Lab 03: Registration and Booking Process

Configure Eligibility Questionnaire

In this exercise, you will be required to create a new question to the eligibility questionairre. The question is required to capture data from the user and save it in the system but does not really impact the overall eligibility computation workflow. Hence, you would just be making changes to the portal to reflect a new question in the existing questionnaire.

### Task 1: Customize existing components and add new components in a solution

In this task, you will re-use the existing solution that you created in Lab1 and add a few components that will be customized to reflect the new question on the portal

1. Navigate to the solution you created in Lab1 called **MVM in a Day** and click on **+Add Existing** and select **Table**

Graphical user interface, application

Description automatically generated

1. In the list that shows up, search for **Covid Vaccination Eligibility** table and click on **Next**

Graphical user interface, text, application, email

Description automatically generated

1. Once the table is added, click on **Select Components**

Graphical user interface, text, application, chat or text message

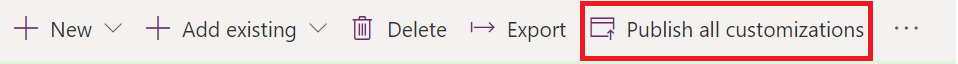
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1. In the list that appears, navigate to **Forms** tab and click checkbox for **Vaccination Management – Portal Web Form** in **Forms** taband click on **Add**

Graphical user interface, text, application, email

Description automatically generated

1. Click on **Publish All Customizations**



1. Add new column with below values -

**Column Name** : Are you a part of Paramilitary/Armed Forces

**Type**: Yes/No

Click on **Done**

Graphical user interface, application

Description automatically generated

1. Once column is added, click on **Save Table**
2. Now navigate to **Forms** tab and select the **Vaccination Management – Portal Web Form**
3. Once the form opens up, navigate to **Table Columns** in the left navigation and click on **Work History**
4. Click on + **Form Field** and select the newly created column called **Are you a part of paramilitary/armed forces**

Graphical user interface, application

Description automatically generated

1. Note the new column show up on the form now

Graphical user interface, text, application, email

Description automatically generated

1. Now click on **Save** and then **Publish** to save the changes and then click **Back** to exit

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1. Get back to solution page and click on **Publish All Customizations**

### Task 2: Restart portal and verify your changes

1. In the same browser where you have logged in to the lab environment, open a new tab and navigate to [**https://admin.powerplatform.microsoft.com/**](https://admin.powerplatform.microsoft.com/)
2. In the navigation pane, click on **Resources** dropdownand then **Portals**

Graphical user interface, application, Teams

Description automatically generated

1. In the Search box, search for <Your allocated environment Name> and you can find the **Registration Portal** show up as a search result. Click on **…** and then **Manage**

Graphical user interface, text, application

Description automatically generated

1. This should launch the Portal Admin Center in a new tab. In the Admin Center, click on **Portal Actions** and then **Restart Portal**

Graphical user interface, application

Description automatically generated

1. Once the portal restarts, navigate back to your portal page and follow the process of checking eligibility as done in Exercise1. Follow through till you reach on the Step 2 of Eligibility questionnaire to verify your new question now shows up in the portal

Graphical user interface, text, application, email

Description automatically generated

**Congratulations**! You have now understood how to add a new question to the Eligibility questionnaire and can track user responses in a Dataverse record.

Configure New Eligibility Process

In this exercise, you will mimic onboarding the MVM solution for a new locale/geo that has different COVID vaccination eligibility rules. In that case, you would be required to override most of the existing portal behaviour and replace it with new rules. You would also be required to edit the overall eligibility workflow that evaluates if a person is eligible according to the configured rules so that the new set of rules are honoured during eligibility computation.

### Task 1: Customize existing components and add new components in a solution

In this task, you will re-use the existing solution that you created in Lab1 and add a few components that will be customized to reflect the new question on the portal

1. Navigate to the solution you created in Lab1 called **MVM in a Day** and search for **Covid Vaccination Eligibility** table and click on it
2. Once the table opens, click on **Add column**  and set the following details -

**Display Name** : Question 1

**Data type** : Yes/No

Click on **Done**

Graphical user interface, application, Teams

Description automatically generated

1. Once column is added, click on **Save Table**
2. Repeat steps 2 to 3 for adding another column with following details –

**Display Name** : Question 2

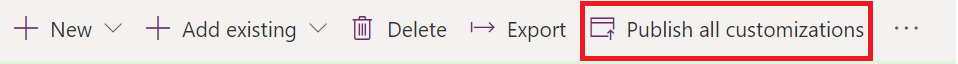
**Data type** : Yes/No

1. This is how your table **Columns** should look like now

Graphical user interface, text, application

Description automatically generated

1. Click on solution name **MVM In A Day** to navigate back and **Publish all customizations**



1. Once published, click again on **Covid Vaccination Eligibility** table in the solution
2. In the list that appears, navigate to **Forms** tab and click **Vaccination Management – Portal Web Form**

Graphical user interface, application

Description automatically generated

1. This should launch the form for editing. Now click on **First Dose** tab and then **+Component** in the navigation bar.

Graphical user interface, text, application, email, Teams

Description automatically generated

1. Now click **1-column tab** from the left navigation and see it reflect on the form as shown

Graphical user interface, text, application, email

Description automatically generated

1. Now click on the **New Tab** andupdate the **Label** to “New Questions”

Graphical user interface, application

Description automatically generated

1. Now click on **+Form Field** in the navigation bar and click on **Question1** and **Question2** to add them to the newly created tab

Graphical user interface, application

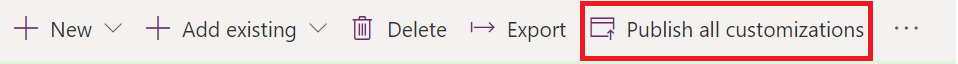
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1. Once added, here is how your form tab will look like -

Graphical user interface, text, application, email

Description automatically generated

1. Click on **Save** and then **Publish**
2. Click on **Back** to exit from the form. Then click on solution name and **Publish all customizations**



### Task 2: Edit portal webform steps to show your page

In this task, you will edit the portal settings to reflect a new page with your questions. While you move from one page to the other on the portal, you are essentially navigating from one tab to the other on the form. To achieve this, each tab on the form is bound as a web form step on the portal. Introducing a new page requires changing the flow of the tabs and injecting a web form step in between. And that is exactly what we would do in this task. The original form step sequence is **Welcome** -> **WorkHistory** followed by other tabs. You will alter the sequence to **Welcome** -> **New Questions** -> **WorkHistory** followed by other tabs.

1. Launch **web.powerapps.com** using your user credentials and ensure the **Environment** is showing up correctly.
2. Click on **Apps** and locate **Portal Management** app, click on **…** and **Play**

Graphical user interface, application, Teams

Description automatically generated

1. This will launch the **Portal Management** app in another tab.
2. In the **Portal Management** app, click on **Web Forms** in the left navigation bar

Application

Description automatically generated with medium confidence

1. In the list that appears, click on **Vaccination Management – Eligibility**

Graphical user interface, application

Description automatically generated with medium confidence

1. Once the web form opens, click on the start step **Welcome** to open the web form step

Graphical user interface, text, application

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1. Web form step should open up. In the start step value that shows **Work History**,click on **X** to clear the value and then click on search icon to create a new Web form step.



1. Click on **New Web Form Step** to launch a create form for web form step

Graphical user interface, text, application, email

Description automatically generated

1. Set following values in the Web Form Step and click **on Save**

Name : **New Questions**

Web Form : **Vaccination Management – Eligibility**

Type : **Load Form**

Target Entity Logical Name : **COVID Vaccination Eligibility**

Next Step : **Work History**

Move Previous Permitted : **Yes**

Enable Entity Permissions : **Yes**

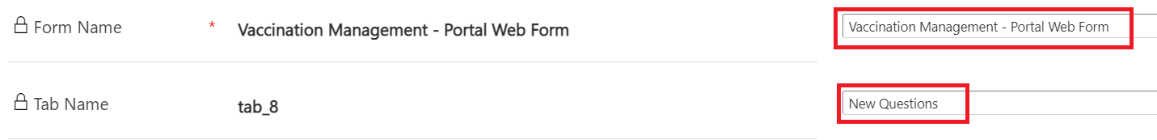
Graphical user interface, text, application, email

Description automatically generated

1. Now navigate to **Form Definition** tab on the form and set the following values and then click on **Save and Close**

Form Name : **Vaccination Management – Portal Web Form**

Tab Name : **New Questions**



1. You will land on the **Welcome** web form step again. Now set the Next step to the web form that you just created – **New Questions**

Graphical user interface, text, application

Description automatically generated

1. Once done, **Save** the form and close.

### Task 3: Edit workflow to change eligibility logic

In this task you will edit the current eligibility logic to take into account the responses to your new questions and compute eligibility accordingly.

1. Navigate back to your **MVM in a Day** solution and click on **+Add existing** and select **Process**

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1. Search for ‘Eligibility Phase’. Select the process named **Vaccination – Eligibility Phase Determination** and click on **Add**

Graphical user interface, text, application, table

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1. Once added, click on the process **Vaccination – Eligibility Phase Determination.** This will launch the process designer in a new tab.
2. Click on **Deactivate** button in the top ribbon. In the dialog that opens, click on **Deactivate**.

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Graphical user interface, text, application, email

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Now the process designer will open up with the editable version of the Process.

1. In the process designer, click on **Insert**  and then select **After Step**. If it is pre-selected, then simply move to the next step.

Graphical user interface, application

Description automatically generated

1. Then click on the **Otherwise if** written on the step that says **Phase 2**. This will highlight the whole conditional step as shown below.

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1. Once the step is selected, click on **Add Step -> Conditional Branch.** This will insert a new step post the selected conditional step.

Graphical user interface, text, application

Description automatically generated

1. Note the step appear in the workflow as shown below. Click on **<condition>(click to configure)**

Text

Description automatically generated with medium confidence

1. In the dialog box that opens,begin selecting the first condition. Set Primary entity dropdown to **COVID Vaccination Eligibility**

Graphical user interface, application, Word

Description automatically generated

1. Now click on the next dropdown and select **Question 1** fromthe list.

Graphical user interface, application

Description automatically generated

1. Add the following conditions and select **Equals**

Graphical user interface

Description automatically generated with medium confidence

1. Now click on the **…** to select values from the options shown

Graphical user interface

Description automatically generated with low confidence

1. In the dialog that pops up, select **Yes**, and then click on **>>>** and then on **OK**

Graphical user interface, application

Description automatically generated

1. This is how your workflow step will look like now

Graphical user interface, application

Description automatically generated

1. Repeat steps 9-13 for **Question 2**. This is how your workflow step will look like after you are done. Click on **Save and Close**

Graphical user interface, text, application

Description automatically generated

1. Once the dialog closes, your workflow designer should look like below screenshot. Now select the row shown below and click on it. Then click on **Add step -> Update record**

Graphical user interface, text, application, email

Description automatically generated

1. In the window that opens, set the **Phase** to ‘Phase 3’ as shown below and click **Save and Close**

Graphical user interface, application

Description automatically generated

1. This is how your final workflow looks like. Click **Save** and then click **Activate**

Graphical user interface, text, application, email

Description automatically generated

### Task 4: Restart portal and verify your changes

1. In the same browser where you have logged in to the lab environment, open a new tab and navigate to [**https://admin.powerplatform.microsoft.com/**](https://admin.powerplatform.microsoft.com/)
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1. In the Search box, search for <Your allocated environment Name> and you can find the **Registration Portal** show up as a search result. Click on **…** and then **Manage**

Graphical user interface, text, application

Description automatically generated

1. This should launch the Portal Admin Center in a new tab. In the Admin Center, click on **Portal Actions** and then **Restart Portal**

Graphical user interface, application

Description automatically generated

1. Once the portal restarts, navigate back to your portal page and follow the process of checking eligibility as done in Exercise1. Follow through till you reach on the Step 2 of Eligibility questionnaire to verify your new question now shows up in the portal

Graphical user interface, application, website

Description automatically generated

**Congratulations**! You have created a new eligibility questionnaire and plugged it in to fire in the eligibility process according to the response.