



Microsoft Dataverse:

Everything, Everywhere, Here and There

Charles Lakes II | MCT



Microsoft Dataverse:

Everything, Everywhere, Here and There

Native Data
Solution

Browser
Accessible

Cloud
Infrastructure

Charles Lakes II | MCT



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*



+ New table ▾ ↵ Import ▾ ↗ Export ▾ ⚡ Analyze ▾



Home



Create



Learn



Apps



AI hub



Tables



Solutions

Tables



Get started with Copilot

AI will generate tables and relationships based on your prompt.



Start with a

★ Recommended

Custom

All



Table ↑ ▾

 Recommended

 Custom

 All



Table ↑ ↓	Name ↴ ↵	Type ↴ ↵	Man...
Account	account	Standard	Yes
Address	customeraddress	Standard	Yes
Appointment	appointment	Activity	Yes
Attachment	activitymimeatta...	Standard	Yes
Business Unit	businessunit	Standard	Yes
Contact	contact	Standard	Yes
Currency	transactioncurre...	Standard	Yes
Email	email	Activity	Yes

 Recommended

 Custom

 All

+ New | Edit | Create an app | Using this table | Import | Export | Advanced | Delete

Tables > Appointment



Table properties

Properties



Name

Primary column

Appointment

Subject

Type

Last modified

Activity

2 years ago

Schema



Columns

Relationships

Keys

Data experiences



Forms

Views

Charts

Dashboards

Customizations



Business rules

Commands

Messages

 Appointment columns and data

 Update forms and views

 Edit |

 Subject* ↑

 Regarding

 Location

 Priority

+58 more



Enter text

Select lookup

Enter text

Select opti

Currency



transactioncurre...

Standard

Yes

Email



email

Activity

Yes

★ Recommended

Custom

Schema

Column

Relationship

Key

Data experiences

Form

View

Chart

Dashboard

Customizations

Business rule

+ New | Edit | Create an app | Using

Appointment

Table properties

Properties



Name	Primary column
Appointment	Subject
Type	Last modified
Activity	2 years ago

Appointment columns and data

Subject*

Req

Enter text

Select loc

Currency

Email

Advanced | Delete

Manage

Yes

Yes

Yes

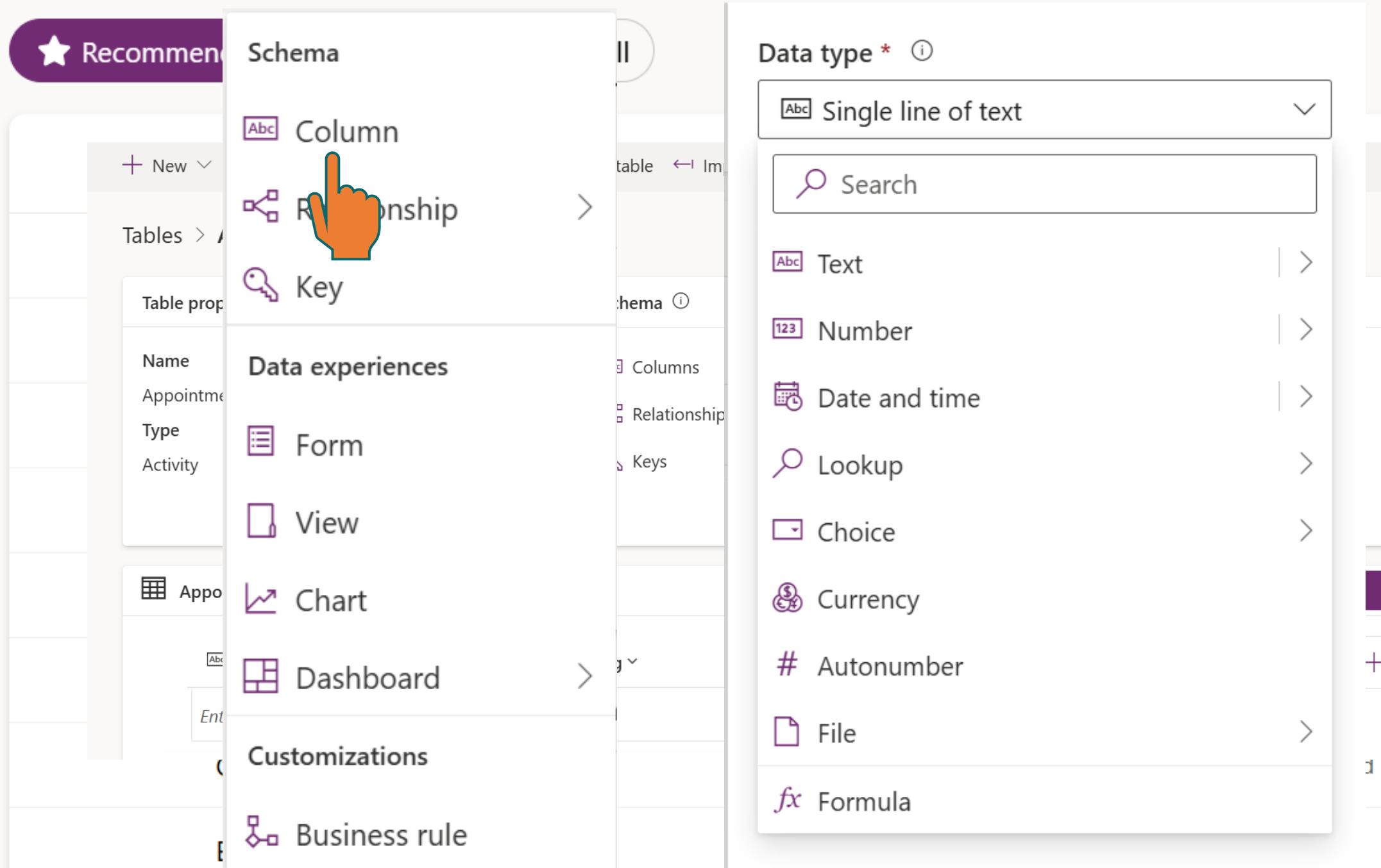
Yes

Yes

Yes

Yes

Yes



★ Recommended

Schema

- Column
- Relationship
- Key
- Data experiences
- Form
- View
- Appointment
- Chart
- Dashboard
- Customizations
- Business rule

Many-to-one

Choose the **Related table** to which to create your relationship lookup. [Learn more](#)

Current (Many)

Table * Appointment

Related (One)

Table *

* — 1

Enter text	Select option
transactioncurre...	Standard
email	Activity

Yes

Tables

Get started with Copilot



AI will generate tables and relationships based on your prompt.



Start with a blank table



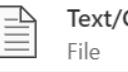
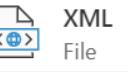
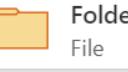
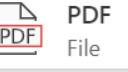
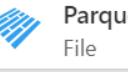
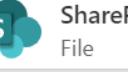
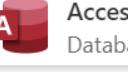
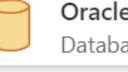
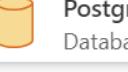
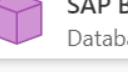
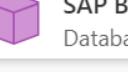
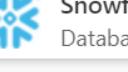
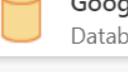
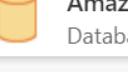
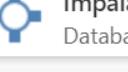
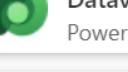
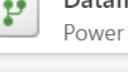
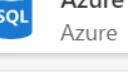
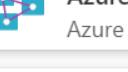
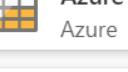
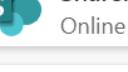
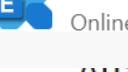
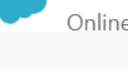
Create with Excel or .CSV file

[★ Recommended](#)[Custom](#)[All](#)

Table ↑ ▾	Name ▾	Type ▾	Managed ▾	Customized ▾	⋮
Account	account	Standard	Yes	No	⋮
Address	customeraddress	Standard	Yes	No	⋮
Appointment	appointment	Activity	Yes	No	⋮
Attachment	activitymimeatta...	Standard	Yes	No	⋮
Business Unit	businessunit	Standard	Yes	No	⋮

Tables

All
File
Database
Microsoft Fabric
Power Platform
Azure
Online services
Other

 workbook	 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

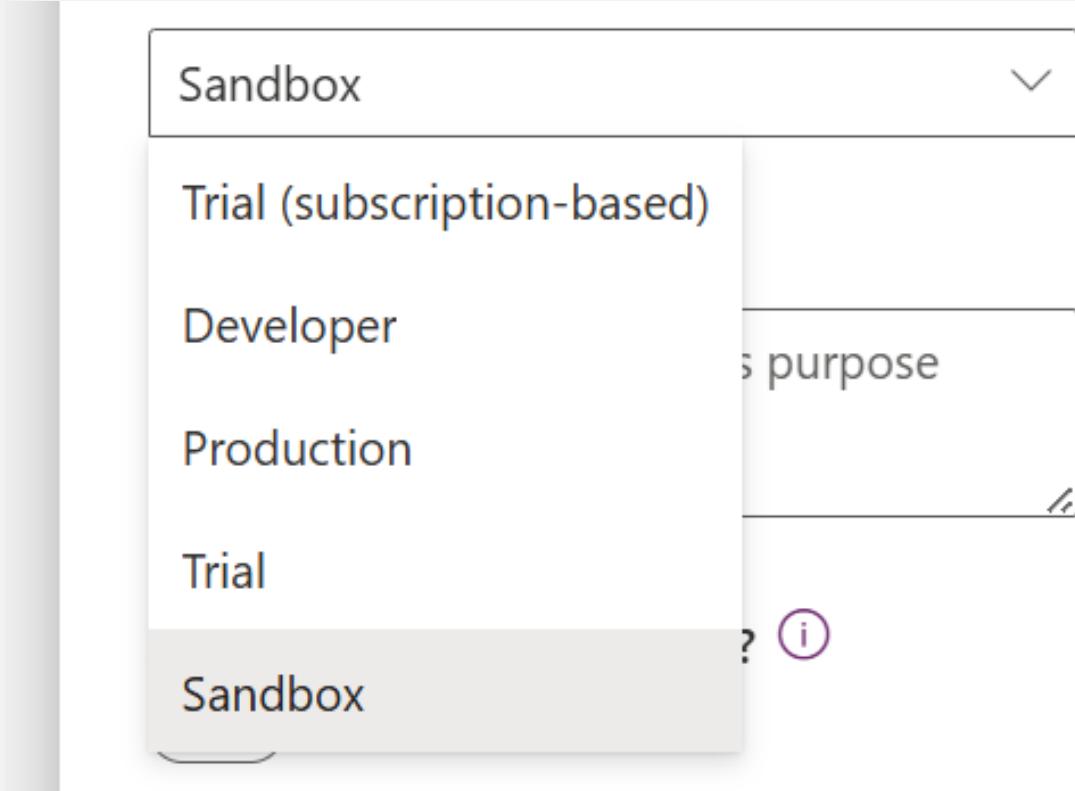
Attachment
activityimmedia...
standard
res
inu
Business Unit
businessunit
Standard
Yes
No



Admins

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

Admins



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

Admins



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

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

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
-----------------------	----------------------------------	-----------------------------	----------------------------

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

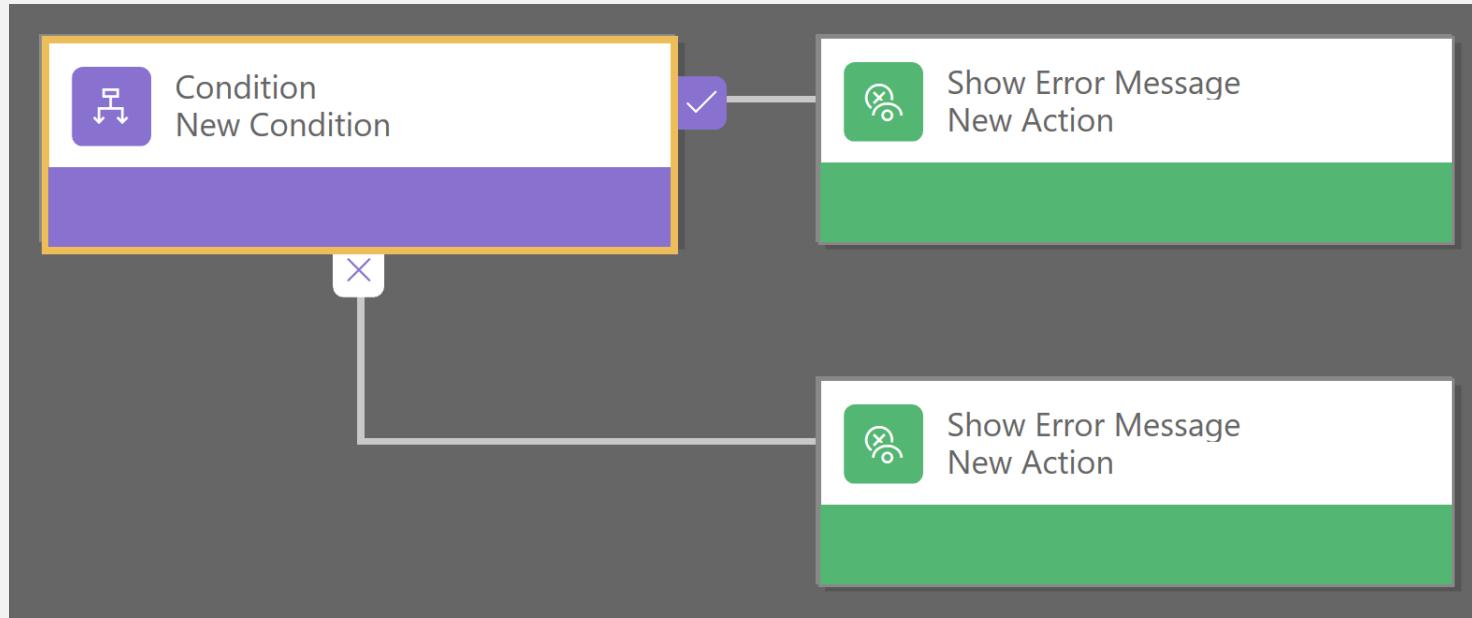
Data model

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



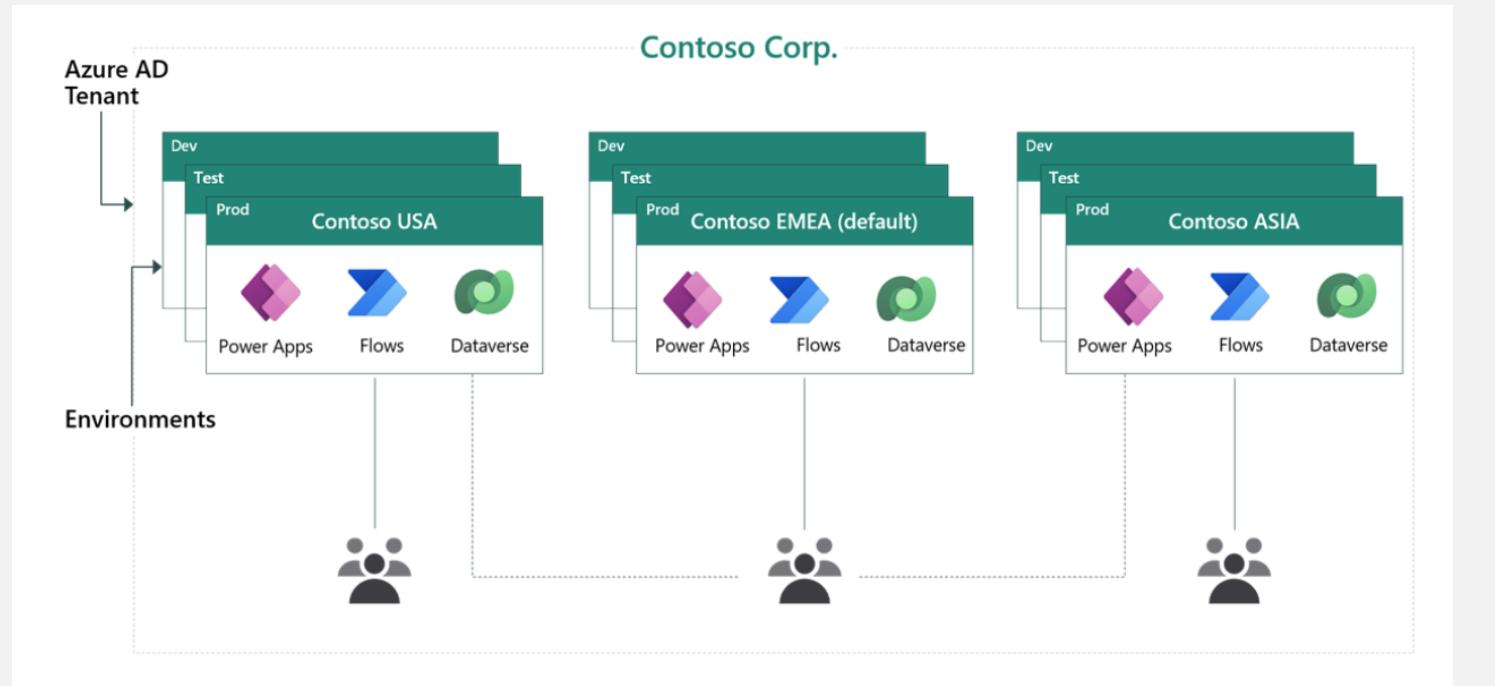
- Data Models
- Business Rules
- Custom Code
- Application Lifecycle Management

Developers

The screenshot shows the 'Tools list' page of the XrmToolBox website. At the top left is the XrmToolBox logo. A navigation bar at the top right includes a menu icon. Below the header, the breadcrumb navigation shows 'Home > Plugins list'. The main title 'Tools list' is displayed prominently. A note below the title states: 'This list shows tools available for XrmToolBox. Note that all existing tools are not yet registered by their owner. As of today, only registered and validated tools are available in XrmToolBox Tool Library.' Below this note, a message says '391 tools so far, and counting...'. At the bottom of the page are search and filter options: 'Search by name or author', 'Add my tool', and 'Filter by category'. A series of buttons represent different categories: Comparison, Configuration, Customizations, Data, Development, Documentation, Migration, Plugins, Power Automate, Power BI, Power Pages, Processes, Reporting, Security, Solutions, Troubleshooting, and User Interface.

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

Developers

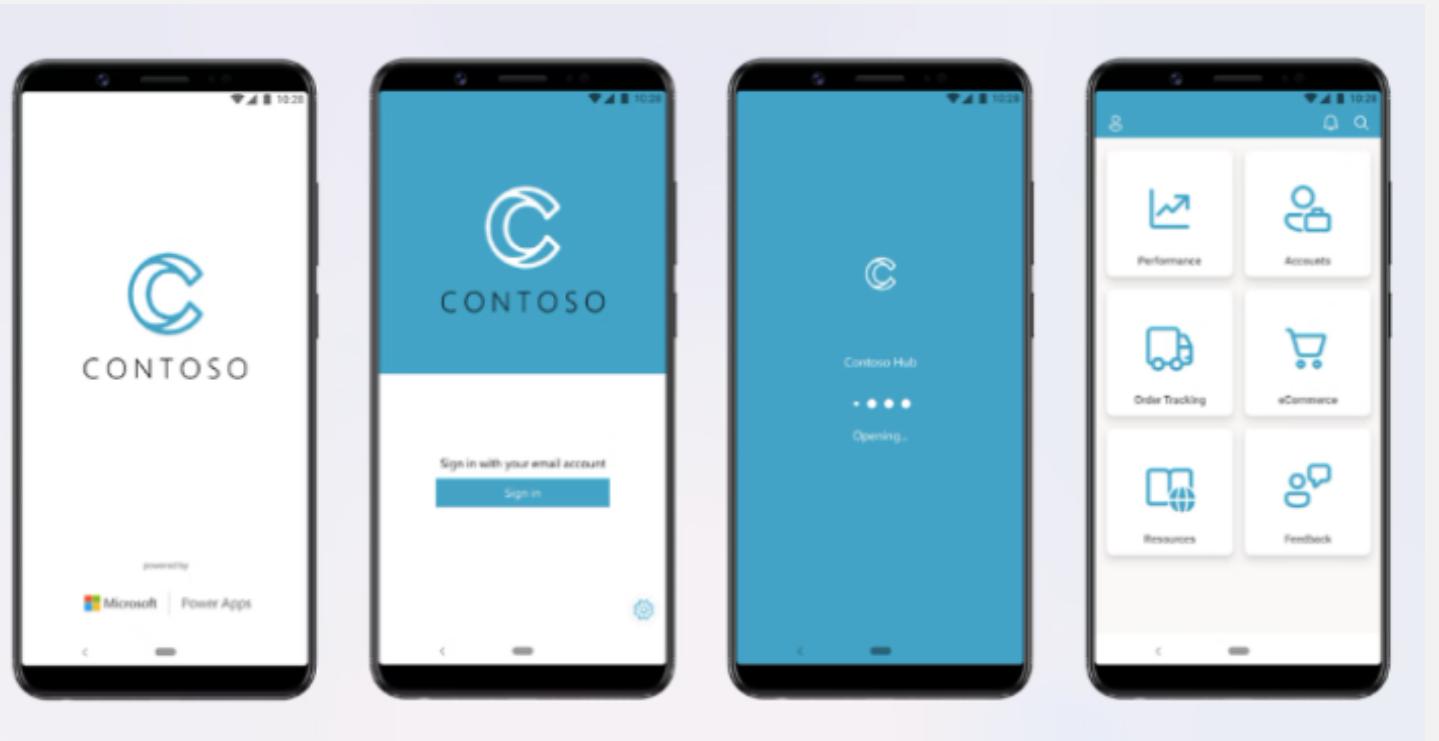


- Data Models
 - Business Rules
 - Custom Code
 - Application Lifecycle Management
- 

Power Users

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

Power Users



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

Power Users

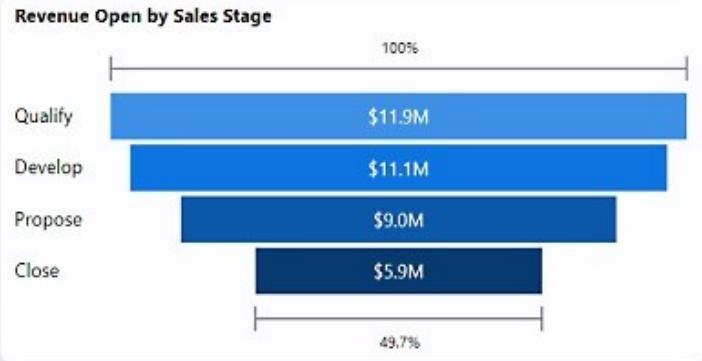
Actions

⋮⋮ 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

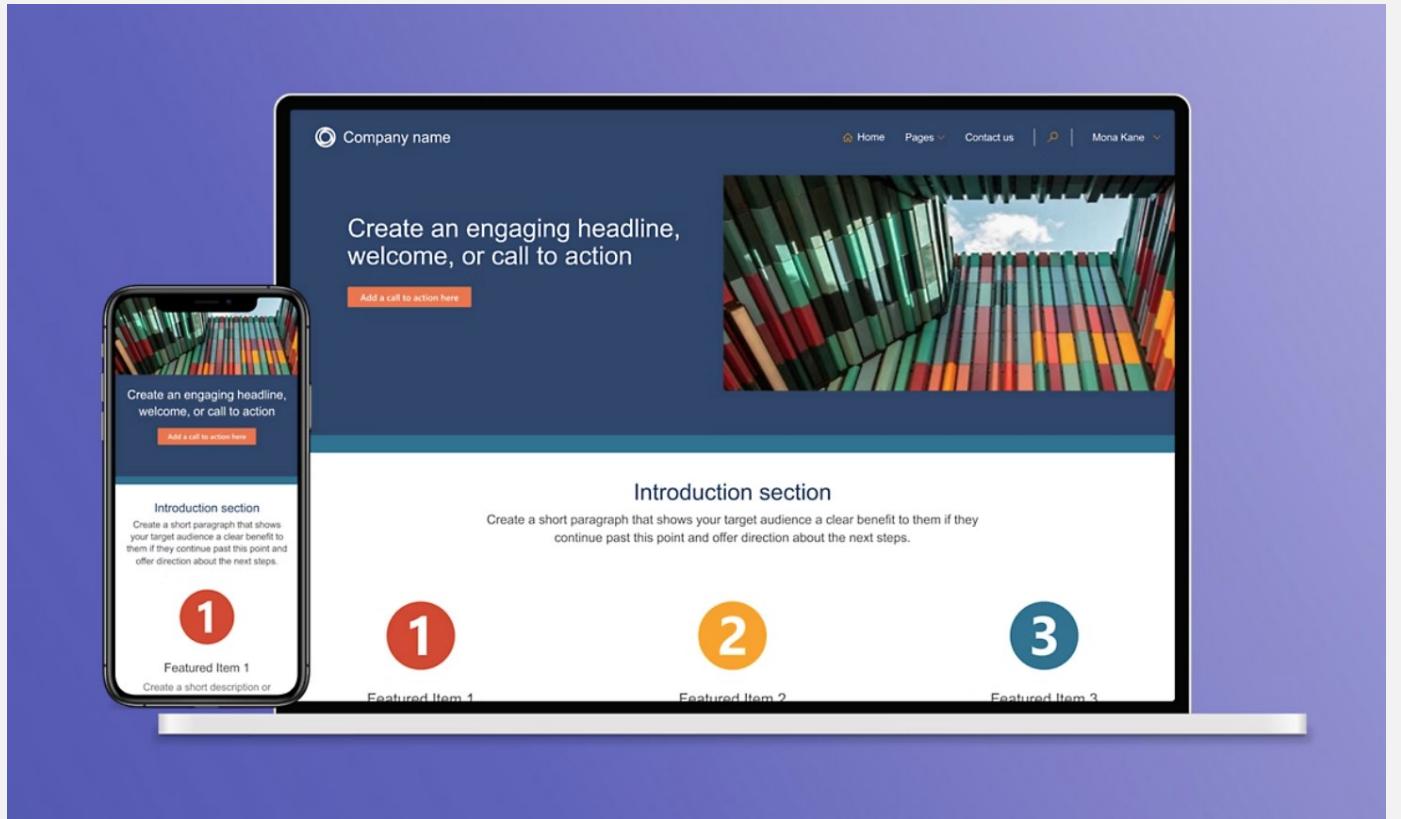
Power Users



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
- Copilot Studio

Power Users



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

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. It includes a text input field with placeholder "Use everyday words to describe what your agent should do ...", a note about being in preview, and a "See terms" link. Below this is a section titled "Start with a template" with a note about being in preview and a "See terms" link. 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.

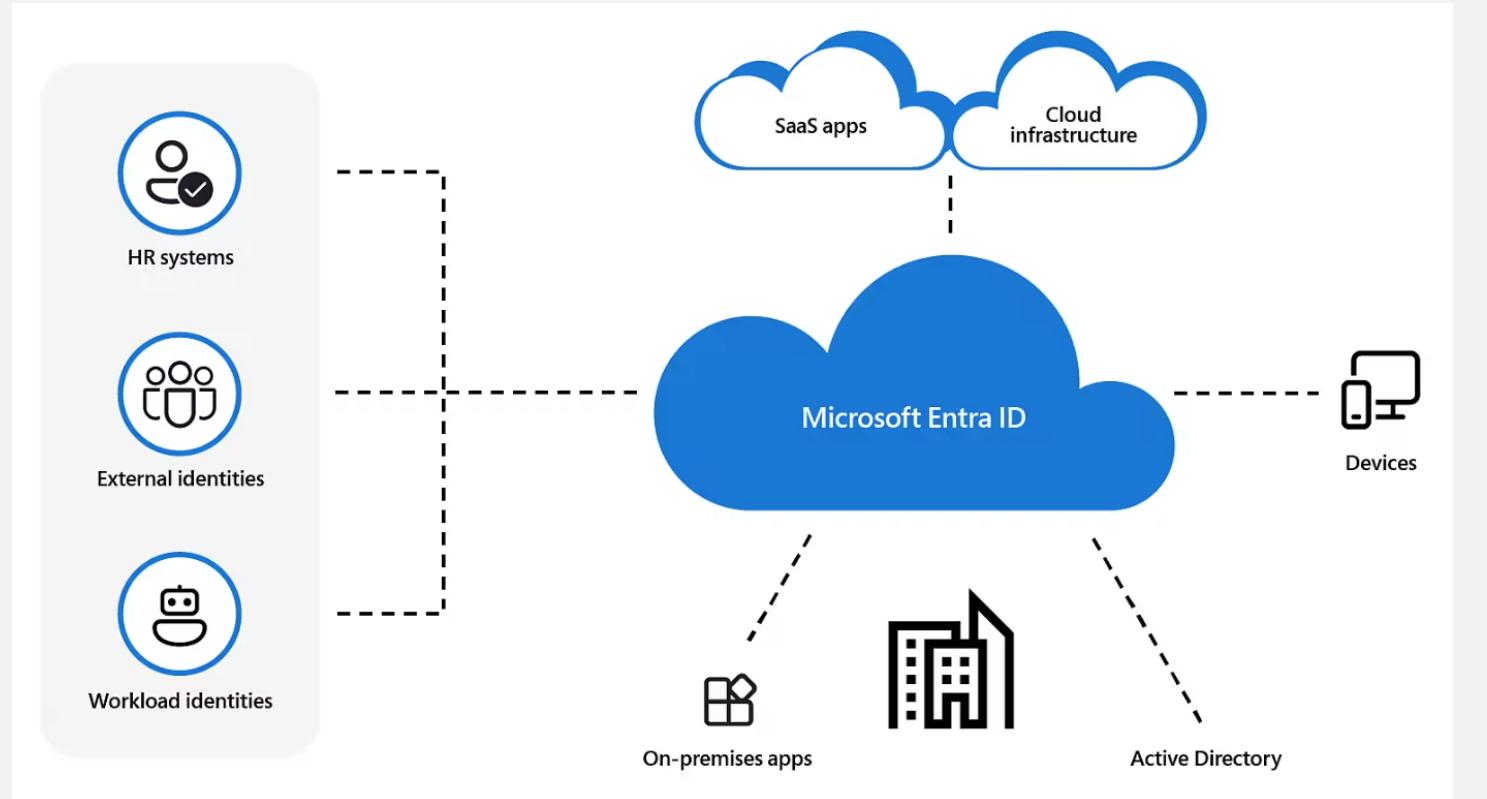
- Power Apps
- Power Automate
- Power BI
- Power Pages
- Copilot Studio



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 icons for 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 with options to 'New app' or 'Import app', 'Monitor', and 'All apps'. Below this, there are three main creation paths: '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



Charles is a technical speaker and low-code advocate with a pro-code background, specializing in transforming business data architecture. Passionate about 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.