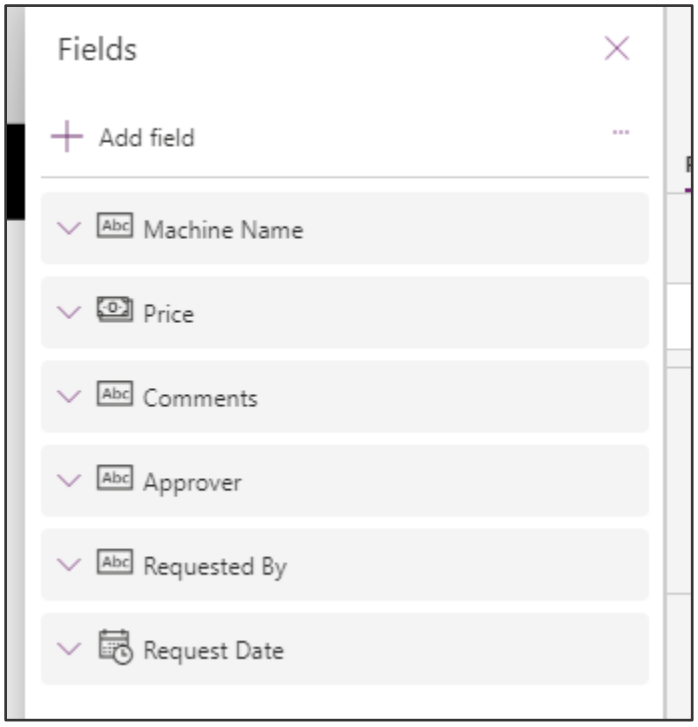
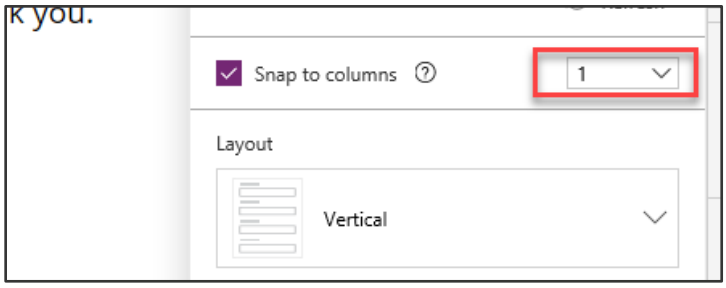
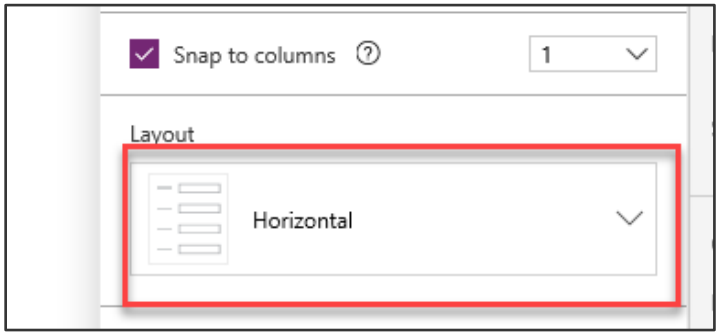


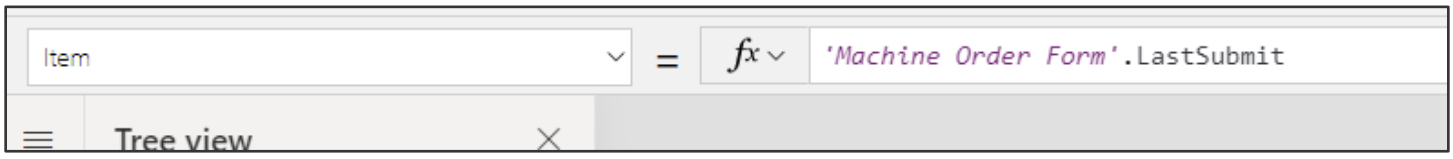
22. Change the **Snap to column** value from 3 to 1.



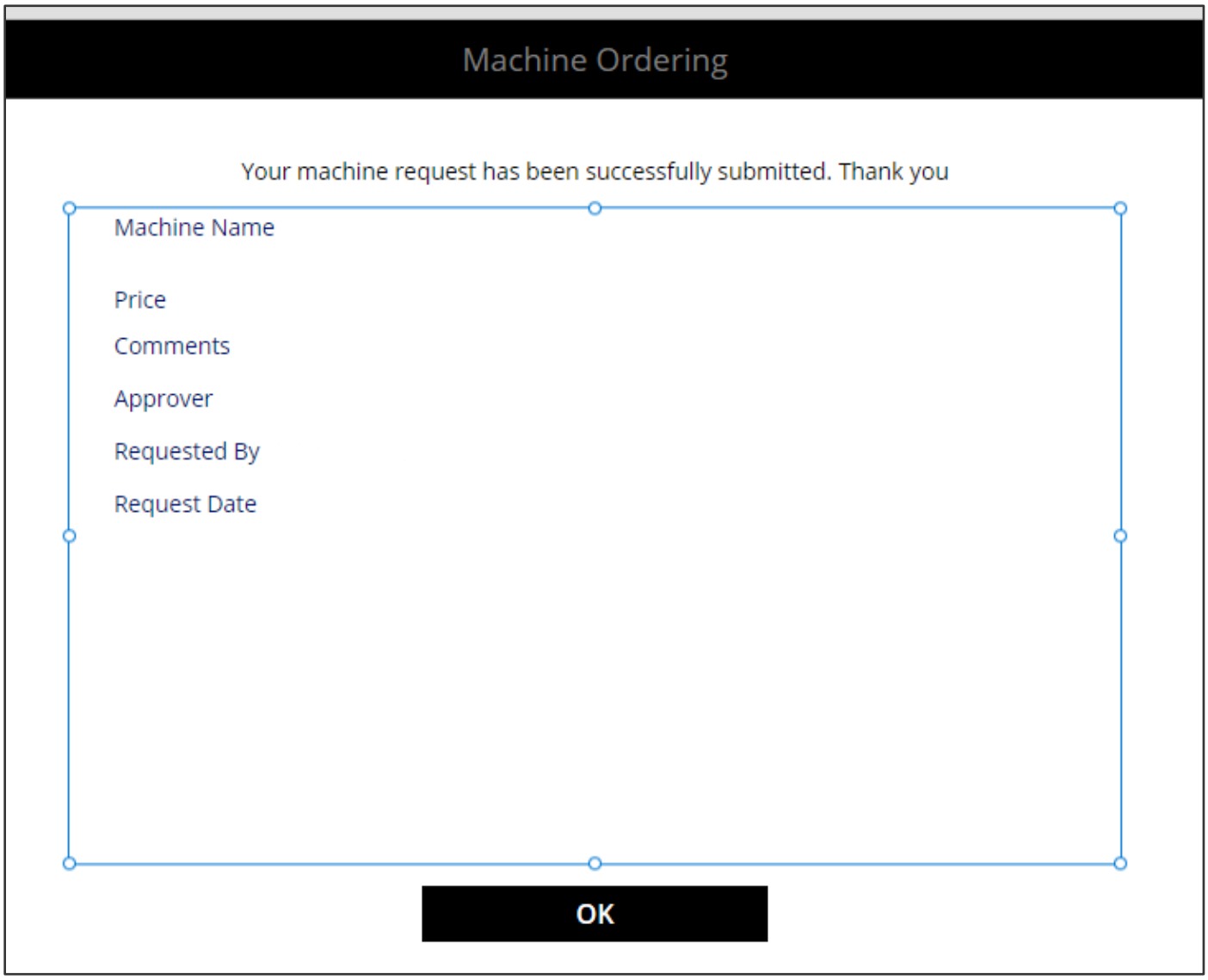
23. Change the **Layout** from Vertical to **Horizontal**.



24. Set form **Item** property to `'Machine Order Form'.LastSubmit`



25. Reposition/Resize the form until it looks like the image below. The Label will be first on the screen, centered under the header. Then, position the view form to be centered under the label. Finally, the "OK" button will should be centered at the bottom of the page under the view form.



26. Save your changes and **Publish**.
27. Select the **Main Screen** and click **Play**.
28. Select few machines and click Compare

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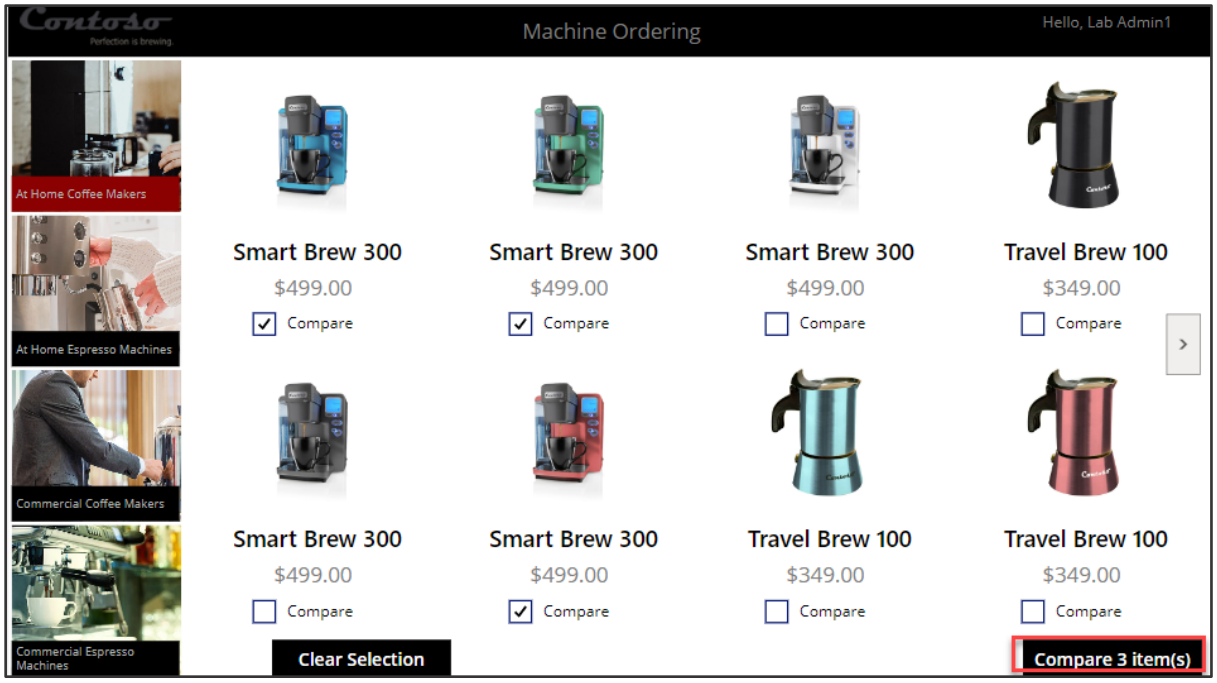
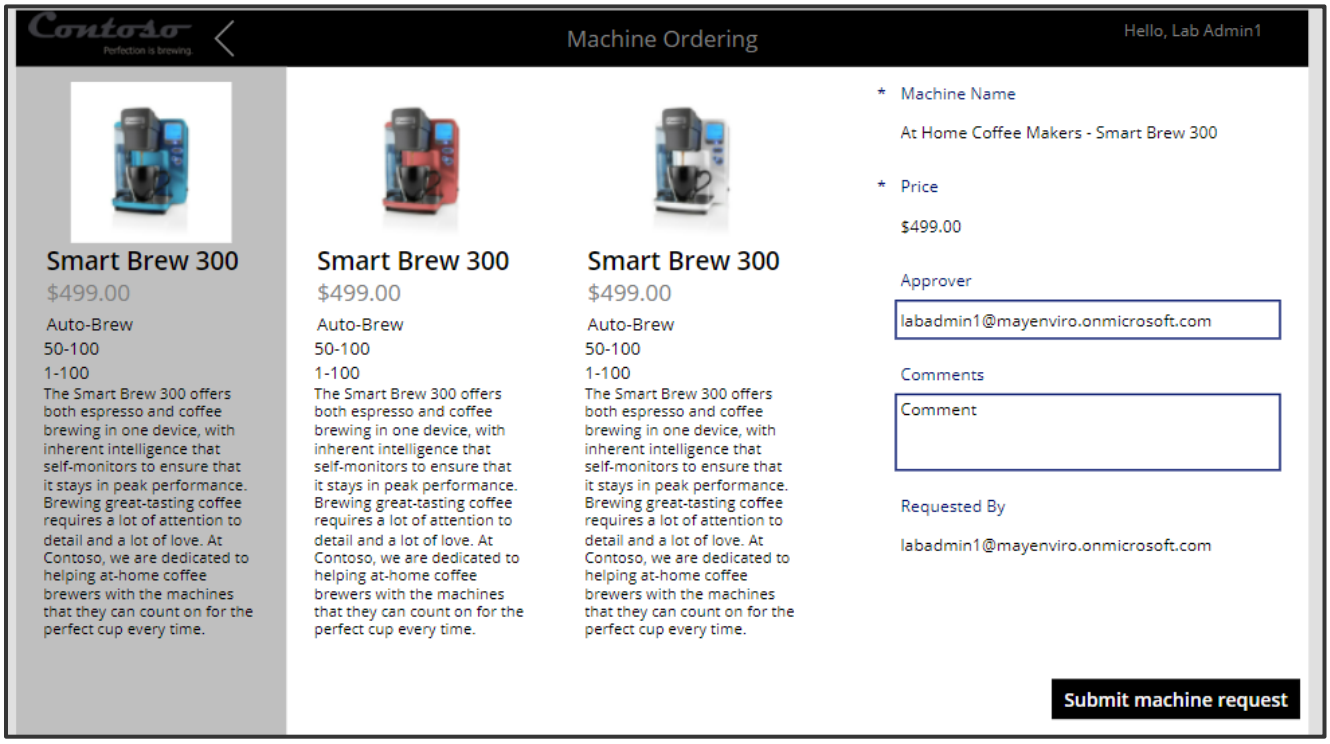
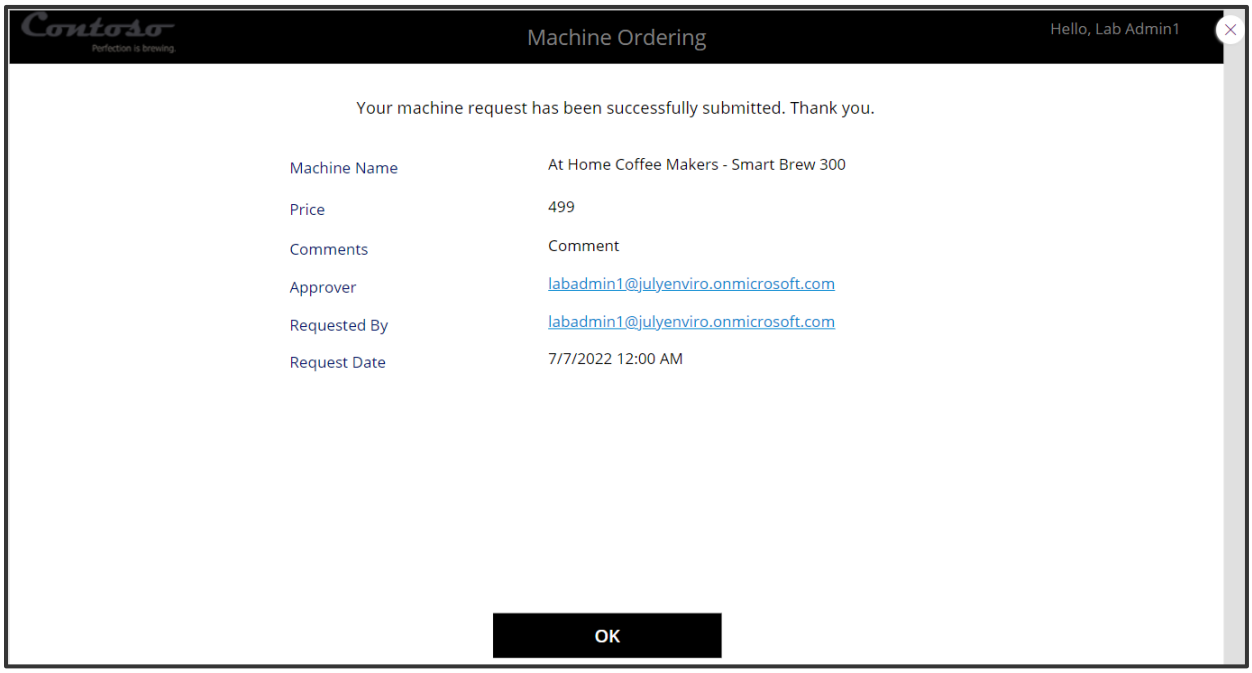


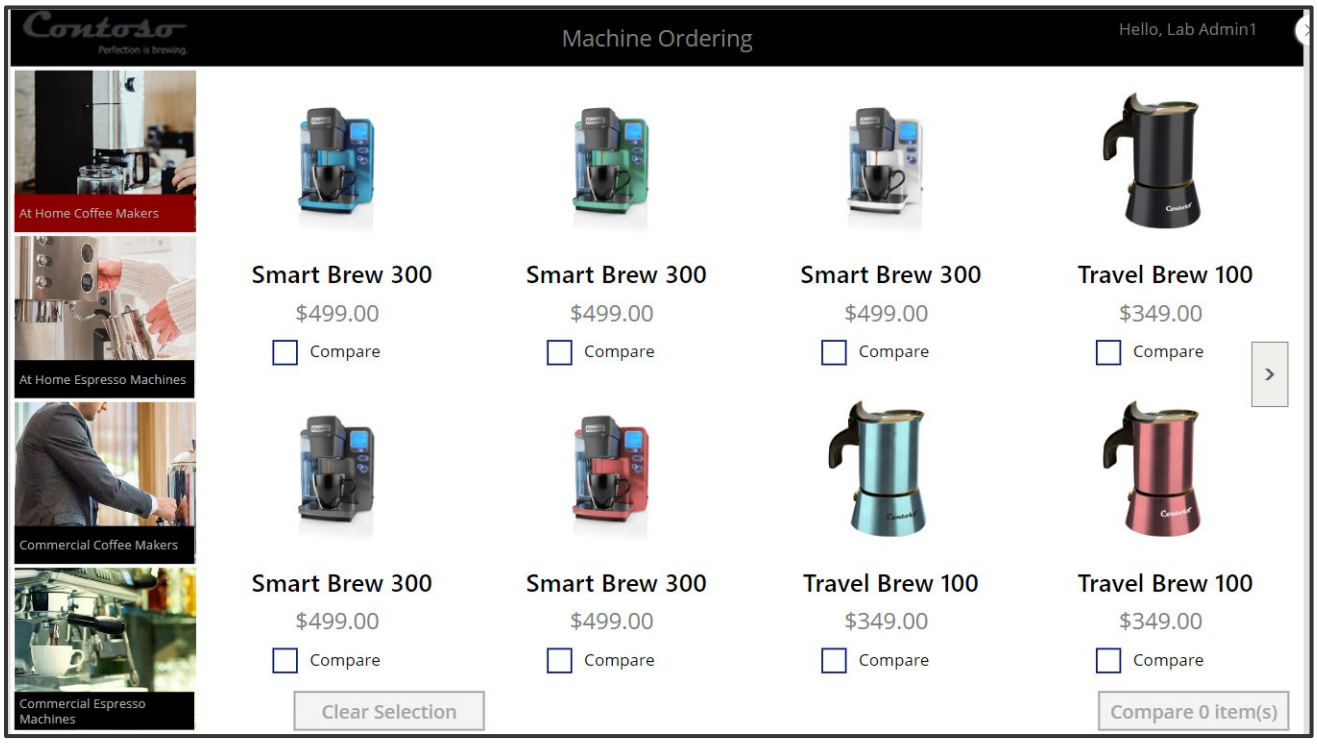
29. Select one of the machines, provide a comment and click **Submit**.



30. Verify that the confirmation screen shows the order details. Click **OK**.



31. The application will navigate back to the main screen and the compare list will be cleared.



32. Close the application.

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References

App in a Day introduces some of the key functionalities available in Power Apps, Power Automate, Power BI and the Microsoft Dataverse. For an up to date list of learning references, see Power Apps Resources and Power Automate Resources.

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