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Tips and tricks to customize SharePoint/Microsoft Lists forms Using Power Apps

by Michel Mendes

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Speaker Presentation

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  - In the IT field since 2008

- Developer Background
  - .net/C# -> SharePoint -> M365 / Power Platform

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Agenda

1. Why to customise a Form using Power Apps?
2. Recommended Use Cases
3. Differences with a Standard Canvas App
4. Disadvantages/Tricky Bits
5. General Recommendations
6. Demo

Why to customise a Form using Power Apps?

Only alternative to build more complex forms

- No Custom Form SPFx yet😣 (Full list experience needs to be built)
- JSON formatting does not allow controlling behaviours
- Form rules only allow showing or hiding fields

Why to customise a Form using Power Apps?

Reuse Out-of-the-box functionality

Users may be already used to it

Filtering, sorting, grouping

List formatting

Excel Exporting

InfoPath replacement? 😂

PowerFx

Language for custom code/formulas has good documentation and supporting community

Recommended Use Cases/Good Side

Integration

Manipulate data from other SharePoint lists

Manipulate data from Other M365 Apps

Permissions based on AAD Security Groups

More Flexible Layout

Tabs
Sections
Custom columns

Quick win to build forms with rules/custom behaviours

Basic customisations with drag and drop or few formulas

Conditionally make fields visible, enabled or required

Regex or custom logic to validate text fields

Differences with a standard Canvas App

Form is accessible only from the List

Not listed between other Canvas Apps

Screen OnVisible/App OnStart events run only on the first time a form is open

Be careful with variables

Export and import a form to a different list is tricky (unsupported)

Need to modify the exported zip and update the site Urls and List GUIDs.
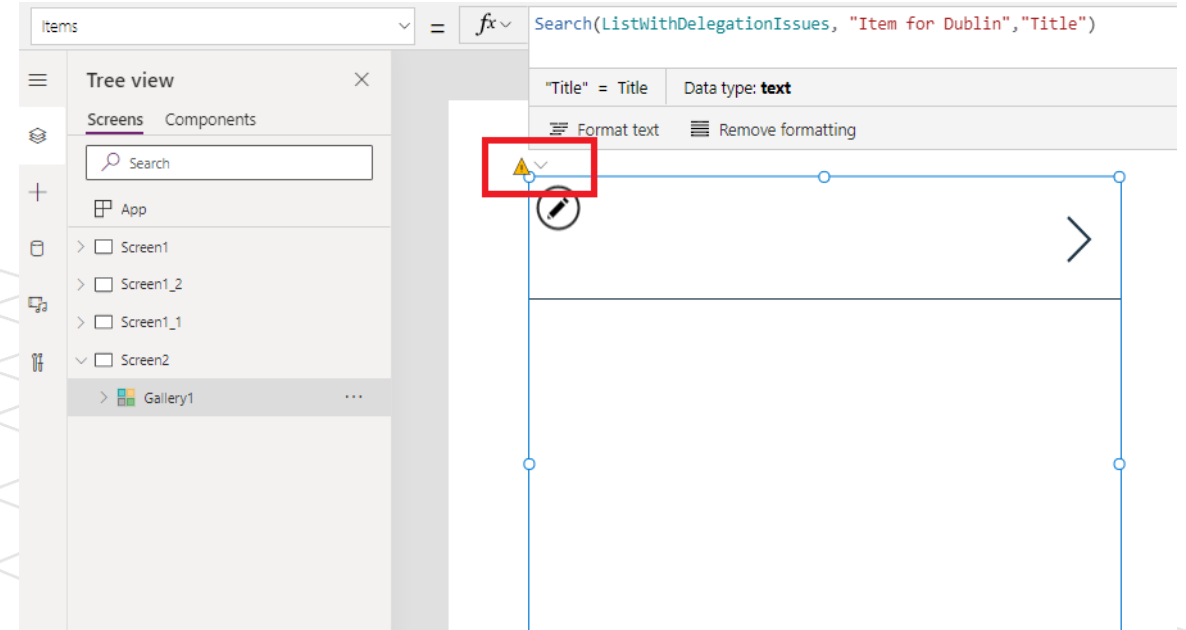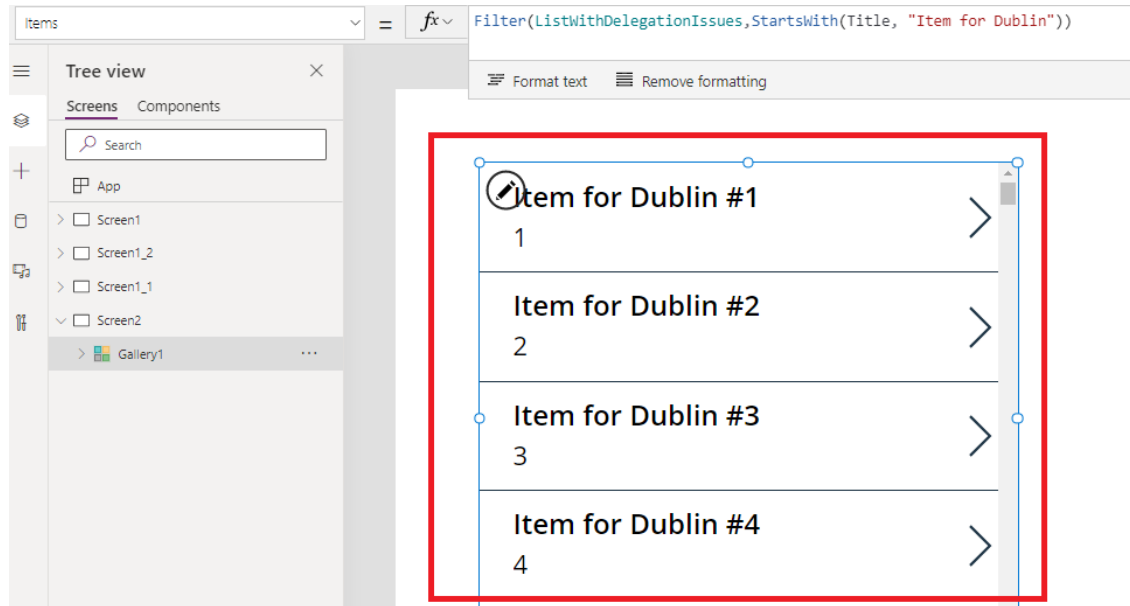
Recommended script to help**: https://github.com/Zerg00s/FlowPowerAppsMigrator**

Disadvantages / Tricky Bits

Delegation

Max of 2000 items can be returned per query in Power Apps

Filter data correctly to get right results

Disadvantages / Tricky Bits

Limitations/Unsupported

Content Types

Managed Metadata (20 item limit/No hierarchy)

Location (View only)

URL (Updates as text)

Image (unsupported)

General Recommendations

Avoid excessive use of variables

Understanding PowerFx and when using declarative logic is the key

Always think: is there a declarative way of doing this instead of imperative?

Reference control selection directly when possible (if both are on the **same screen**)

Location

Lisbon	⌄

OnChange `=` `fx ⌄` `Set(showNotes,Self.Selected.Value = "Lisbon")`

Notes

Visible `=` `fx ⌄` `showNotes`

Notes

Visible `=` `fx ⌄` `cboLocation.Selected.Value = "Lisbon"`

General Recommendations

When using Variables or Collections

Reset variables and Clear collections on the SharePoint integration events when needed

Be careful with context variables – Won't work as expected

Disable Quick Edit when using custom rules

Otherwise users can bypass rules from the form
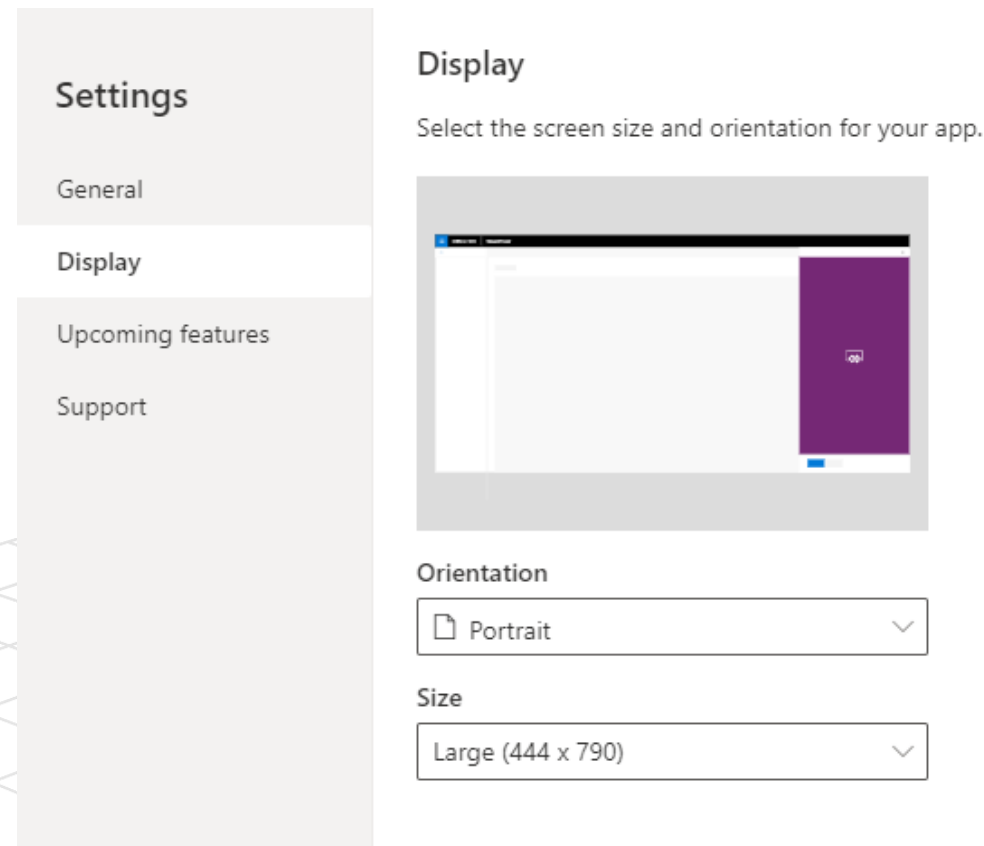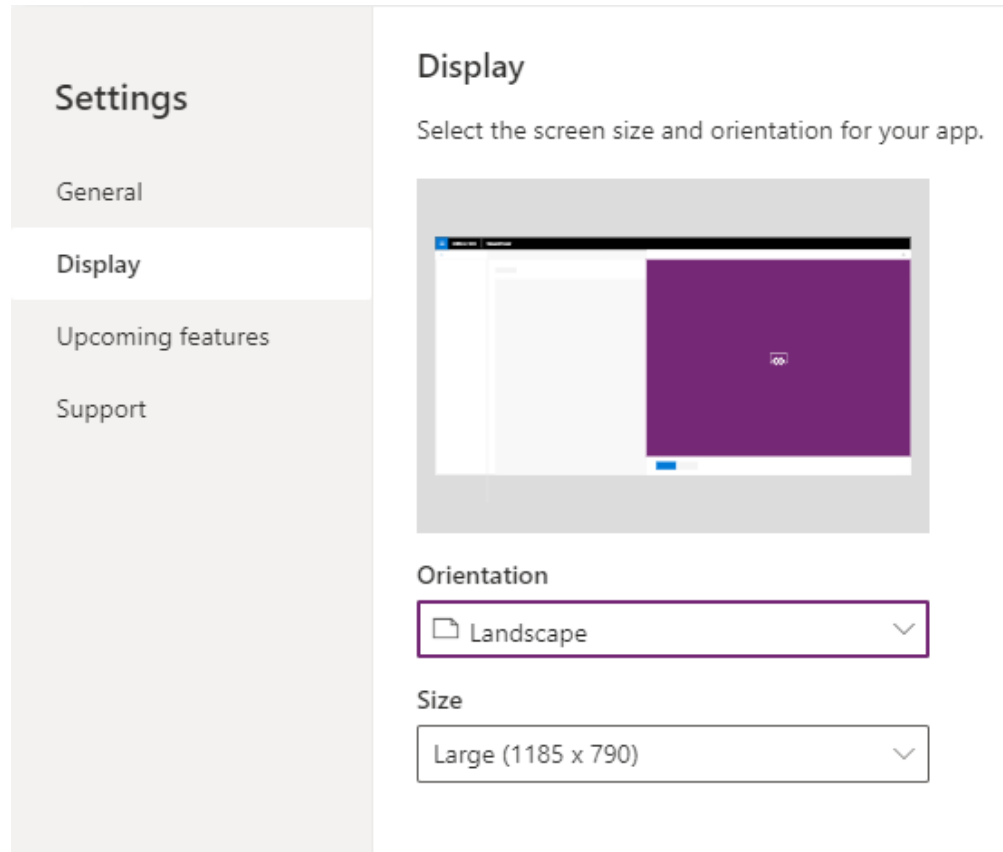
'With' Function

Useful to manipulate results as 'Temporary Variables' or self-contained formulas

```
With( { radius: 10,
        height: 15 },
    Pi() * (radius*radius) * height
)
// Result: 4712.38898038 (as shown in a label control)
```

General Recommendations

Landscape

Better layout for forms focused on Desktop only

Demo

Useful Resources

Script to convert exported packages and deploy to a different list/site:

- https://github.com/Zerg00s/FlowPowerAppsMigrator

Tokens and details to use with the IsMatch function:

- https://docs.microsoft.com/en-us/powerapps/maker/canvas-apps/functions/function-ismatch

With function explained:

- https://docs.microsoft.com/en-us/powerapps/maker/canvas-apps/functions/function-with

Integration with SharePoint explained:

- https://docs.microsoft.com/en-us/powerapps/maker/canvas-apps/sharepoint-form-integration

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