



# Move SharePoint Custom Forms

Governance white paper

**Summary:** The document is a technical white paper that provides best practices for governance and security of SharePoint custom forms with Power Apps & steps on how to migrate existing SharePoint custom forms to a dedicated Power Platform environment.

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## SharePoint Custom Forms

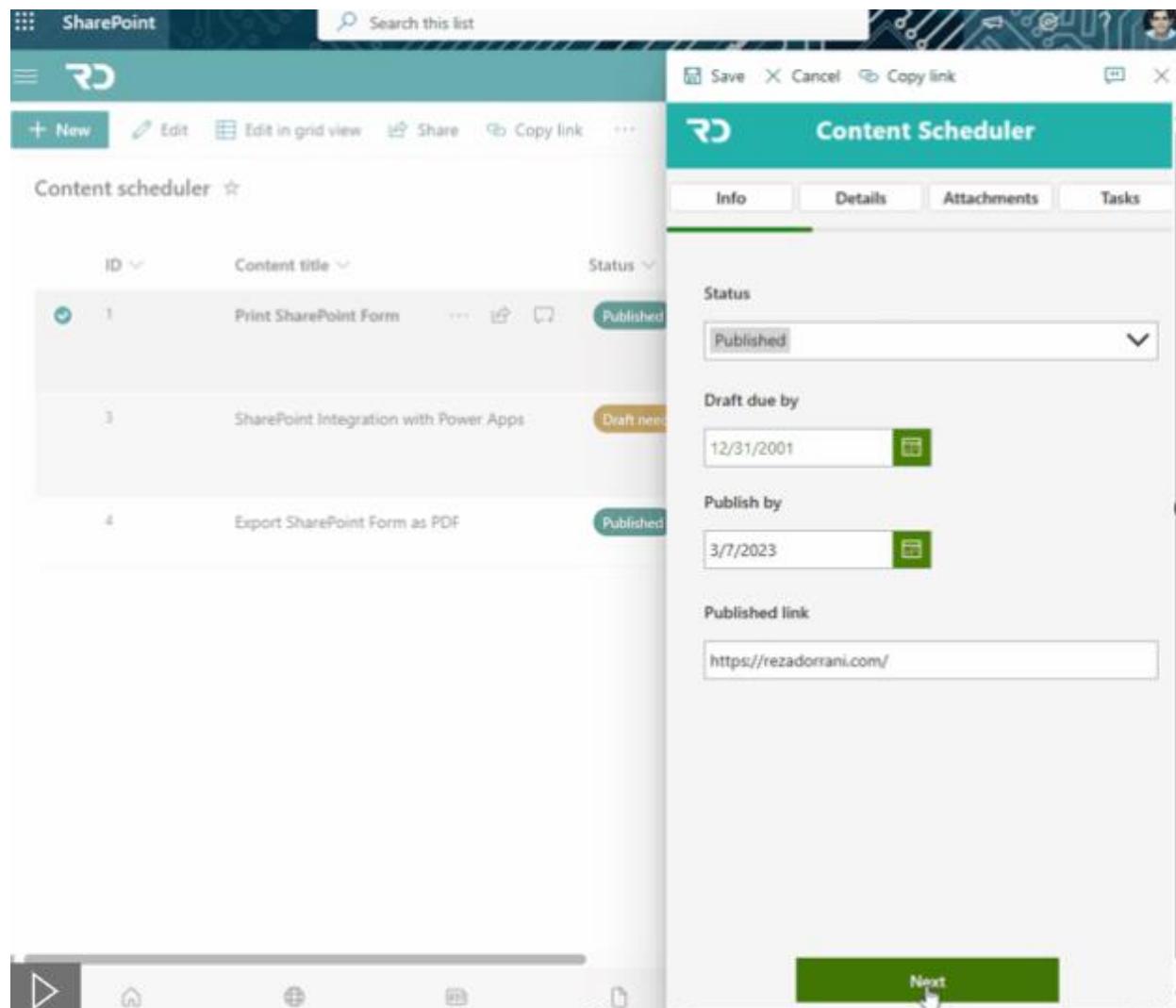
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# SharePoint Custom Forms with Power Apps

## Enhance SharePoint list or library form experiences with Power Apps

[Power Apps customizations](#) offer a “what you see is what you get” experience for forms customization. No need to write traditional code in C# or download another app (such as InfoPath) to provide users with a dynamic form experience as an alternative to the traditional SharePoint form experience. Power Apps makes it easy for anyone to start customizing user experiences!

[Customize a Microsoft Lists or SharePoint form by using Power Apps \(contains video\) - Power Apps | Microsoft Learn](#)



## License requirement for SharePoint custom forms

Many enterprise Office plans, such as M365 E1, E3, or E5, include standard Power Apps entitlements. As the custom form mainly uses [Standard connectors such as SharePoint](#), users with Office licenses that include Power Apps can access and run SharePoint Custom Forms with Power Apps.

If your SharePoint Custom Form uses [Premium connectors](#), each user running the Power Apps Form will require a Premium Power Apps license.

## License requirements for external users (guest users) for SharePoint Custom Forms

If SharePoint Custom Form uses Standard connectors, when you share your list/library with a guest user, they will be able to leverage customized SharePoint Custom Form with Power Apps without any additional [licensing](#) needs.

Screenshot dated 12/1/2023

### What license must be assigned to my guest so they can run an app shared with them?

The following table explains whether the guests can run (use) customized Microsoft Lists or SharePoint library forms, canvas apps, and model-driven apps using the referenced license.

[Expand table](#)

Plan	Customized Microsoft Lists or SharePoint library form (using non-premium connectors)	Customized Microsoft Lists or SharePoint library (using premium connectors)	Canvas app (using non-premium connectors)	Canvas app (using premium connectors)	Model-driven app
No license	✓	X	X	X	X
SharePoint user (without Power Apps license)	✓	X	X	X	X
Power Apps included with Office	✓	X	✓	X	X
Power Apps per app plan	✓	✓	✓	✓	✓
Power Apps per user plan	✓	✓	✓	✓	✓

For more information about pricing and the capabilities of various plans, go to [Microsoft Power Apps and Power Automate Licensing Guide](#).

# Environment + Security + DLP

## Who can create SharePoint custom forms?

ALL SharePoint Custom forms are stored in the tenant's [Default Power Platform Environment](#).

In the Default Power Platform Environment, *every user is enabled with the Environment Maker role*. This role grants “create” privileges for Power Apps and Power Automate flows to ALL Users in the environment.

Within SharePoint, a user with ‘Full Control’ or ‘Edit’ level permissions to a SharePoint List/Library will be allowed to create a SharePoint Custom Form with Power Apps.

The combination of a user with “Environment Maker” access in the Default Environment  ‘Edit’ or ‘Full Control’ access to the SharePoint List/Library, grants the user the access to build a SharePoint Custom Form with Power Apps.

## Data Loss Prevention (DLP) for SharePoint custom forms

Since Custom Forms live in the Default Environment, any DLP Policy applied to the Default environment will apply for Custom Forms as well.

No option to apply DLP policies specific to Custom Forms only.

## Best Practices for SharePoint Custom Forms

### Change the SharePoint custom form environment from Default to a different environment

You can designate any environment as a [dedicated SharePoint custom forms environment](#). This offers admins the flexibility to leverage security roles for the designated environment and assign access to specific users or ALL users to create & edit SharePoint custom forms.

There is a SharePoint custom forms security role (downloadable from [AppSource](#)) which grants users access to create SharePoint custom forms in the designated environment (principle of least privilege). Admins may choose to leverage this role or create a custom role to include the privileges within.

Also, admins can configure DLP policies specific to the designated environment, thereby enabling DLP policies for custom form scenarios.

*Designate an alternate SharePoint custom forms environment and install custom security role:*

1. Create a new environment with configurations as below:

**New environment** X

(i) This operation is subject to [capacity constraints](#)

**Name \***  
SharePoint Environment

**Group**  
Choose a group

**Region \***  
United States - Default

A local region can provide quicker data access

**Type (i) \***  
Production

**Purpose**  
Dedicated environment for storing custom SharePoint forms.

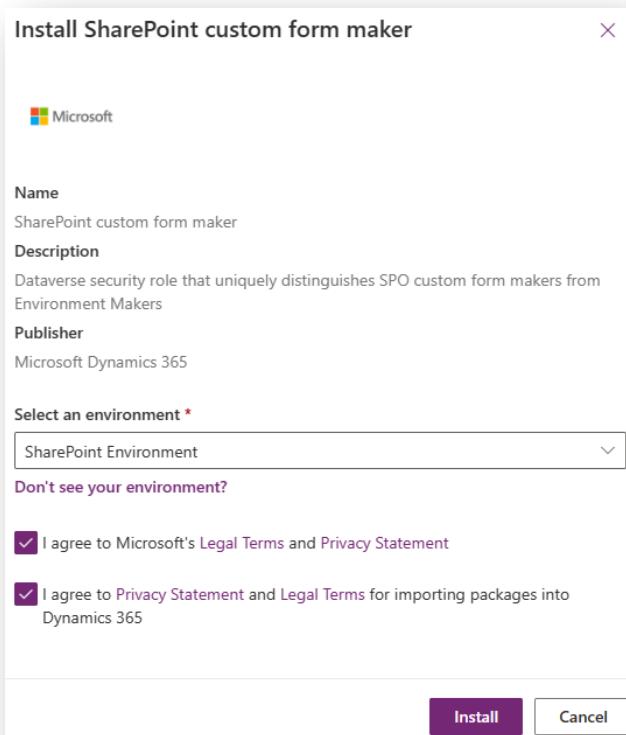
Add a Dataverse data store? (i)  
 Yes

Pay-as-you-go with Azure? (i)  
 No

Save Cancel

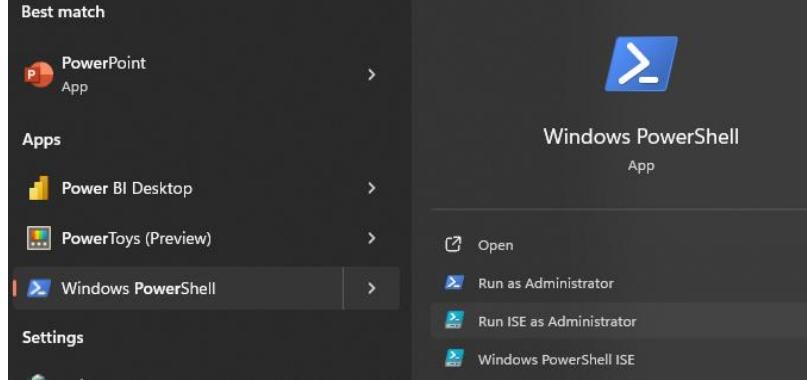
2. Next, add the **SharePoint custom form maker** security role to this environment. (You will assign this role to all users who will be allowed to create a custom form.)

- a. Go to <https://appsource.microsoft.com/en-US/product/dynamics-365/mscrm.sharepointcustomformmaker?tab=Overview>
- b. Select **Get it now**.
- c. Confirm your contact information.
- d. Select your **SharePoint environment** (that you made in step 1) from the dropdown menu.



- e. Review the legal and privacy disclosures.
- f. Select **Install**.

This process installs a solution into your environment with a custom security role with minimum privileges to be able to create a custom form.

3. To assign users the new security role:
  - a. Go to <https://admin.powerplatform.microsoft.com/environments>
  - b. Open the **SharePoint Environment Details** page.
  - c. In the Access section, select **See All** under Users.
  - d. Select the user you would like to assign “create” privileges for custom forms.
  - e. In the ribbon at the top of the screen, select **Manage security roles**.
  - f. Select the **SharePoint Custom Form maker** role and then select **Save**.
  
4. To designate SharePoint Environment as the default for custom forms, you will need to run a PowerShell command:
  - a. You will need Power Platform Admin privileges and Admin rights on your local machine to run the command.
  - b. If you have never run PowerShell commands from your machine before, you will need to install the Power Platform PowerShell modules to continue. If you have already installed the modules before, skip to step 4.e
  - c. Open PowerShell ISE as an Administrator.
  - d. Run these commands:
 

```
Set-ExecutionPolicy -ExecutionPolicy RemoteSigned -Force
Install-Module -Name Microsoft.PowerApps.Administration.PowerShell
Install-Module -Name Microsoft.PowerApps.PowerShell -AllowClobber
```
  
  - e. Once the PowerShell modules are installed, you’re ready to set the designated SharePoint environment by running these commands with the appropriate environment ID from the PPAC:
 

```
Set-AdminPowerAppSharepointFormEnvironment --EnvironmentName
'<EnvironmentGUID>'
```

After successfully completing the steps above, you will have designated the SharePoint environment so that all ***newly created*** custom forms will be stored in this environment.

 **Note:** Any *existing* SharePoint custom forms will remain in the default environment.

 **Note:** If the SharePoint environment is deleted, all the forms stored within it will be lost, and the SharePoint custom form experience will return to default SharePoint custom forms.

## Move Existing Custom Forms to a Designated Environment

Did you know that you can manually move existing custom forms to the new environment?

Existing SharePoint custom forms can be moved to designated SharePoint environment. The remainder of this section shows a manual process to move a SharePoint form out of the default environment.

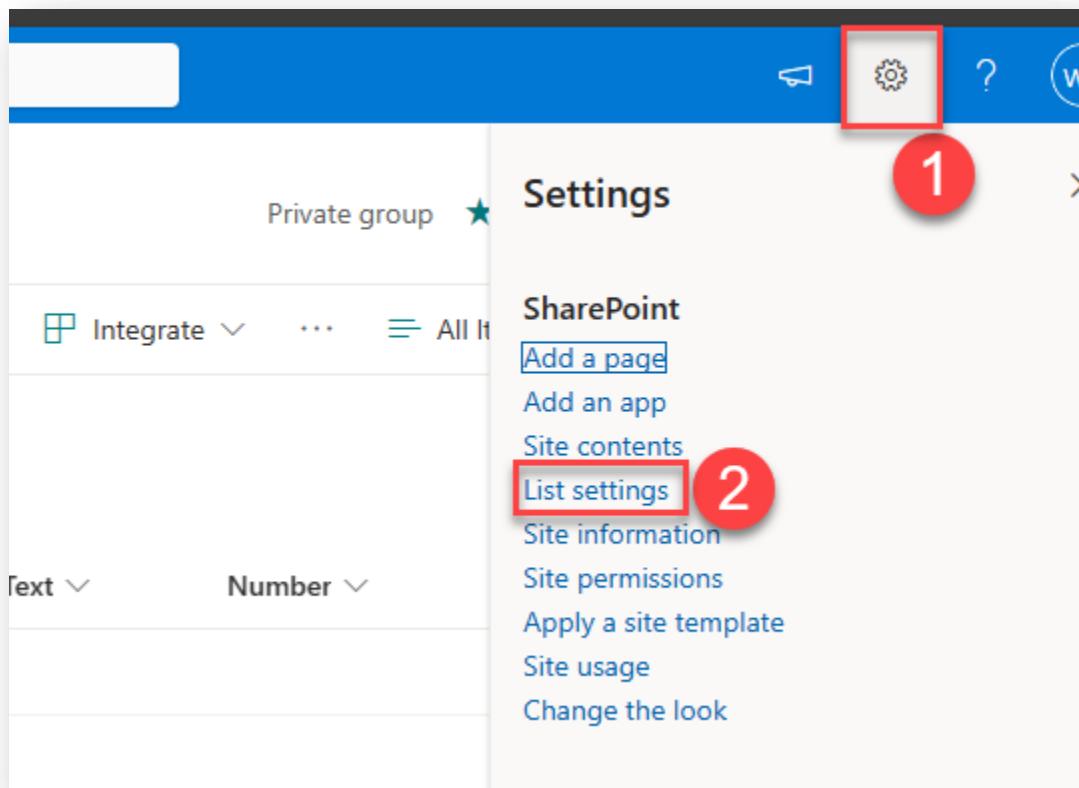


**Tip:** Use the CoE starter kit to identify list of all the SharePoint custom forms

**Note:** As the original form will be deleted from the default environment, when you follow the steps here, you will lose all previously stored versions of your SharePoint custom forms

*Steps outlining the process to move existing forms to a designated Sharepoint environment*

1. Go to your SharePoint list/library with the custom form, click the Settings icon on the top right-hand corner of your screen
2. Select **List Settings**



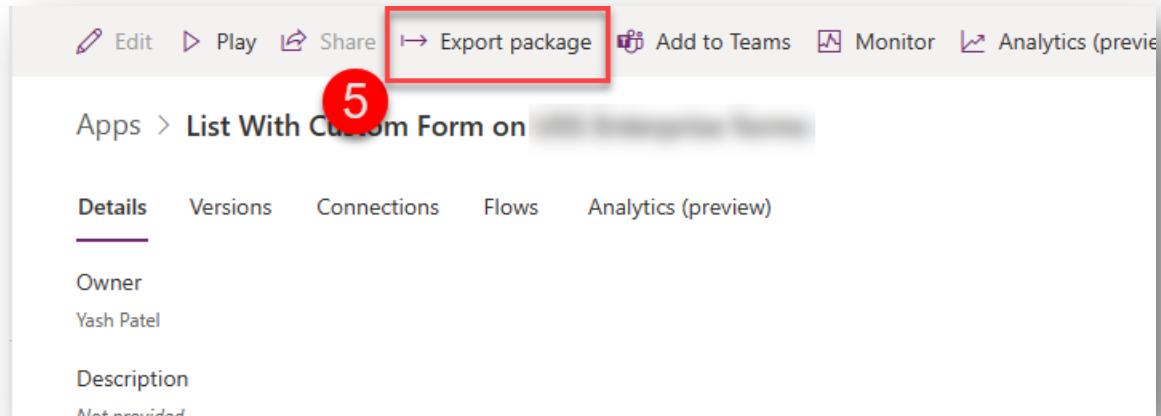
3. Under *General Settings*, select **Form Settings**

The screenshot shows the 'List With Custom Form' settings page. In the 'General Settings' section, there is a list of options: List name, description and navigation, Versioning settings, Advanced settings, Validation settings, Audience targeting settings, Rating settings, and Form settings. The 'Form settings' option is highlighted with a red box and a large red number '3'.

4. Click on **See versions and usage**

The screenshot shows the 'Form Settings' page. It includes a 'Form Options' section with a description of how PowerApps can be used to customize forms. Below this, there are three radio button options for selecting a form type: 'Use the default SharePoint form', 'Use a custom form created in PowerApps (requires new list experience)', and 'Use a custom form created in InfoPath'. The second option is selected, and the 'See versions and usage' link is highlighted with a red box and a large red number '4'.

5. On the Power Apps window, click on **Export Package** in the ribbon



6. In the *Name* field, give your export package a name of your choice.
7. Under the *Import Setup* options, select **Create as new**
8. Click on **Export**. A download window should appear. Save the file to your computer

The screenshot shows the 'Export package' dialog box. In the 'Package details' section, the 'Name' field is filled with 'SP Form Export' (marked with a red circle containing the number 6). The 'Environment' dropdown is set to 'Contoso (default)'. The 'Description' field is empty. In the 'Review Package Content' section, there is one item listed: 'List With Custom Form on [redacted]' with a resource type of 'App' and an 'Import Setup' of 'Create as new' (marked with a red circle containing the number 7). The 'ACTION' column for this item shows a download icon. In the 'Related resources' section, it says 'No items'. At the bottom right of the dialog box, there are 'Export' and 'Cancel' buttons, with the 'Export' button being purple and the 'Cancel' button being white.

**Optional:** If your custom form has Flows which support any functions, be sure to configure flow export as well

Export package

Package details  
Created by Will Riker on 01/31/2024

Name \* **6** SP Form Export

Environment Contoso (default)

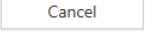
Description

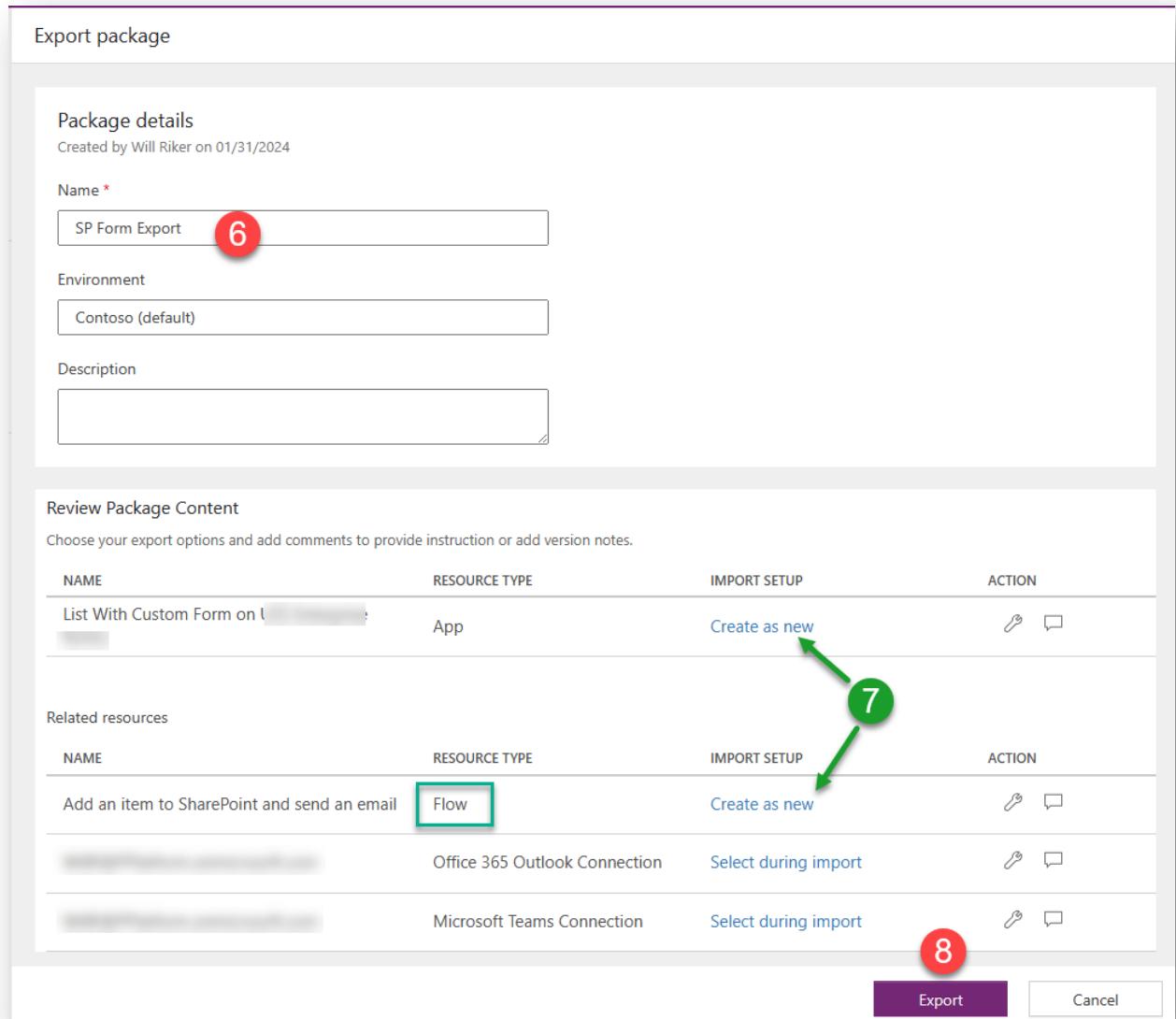
Review Package Content  
Choose your export options and add comments to provide instruction or add version notes.

NAME	RESOURCE TYPE	IMPORT SETUP	ACTION
List With Custom Form on t [REDACTED]	App	Create as new	 

Related resources

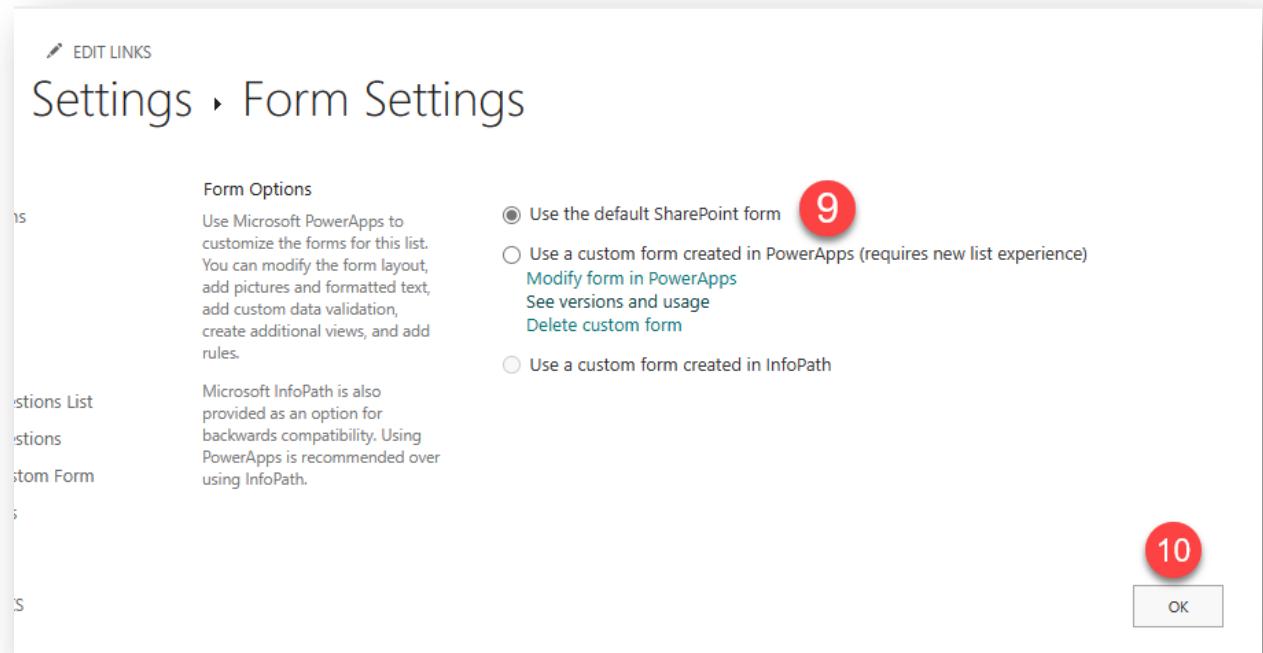
NAME	RESOURCE TYPE	IMPORT SETUP	ACTION
Add an item to SharePoint and send an email	Flow <b>7</b>	Create as new	 
[REDACTED]	Office 365 Outlook Connection	Select during import	 
[REDACTED]	Microsoft Teams Connection	Select during import	 

**8**  



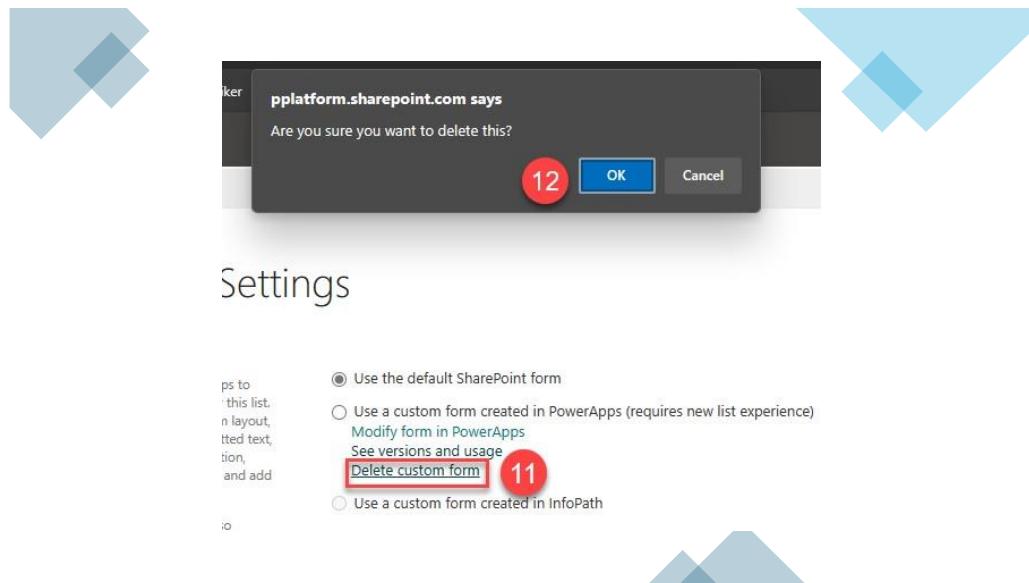
9. Return to the Form Settings tab in your browser. Select **Use the Default SharePoint form**

10. Click **OK**



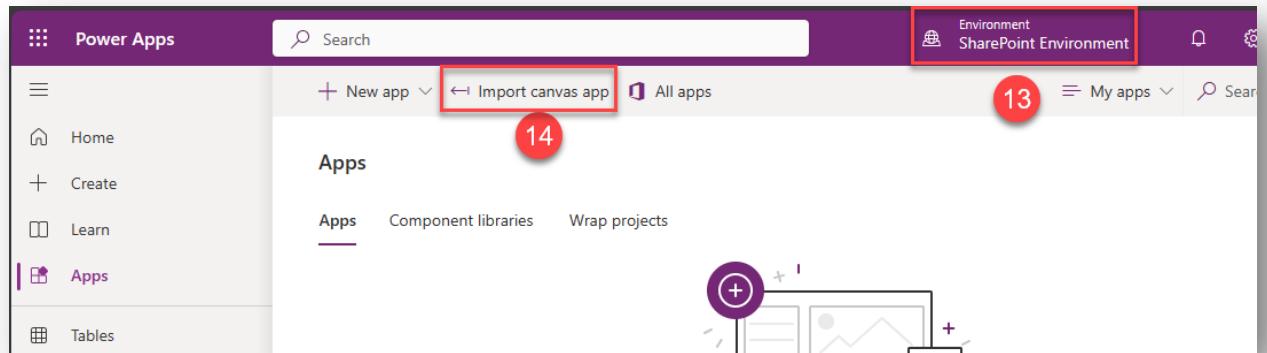
11. Under *General Settings*, select **Form Settings** > select **Delete custom form**

12. Click **OK** in the popup

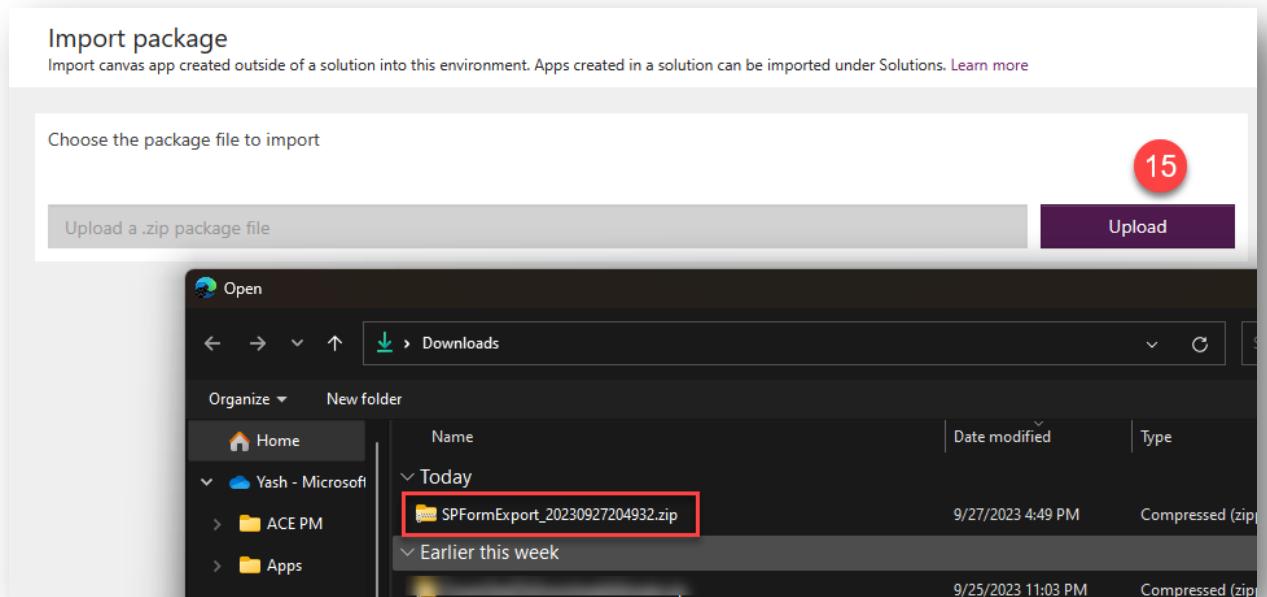


13. Open another tab and navigate to <https://make.powerapps.com/> and select the environment where you intend to migrate your SharePoint form from the environment dropdown list on the top right

14. Under the **Apps** tab on the left, select **Import canvas app**



15. Click **Upload** and select the .zip package you saved in step 8



16. Once upload completes successfully, click on **Import**

The screenshot shows the 'Import package' screen in the Power Apps environment. The left sidebar has 'Apps' selected. The main area displays 'Package details' for a package named 'SP Form Export' created on 09/27/2023. Under 'Review Package Content', there is one item listed: 'List With Custom Form on [redacted]' which is an 'App' resource type set to 'Create as new'. Below this, under 'Related resources', it says 'No items'. A success message at the bottom states 'Your package was uploaded successfully.' A red circle with the number '16' is positioned above the 'Import' button, which is highlighted with a red border.

Import package

Import canvas app created outside of a solution into this environment. Apps created in a solution can be imported under Solutions. Learn more

Package details

Created by [redacted] on 09/27/2023

Name: SP Form Export

Environment: Contoso (default)

Description: N/A

Review Package Content

Choose your import options.

NAME	RESOURCE TYPE	IMPORT SETUP	ACTION
[redacted]	List With Custom Form on [redacted]	App	Create as new

Related resources

NAME	RESOURCE TYPE	IMPORT SETUP	ACTION
No items			

16

Your package was uploaded successfully.

Import Cancel

**Optional:** Follow steps below when importing Power Automate flows along with the custom form

1. Select proper connections for each connector to be used in the flow

Import package

Import canvas app created outside of a solution into this environment. Apps created in a solution can be imported under Solutions. Learn more

Package details

Created by [REDACTED]

Name  
SP Form Export

Environment  
Contoso (default)

Description  
N/A

Review Package Content

Choose your import options.

NAME	RESOURCE TYPE	IMPORT SETUP	ACTION
<input checked="" type="checkbox"/> List With Custom Form on [REDACTED]	App	Create as new	

Related resources

NAME	RESOURCE TYPE	IMPORT SETUP	ACTION
<input checked="" type="checkbox"/> Add an item to SharePoint and send an email	Flow	Create as new	
<input checked="" type="checkbox"/> [REDACTED]	Office 365 Outlook Connection	Select during import	
<input checked="" type="checkbox"/> [REDACTED]	Microsoft Teams Connection	Select during import	

16

Import Cancel

2. After import completes successfully, open the Power Automate portal

(<https://make.powerautomate.com/>) in a new tab on your browser

3. Ensure you are in the designated Sharepoint Environment

Search

Environments SharePoint Environment

New flow Import

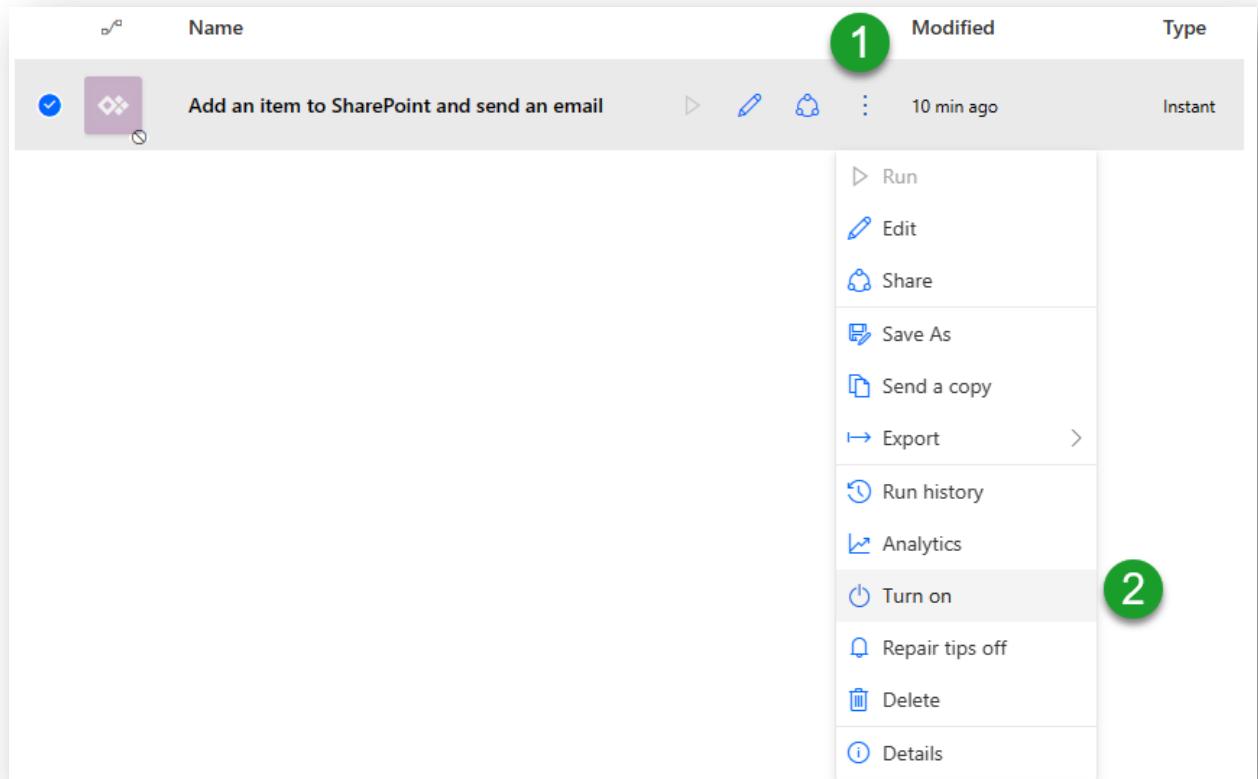
Cloud flows Desktop flows Shared with me

Flows

#	Name	Modified	Type
	Add an item to SharePoint and send an email	10 min ago	Instant

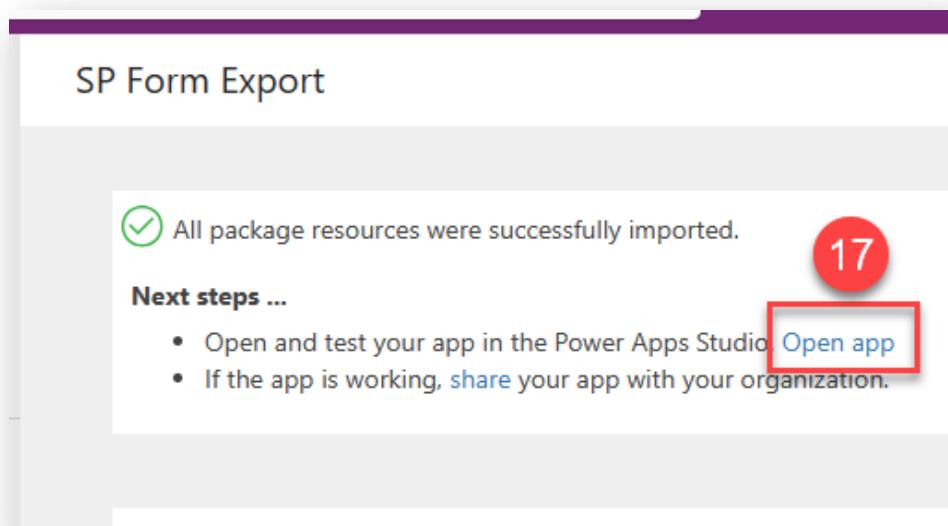
Install

4. Click on the **More Commands** selector to open flow options. Select **Turn On**

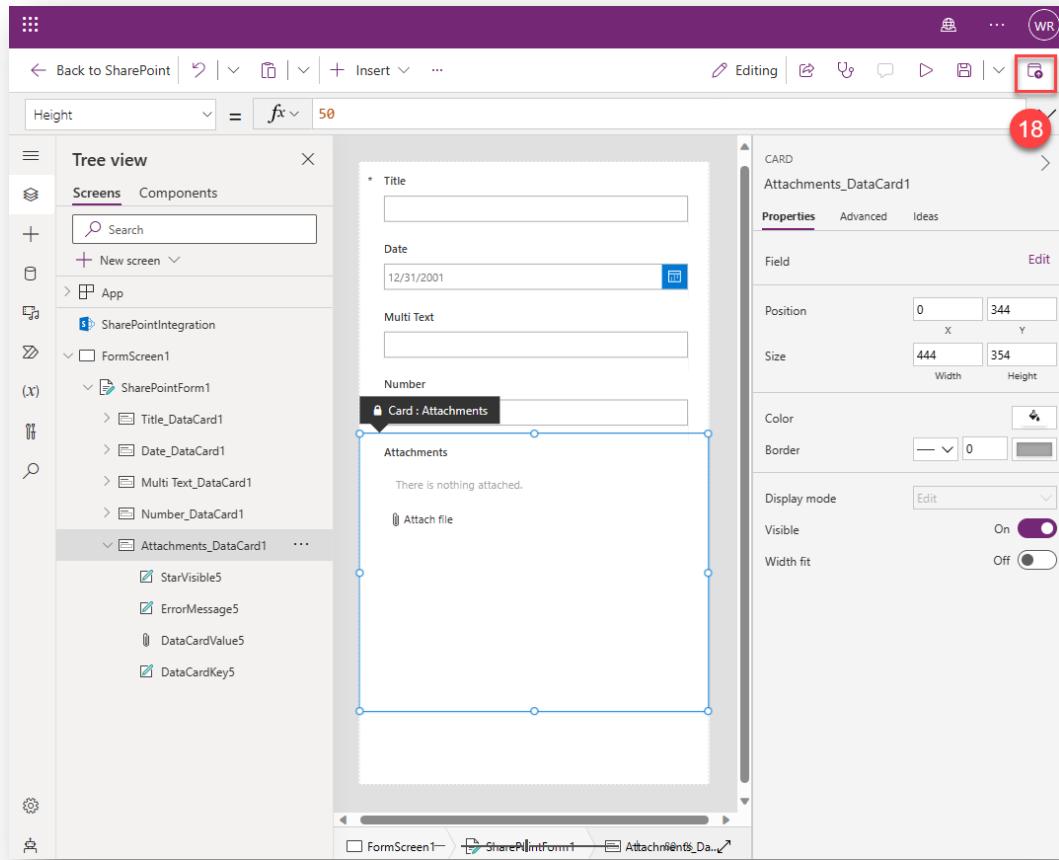


5. Now we're ready to publish the custom form in the Power Apps portal. Please continue with step 17 below.

17. After the package successfully imports, select **Open app** under the *Next steps* bullet points

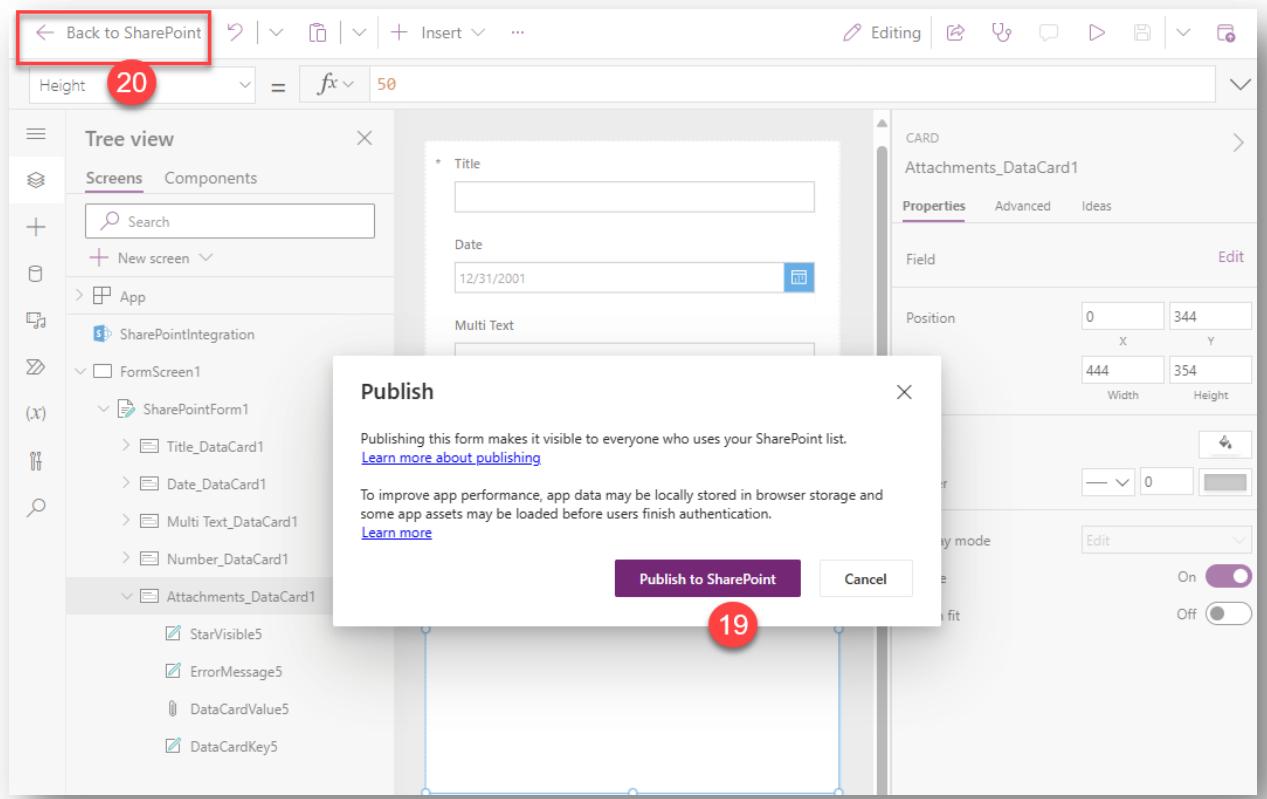


18. Click on the **Publish** button in the top right corner of the screen



19. In the popup, click **Publish to SharePoint**

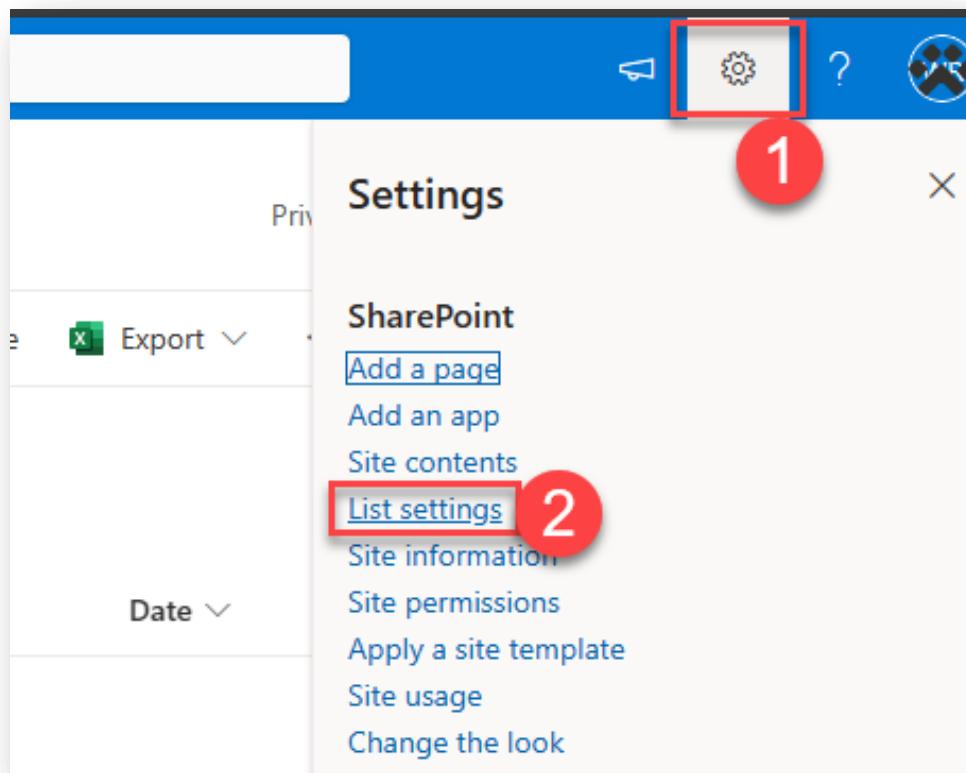
20. Click **Back to SharePoint** in the top left



After the Form is published, the form experience for your list will be updated to the custom form.

*Verify your SharePoint custom form was successfully moved to the designated environment*

1. Click the Settings icon on the top right-hand corner of your screen
2. Select **List Settings**



3. Under *General Settings*, select **Form Settings**

The screenshot shows the 'List With Custom Form' settings page. On the left, there's a vertical navigation bar with links like 'Questions List', 'Questions', 'Custom Form', 'Audience targeting settings', 'Rating settings', and 'Form settings'. A red circle with the number '3' highlights the 'Form settings' link. To the right, under 'List Information', it shows the list name ('List With Custom Form'), web address ('https://ppplatform.sharepoint.com/sites/US...'), and description (''). Below this, there are two main sections: 'General Settings' and 'Permissions'. Under 'General Settings', there's a list of options: 'List name, description and navigation', 'Versioning settings', 'Advanced settings', 'Validation settings', 'Audience targeting settings', 'Rating settings', and 'Form settings'. The 'Form settings' link is highlighted with a red box and the number '3'.

EDIT LINKS

## List With Custom Form ▸ Settings

List Information

**Name:** List With Custom Form  
**Web Address:** https://ppplatform.sharepoint.com/sites/US...  
**Description:**

General Settings      Permissions

Questions List      List name, description and navigation      Delete this item

Questions      Versioning settings      Permissions

Custom Form      Advanced settings      Workflow Settings

Audience targeting settings      Enterprise M...

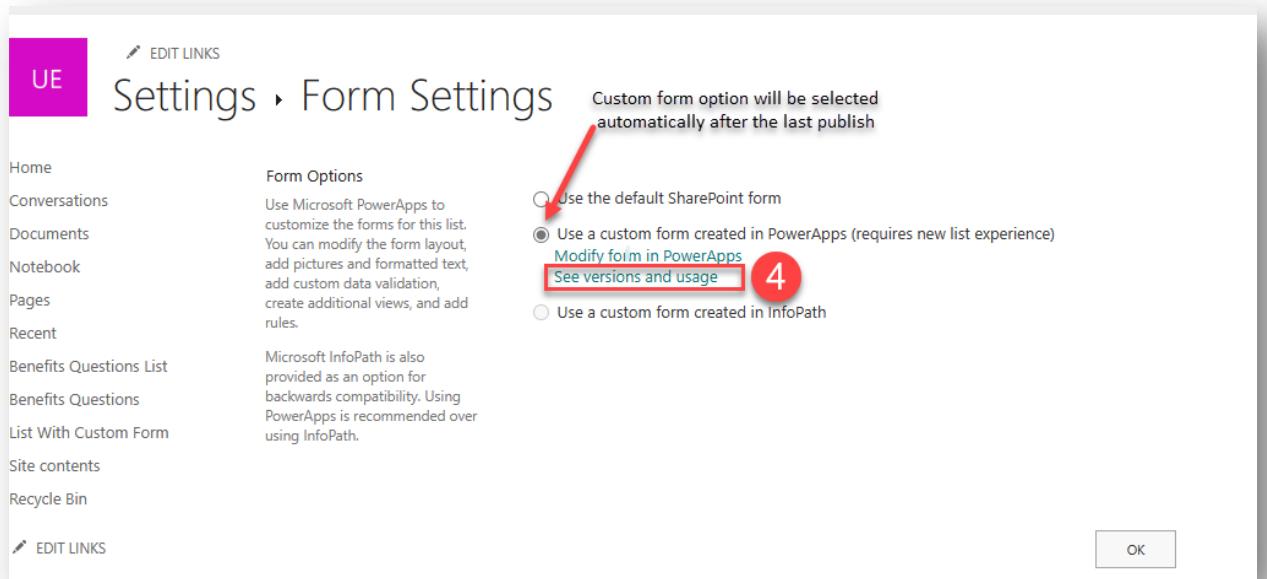
Rating settings

**Form settings** 3

LINKS

Columns

4. Click on **See versions and usage**



5. Verify in environment list dropdown that your designated SharePoint environment is selected

