



Microsoft Dataverse:

Everything, Everywhere, Here and There

Charles Lakes II



About Me:



Software
Engineer.



Community
Speaker.



M365
Blogger.



Middle-child.

Agenda:



Information
workers.



Power
users.



Developers.



Admins.

Dataverse:

“. . . formerly known as Microsoft Common Data Service . . . , is a **relational database engine** offered . . . as a cloud-based data management software as a service for storing business data. . . It decouples the data from the application, allowing an administrator to analyze . . . and report on data previously existing in different locations. It is based on **Common Data Model** principles, enhanced with rich security features, business logic, and productivity tools.”

- Wikipedia

- Home
- Create
- Learn
- Apps
- AI hub

Tables



Get started with Copilot

AI will generate tables and relationships based on your prompt.



Start with a blank table



Create with Excel or .CSV file



Create with SharePoint list

PREVIEW

★ Recommended

Custom

All

Table ↑ ↓	Name ↓	Type ↓	Managed ↓	Customized ↓	Customizable ↓	Tags ↓
Account	account	Standard	Yes	No	Yes	Core
Address	customeraddress	Standard	Yes	No	Yes	Standard
Appointment	appointment	Activity	Yes	No	Yes	Productivity
Attachment	activitymimeatta...	Standard	Yes	No	Yes	Productivity
Business Unit	businessunit	Standard	Yes	No	Yes	Standard
Contact	contact	Standard	Yes	No	Yes	Core
Currency	transactioncurre...	Standard	Yes	No	Yes	Standard
Email	email	Activity	Yes	No	Yes	Productivity
Email Template	template	Standard	Yes	No	Yes	Standard
Fax	fax	Activity	Yes	No	Yes	Productivity
Feedback	feedback	Standard	Yes	No	Yes	KB
Letter	letter	Activity	Yes	No	Yes	Productivity

Tables

- + Create
 - Learn
 - Apps
 - AI hub
-
- Tables
 - Custom
 - All
-
- Solutions
 - More

Get started with Copilot



AI will generate tables and relationships based on your prompt.

★ Recommended

Custom

All



Table ↑ ▾

Account



File

Database

Microsoft Fabric

Power Platform

Azure

Online services

... Other

 Excel workbook
File Text/CSV
File XML
File JSON
File Folder
File PDF
File Parquet
File SharePoint folder
File SQL Server database
Database Access
Database SQL Server Analysis Services
Database Oracle database
Database IBM Db2 database
Database MySQL database
Database PostgreSQL database
Database Teradata database
Database SAP HANA database
Database SAP BW Application Server
Database SAP BW Message Server
Database Snowflake
Database Google BigQuery
Database Amazon Redshift
Database Impala
Database Dataflows
Microsoft Fabric KQL Database
Microsoft Fabric Dataverse
Power Platform Dataflows
Power Platform Azure SQL database
Azure Azure Synapse Analytics (SQL DW)
Azure Azure Analysis Services
Azure Azure Blobs
Azure Azure Tables
Azure Azure Data Explorer (Kusto)
Azure Azure Data Lake Storage Gen2
Azure Azure HDInsight Spark
Azure SharePoint Online list
Online services Microsoft Exchange Online
Online services Salesforce objects
Online services Salesforce reports
Online services Google Analytics
Online services



Admins

- Environments
- Auditing
- Security Roles
- Geo Regions
- Data Loss Prevention
- Center of Excellence

Admins

- Sandbox
- Trial (subscription-based)
- Developer
- Production
- Trial
- Sandbox

- Environments
 -  Auditing
 - Security Roles
 - Geo Regions
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 - Center of Excellence

Admins

Auditing

Manage logging for Dataverse data

Start Auditing

Log access 

Read logs 

Retain these logs for

Set the retention policy for these logs, after which they'll be deleted.

Forever

- Environments
- Auditing
-  Security Roles
- Geo Regions
- Data Loss Prevention
- Center of Excellence

Admins

Role ↑		Business unit	Managed
AIB Roles	...	orgda13f916	Yes
AIB SML Roles	...	orgda13f916	Yes
App Deployment Orchestration Role	...	orgda13f916	Yes
App Opener	...	orgda13f916	Yes
Async ingestion	...	orgda13f916	Yes
Basic User	...	orgda13f916	Yes
BizQAAppl	...	orgda13f916	Yes
Bot Author	...	orgda13f916	Yes
Bot Contributor	...	orgda13f916	Yes
Bot Transcript Viewer	...	orgda13f916	Yes
Bulk Archival Role	...	orgda13f916	Yes
BusinessApplicationPlatformRole	...	orgda13f916	Yes

- Environments
- Auditing
- Security Roles
-  Geo Regions
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Admins



- Environments
- Auditing
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Admins

Business (999) | Default

Non-business (293)

Blocked (0)

Connectors for sensitive data. Connectors in this group can't share data with connectors in other groups. New connectors will show up here by default.



Name ▾

Blockable ▾



Excel Online (Business)

No



SharePoint

No



Office 365

- Environments
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Admins

Tenant Overview

OVERVIEW ENVIRONMENTS APPS FLOWS CUSTOM CONNECTORS MAKERS

57 Total Environments	8 Environment Created This Month	10 Total Environment Makers	25 Total Custom Connectors
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Top 20 Environments by App Count

Environment	Apps	Flows
Contoso (Development) (contosodev)	114	53
PowerApps CAT Demos (orgcebea810)	39	35
Contoso CoE (contosoCoE)	34	103
Playground	29	3
Test Environment (orgc7b9acef)	25	17
Lee Gu's Environment (orgd7554cf0)	22	7
COE - TEST (coetest)	20	1
CoE Doc Testing Jen (org4f519d40)	18	25
CoE Toolkit Install (org4e419c4d0)	18	18

Power Apps

Top App Maker

App Maker	Apps
Megan Bowen	198
Lee Gu	68
Adele Vance	50
Emily Braun	45
Debra Berger	45
SYSTEM	16
Alex Wilber	7

- Environments
- Auditing
- Security Roles
- Geo Regions
- Data Loss Prevention
- Center of Excellence



Developers

- Data Models
- Business Rules
- Custom Code
- Application Lifecycle Management

Developers

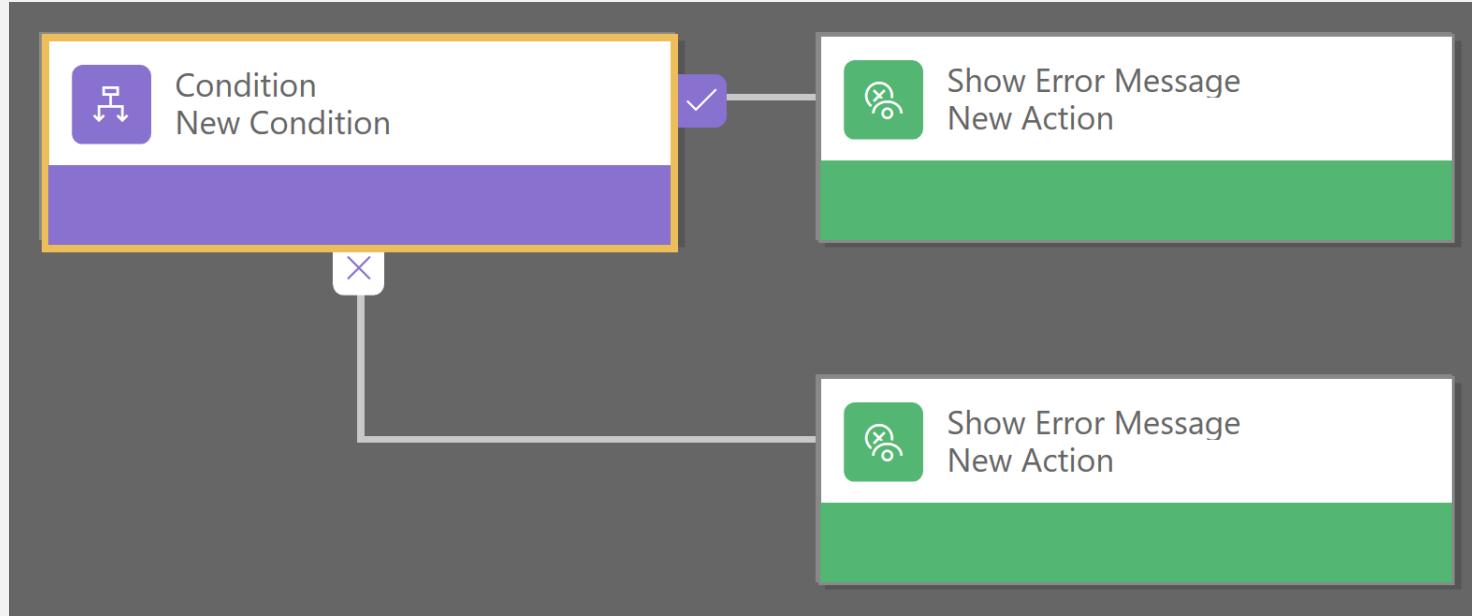
Data model

A collection of related [tables](#). In the context of model-driven apps, these are held within the [Dataverse](#) database.

In a custom [solution](#), the data model is often the set of related tables built with the purpose of delivering the overall business application.

- Data Models
- Business Rules
- Custom Code
- Application Lifecycle Management

Developers



- Data Models
- Business Rules
- Custom Code
- Application Lifecycle Management

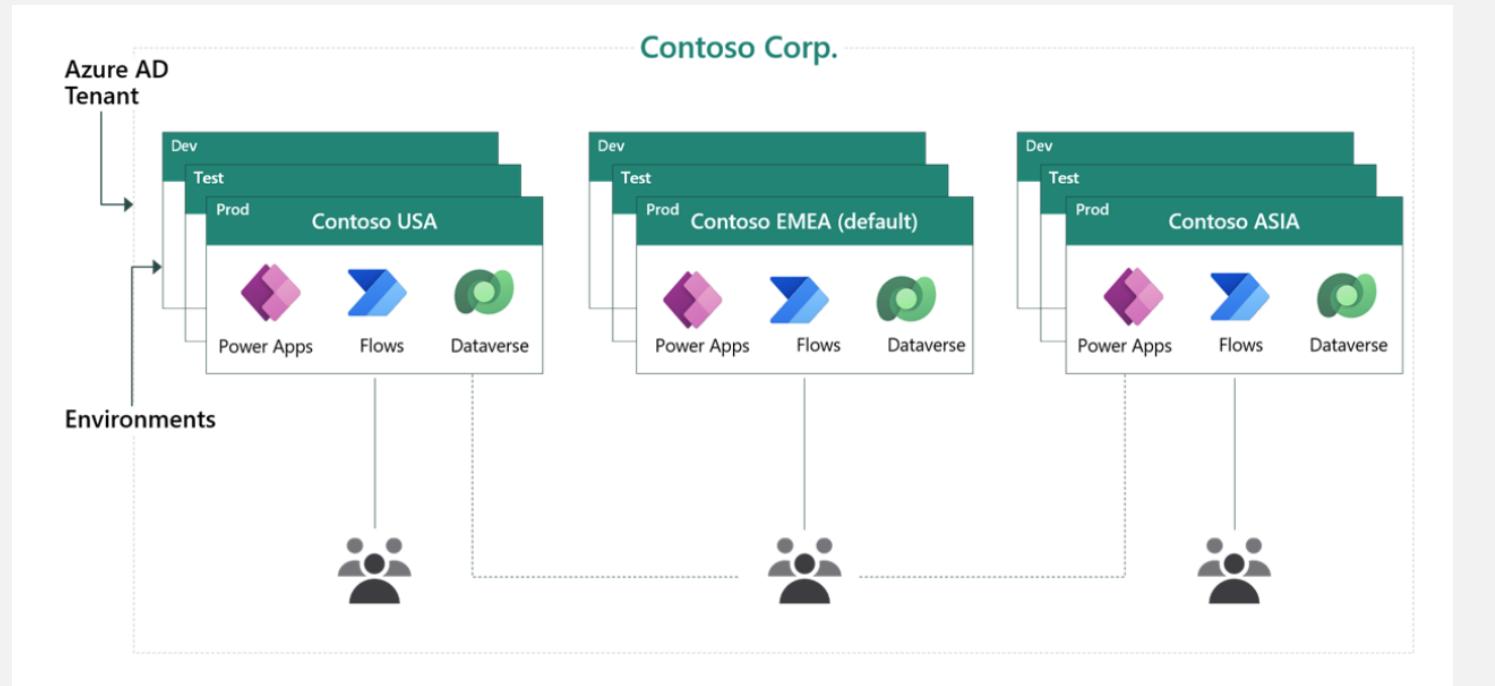
Developers

What is XrmToolBox?

XrmToolBox is a Windows application that connects to Microsoft Dataverse. Dynamics 365 Customer Engagement (CE) applications, like Dynamics 365 for Sales, Service or Talent also use Microsoft Dataverse as their foundational data service. XrmToolBox, provides tools to ease customization, configuration and operation tasks for anything built on Microsoft Dataverse, including Dynamics 365 CE (formerly CRM) and model-driven PowerApps. It is shipped with more than 30 tools to make administration, customization or configuration tasks easier and less time consuming. And more than 100 other tools are available in the Tool Library.

- Data Models
 - Business Rules
 - Custom Code
- 
- Application Lifecycle Management**

Developers

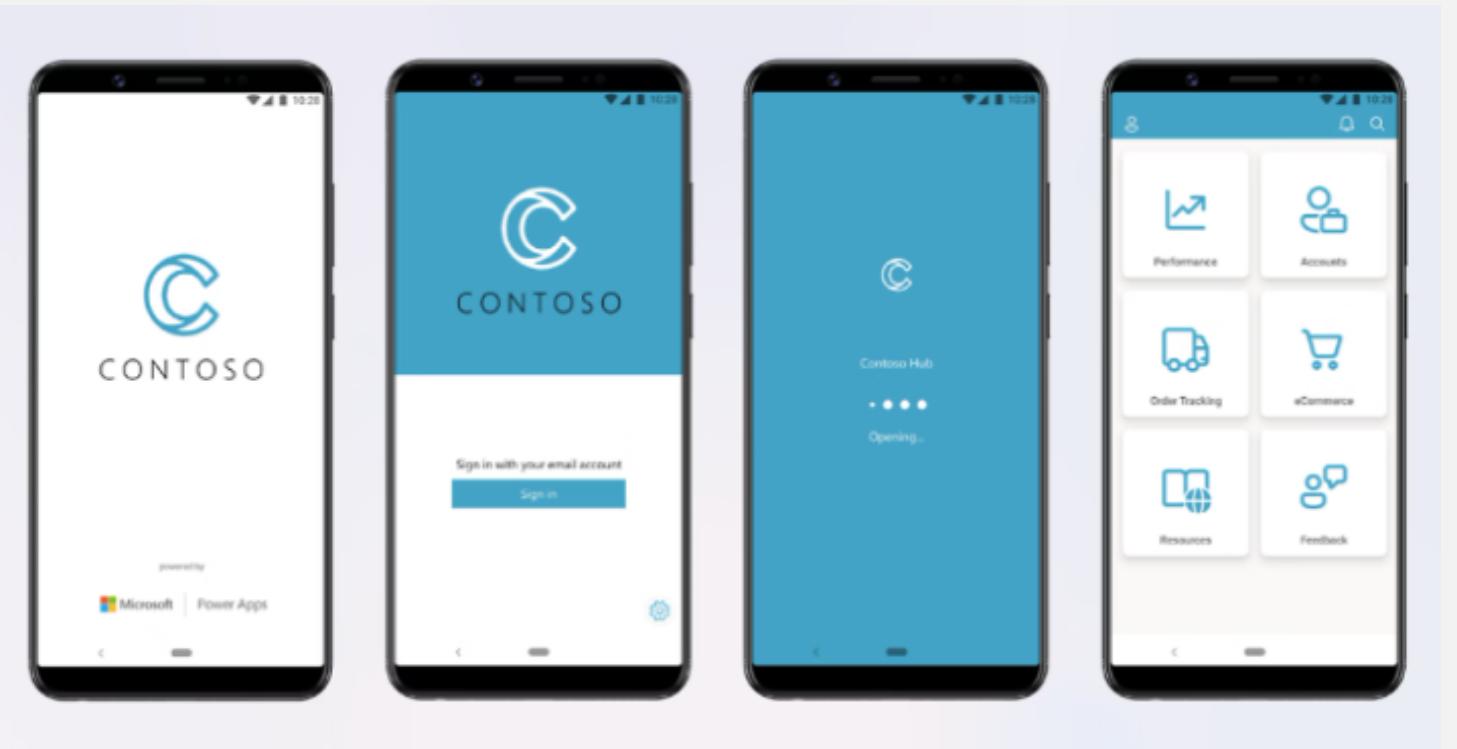


- Data Models
 - Business Rules
 - Custom Code
 - Application Lifecycle Management
- 

Power Users

- Power Apps
- Power Automate
- Power BI
- Power Pages
- Copilot Studio

Power Users



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Power Users

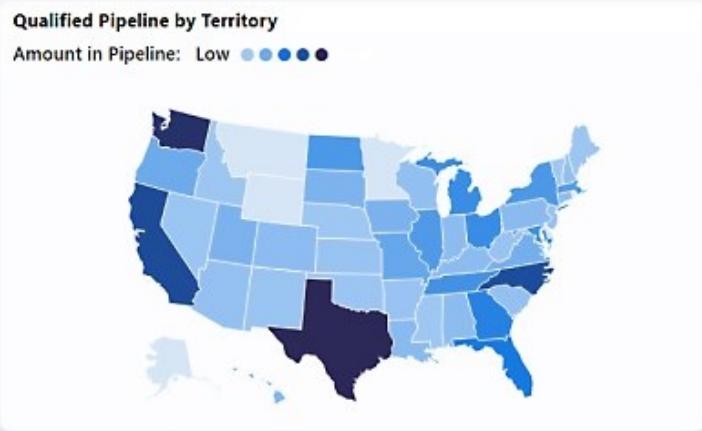
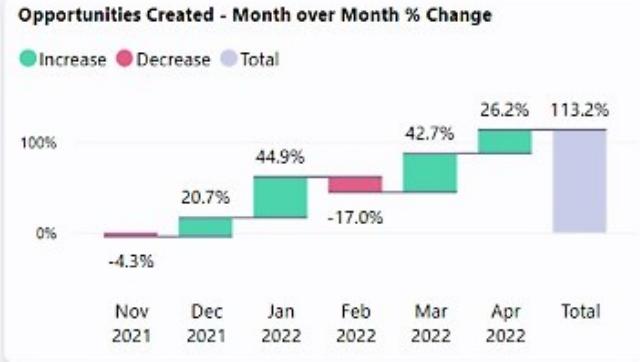
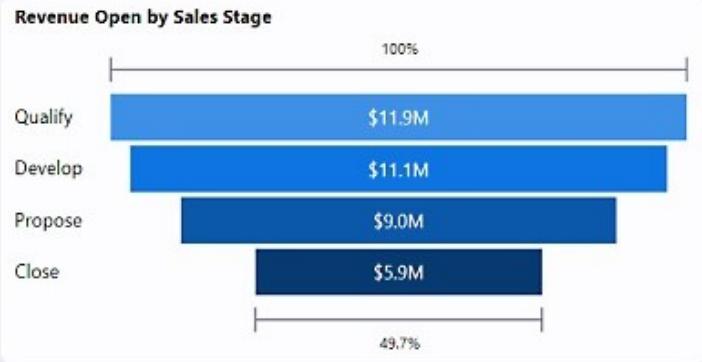
Actions

⋮⋮ Expand table

Add a new row	This action allows you to add a new row in the selected Microsoft Dataverse table. This connector was formerly known as Common Data Service (current environment).
Add a new row to selected environment	Create a new row in a table in a Power Platform environment.
Delete a row	This action allows you to delete a row from a Microsoft Dataverse table. This connector was formerly known as Common Data Service (current environment).

- Power Apps
- Power Automate
-  Power BI
- Power Pages
- Copilot Studio

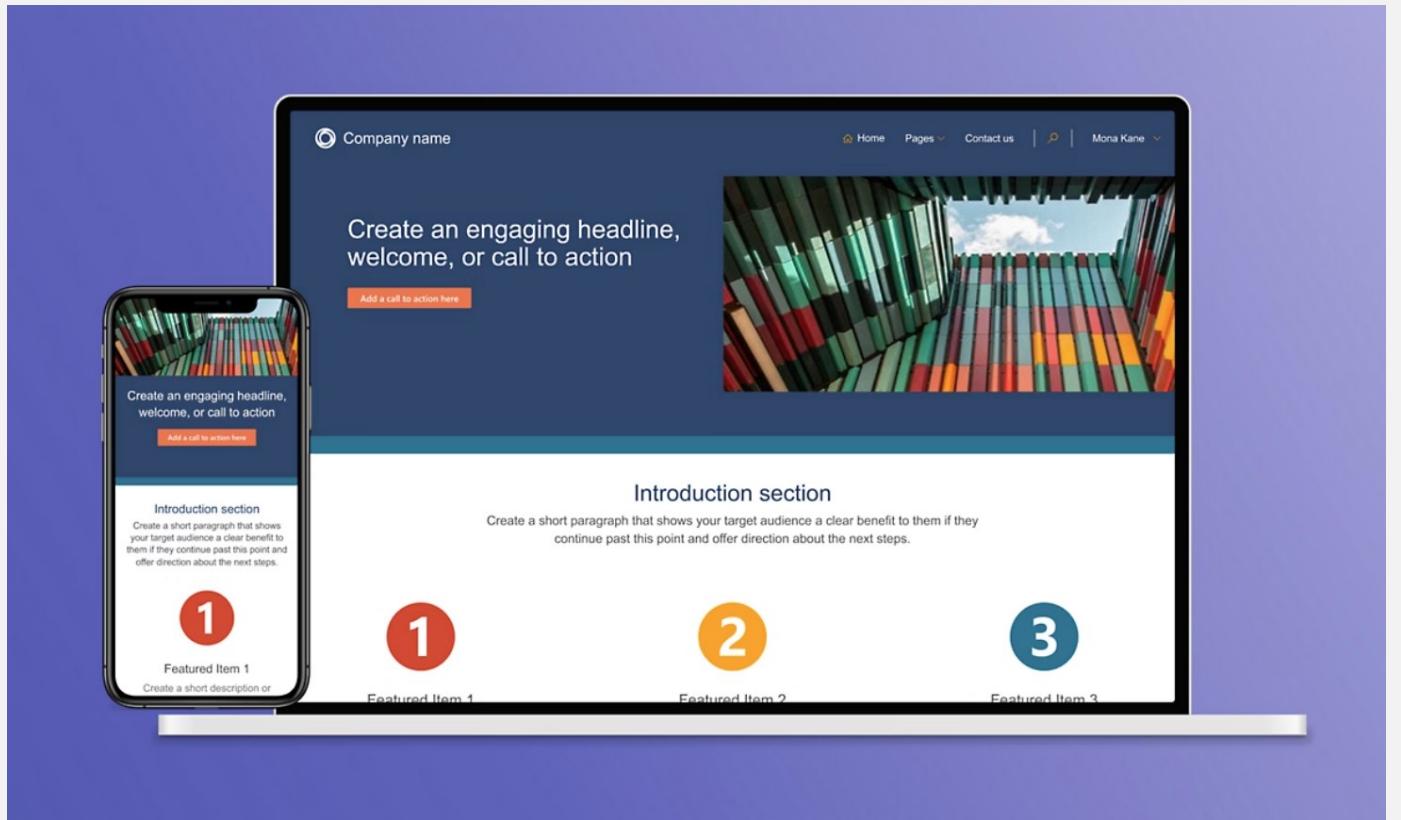
Power Users

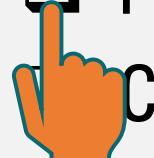


Territory	Revenue Won	Qualified Pipeline
US-SOUTH	\$12,822,337.0	\$10,577,028.0
US-WEST	\$7,675,049.0	\$7,650,227.0
US-MIDWEST	\$6,294,878.0	\$5,568,972.0
US-NORTHE...	\$2,669,153.0	\$2,116,380.0
Total	\$29,461,417.0	\$25,912,607.0

- Power Apps
- Power Automate
- Power BI
-  Power Pages
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Power Users



- Power Apps
- Power Automate
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Power Users

The screenshot shows the Microsoft Copilot Studio interface. At the top, there's a navigation bar with a user profile icon, back, forward, and search/copy/paste buttons, followed by the URL <https://www.copilotstudio.microsoft.com>. Below the navigation is a sidebar with icons for Home, Create, Copilots, Library, and three dots. The main content area has a title "Describe your agent to create it" with tabs for Helpdesk, Expense tracking, and Human Resources. A text input field says "Use everyday words to describe what your agent should do ...". A note below it states "This AI-powered feature is in preview. See terms". Below this, there's a section titled "Start with a template" with a note "This AI-powered feature is in preview. See terms". It lists four templates: "Weather" (blue hexagon icon), "Website Q&A" (orange hexagon icon), "Store Operations" (pink hexagon icon), and "Organization Navigator" (purple hexagon icon). Each template has a brief description.

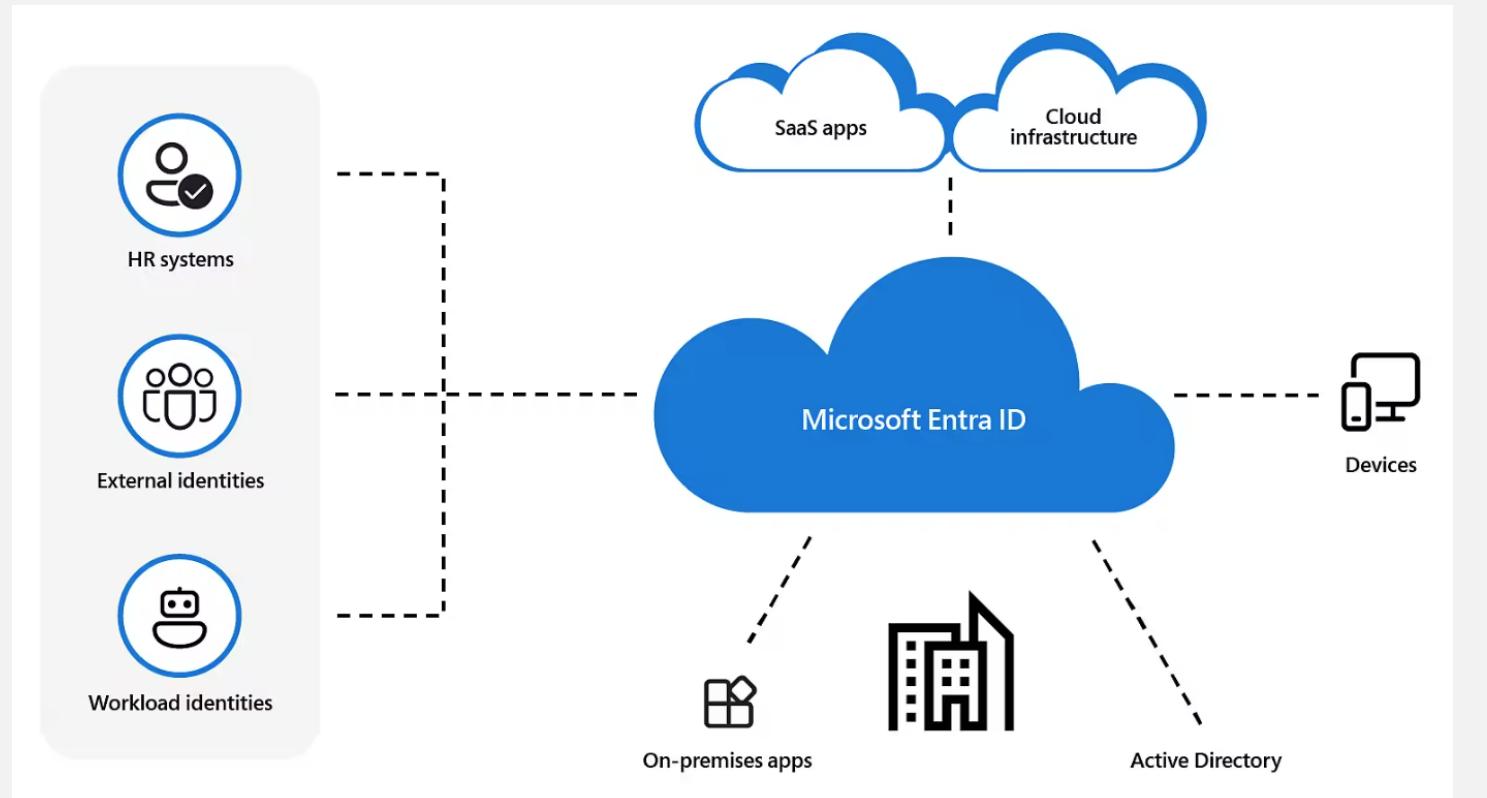
- Power Apps
- Power Automate
- Power BI
- Power Pages
- Copilot Studio



Information Workers

- Entra ID
- Browser UX
- Familiar

Information Workers



- Entra ID
- Browser UX
- Familiar

Information Workers

The screenshot shows the Microsoft Power Apps portal interface. On the left, there's a navigation sidebar with sections like Home, Create, Learn, Apps (which is selected), AI hub, Tables, Flows, Solutions, More, and Power Platform. The main area has a search bar at the top and buttons for New app, Import app, Monitor, and All apps. Below this, there are three main creation options: "Start with Copilot" (using everyday words to describe what your app should collect, track, list, or manage), "Start with data" (create new tables, select existing tables, or connect to external data sources), and "Start with an app template" (select from a list of fully-functional business app templates). At the bottom, there are buttons for My apps, Shared with me, and All. A table below lists existing apps: Solution Health Hub (modified 2 years ago) and Power Pages Management (modified 1 year ago).

Name	Modified
Solution Health Hub	2 years ago
Power Pages Management	1 year ago

- Entra ID
- Browser UX
-  Familiar

Information Workers

Data experiences ⓘ

-  Forms
-  Views
-  Charts
-  Dashboards

- Entra ID
- Browser UX
- Familiar



Recap:



Information
workers.



Power
users.



Developers.



Admins.

Contact:

 /charles-e-lakes-ii

 @The2Lakes

 /losodamus



Charles is a technical speaker and low-code advocate with a pro-code background, specializing in transforming business data architecture. With a passion for innovation, he shares his expertise to solve complex business problems and guide organizations in reimagining their legacy processes, advancing automation initiatives, streamlining operations, and reducing infrastructure costs.