



Crash Course in Power Apps portals

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Agenda

What is Power Apps portals?

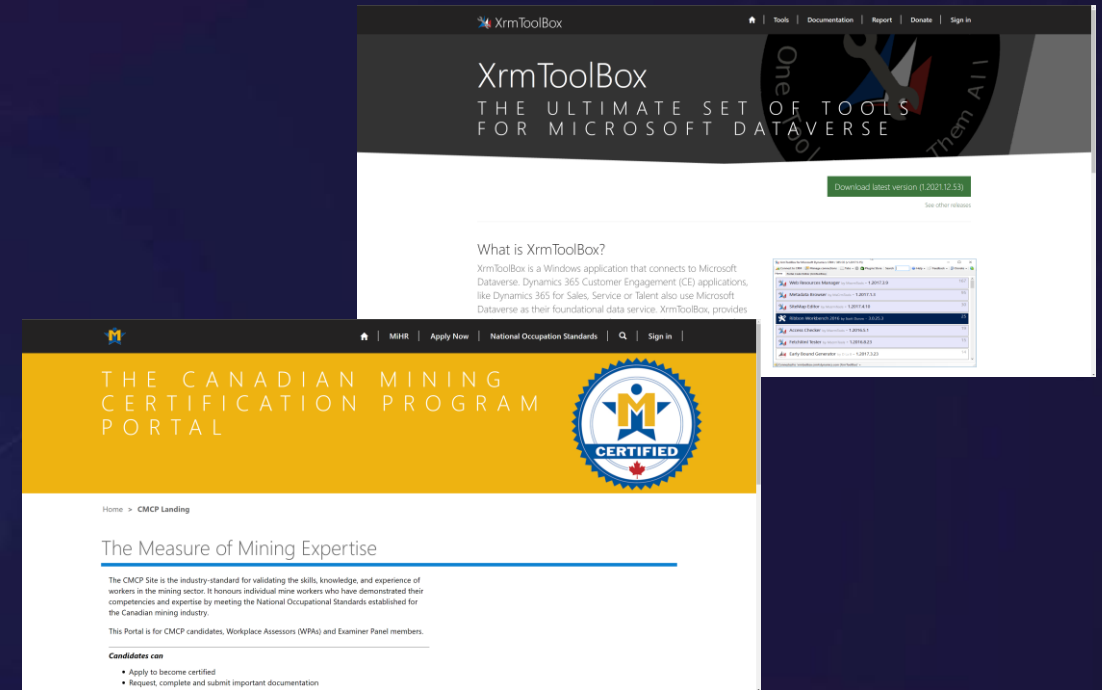
Build a simple portal app

- Provision a portal
- Tools
- Design, build, style a page
- Add a page to add data
- Security
- Allow users to view their data

Questions?

What are Power Apps portals?

- Platform to build websites, web applications and mobile apps
- Allows external stakeholders to interact (create, read, update, delete) data in Dataverse
- Can be component in an overall business application or standalone



Our scenario...

- We have been asked to build a website for the Royal Sasquatch Watching Society (not a real thing... or is it?)
- RSWS already has a Power App to track Sasquatch sightings, but would like to allow the public to log sightings



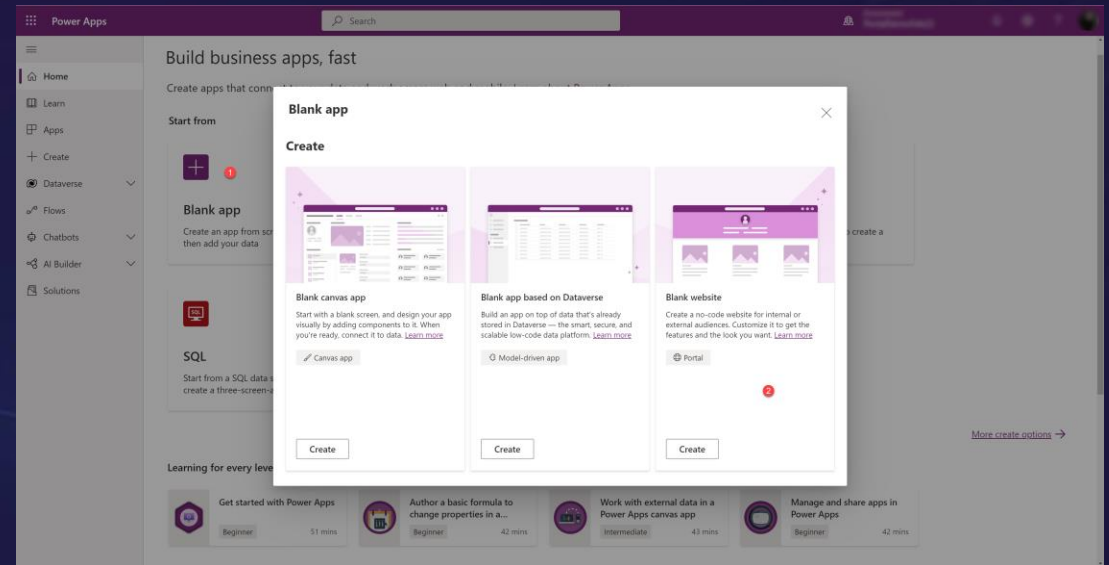
Provision a portal

Choose an environment

Dataverse required

Start with a sandbox/trial

Avoid provisioning on production until you are ready!!!

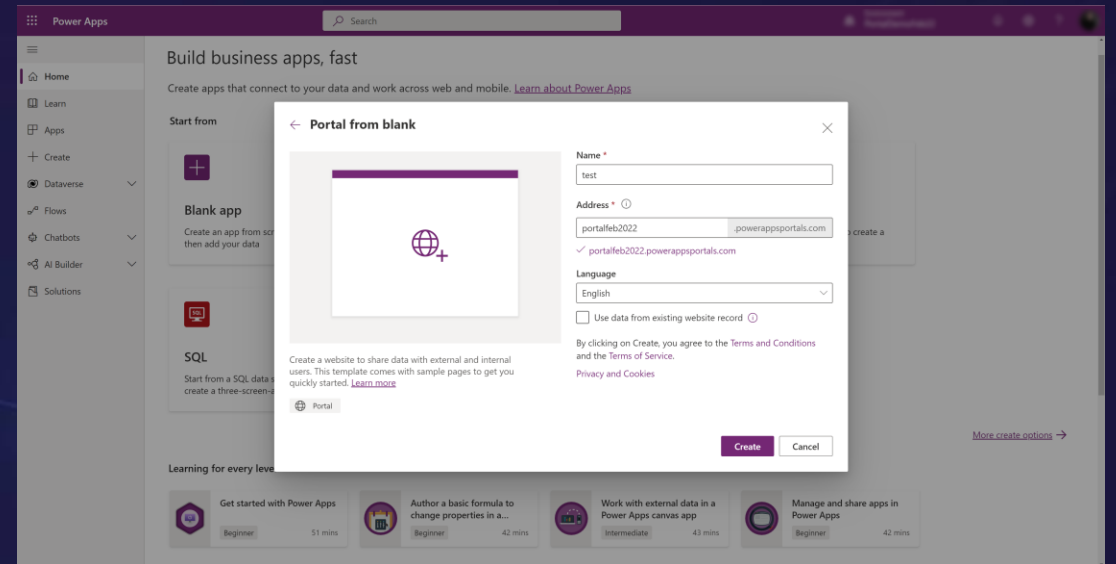


Provision a portal

Give it a name

Unique URL (can create custom one later)

Re-provision a previous portal from an expired trial

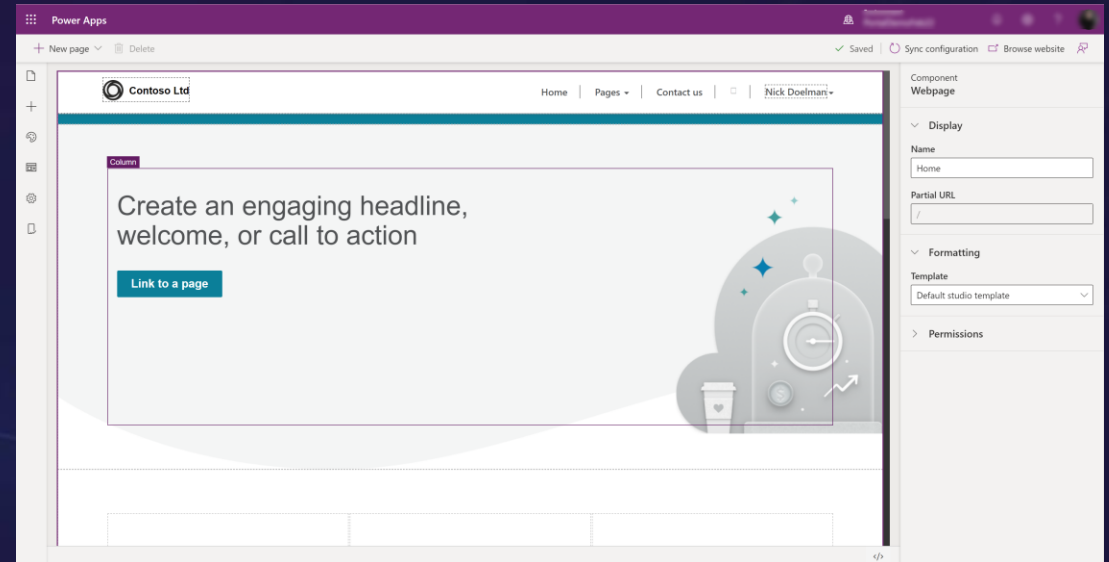


Tools: The portals Studio

Tool to build portal apps

Add pages, images, components

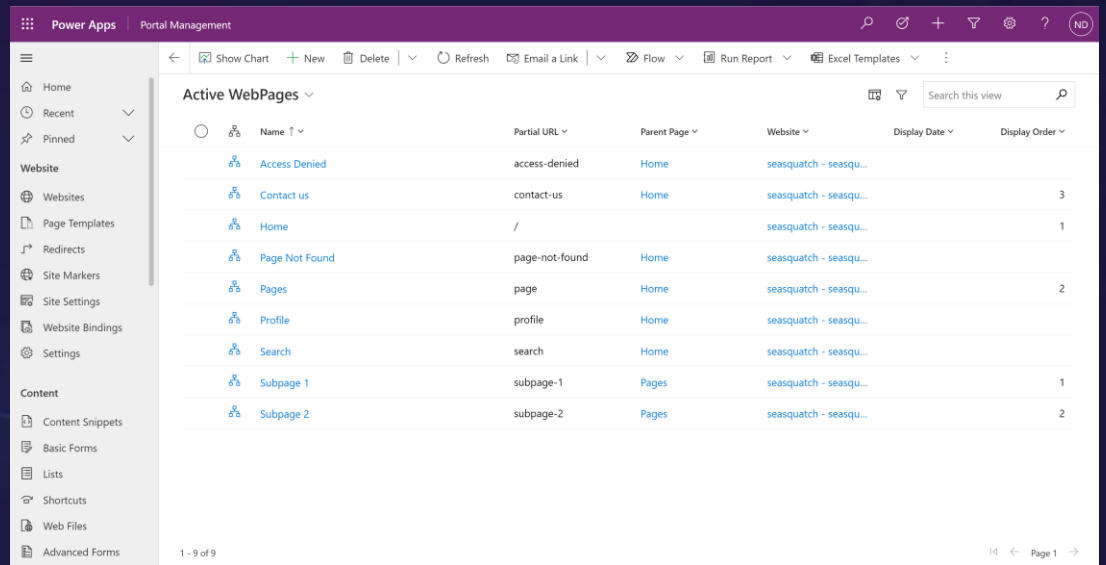
Update site map



Tools: Portals Management App

Model-driven Power App

Add and update portal metadata (web pages, forms, lists, etc)



The screenshot displays the 'Portal Management' interface in Power Apps. The left sidebar contains navigation options: Home, Recent, Pinned, Website, Websites, Page Templates, Redirects, Site Markers, Site Settings, Website Bindings, Settings, Content, Content Snippets, Basic Forms, Lists, Shortcuts, Web Files, and Advanced Forms. The main area shows a table titled 'Active WebPages' with columns for Name, Partial URL, Parent Page, Website, Display Date, and Display Order. The table lists several web pages, including 'Access Denied', 'Contact us', 'Home', 'Page Not Found', 'Pages', 'Profile', 'Search', 'Subpage 1', and 'Subpage 2'. The 'Home' page is the parent for 'Pages', 'Profile', 'Search', 'Subpage 1', and 'Subpage 2'. The 'Pages' page is the parent for 'Subpage 1' and 'Subpage 2'. The 'Website' column for all entries is 'seasquatch - seasqu...'. The 'Display Order' column shows values 1, 2, and 3 for different pages.

Name	Partial URL	Parent Page	Website	Display Date	Display Order
Access Denied	access-denied	Home	seasquatch - seasqu...		
Contact us	contact-us	Home	seasquatch - seasqu...		3
Home	/	Home	seasquatch - seasqu...		1
Page Not Found	page-not-found	Home	seasquatch - seasqu...		
Pages	page	Home	seasquatch - seasqu...		2
Profile	profile	Home	seasquatch - seasqu...		
Search	search	Home	seasquatch - seasqu...		
Subpage 1	subpage-1	Pages	seasquatch - seasqu...		1
Subpage 2	subpage-2	Pages	seasquatch - seasqu...		2

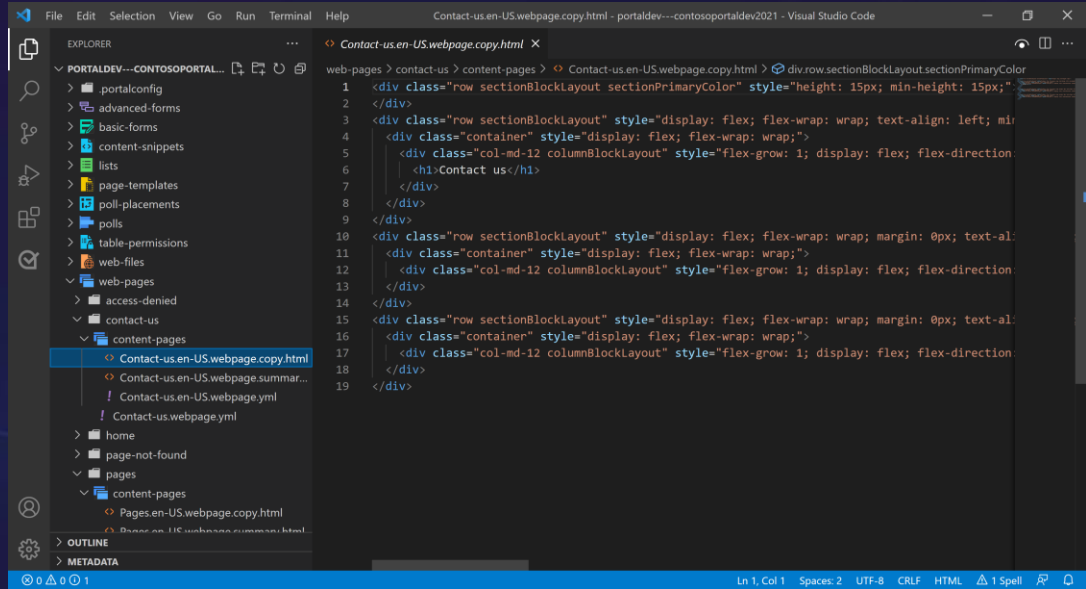
Tools: VS Code + Power Platform CLI

Pro-developer experience

Update portal code (HTML, CSS, Liquid, JavaScript)

Migrate from dev to test, to prod, etc.

Not covered in today's session, but mentioning for awareness

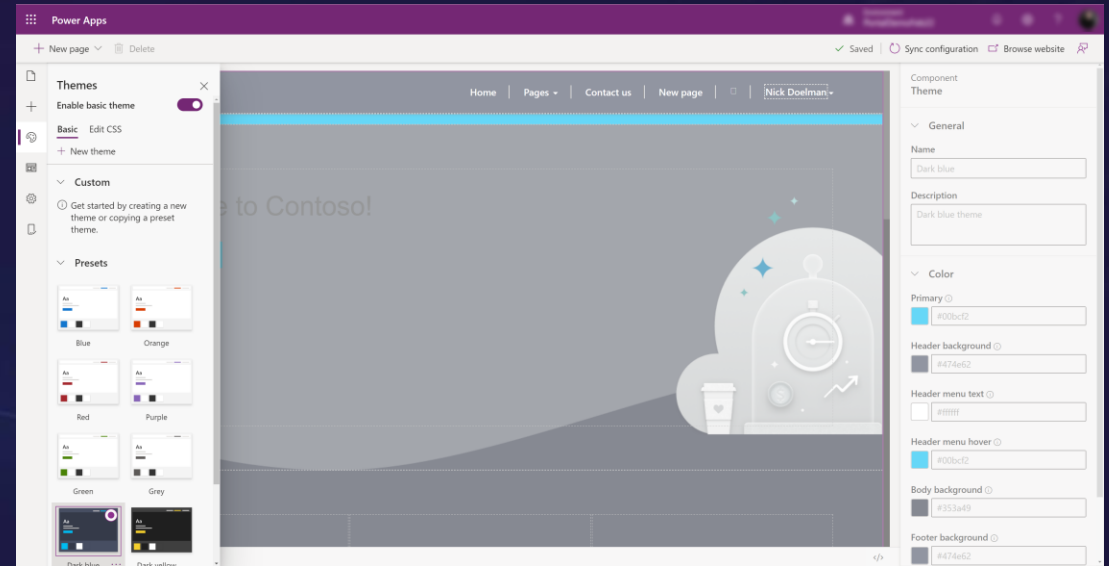


Branding and Styling

Some basic branding and styling
(colors + themes)

Customize CSS

Improvements coming to this feature

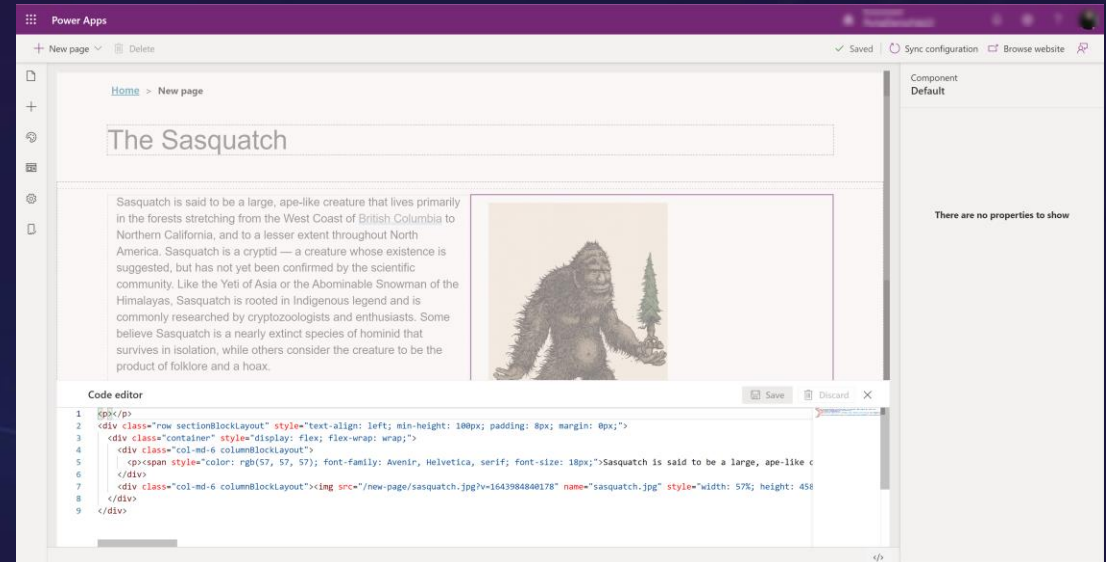


Create a page

Choose Template

Add text, images

Edit the HTML to fine tune the page



Working with Data

Common requirement is to collect, view, and edit data

Portals use Dataverse

Portal components for viewing and working with data have foundation in model-driven app components (forms and views)

The image displays two screenshots of the Microsoft Power Apps interface, illustrating the 'Form' and 'View' components for working with data in Dataverse.

Top Screenshot: Form Editor

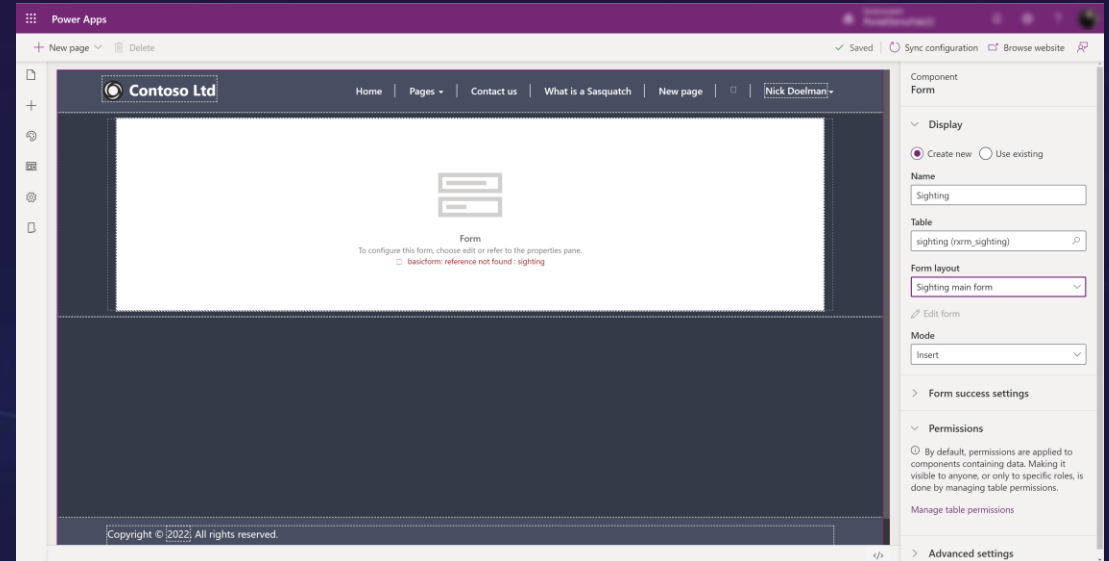
The top screenshot shows the 'Form' editor for a 'New sighting' form. The interface includes a 'Tree view' on the left, a 'Form field' pane in the center, and a 'Form settings' pane on the right. The 'Form field' pane shows the 'General' tab with fields for 'Subject', 'Contact Email', and 'Date and Time of Sighting'. The 'Form settings' pane shows the 'Sighting main form' properties, including 'Table sighting', 'Display Name', and 'Description'.

Bottom Screenshot: View Editor

The bottom screenshot shows the 'View' editor for the 'sighting' table. The interface includes a 'Table columns' pane on the left, a 'Table' in the center, and a 'Filter by' section on the right. The 'Table columns' pane shows a list of columns for the 'sighting' table, including 'Contact', 'Created By', 'Created By (Delegate)', 'Created On', 'Modified By', 'Modified By (Delegate)', 'Modified On', 'Owner', 'Owning Business Unit', 'Record Created On', 'Status', and 'Status Reason'. The 'Table' displays a list of sightings with columns for 'Subject', 'Details', 'Contact Email', and 'Date and Time'. The 'Filter by' section shows a filter for 'Status is Active'.

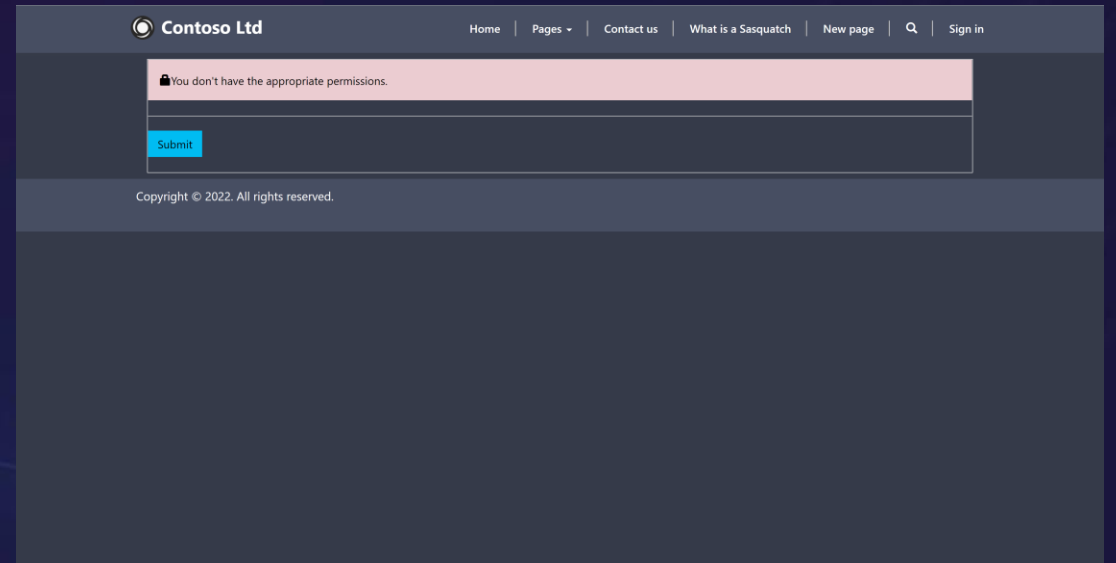
Working with Data

Add form and list components to a web page



Data Security

Portals have security enabled out of the box



Data Security

Add Table Permissions

Define privileges for Web Roles

Power Apps

+ New permission

Permission Na... State Table Access Type Relationship Read Wri

Active (1)

Feedback : Active Feedback (feedback) Global access --

New table permission

This permission does not take effect until roles are added.

Basic Child permissions

Name *

Add sightings

Table *

sighting (xrm_sighting)

Access type *

Global access

Show all rows in the table to users in the selected roles. [Learn more](#)

Privileges

☐ Read ☐ Write ☒ Create

☐ Delete ☐ Append ☐ Append to

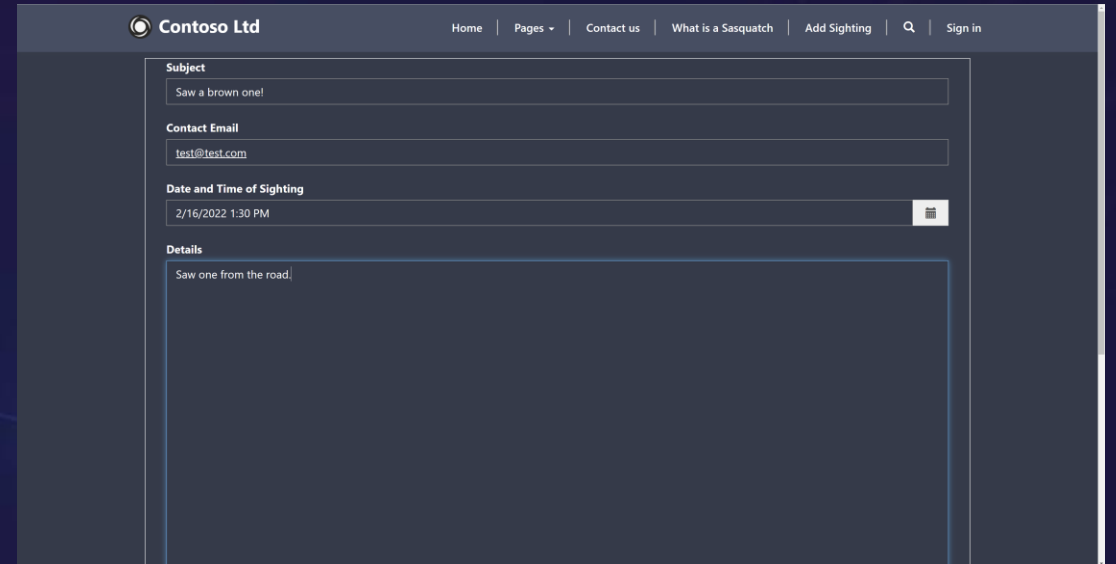
Roles

+ Add roles

Save Cancel

Adding Data

Add information using a Form



The screenshot shows a web application interface for "Contoso Ltd". The navigation bar includes links for Home, Pages, Contact us, What is a Sasquatch, Add Sighting, a search icon, and a Sign in link. The main form is titled "Add Sighting" and contains the following fields:

- Subject:** A text input field containing "Saw a brown one!".
- Contact Email:** A text input field containing "test@test.com".
- Date and Time of Sighting:** A date and time picker showing "2/16/2022 1:30 PM" with a calendar icon.
- Details:** A large text area containing "Saw one from the road".

Authenticated Portal Users

Portal users = Dataverse Contacts

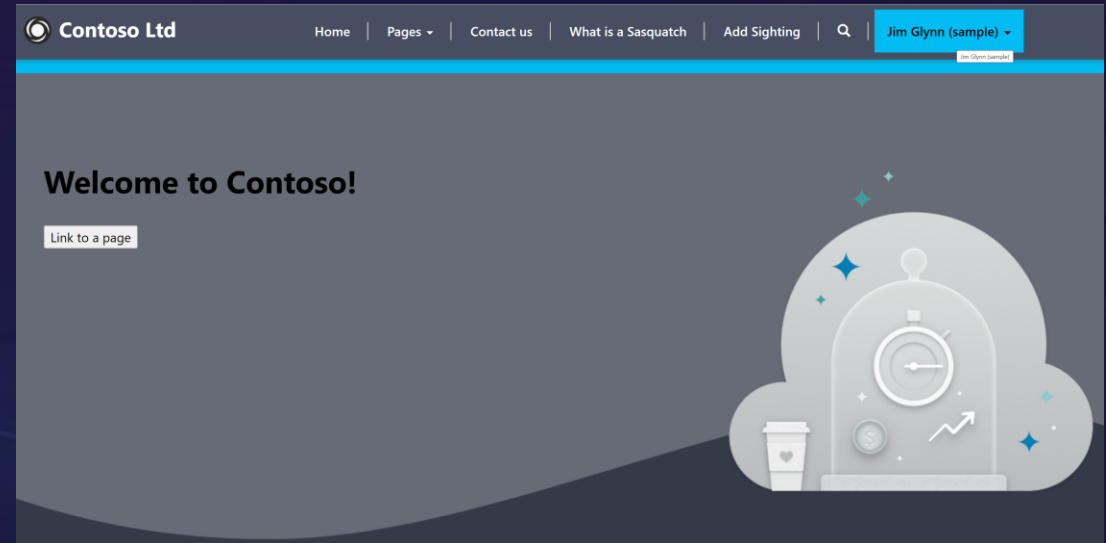
Set up Authentication (e.g. Azure B2C, others)

Invite existing contacts

The image displays two screenshots related to portal user authentication. The top screenshot shows the 'Power Apps | Portal Management' interface. On the left is a navigation pane with categories like 'Basic Forms', 'Security', and 'Invitations'. The 'Invitations' section is selected, showing a form for 'Jim Glynn (sample) - Saved'. The form has tabs for 'General', 'Advanced', 'Activities & Notes', and 'Related'. The 'General' tab is active, showing fields for Name (Jim Glynn (sample)), Expiry Date, Type (Single), Inviter, and Owner/Sender (Nick Doelman). The bottom screenshot shows a web portal for 'Contoso Ltd' with a navigation bar including 'Home', 'Pages', 'Contact us', 'What is a Sasquatch', 'Add Sighting', and 'Sign in'. Below the navigation bar are links for 'Sign in', 'Register', and 'Redeem invitation'. The 'Redeem invitation' link is highlighted. The main content area is titled 'Sign up with an invitation code' and features a text input field for the 'Invitation code' containing a long alphanumeric string. Below the input field is a checkbox labeled 'I have an existing account' and a blue 'Register' button. The footer of the page states 'Copyright © 2022. All rights reserved.'

Authenticated Portal Users

User signed into portal
Assign user to web roles



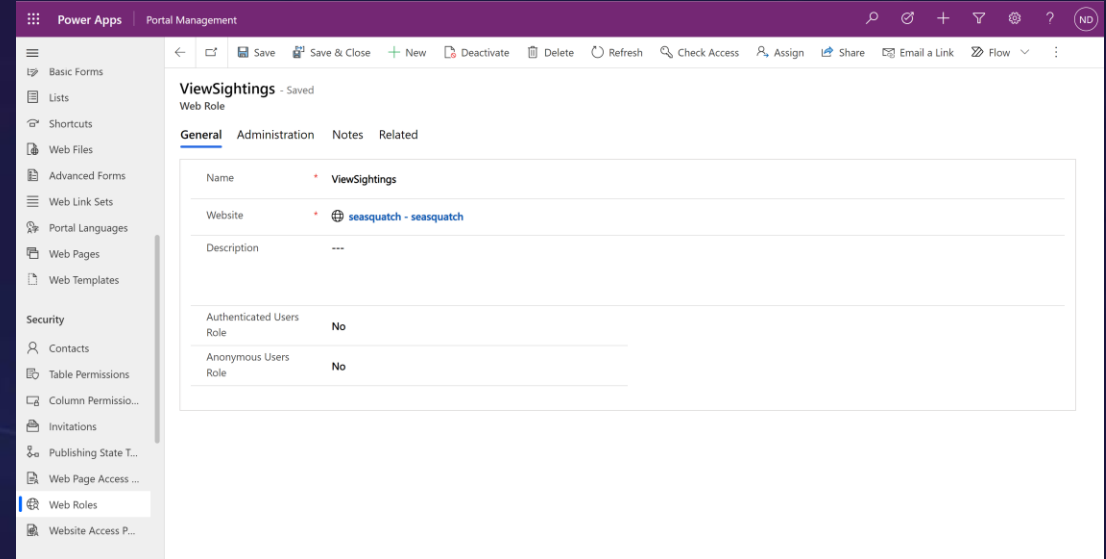
Custom Web Roles

Portal users can be assigned to web roles

Default web roles for all authenticate users and all anonymous users

Web roles tied to:

- Table Permissions
- Page Permissions
- Column Permissions



Viewing Data

Use Dataverse views to add list components to pages

Apply security

Drill down to view, edit or add data.

The image shows a Power Apps interface. The top part is a canvas where a 'List' component is being configured. The right-hand pane shows the 'Component List' settings for the 'List' component. Under the 'Display' section, 'Create new' is selected. The 'Name' is 'My Sightings'. The 'Table' is 'sighting (rxrm_sighting)'. The 'Views' dropdown is set to 'Active sightings'. There are also toggle switches for 'Create new record' and 'Show record count'.

Below the canvas is a preview of the web page. The page has a header with the 'Contoso Ltd' logo and navigation links: Home, Pages, Contact us, What is a Sasquatch, Add Sighting, My Sightings, and a search icon. The main content area displays a table with the following data:

Subject ↑	Details	Contact Email	Date and Time of Sighting
Big One	Saw one at the highway	test@test.com	2/4/2022 1:29 AM
Saw sasquatch while camping	Saw a large one!	test@test.com	2/4/2022 1:29 AM

The footer of the preview shows 'Copyright © 2022. All rights reserved.'

Use Table Permissions to Filter Data

ViewSightings

Basic

Child permissions

Name *

ViewSightings

Table *

sighting (rxrm_sighting)

Access type *

Contact access

Show rows in the table associated to the signed-in user (contact). [Learn more](#)

Relationship *

rxrm_sighting_Contact_Contact

Related tables

sighting

rxrm_sighting_Contact_Contact

Contact

Save

Cancel

Change access type

Can be based on user (contact or account)

Add child permissions for greater granularity

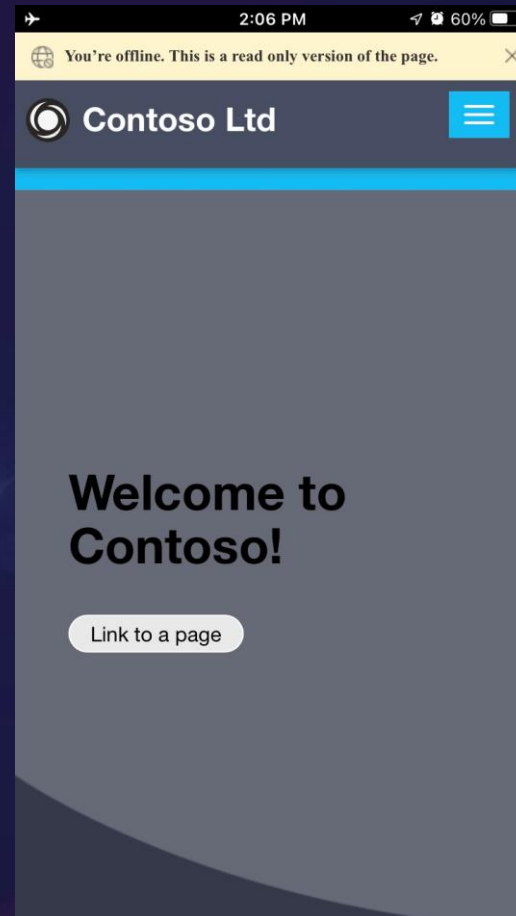
Contoso Ltd			
Home	Pages	Contact us	What is a Sasquatch
Add Sighting	My Sightings		Jim Glynn (sample)
Subject	Details	Contact Email	Date and Time of Sighting
Big One	Saw one at the highway	test@test.com	2/4/2022 1:29 AM

Create Mobile App

Create Progress Web Apps

Configure offline mode

Deploy apps using app stores



Other features of Power Apps portals

Custom web templates and layouts using Liquid markup

Portals web API (pro-dev customization)

Display SharePoint, Power BI, Power Virtual Agents

Calendar and Map views

Launch workflows

Extend Power Platform projects



QUESTIONS?