

Building solutions with Dataverse for Teams

Lab 0 - Prerequisites

Workshop Version: 1.4, Published: 02-2023

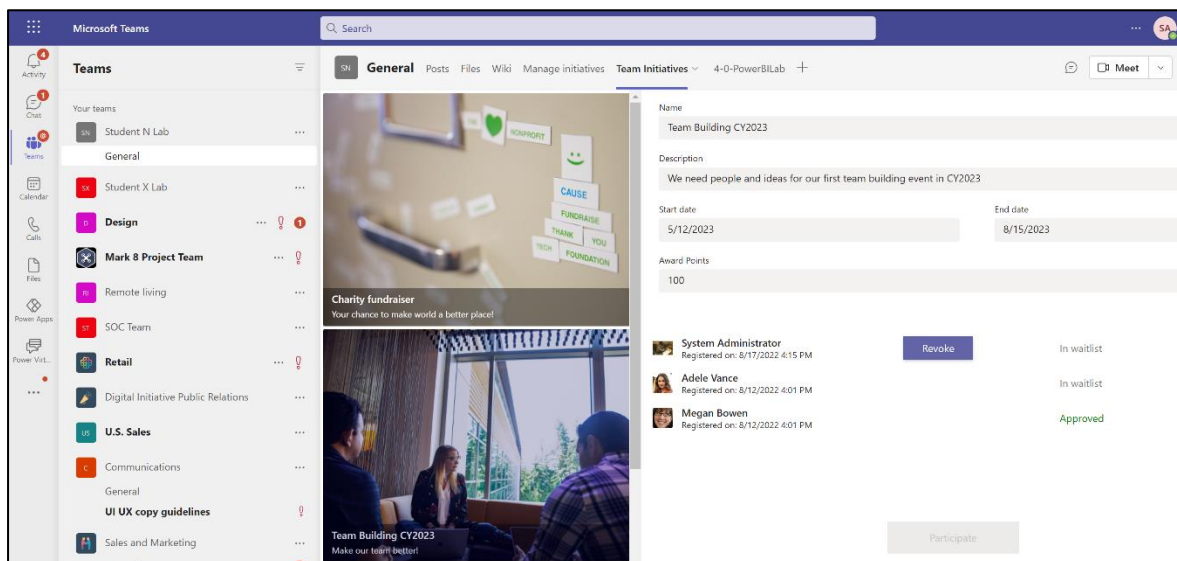
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Lab scenario overview

All the labs in this course cover step-by-step building of solution called **Team Initiatives**, that is fully based on **Dataverse for Teams** and includes a wide range of **Power Platform** capabilities.

Team Initiatives is a solution that helps team owners to organize various activities/events within team and onboard people who wish to participate, through an approval process.



Each lab is a dependency for the next lab, that's why it's highly recommended to ask the instructor for help, if you have any problems, before proceeding to the next lab:

- **Lab 0** – Helps you to set up lab prerequisites
- **Lab 1** – Explains how to work with tables in Dataverse for Teams and build basic Power Apps for these tables
- **Lab 2** – Explains how to build more complex data models and Power Apps in Dataverse for Teams as you can see on the screenshot above
- **Lab 3** – Helps to enrich your applications with complex business logic using Power Automate flows with your Dataverse for Teams
- **Lab 4** – Explains how to use Power Virtual Agents to build bots, that will interact with data in Dataverse for Teams
- **Lab 5** – Shows how to use Dataverse for Teams data for reporting

Exercise 1:

Connect to your M365 tenant



Important

If you are experiencing problems with access, or you cannot find any of the resources and components described in this exercise – please, **notify your instructor as soon as possible**.

Objectives:

- Access to Skillable (Labs on Demand)
- Retrieve and use your M365 credentials to access your hands-on labs

Estimated time:

15 minutes

Task 1: Access to Labs on Demand



Important – Use Incognito/InPrivate mode

All the labs in this course require you to use the latest version of Edge or Chrome in **Incognito/InPrivate** mode.

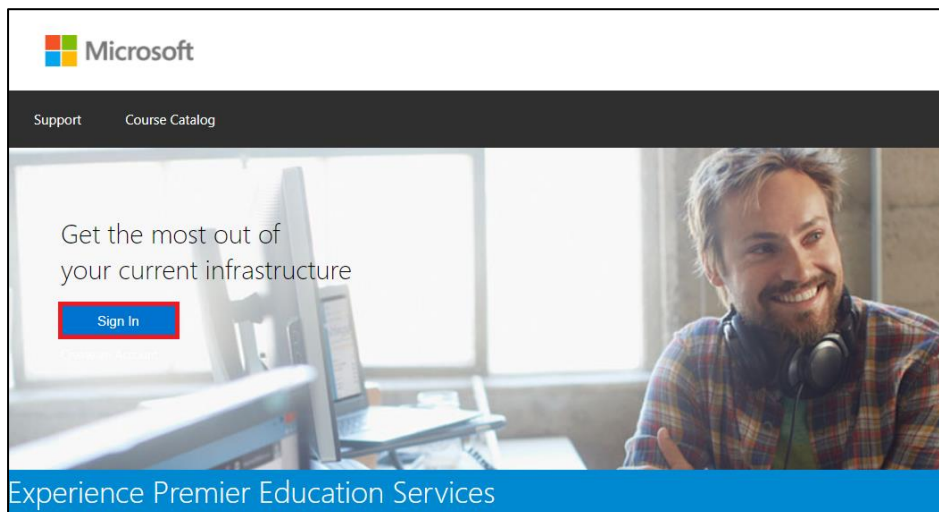
It's needed to avoid interference with your corporate account session.

If you are experiencing any problems with starting up a browser in Incognito/InPrivate mode – please, **notify your instructor as soon as possible**.

1. Open preferred browser in **Incognito/InPrivate** mode and navigate to:

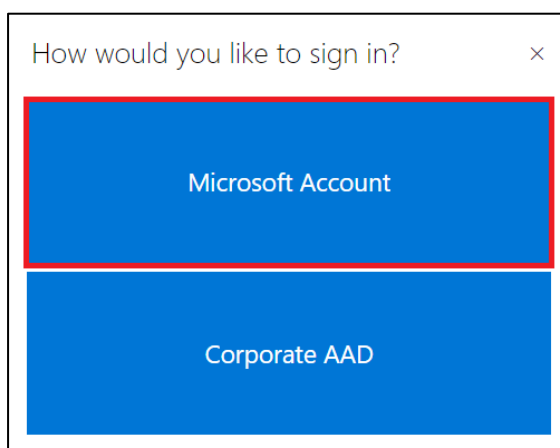
<https://aka.ms/lod>

2. Click **Sign In** button

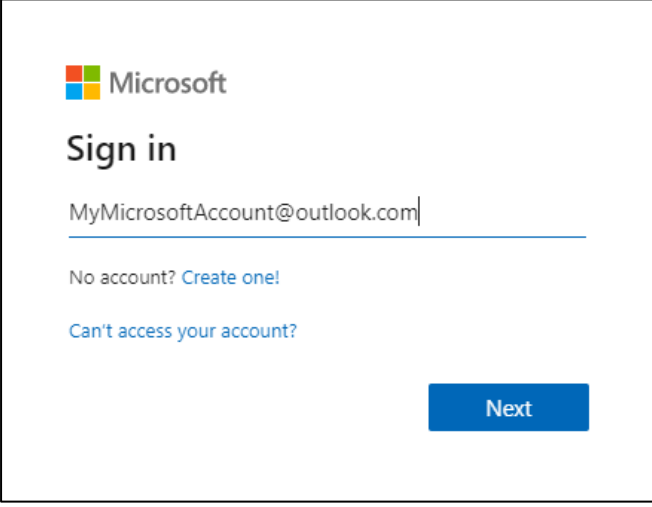


3. Choose **Microsoft Account** option

Organization policies may not allow to use your Corporate Account, we recommend using Microsoft Account to connect to Skillable (Labs on Demand).

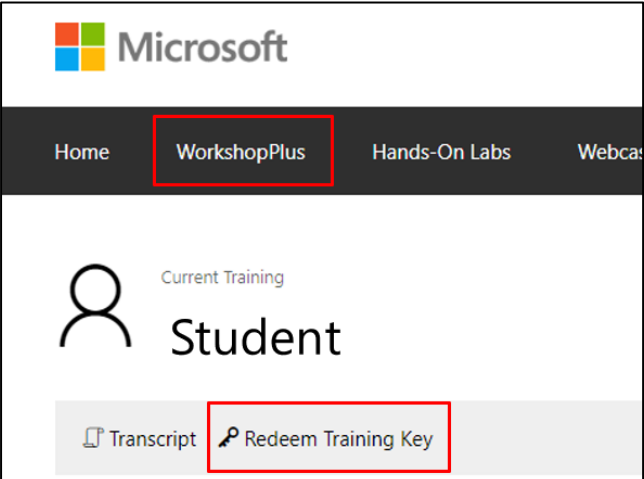


4. Sign in using your personal **Microsoft Account**



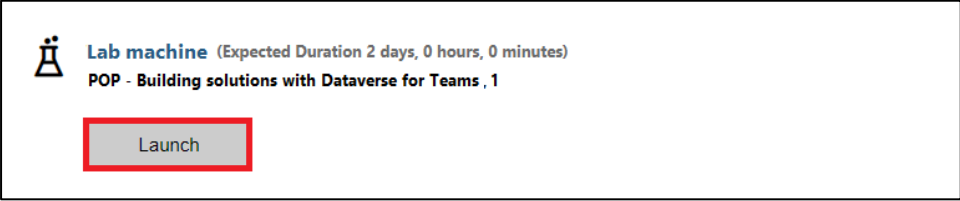
The image shows the Microsoft sign-in page. At the top is the Microsoft logo. Below it is the text "Sign in". There is a text input field containing the email address "MyMicrosoftAccount@outlook.com". Below the input field are two links: "No account? Create one!" and "Can't access your account?". At the bottom right is a blue button labeled "Next".

5. After you logged in, go to **WorkshopPlus** -> **My Training**
Click **Redeem Training Key** and provide **the training key provided by the Instructor**



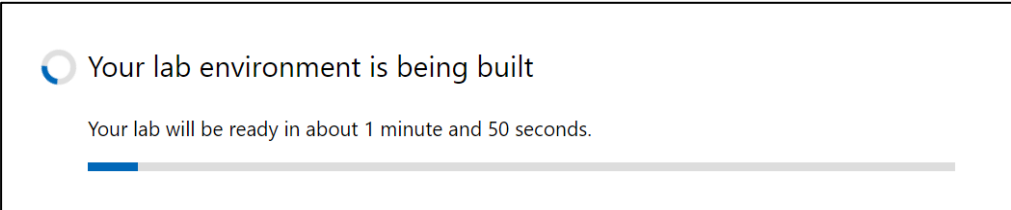
The image shows the Microsoft WorkshopPlus "My Training" page. At the top is the Microsoft logo. Below it is a navigation bar with links: "Home", "WorkshopPlus" (highlighted with a red box), "Hands-On Labs", and "Webcasts". Below the navigation bar is a section titled "Current Training" with a user icon and the text "Student". Below this is a row of buttons: "Transcript" and "Redeem Training Key" (highlighted with a red box).

6. Find activity **Lab machine** and click **Launch**



The image shows a card for the "Lab machine" activity. It features a flask icon, the text "Lab machine (Expected Duration 2 days, 0 hours, 0 minutes)", and "POP - Building solutions with Dataverse for Teams , 1". At the bottom is a button labeled "Launch" (highlighted with a red box).

7. New window should open, give it some time to load lab contents:



The image shows a loading screen for the lab environment. It features a circular progress indicator, the text "Your lab environment is being built", and "Your lab will be ready in about 1 minute and 50 seconds." Below the text is a progress bar.

8. When the lab is loaded, navigate to **Resources** tab



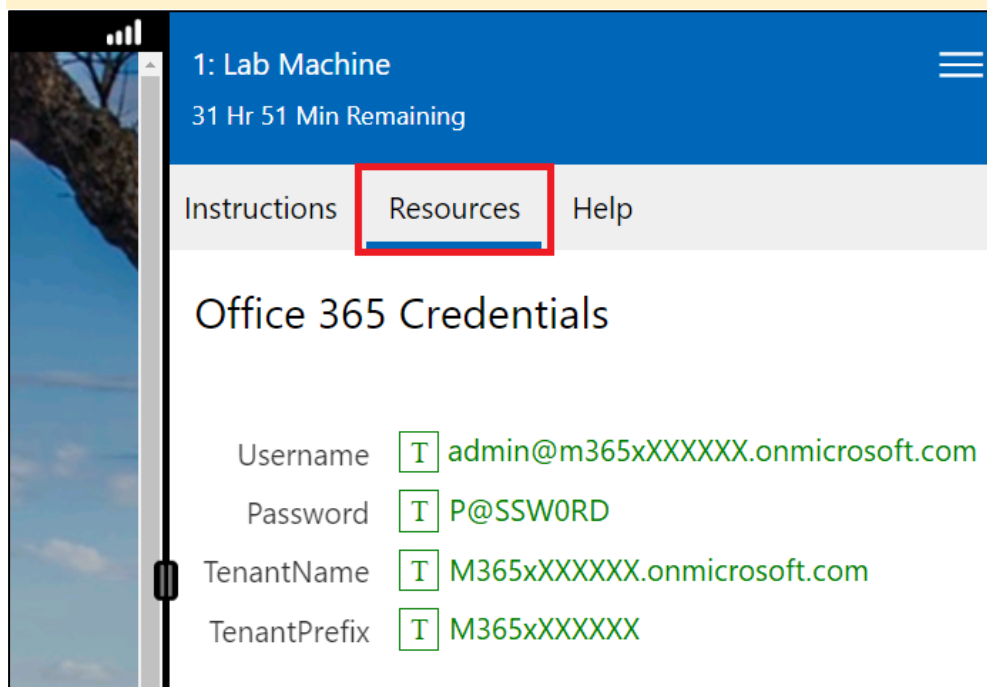
Important – Lab Tenant Credentials

Office 365 credentials displayed in Resources tab will be used in ALL lab exercises.

Please, copy them locally and use them to login to Microsoft 365 tenant in the next and all following tasks.

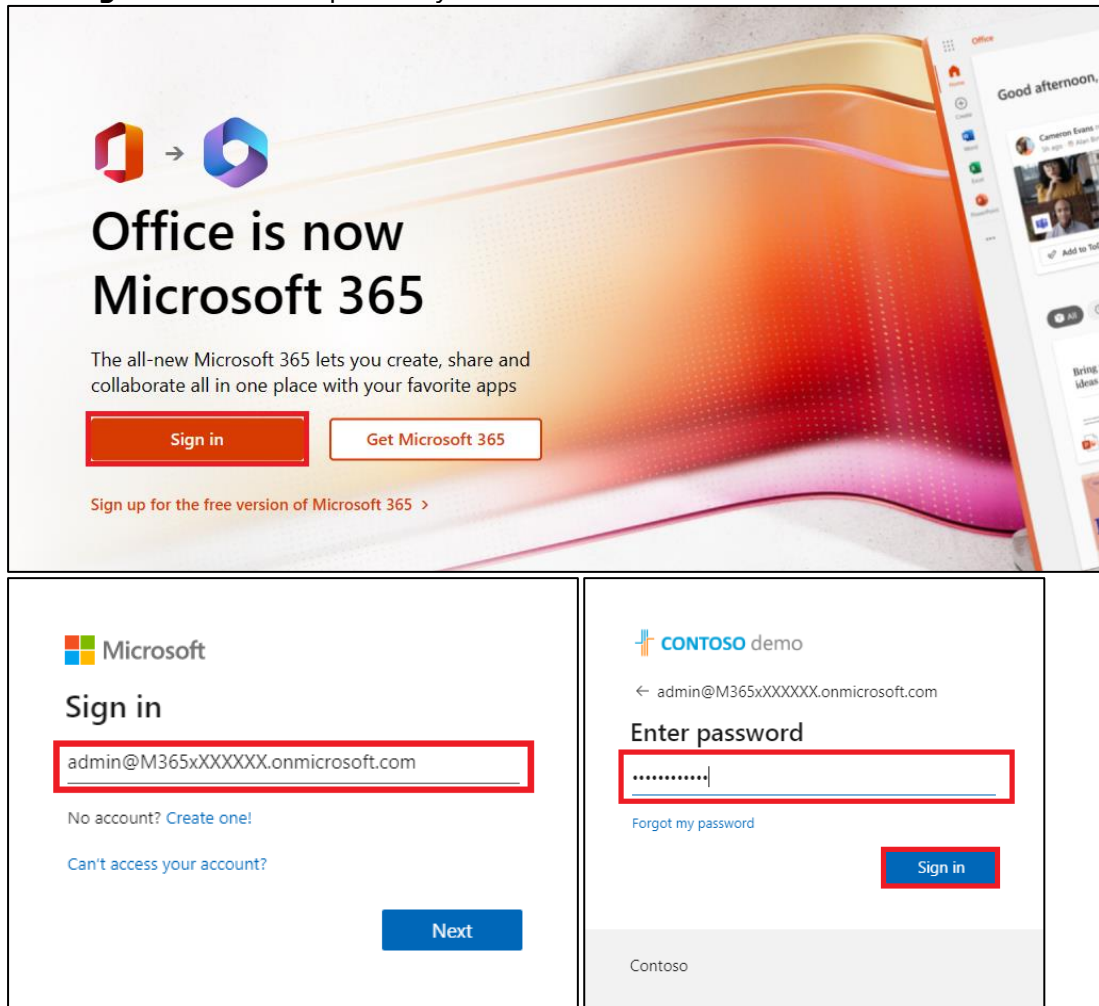
When you see M365xXXXXXX URLs and Usernames in your lab docs, please, replace it with TenantPrefix of your lab tenant.

For example: admin@M365xXXXXXX.onmicrosoft.com should be replaced with the actual username provided in the Resources tab.



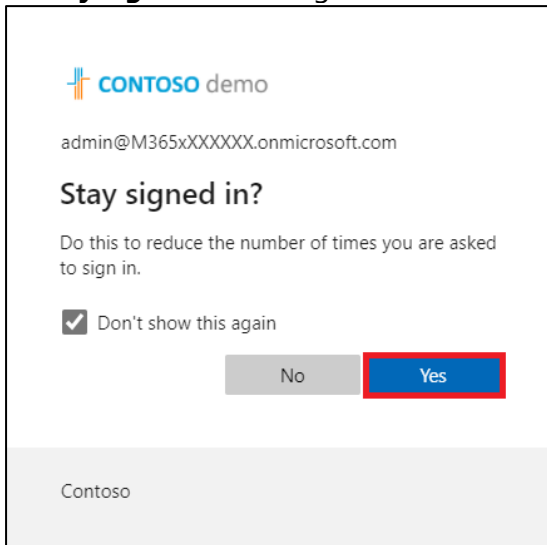
Task 2: Connect to your hands-on labs Microsoft 365 tenant

1. Please, have your **Username** and **Password** information (found in LoD lab resources tab) ready – it will be used across all the hands-on labs in this course.
2. Open preferred browser in **Incognito/InPrivate** mode and navigate to:
<https://microsoft365.com>
3. Click **Sign in** button and provide your **Username** and **Password**:



The image shows the Microsoft 365 sign-in process. The top part is the Microsoft 365 landing page, which features the Microsoft 365 logo and the text "Office is now Microsoft 365". Below this, there is a "Sign in" button and a "Get Microsoft 365" button. The bottom part is the sign-in form, which is divided into two sections. The left section is for the username, and the right section is for the password. The username field contains the text "admin@M365XXXXXXXX.onmicrosoft.com". The password field contains a series of dots. The "Sign in" button is located at the bottom right of the password field. The "Next" button is located at the bottom of the username field.

4. In **Stay signed in?** dialog, check **Don't show this again** and click **Yes**



5. Now you are signed into your hands-on labs M365 tenant. Use this session in all other labs.



Important

If you accidentally logged out, please, return to this lab and repeat these steps to log in once again.

Always remember to replace M365XXXXXX with your actual lab tenant prefix.

Exercise 2:

Set up a Dataverse for Teams environment

Objectives:

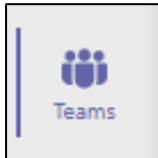
- Create a team
- Install and pin required Teams apps
- Provision a Dataverse for Teams environment
- Do initial Approvals provisioning

Estimated time:

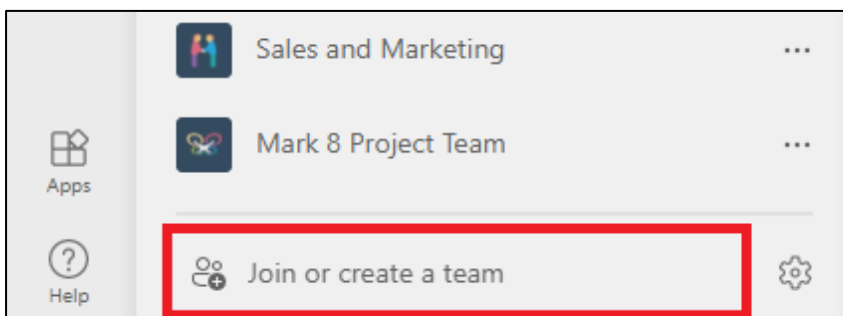
15 minutes

Task 1: Create a Team

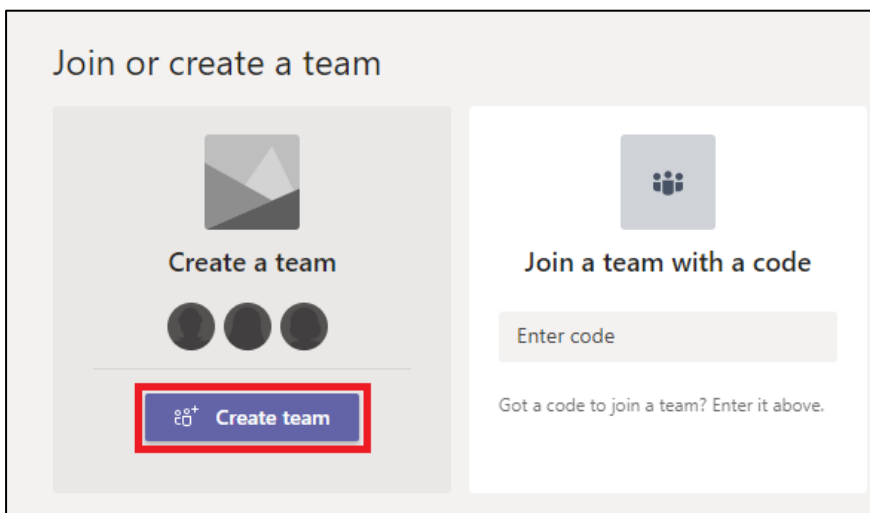
1. In **InPrivate/Incognito** browser mode, while logged in into your **M365XXXXXXX lab tenant**, navigate to <https://teams.microsoft.com>
2. Make sure that you have **Teams** selected on the left bar



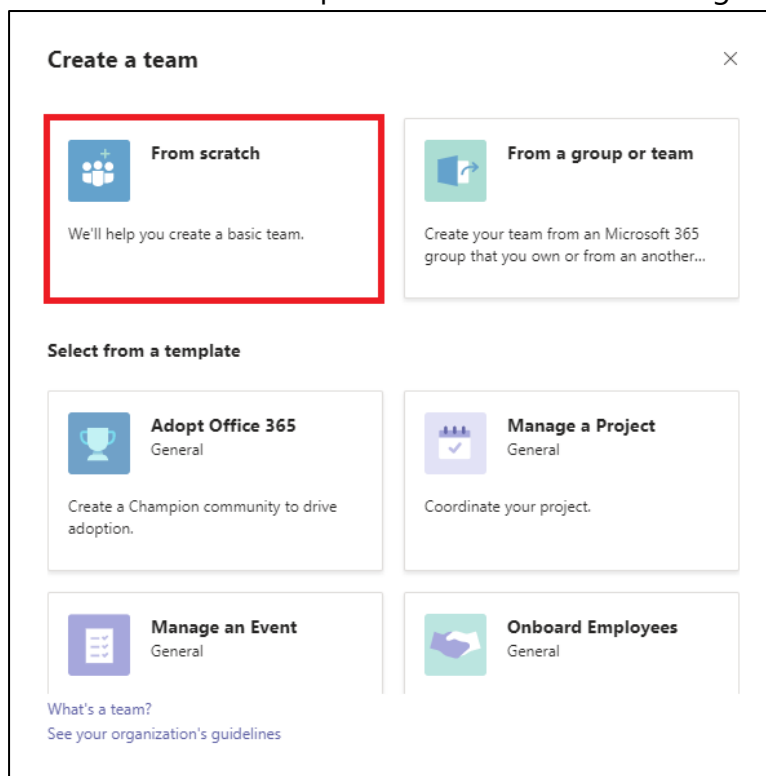
3. Click **Join or create a team** in the left bottom corner



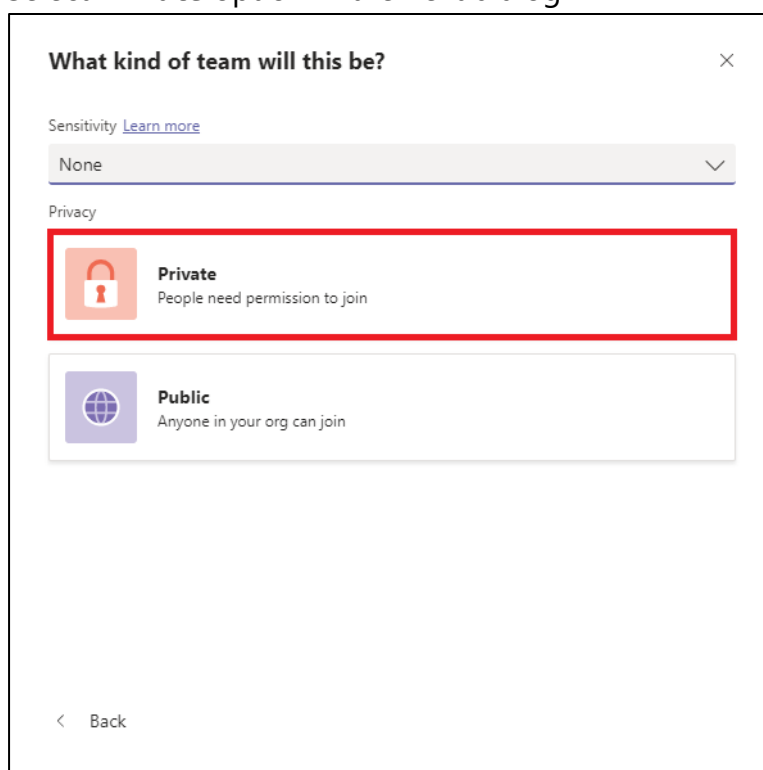
4. Click **Create team** button



5. Select **From scratch** option in Create a team dialog

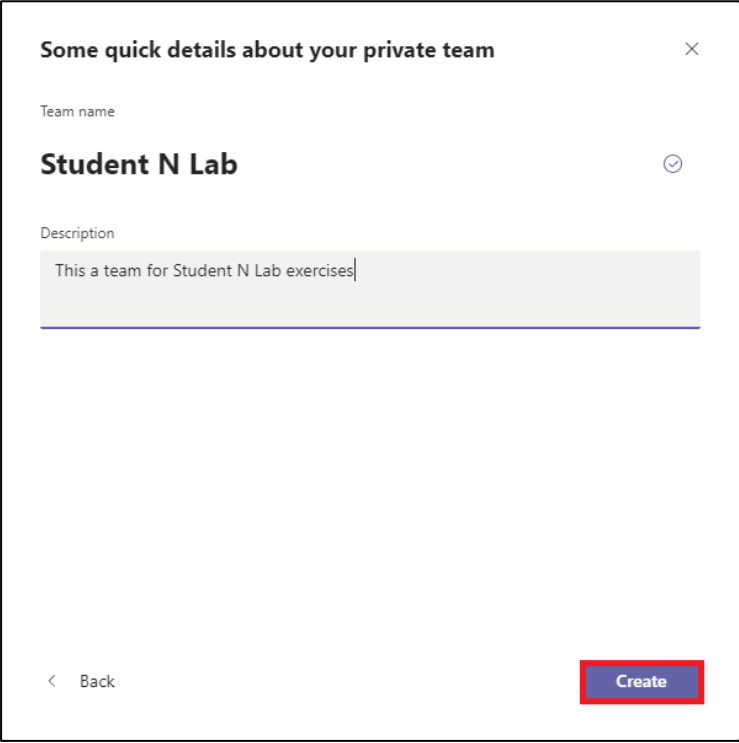


6. Select **Private** option in the next dialog



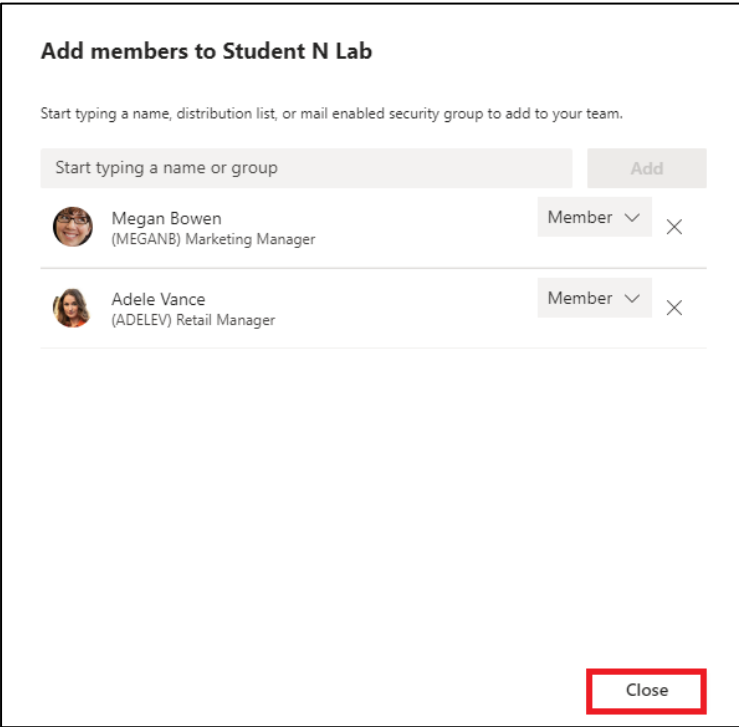
7. **Name your team**, you may include your initials or student number to easily recognize your Team, and then click **Create**

Note: In all upcoming examples you will see **Student N Lab** as an example.



The screenshot shows a dialog box titled "Some quick details about your private team" with a close button (X) in the top right corner. Below the title, there is a "Team name" field containing the text "Student N Lab" with a checkmark icon to its right. Below that is a "Description" field containing the text "This a team for Student N Lab exercises". At the bottom left, there is a "Back" button with a left arrow. At the bottom right, there is a "Create" button, which is highlighted with a red rectangle.

8. Add **Adele Vance** and **Megan Bowen** as team members, then click **Close**



The screenshot shows a dialog box titled "Add members to Student N Lab". Below the title, there is a text prompt: "Start typing a name, distribution list, or mail enabled security group to add to your team." Below this is a search input field with the placeholder text "Start typing a name or group" and an "Add" button to its right. Below the search field, there are two list items. The first item shows a profile picture of Megan Bowen, her name "Megan Bowen", her title "(MEGANB) Marketing Manager", a "Member" role with a dropdown arrow, and a close button (X). The second item shows a profile picture of Adele Vance, her name "Adele Vance", her title "(ADELEV) Retail Manager", a "Member" role with a dropdown arrow, and a close button (X). At the bottom right, there is a "Close" button, which is highlighted with a red rectangle.

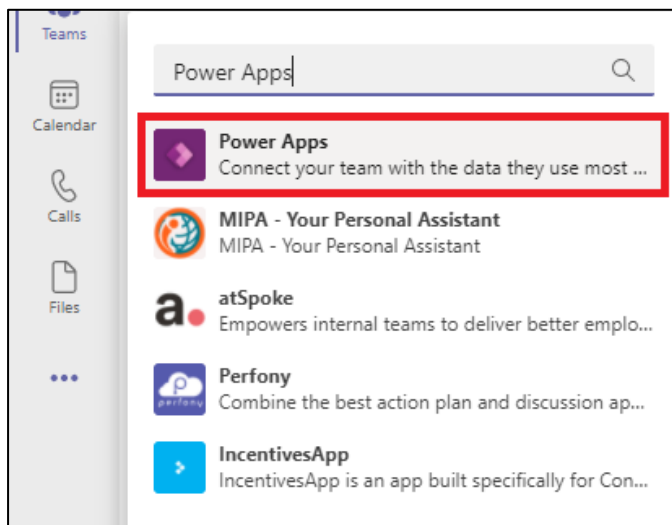
9. Task is completed.

Task 2: Install and pin required Teams apps

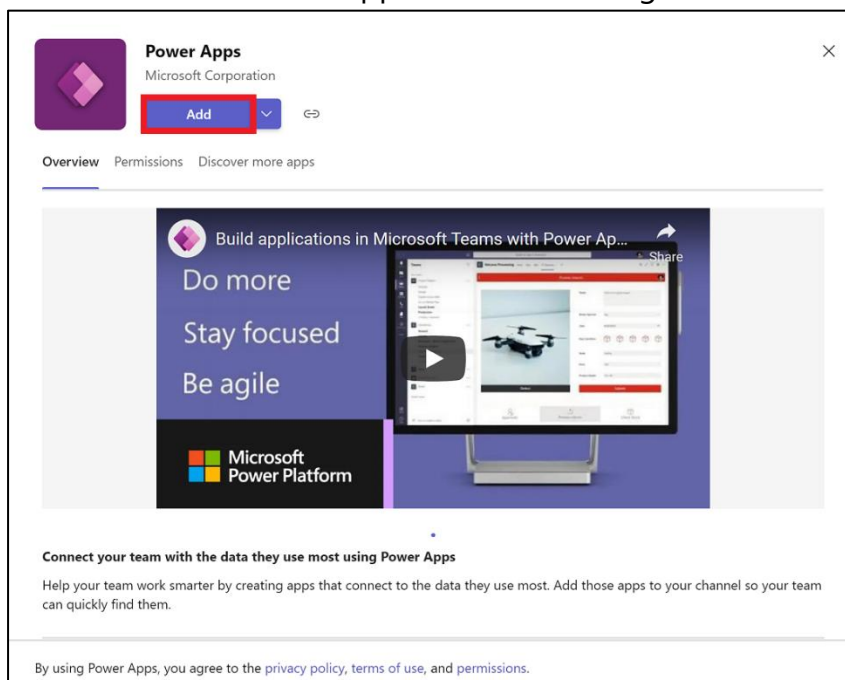
1. If Teams web app is not started yet, navigate to <https://teams.microsoft.com>
2. Select **ellipsis (...)** icon in the left bar



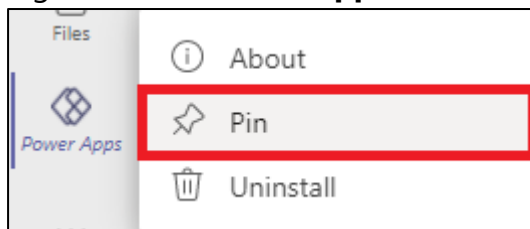
3. Type **"Power Apps"** in the "Find an app" prompt, then **click** on this app



4. Click **Add** button in the app installation dialog



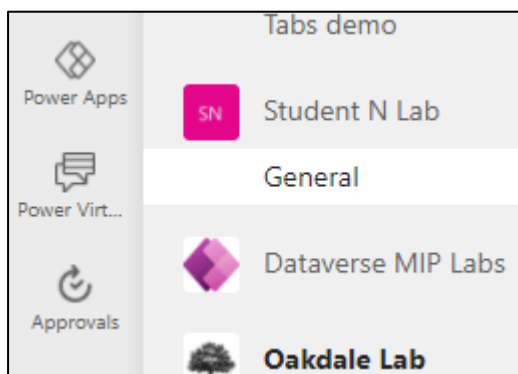
5. Right-click on **Power Apps** in the left bar and select **Pin**



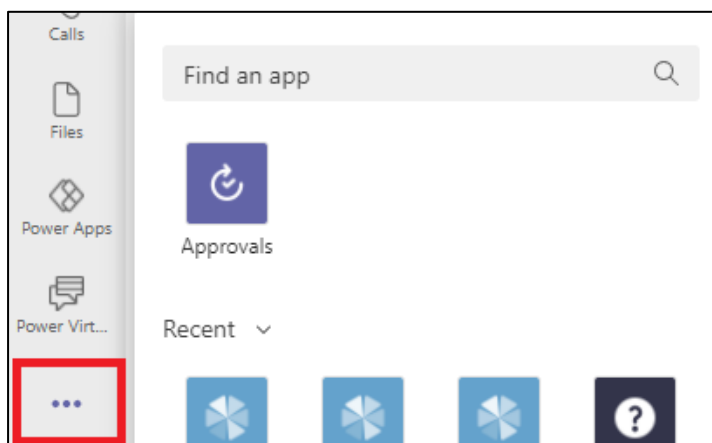
6. Repeat the same set of actions for the following apps:

a. **Power Virtual Agents**

b. **Approvals**



Note: Some icons may be hidden, because of the browser window size.
In this case, you can access these apps by clicking **ellipsis (...)**



Task is completed.

Task 3: Provision a Dataverse for Teams environment



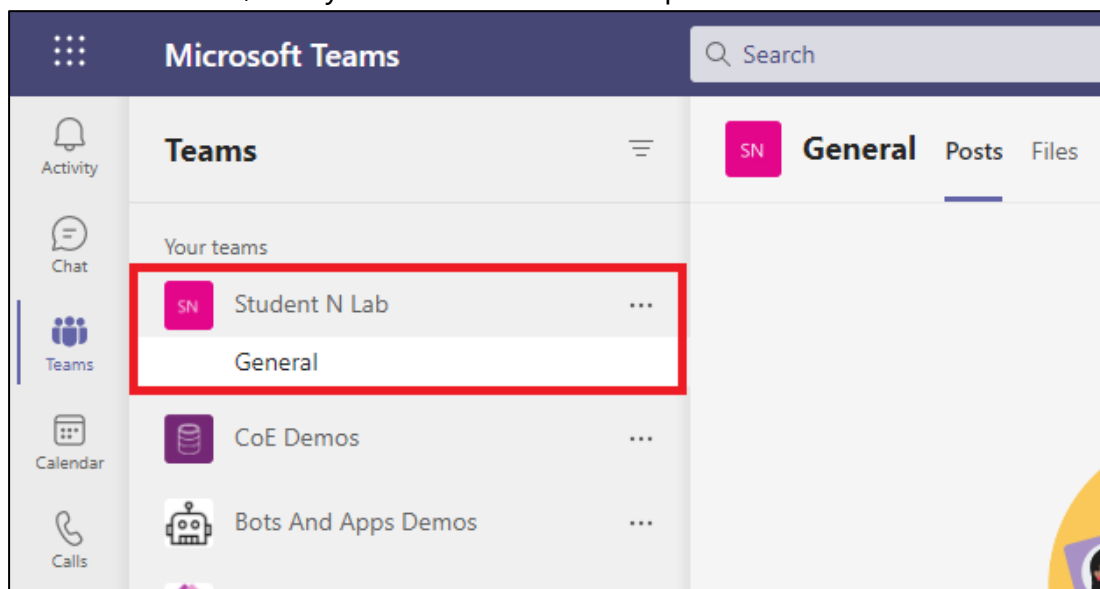
Dataverse for Teams environments

Dataverse for Teams environment is a container connected to your Team, that can host Team's apps, flows, bots, and data tables.

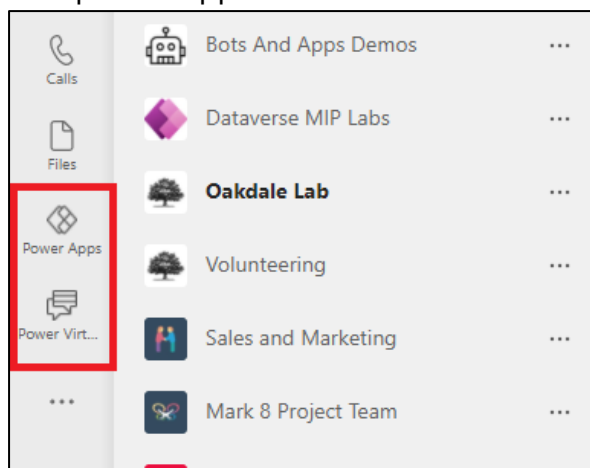
This environment is isolated from Power Platform's default productivity environment, where we usually work with apps and flows.

1. Navigate to <https://teams.microsoft.com>
2. Let's check that everything we need for the labs is in place

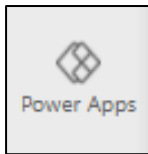
Locate the **Team**, that you have created in the previous task



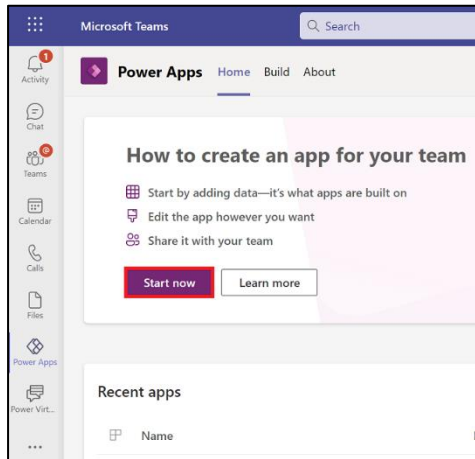
3. Find pinned app shortcuts in the left bar



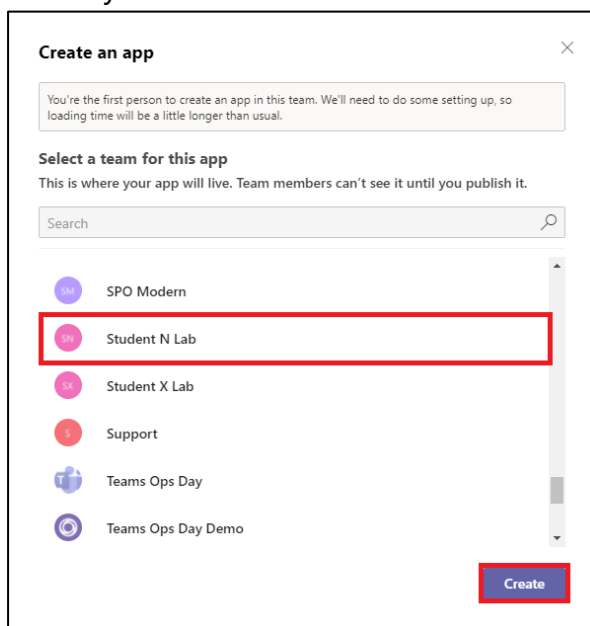
4. Select the **Power Apps** app



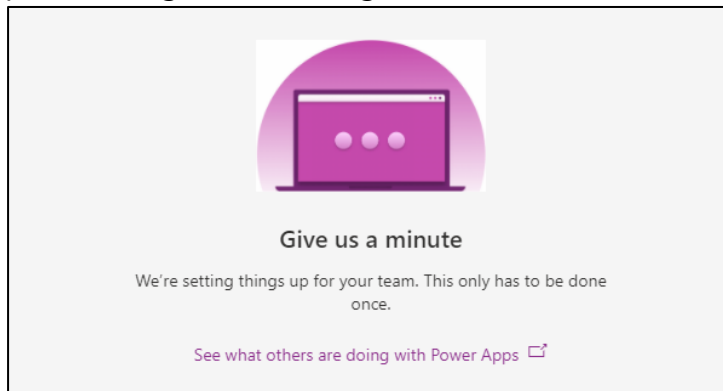
5. Click **Start now** on Power Apps home screen



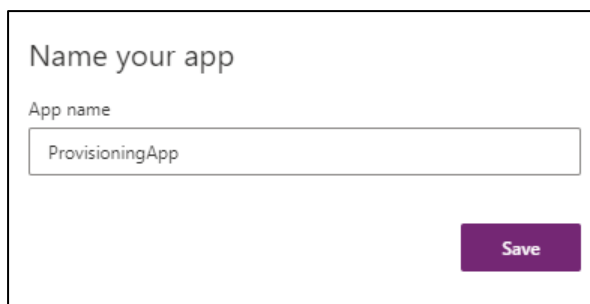
6. **Select** your team and click **Create**. Give it some time.



7. **Give us a minute** window will appear – Dataverse for Teams environment provisioning has started, give it some time.



8. Name your app as **ProvisioningApp** – we will not need it later anyway. Click **Save** button.

A screenshot of a 'Name your app' form. The title 'Name your app' is at the top. Below it, the label 'App name' is positioned above a text input field. The input field contains the text 'ProvisioningApp'. At the bottom right of the form is a purple button with the word 'Save' in white text.

Task is completed.

Task 4: Approvals provisioning

! Why do Approvals need provisioning?

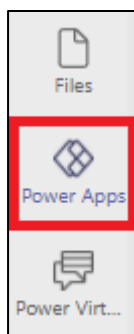
Approvals is a built-in application that uses Dataverse to store its data model. You may be familiar with this application, if you have ever created any flows and apps, that use Approvals connector.

By default, all the data tables related to Approvals are not provisioned in the environment. Provisioning happens on-demand when any user creates an approval for the **first time** in that environment.

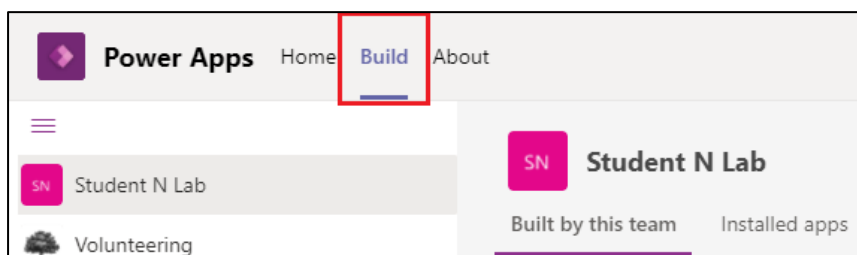
It may take some time, that's why we will start it right in the first lab.

More info: [Power Automate Approvals Provisioning Overview and Troubleshooting \(microsoft.com\)](https://powerapps.microsoft.com/en-us/blog/power-automate-approvals-provisioning-overview-and-troubleshooting/)

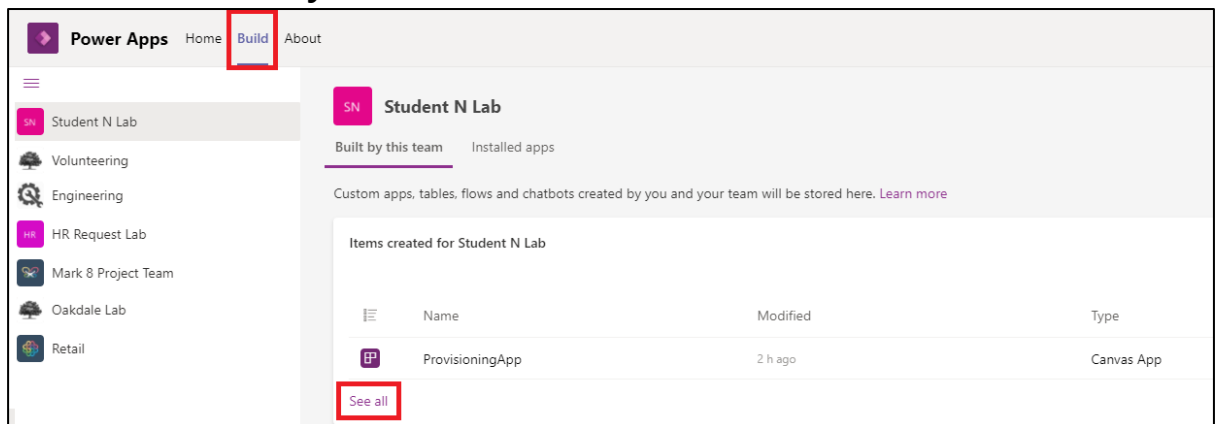
1. Open **Power Apps** app using the left bar



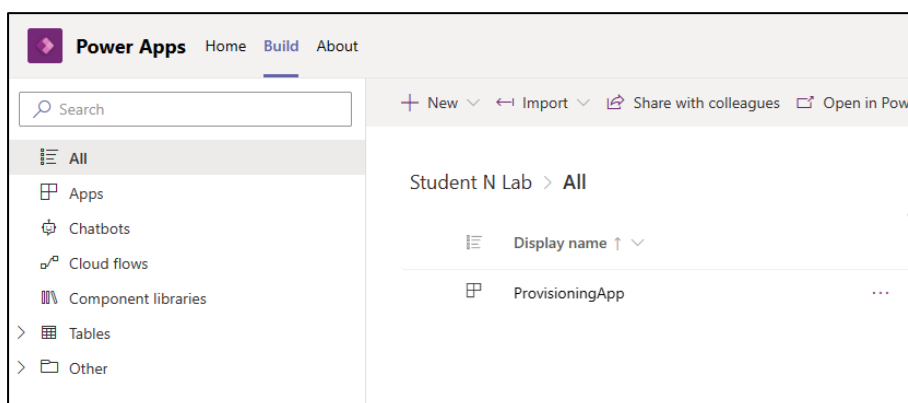
2. Select **Build** tab, then find and select your Team



3. In **Items created for your team**, click **See all** link

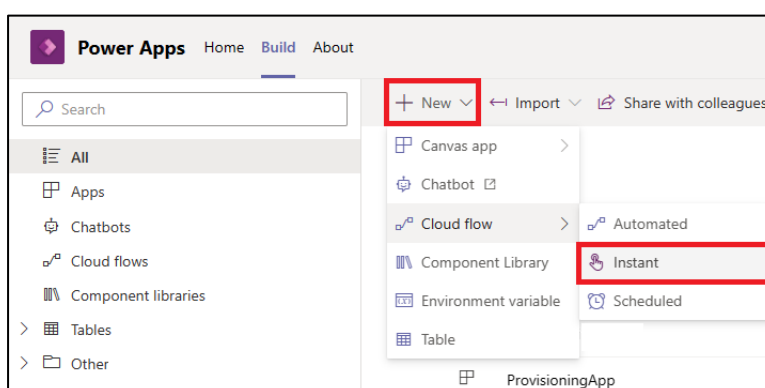


4. In this interface, you can see all the content created in your Team's **Dataverse for Teams** environment:



We will use this interface as the starting point in many lab tasks later.

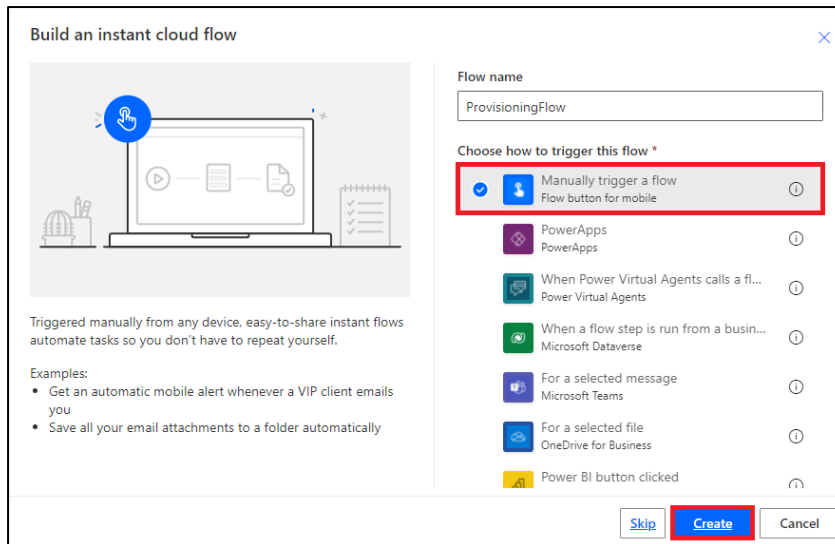
5. To create a new flow, click **+New -> Cloud Flow -> Instant**



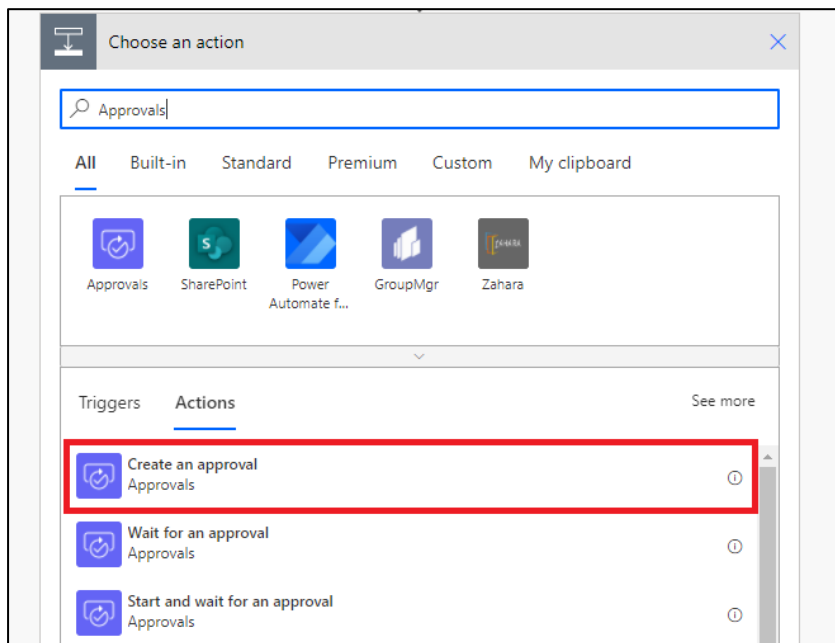
6. Set **Flow name** as *ProvisioningFlow*

Select **Manually trigger a flow** trigger

Click **Create** button (example on screenshot below)



7. Click **+New step** button
Select **Create an approval** action in **Approvals** connector by clicking on it
(use Search, if this connector or action is not present)



8. Set properties for **Create an approval**:
 - Approval type:** Approve/Reject – First to respond
 - Title:** ProvisioningFlow
 - Assigned to:** admin@m365XXXXXXXX.onmicrosoft.com
(replace m365XXXXXXXX with your actual Tenant Prefix)
 - Details:** any text

See an example on screenshot below.

Manually trigger a flow

Create an approval

* Approval type: Approve/Reject - First to respond

* Title: ProvisioningFlow

* Assigned to: admin@m365xXXXXX.onmicrosoft.com

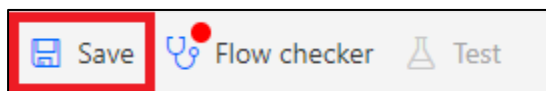
Details: any text

Item link: Add a link to the item to approve

Item link description: Describe the link to the item

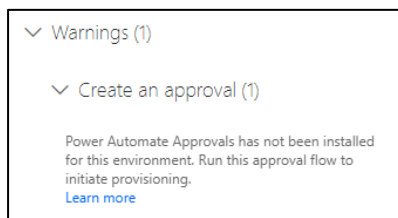
Show advanced options

9. Save a flow



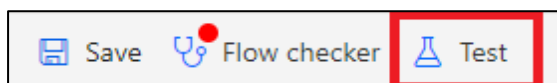
Notice that **Flow checker** has a warning, if you click on it, you should see the following:

Power Automate Approvals has not been installed for this environment. Run this approval flow to initiate provisioning.

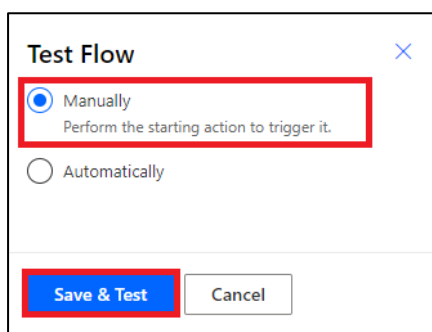


This is the exact reason of why we are creating this ProvisioningFlow.

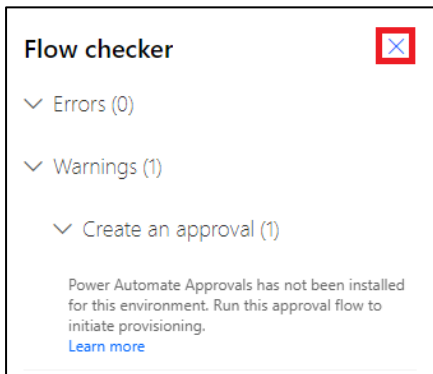
10. After the flow is saved, click **Test** button



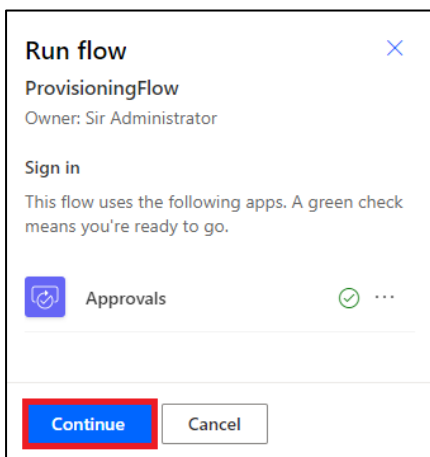
11. Select **Manually** option and click **Save & Test** button to start a test flow run.



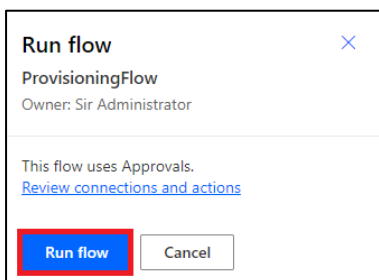
12. **Flow checker** may show the warning once again. If it happens, just close it.



13. Confirm sign in details for a flow test by clicking **Continue** button:



14. Click **Run flow** button to finally run the flow.



Check that the flow is running, but don't wait for it now.

This flow will fail, but it will start Approvals provisioning process, that may take some time.

Task is completed.