



# Microsoft Power Virtual

## Agents in a Day

Trainer Set Up and Prerequisites

May 2021

# Contents

<i>Lab Overview and Pre-requisites</i> .....	1
<i>Instructor Set Up and Prerequisites</i> .....	1
<i>Task 1: Set up a tenant</i> .....	1
<i>Task 2: Obtain a Power Virtual Agents Trial</i> .....	7
<i>Task 3: Obtain a Power Apps Trial</i> .....	9
<i>Task 4: Create users and assign licenses</i> .....	13
<i>Optional- Turn off Multi-factor authentication</i> .....	18
<i>Task 5: Create a trial environment</i> .....	20
<i>Task 5: Import PVA in a Day solution package</i> .....	26
<i>Task 6: Generate data for participants to use</i> .....	33
<i>Lab survey</i> .....	37
<i>Terms of Use</i> .....	38

## Lab Overview and Pre-requisites

The estimated time to complete this setup is 60 minutes.

Providing your attendees with a tenant already set up will maximize the time available for learning on the day, and allow them to get started with Power Virtual Agents quickly and easily. It will also remove the need for any troubleshooting with security and permissions issues faced by some customers who are unable to sign up for a trial or create an environment.

Note that a maximum of 24 attendees can have access to a tenant, based on the limitations of the free Office 365 trial licenses. If you have more than 24 attendees, you will have to repeat these prerequisites for the next lot of 24 attendees.

## Instructor Set Up and Prerequisites

 This document takes you through setting up a tenant to use for training. You will: <ul style="list-style-type: none"><li>• Create a trial account and set up a tenant</li><li>• Set up user accounts and assign licences'</li><li>• Create a new environment</li></ul>	 The time to complete this setup is [60] minutes.
--	--

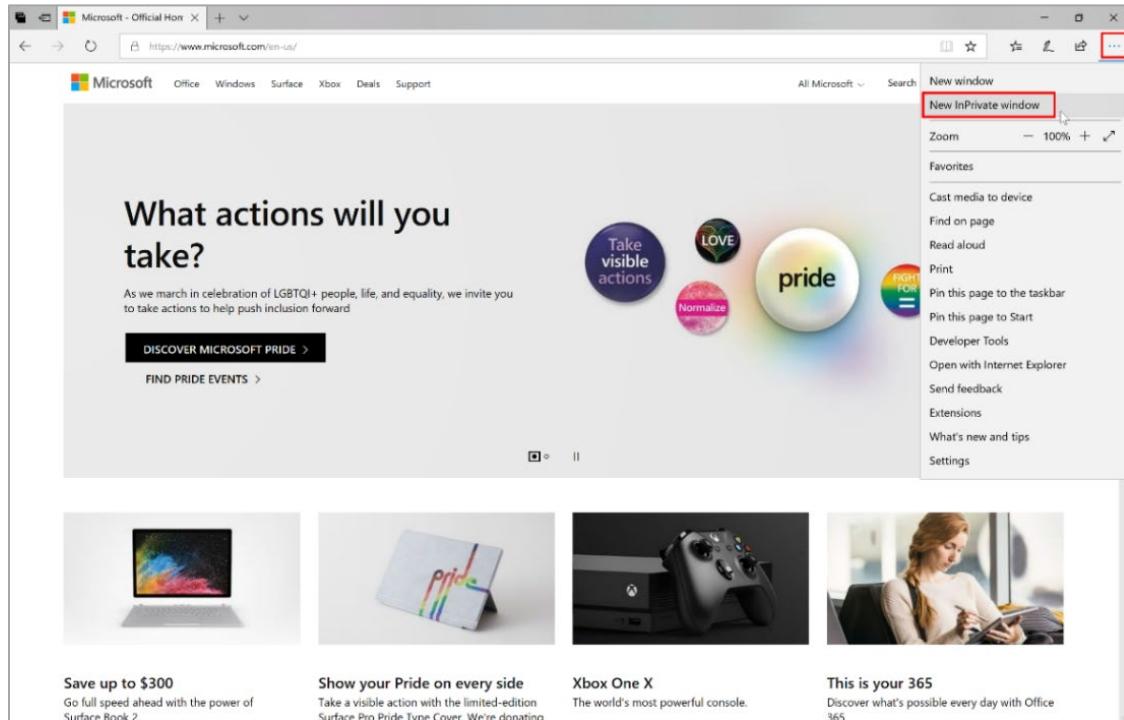
## Task 1: Set up a tenant

You will sign up for an Office 365 E3 tenant with trial licenses for Power Virtual Agents and Power Apps for attendees to work in. Note that a maximum of 24 attendees can have access to a tenant, based on the limitations of the free Office 365 trial licenses. If you have more than 24 attendees, you will have to repeat these prerequisites for the next lot of 24 attendees.

Follow the instructions below to sign up for a free trial.

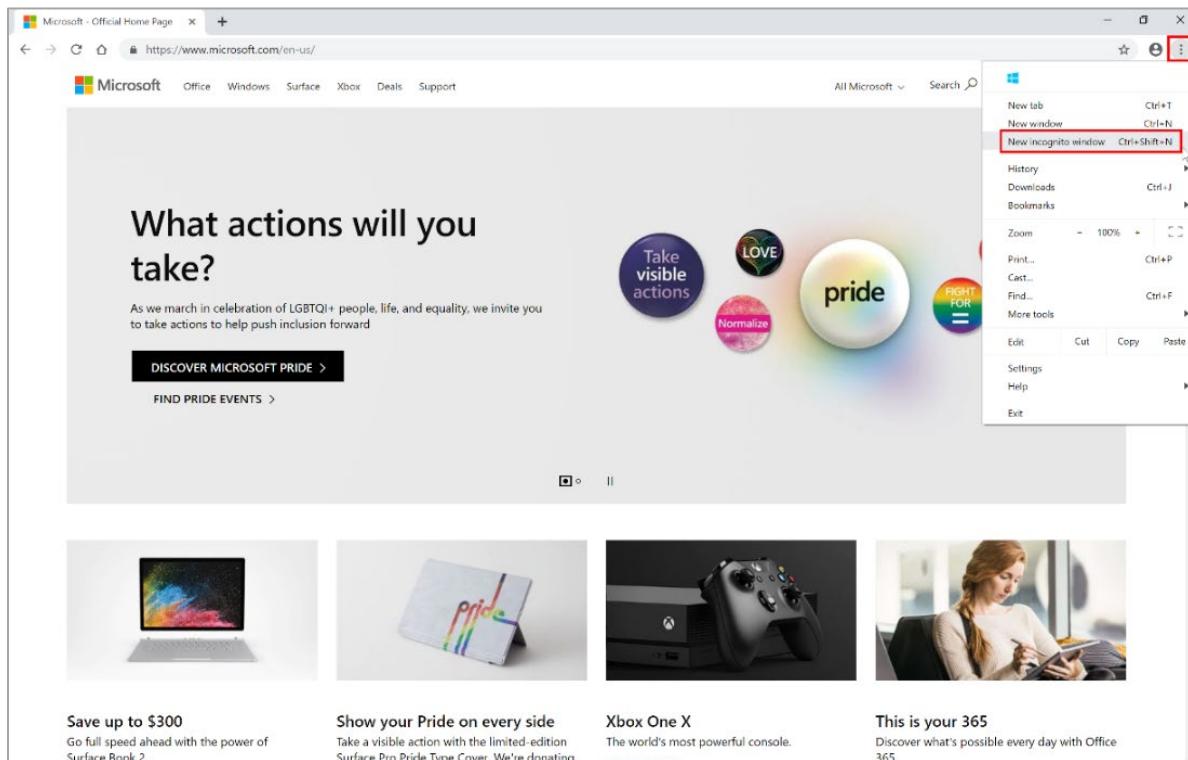
Open a private browser

- ➔ If you're in Edge, open a New InPrivate Window.
- I. To open a New InPrivate Window in Edge: click ⋮
  - II. Then, select New InPrivate Window.



If you're in Chrome, open a New Incognito Window.

- I. To open New Incognito Window in Chrome: click :
- II. Then, select New Incognito Window.



1. In your private browser, navigate to <https://products.office.com/en-us/business/office-365-enterprise-e3-business-software>. Select **Free Trial** to navigate to trial sign up page.

The screenshot shows the Microsoft 365 product page. At the top, there's a navigation bar with links for Microsoft, Microsoft 365, Products, Capabilities, Resources, and Support. On the right side of the header are links for All Microsoft, Search, and Sign in. Below the header, there's a photograph of a person wearing glasses looking at a laptop screen displaying Microsoft Excel. To the left of the laptop is a white vase with red flowers and a small geometric object. An open book is also visible on the desk. The main content area features a large image of a woman's profile. Below the image, the text "Office 365 E3" is displayed, followed by a list of features:

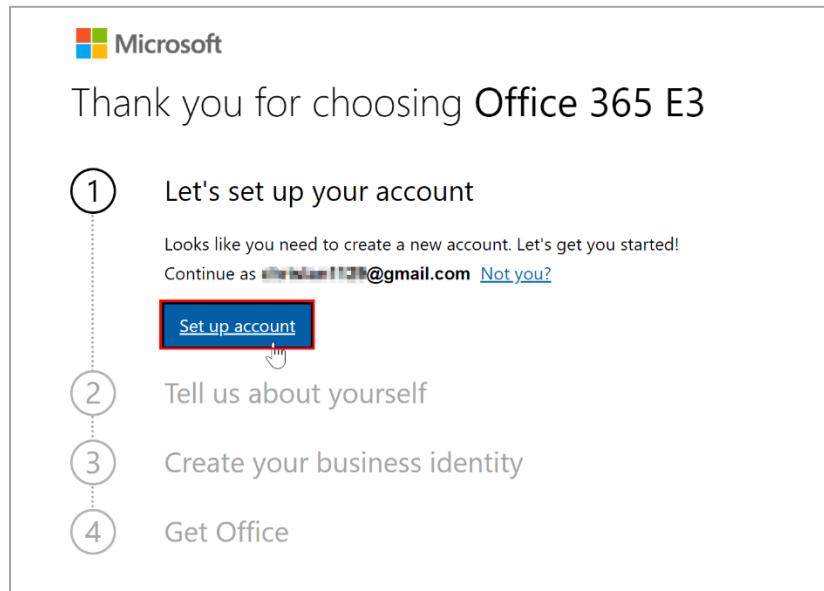
- Includes full desktop versions of Office apps
- Each user can install Office mobile apps on 5 PCs or Macs, 5 tablets, and 5 phones
- Five layers of security and monitoring help keep customer data safe
- Reduce IT costs, and move to the cloud on your terms
- Guaranteed 99.9% uptime, and 24/7 support from Microsoft

To the right of the features, the price "\$20.00 user/month (annual commitment)" is shown, along with "Buy now" and "Free trial >" buttons. The "Free trial >" button is highlighted with a red border.

2. Enter your email address and click **Next**.

The screenshot shows the first step of a four-step account setup wizard. The Microsoft logo is at the top left. The main heading is "Thank you for choosing Office 365 E3". Step 1, "Let's set up your account", is currently active. It instructs the user to enter their work or school email address. A red-bordered input field is provided for this purpose. A "Next" button is located below the input field. To the left of the input field, there are numbered circles indicating the steps: 1 (active), 2, 3, and 4. Step 2 is "Tell us about yourself", Step 3 is "Create your business identity", and Step 4 is "Get Office".

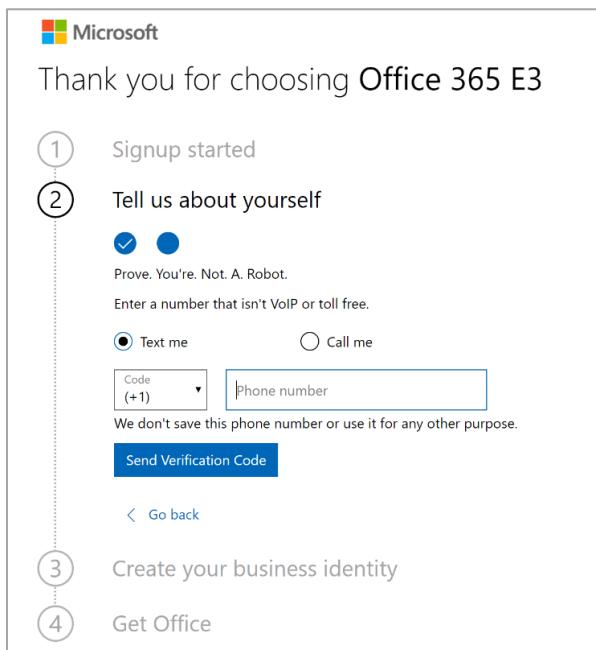
3. Click **Set up account**. If it prompts you to sign in at this stage, select the option **Create a new account instead**.



4. Fill in your information and click **Next**.

The screenshot shows the Microsoft logo and the text "Thank you for choosing Office 365 E3". A numbered list on the left indicates the steps: 1. Signup started (step 1 is completed), 2. Tell us about yourself (highlighted with a red circle), 3. Create your business identity, and 4. You're all set. Below step 2, there are input fields for First name (Virtual), Middle name (empty), Last name (Agent), Business phone number (2066666666), Company name (Demo company), Company size (10-24 people), and Country or region (United States). The "Country or region" field is highlighted with a blue border and a cursor icon. A "Next" button is located below the input fields.

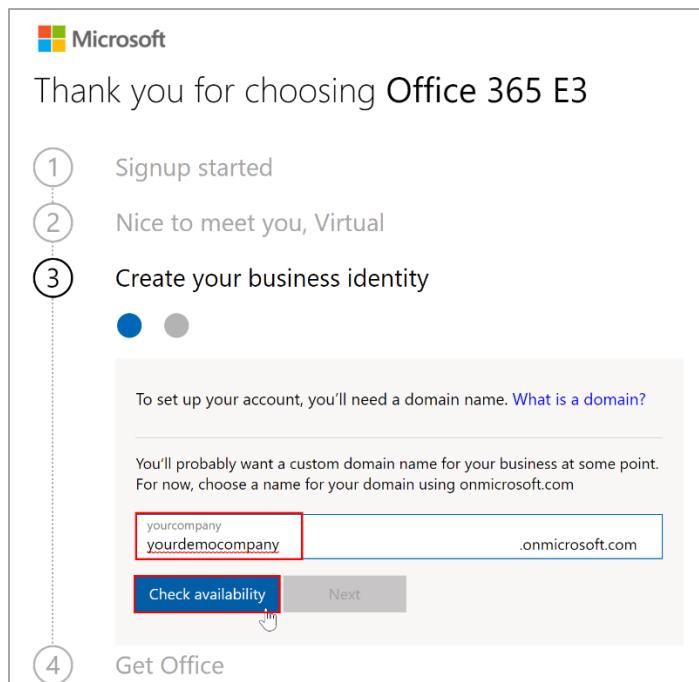
You'll be asked to verify your identify using either phone call or text message. Follow the directions and confirm your identity by entering your phone number, and then entering the verification code you receive.



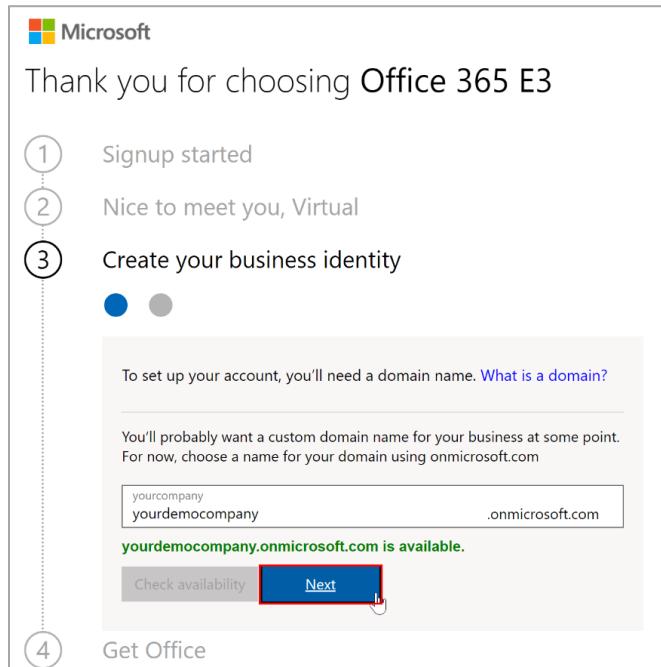
5. On the create your user ID page, fill in information for an administrator user and select your tenant domain.

*Note: the tenant domain must be unique.*

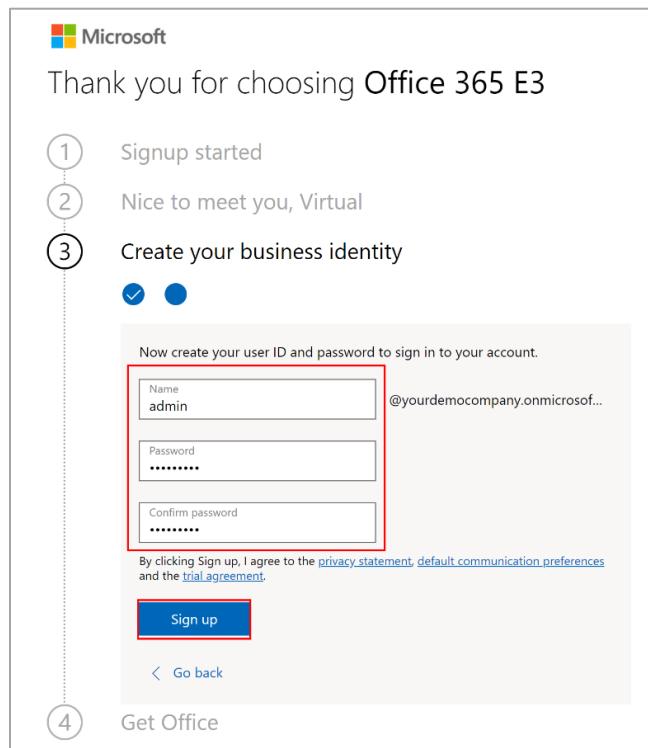
6. Click **Check availability**.



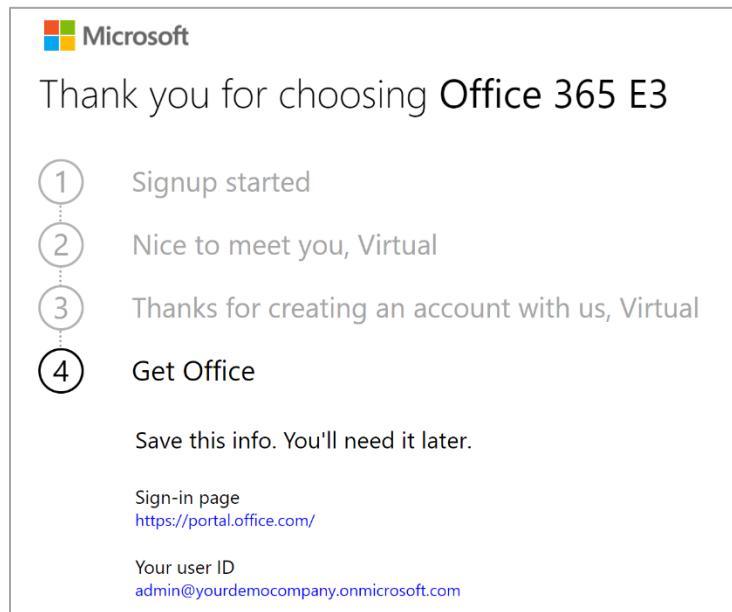
7. Click **Next** if the custom domain name is available.



8. Now, let's create your user ID and password to sign in to your account. Fill out a username and password, then click **Sign Up**.

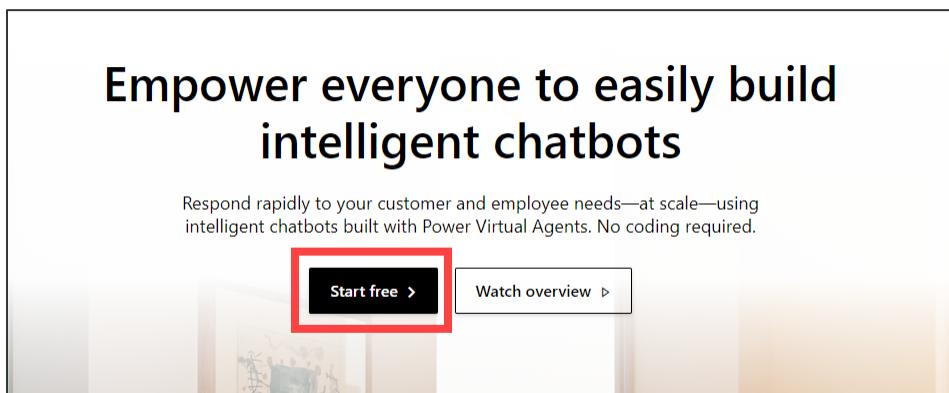


9. Wait while the tenant is created. It usually takes less than 1 minute. Take note of the login details you have just created as you will be using this to complete the training.

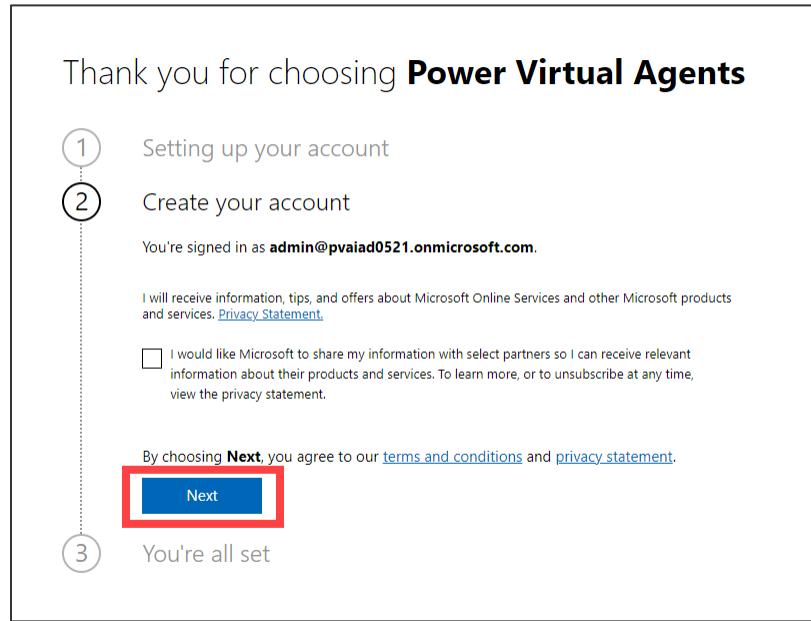


## Task 2: Obtain a Power Virtual Agents Trial

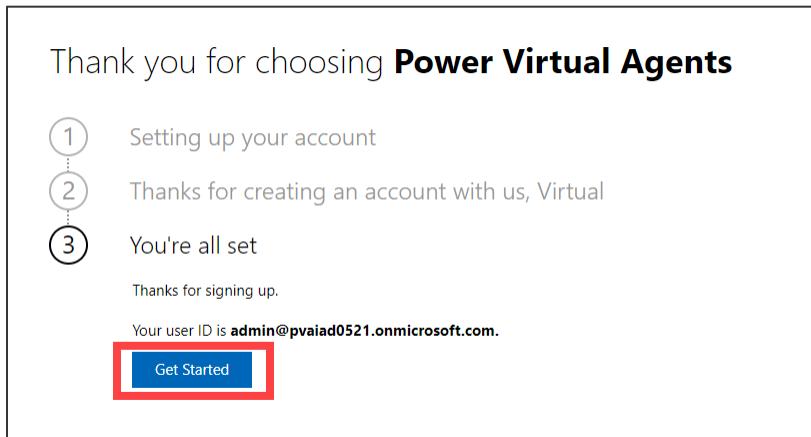
1. Navigate to <https://aka.ms/trypva> and click on **Start free** to sign up for a trial.



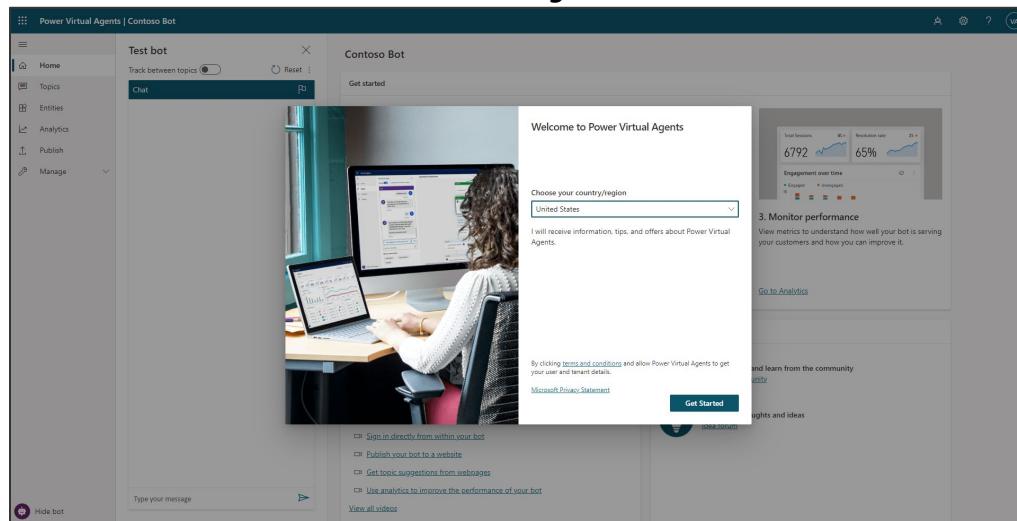
2. Click Next



3. Click Get Started

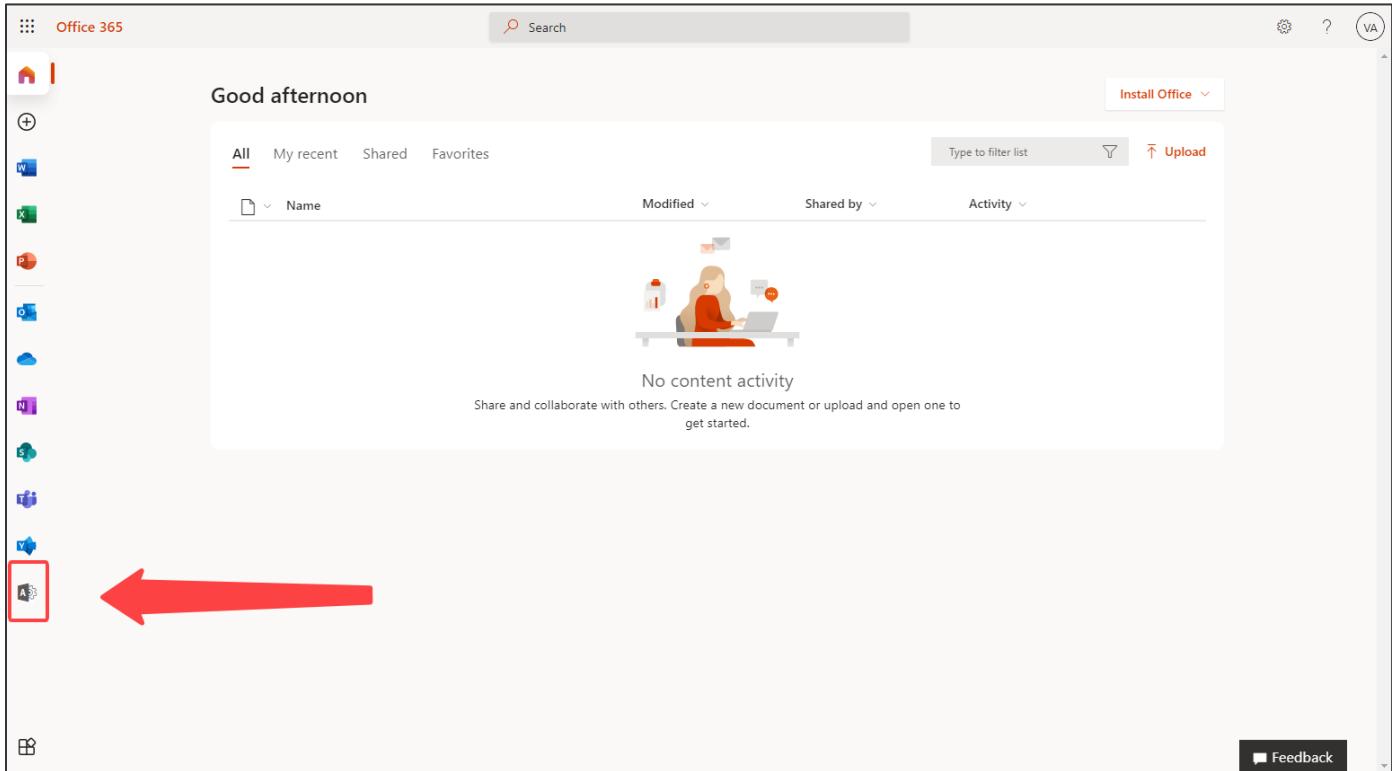


4. You will then be taken to the **Welcome to Power Virtual Agents** screen. You can close this browser tab.



## Task 3: Obtain a Power Apps Trial

1. Navigate to <https://www.portal.office.com> and click on **Admin** to open the Admin Center.



2. On the left side of the Admin Center, expand **Billing** and click on **Purchase Services**.

The screenshot shows the Microsoft 365 Admin Center interface. On the left sidebar, under the 'Billing' section, the 'Purchase services' option is highlighted with a red box. The main content area displays a 'Finish setting up Office 365 E3' card with several setup steps: 'Install Office', 'Add domain', 'Add users', 'Connect domain', 'Set up your mobile device', and 'Share Microsoft Teams'. Below this, there's a 'Now it's time to install your Office apps' section with a 'Go to guided setup' button. At the bottom, there's a 'Microsoft Teams' card.

3. Search for **Power Apps**.

The screenshot shows the 'Purchase services' page in the Microsoft 365 Admin Center. The left sidebar shows the 'Purchase services' option selected. In the main content area, there's a search bar with 'Power apps' typed in, which is also highlighted with a red box. Below the search bar, there's a 'Select up to three products for a detailed comparison.' section with 'Product 1', 'Product 2', 'Product 3', and a 'Compare products' button. Underneath, there's a 'Microsoft 365' section with a Microsoft 365 logo and a description: 'Microsoft 365 combines Office 365, Windows 10, and Enterprise Mobility + Security together for your organization. Today's modern workspace allows people to meet, collaborate, and stay connected across boundaries. Microsoft 365 supports teamwork, connecting services like Microsoft Teams, SharePoint, and Yammer and providing a hub for collaboration.' A 'Show all 4 ^' link is visible at the bottom right of this section.

4. Find **Power Apps per user plan** and click on **Details**. Ensure this is **per user plan**, do not select per app plan.

**Business apps**

Boost employee productivity with apps that power your organization. Build apps, automate processes and tasks, plan and track your projects, and create diagrams, organization charts, maps, and workflows - all to support your business.

**Power Apps per app plan**

Each subscription provides assigned user with the user rights to a specific custom business application.

From \$10.00 add-on licenses/month

**Power Apps per user plan**

Subscription enables licensed user to create, customize, share, and run business applications.

From \$40.00 licenses/month

**Power Apps and Power Automate capacity add-on**

Each license includes an additional 10,000 daily API calls and is assignable to a single user OR multiple users and/or business processes.

From \$50.00 add-on licenses/month

**Power Apps Portals login capacity add-on**

Power Apps Portals allow organizations to extend business processes to employees and external audiences. Each subscription includes 100 daily log ins...

From \$200.00 add-on licenses/month

**Power Apps Portals page view capacity add-on**

Power Apps Portals allow organizations to extend business processes to employees and external audiences. Each license includes 100,000 external us...

From \$100.00 add-on licenses/month

**Power Apps Portals login capacity add-on Tier 2 (10 unit min)**

Power Apps Portals allow organizations to extend business processes to employees and external audiences. Each unit includes 100 daily log ins by...

From \$100.00 add-on licenses/month

**Power Virtual Agent**

Base license that provisions 2000 sessions per tenant per month

**Power Automate per flow plan**

Power Automate reserved capacity serves users across your department/organization with workflow automation for a single process. Each subscription...

5. Click on **Start free trial** for Power Apps per user plan.

**Power Apps per user plan**

Subscription enables licensed user to create, customize, share, and run business applications.

Select license quantity: 1

Select billing frequency: \$40.00 license/month (Pay monthly, annual commitment)

Subtotal before applicable taxes: \$40.00

**Start free trial**

	Power Apps per user plan	Power Automate per user plan	Microsoft Stream
From \$40.00 licenses/month	From \$15.00 licenses/month	From \$5.00 licenses/month	
<b>Details</b>	<b>Details</b>	<b>Details</b>	

**Compare details**

Included: Included, Partially included, Not included

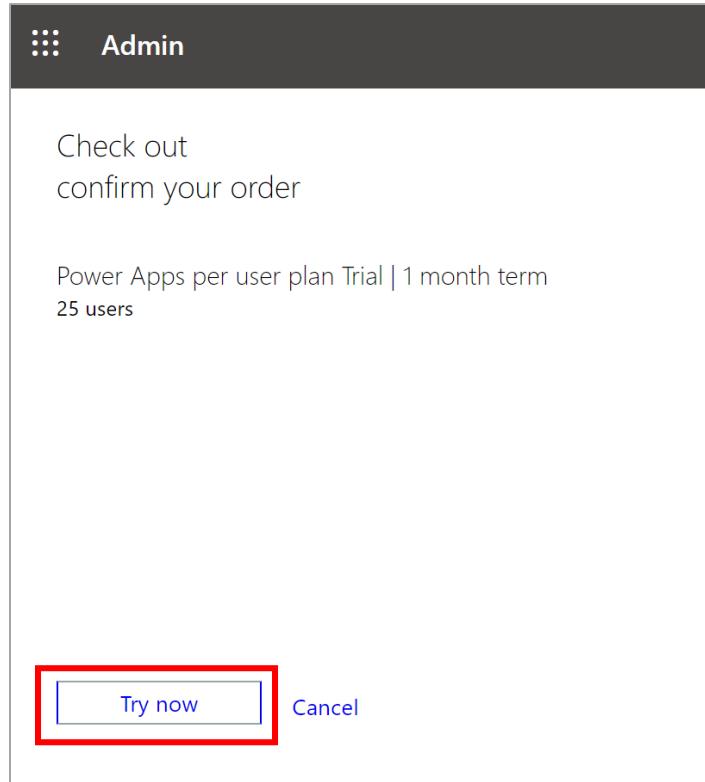
**Business apps**

Boost employee productivity with apps that help your organization automate processes, plan and track projects, create workflows, and more.

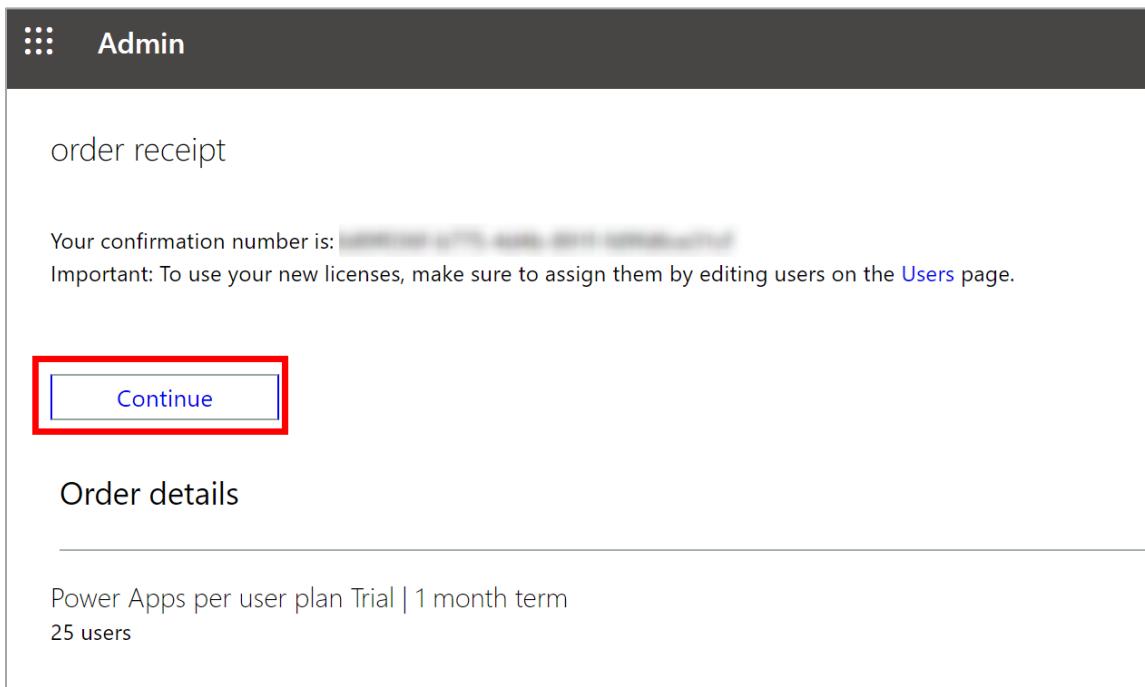
**Included apps**

- Stream
- PowerApps

6. Click **Try now** to confirm your order.



7. Click **Continue** on your order receipt screen.



## Task 4: Create users and assign licenses

You will now create user accounts within the tenant. There will be an account created for each training attendee. The accounts will be created by uploading a template for the user set up.

From your trainer material package, open the csv file called **Import User Template.csv**. You will use this template to add in the details of your attendees. The template contains 24 sample users.

The template provided will appear as below:

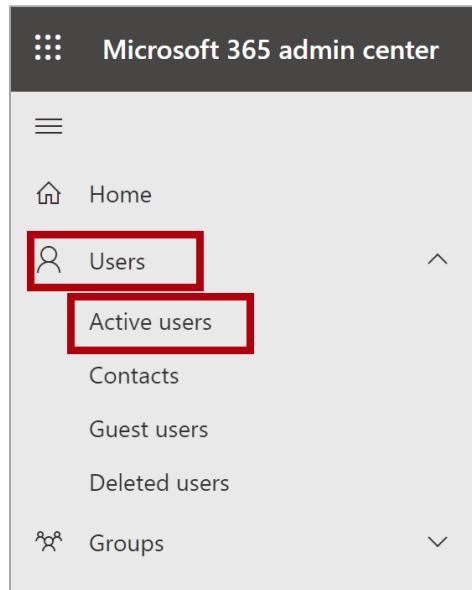
1. Use Search and Replace in Excel to replace "yourtenantname" in the User Name column with the tenant name you chose in the setup.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
User Name	First Name	Last Name	Display Name	Job Title	Department	Office Num	Office Pho	Mobile Pho	Fax	Address	City	State or Pr ZIP or Post	Country or Region				
User.1@yourtenantname.onmicrosoft.com	User		1 User 1														
User.2@yourtenantname.onmicrosoft.com	User		2 User 2														
User.3@yourtenantname.onmicrosoft.com	User		3 User 3														
User.4@yourtenantname.onmicrosoft.com	User		4 User 4														
User.5@yourtenantname.onmicrosoft.com	User		5 User 5														
User.6@yourtenantname.onmicrosoft.com	User		6 User 6														
User.7@yourtenantname.onmicrosoft.com	User		7 User 7														
User.8@yourtenantname.onmicrosoft.com	User		8 User 8														
User.9@yourtenantname.onmicrosoft.com	User		9 User 9														
User.10@yourtenantname.onmicrosoft.com	User		10 User 10														
User.11@yourtenantname.onmicrosoft.com	User		11 User 11														
User.12@yourtenantname.onmicrosoft.com	User		12 User 12														
User.13@yourtenantname.onmicrosoft.com	User		13 User 13														
User.14@yourtenantname.onmicrosoft.com	User		14 User 14														
User.15@yourtenantname.onmicrosoft.com	User		15 User 15														
User.16@yourtenantname.onmicrosoft.com	User		16 User 16														
User.17@yourtenantname.onmicrosoft.com	User		17 User 17														
User.18@yourtenantname.onmicrosoft.com	User		18 User 18														
User.19@yourtenantname.onmicrosoft.com	User		19 User 19														
User.20@yourtenantname.onmicrosoft.com	User		20 User 20														
User.21@yourtenantname.onmicrosoft.com	User		21 User 21														
User.22@yourtenantname.onmicrosoft.com	User		22 User 22														
User.23@yourtenantname.onmicrosoft.com	User		23 User 23														
User.24@yourtenantname.onmicrosoft.com	User		24 User 24														

If you do not need to create 24 users, **delete the unused rows**.

**Ensure you do not delete or rename any columns.** Leave unused columns blank.

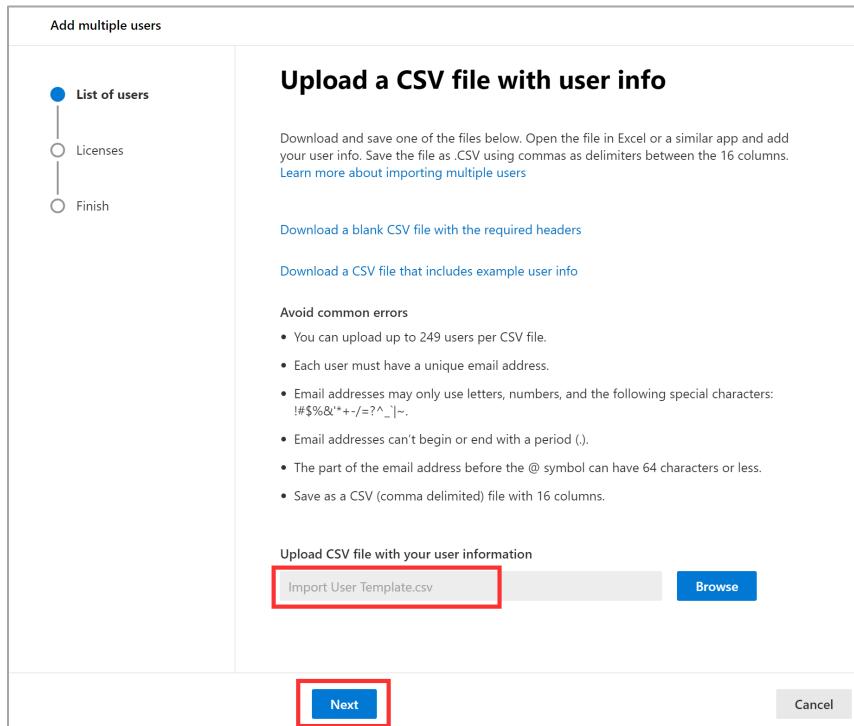
2. Save the template once complete. It should be saved as a **.csv** file.
3. Go back to the Admin Center, and go to **Users > Active Users** from the navigation menu. If you need to navigate to the Admin Center again, you can access it by going to <https://admin.microsoft.com/> and signing in with the trial tenant you created in Task 1.



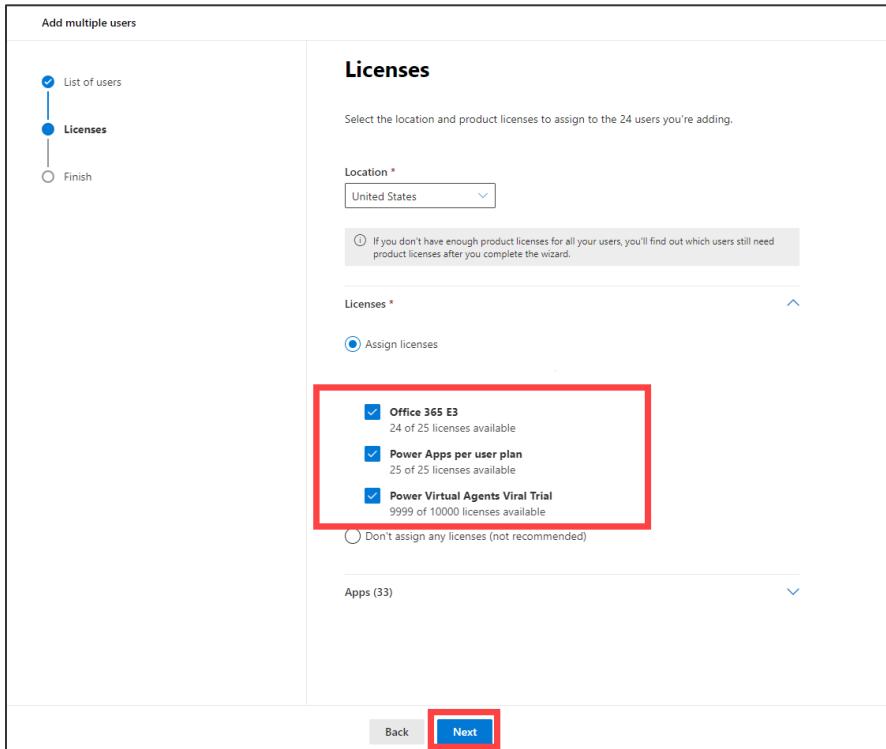
4. Click on **+Add Multiple Users**

The screenshot shows the 'Active users' page in the Microsoft 365 admin center. The left sidebar shows the 'Users' section with 'Active users' selected. The main area displays a table with one user entry: 'Virtual Agent' (Display name) and 'admin@pveiad0521.onmicrosoft.com' (Username). At the top of the table, there is a 'Recommended actions' bar with several buttons, including 'Add a user', 'User templates', and 'Add multiple users' (which is highlighted with a red box). Below the table are 'Filter' and 'Search active users list' options.

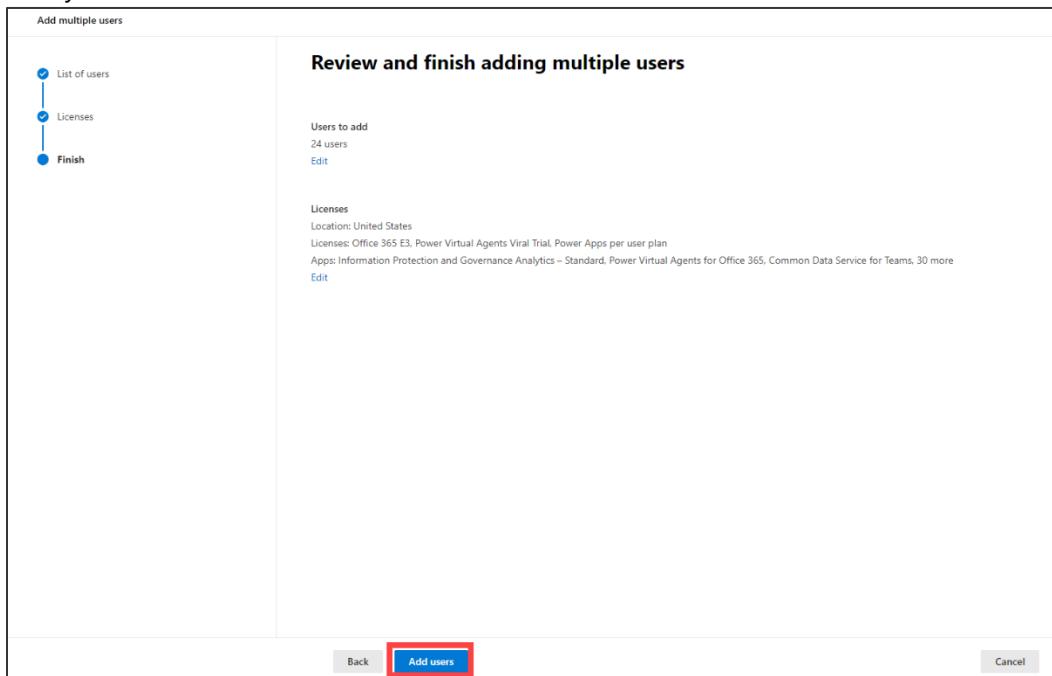
5. Browse for the template you created with your attendees, then click **Next**.



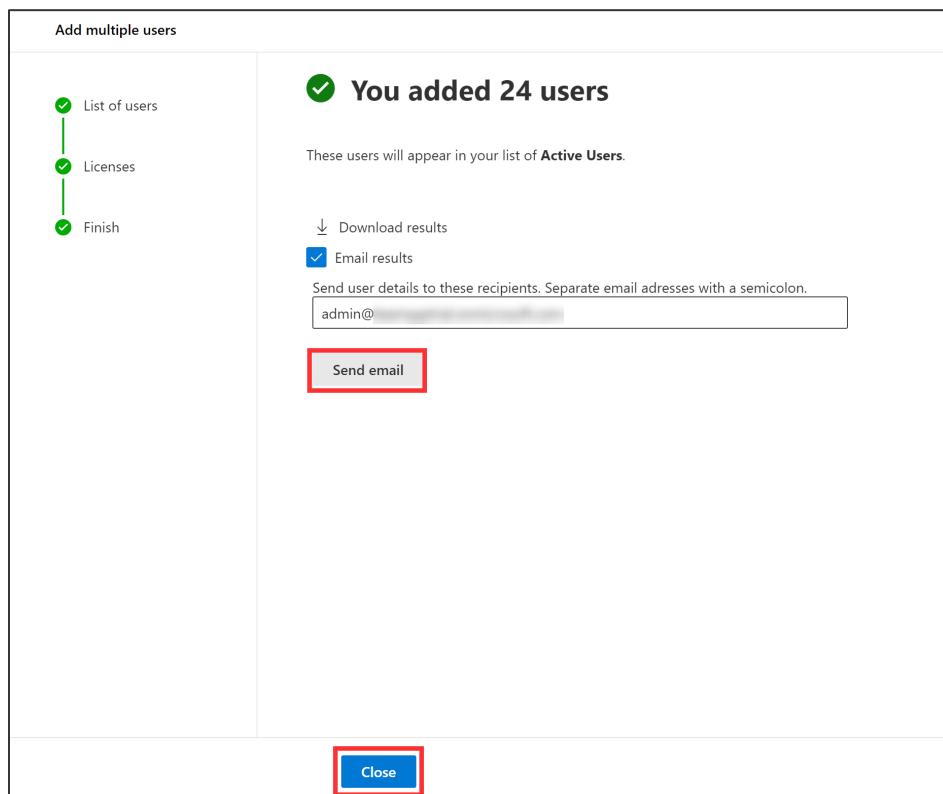
6. Assign the **Office 365 E3, Power Apps per user plan and Power Virtual Agents Viral Trial** licenses, then click **Next**.



7. Click **Add users**, then wait until the users are added. **Do not** close Add multiple users pop out. This may take approximately 5 minutes.



8. Once the users have been added, click **Download Results** and **Send email**. (Enter your regular email address here). Then, click **Close**.



9. You will be redirected to the Admin Center, where you will see the page of Active users. Confirm that you can see a profile for each of the attendees you imported. Confirm they have the Office 365 E3, Power Virtual Agents Viral Trial and Power Apps per user plan licenses assigned.

Display name ↑	Username	Licenses
User 1	User.1@onmicrosoft.com	Microsoft Power Automate Free, Power Apps per user plan
User 10	User.10@onmicrosoft.com	Power Apps per user plan, Power Virtual Agents Viral Trial
User 11	User.11@onmicrosoft.com	Power Apps per user plan, Power Virtual Agents Viral Trial
User 12	User.12@onmicrosoft.com	Power Apps per user plan, Power Virtual Agents Viral Trial
User 13	User.13@onmicrosoft.com	Power Apps per user plan, Power Virtual Agents Viral Trial
User 14	User.14@onmicrosoft.com	Power Apps per user plan, Power Virtual Agents Viral Trial
User 15	User.15@onmicrosoft.com	Power Apps per user plan, Power Virtual Agents Viral Trial
User 16	User.16@onmicrosoft.com	Power Apps per user plan, Power Virtual Agents Viral Trial
User 17	User.17@onmicrosoft.com	Power Apps per user plan, Power Virtual Agents Viral Trial
User 18	User.18@onmicrosoft.com	Power Apps per user plan, Power Virtual Agents Viral Trial
User 19	User.19@onmicrosoft.com	Power Apps per user plan, Power Virtual Agents Viral Trial
User 2	User.2@onmicrosoft.com	Power Apps per user plan, Power Virtual Agents Viral Trial
User 20	User.20@onmicrosoft.com	Power Apps per user plan, Power Virtual Agents Viral Trial
User 21	User.21@onmicrosoft.com	Power Apps per user plan, Power Virtual Agents Viral Trial
User 22	User.22@onmicrosoft.com	Power Apps per user plan, Power Virtual Agents Viral Trial
User 23	User.23@onmicrosoft.com	Power Apps per user plan, Power Virtual Agents Viral Trial

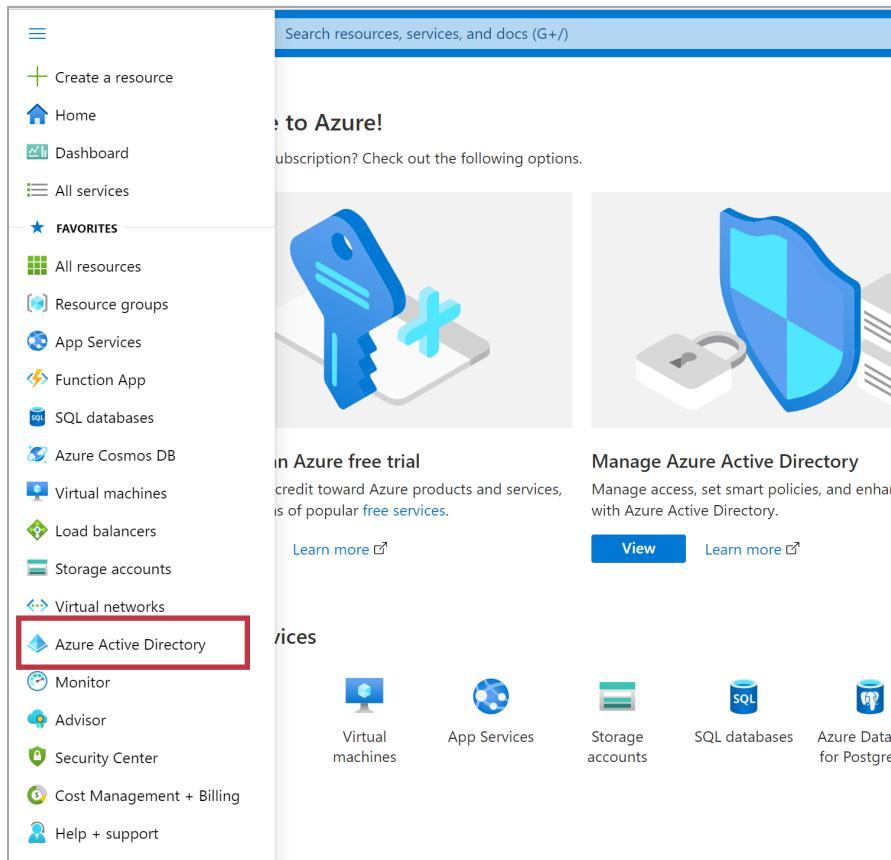
10. Open the .csv file you downloaded in step 9. This file contains the login information for each user. **This file is important, as the user details will need to be distributed to each attendee.** If you need to download this information again, it would have been emailed to you. Each user will be prompted to change their password upon login.

*To distribute the login details to each attendee, we recommend sending an email using mail merge to send the correct Username and Password to the attendee's actual email address prior to the start of the training.*

## Optional- Turn off Multi-factor authentication

Upon login, users may be asked to set up multi-factor authentication (MFA) on their trial account. To avoid this, you can turn MFA off for the tenant via the Azure portal.

1. Navigate to <https://portal.azure.com/> and sign in with your admin account for the tenant.
2. Click on the  icon on the top left of the screen to expand the navigation menu.
3. Click on **Azure Active Directory**.



4. Click on **Properties** then **Manage Security defaults**.

The screenshot shows the 'Demo company | Properties' page in the Azure Active Directory section. The left sidebar lists various Azure services like Groups, External Identities, and User settings, with 'Properties' highlighted by a red box. The main content area displays tenant properties such as Name (Demo company), Country or region (United States), Location (United States datacenters), and Notification language (English). At the bottom, there's a section titled 'Access management for Azure resources' with a note about a Virtual Agent managing access. A 'Manage Security defaults' button is highlighted with a red box.

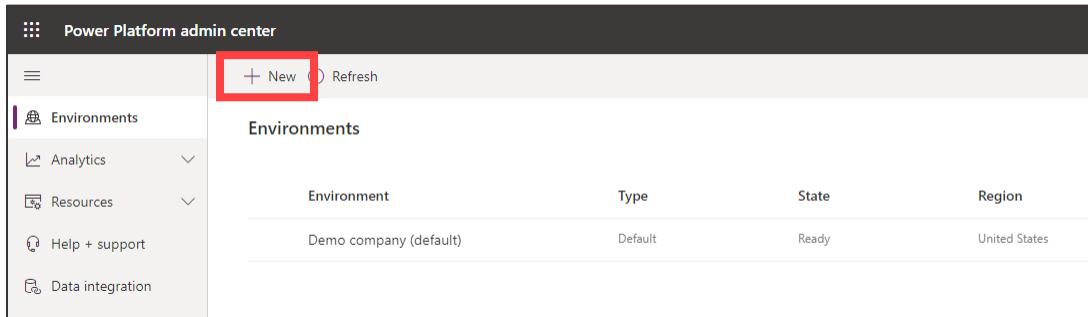
5. Switch the Enable Security defaults toggle to **No**. Then, **save** your changes.

The screenshot shows the 'Enable Security defaults' dialog box. It contains a descriptive text about security defaults and a 'Learn more' link. Below is a toggle switch with 'Yes' and 'No' buttons, where 'No' is highlighted with a red box. There's a section for providing feedback on why security defaults are disabled, with several checkboxes and a text input field 'Trial account for training'. At the bottom is a large blue 'Save' button highlighted with a red box.

## Task 5: Create a trial environment

You'll need to create a Power Apps trial environment so that attendees can experience using Power Virtual Agents with Microsoft Dataverse, for the bot to retrieve and post data.

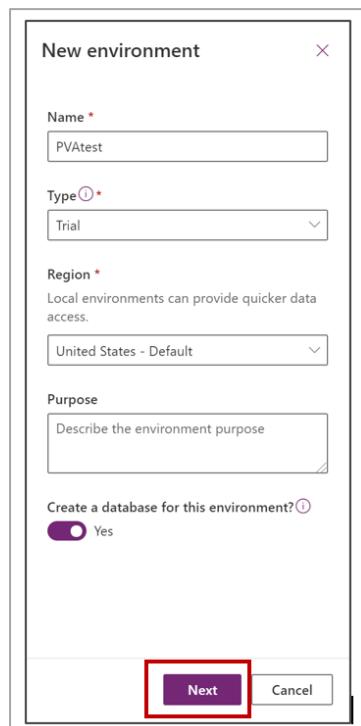
1. In your private browser, navigate to the Power Platform Admin Center [/https://admin.powerplatform.microsoft.com/environments](https://admin.powerplatform.microsoft.com/environments), and sign in with the trial account you just created.
2. Select +New to create a new Environment.



The screenshot shows the 'Environments' section of the Power Platform Admin Center. On the left, there's a sidebar with 'Environments' selected. In the center, a table lists one environment: 'Demo company (default)' with Type 'Default', State 'Ready', and Region 'United States'. At the top right, there's a '+ New' button, which is highlighted with a red box.

Fill in the fields in the New environment dialog box with these values and select **Next** to continue. *Note: Creating an environment may take up to one minute.*

- Environment Name: PVAtest
- Type: Trial
- Region: United States (default)
- Create a database for this environment? Yes



The screenshot shows the 'New environment' dialog box. It has fields for 'Name' (PVAtest), 'Type' (Trial), 'Region' (United States - Default), and a toggle for 'Create a database for this environment?' (Yes). The 'Next' button at the bottom is highlighted with a red box.

3. Specify values in the **Add database** dialog box, as follows:

- Language: English
- URL: (*leave this blank*)
- Currency: USD
- Select the “Deploy Sample Apps and Data” option
- Click on the +Select to add a Security group (this will add all users to this environment)
  - Select Demo company (or the name you chose for your company when you started your trial)
  - Click Done

The image contains two screenshots of Microsoft Dynamics 365 interface screens.

**Left Screenshot: Add database**

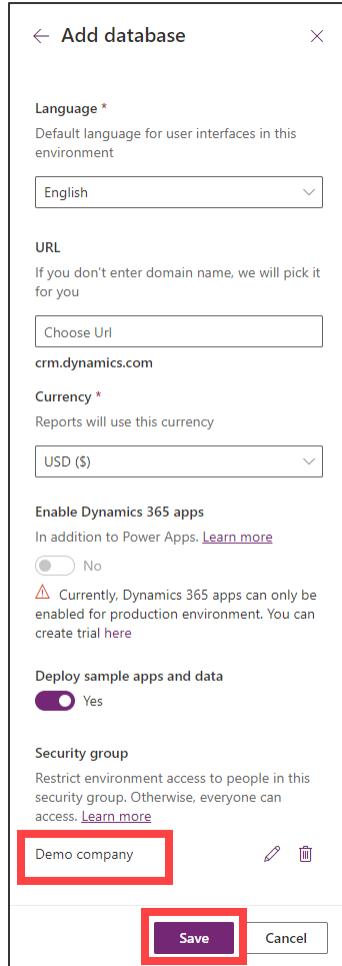
- Language:** English (selected in a dropdown menu)
- URL:** crm.dynamics.com
- Currency:** USD (\$)
- Deploy sample apps and data:** Yes (selected)
- Security group:** + Select (button highlighted with a red box)

**Right Screenshot: Edit Security group**

- Name ↑**
- All Company** (radio button)
- Demo company** (radio button selected, highlighted with a red box)

**Buttons at the bottom:** Done (highlighted with a red box) and Cancel

4. You should now see your chosen security group in the settings. Click **Save**.



5. An alert bar will pop up to tell you that your new environment is getting prepared.

The screenshot shows the Power Platform admin center 'Environments' page. A green alert bar at the top states: 'New environment PVATest is getting prepared. It can be used once active.' The main table lists environments:

Environment	Type	State	Region
PVATest	Trial	PreparingInstance	United States
Demo company (default)	Default	Ready	United States

6. Wait about a minute and click refresh. When your environment is fully prepared, you will see this message. Click on your environment name to open it

The screenshot shows the Power Platform admin center interface. On the left, there's a navigation sidebar with options like Environments, Analytics, Resources, Help + support, Data integration, Data (preview), Data policies, and Admin centers. The main area is titled "Environments" and lists two environments: "PVAtest" (Trial (29 days), Ready, United States) and "Demo company (default)" (Default, Ready, United States). A green notification bar at the top right says "New environment PVAtest has been successfully created."

7. Click on Users: See all

The screenshot shows the "PVAtest" environment details page in the Power Platform admin center. The left sidebar shows the same navigation options as the previous screen. The main content area displays environment details (Environment URL: .crm.dynamics.com, State: Ready, Region: United States, Refresh cadence: Frequent, Type: Trial, Organization ID: [redacted]), a Version section (Database version: 9.2.21034.00182), and an Updates section (2021 release wave 1, On). To the right, there are three sections: "Access" (Security roles: See all, Teams: See all, Users: See all, highlighted with a red box), "Resources" (Dynamics 365 apps, Portals, Power Apps, Flows), and a Feedback button at the bottom right.

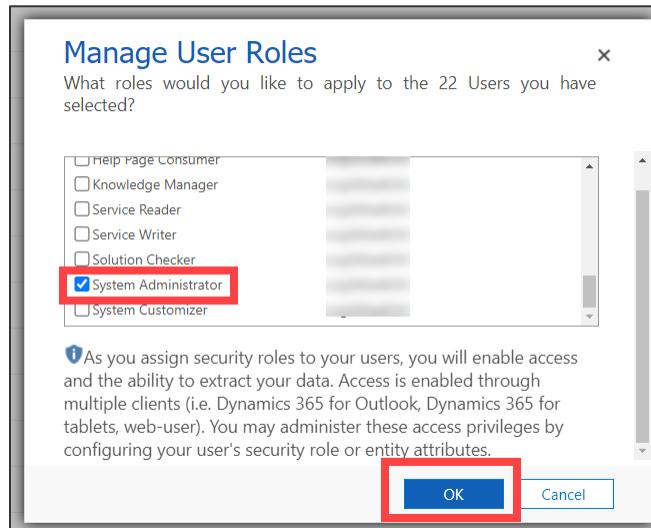
8. You will see a list of all the users you created earlier. This can take some time to come through, so if you don't see the users there, give it 30 mins (or longer as needed) and come back and check again. Click on Manage users in Dynamics 365

The screenshot shows the Power Platform admin center interface. On the left, there's a navigation sidebar with sections like Environments, Analytics, Resources, Help + support, Data integration, Data (preview), Data policies, and Admin centers. The main area is titled 'Manage users in Dynamics 365'. It shows a list of users with columns for Name and Username. The 'Name' column lists 'User 1' through 'User 20'. The 'Username' column lists 'User.1@...' through 'User.20@...'. A red box highlights the 'Manage users in Dynamics 365' button in the top toolbar.

9. This will pop open a new tab. Search for **user** in the *Search for records* box, click the box at the top left of the list to select all your users, and then click on **MANAGE ROLES** in the top toolbar.

The screenshot shows a search results page with a search bar containing 'user'. A red box highlights the search term. Below the search bar, there's a checkbox at the top left of the user list, which is checked, indicating all users are selected. The user list includes columns for Full Name, Position, Main Phone, Business Unit, Title, and Primary Email. The 'Full Name' column contains entries from 'User 1' to 'User 23'. The 'Primary Email' column shows emails ending in '@onmicrosoft.com'. At the top of the page, there are several buttons: NEW, APPROVE EMAIL, REJECT EMAIL, PROMOTE TO ADMIN, MANAGE ROLES (which is highlighted with a red box), CHANGE BUSINESS UNIT, CHANGE MANAGER, CHANGE POSITION, SEND DIRECT EMAIL, and three dots. The 'MANAGE ROLES' button is located just below the search bar.

10. In the pop up dialog, scroll down to find System Administrator, check that box, and click OK. Assigning System Administrator gives your users full access to everything for the training.



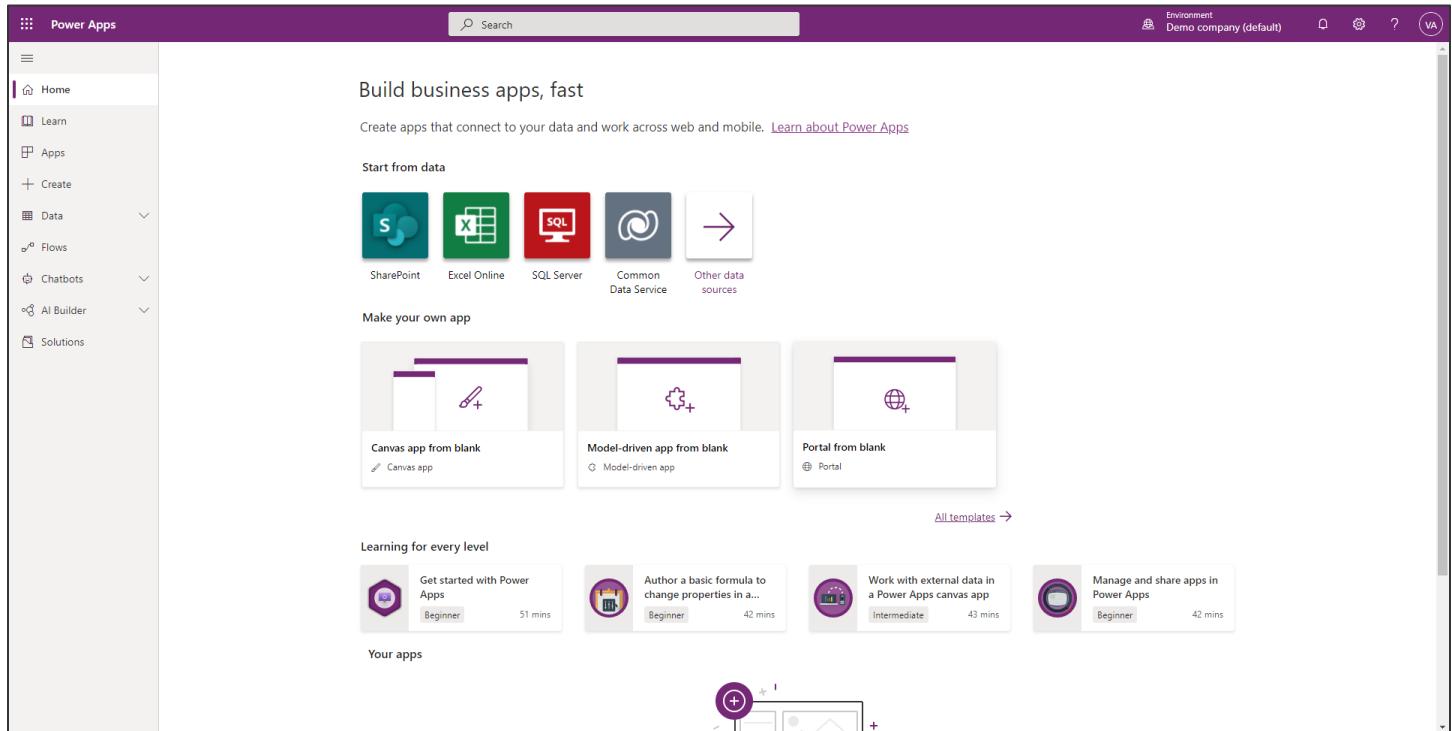
11. Wait for the progress bar to run, and the dialog box to close. You can now close the Users browser tab.

12. You are now ready to install a solution package to use for the training.

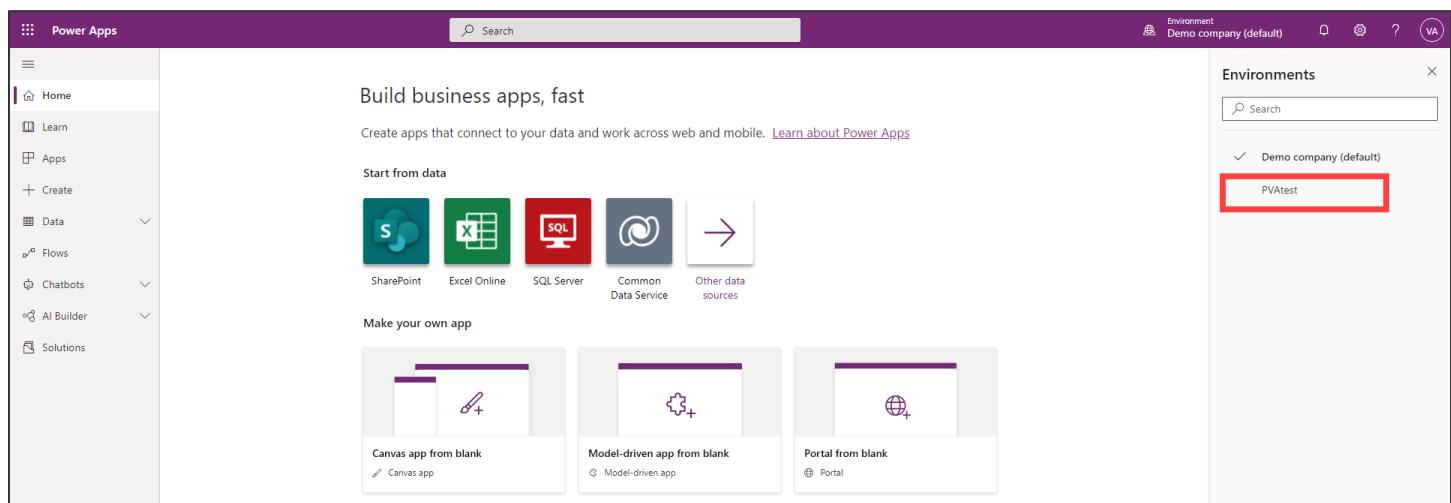
## Task 5: Import PVA in a Day solution package

In this task, you will import a solution file that contains a Dataverse table and a Power Automate flow to generate data for that table. This will enable your participants to build a bot that interacts with Dataverse to retrieve and create data rows (without them needing to build their own data source).

1. Navigate to <https://make.powerapps.com> in your Edge or Chrome private browsing window.



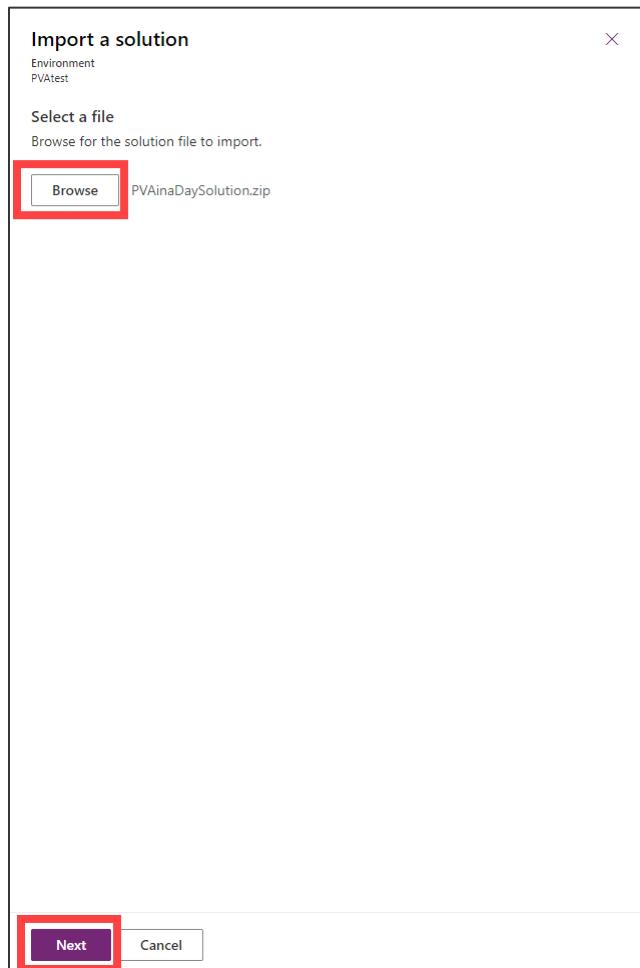
2. Click the **environment** icon and select the environment you just created (PVATest). Ensure you no longer have the default environment selected.



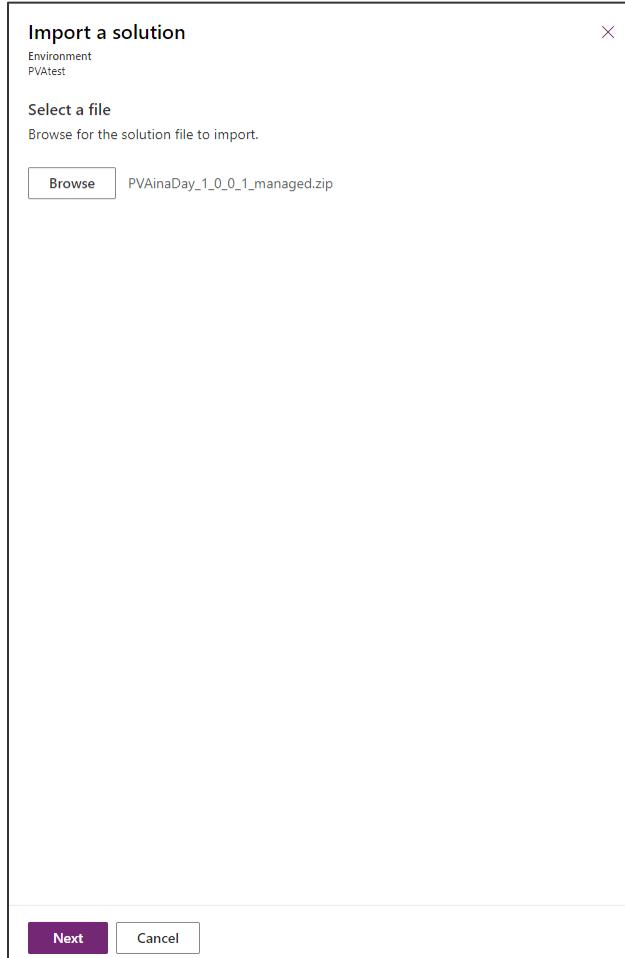
### 3. Select **Solutions** and click **Import**.

Display name	Name	Created	Version	Managed externally?	Solution check
AI Sample Data	msdyn_AIBuilderSam...	4/24/2021	1.0.0.6	ⓘ	Checked by Microsoft
Asset Checkout	AssetCheckout	4/24/2021	0.0.0.1	ⓘ	Checked by Microsoft
Innovation Challenge	InnovationHub	4/24/2021	0.0.0.1	ⓘ	Checked by Microsoft
Fundraiser	msdyn_SampleApp	4/24/2021	1.0.0.4	ⓘ	Checked by Microsoft
Power Apps Checker Base	msdyn_PowerAppsC...	4/24/2021	1.2.0.74	ⓘ	Checked by publisher
Power Apps Checker	msdyn_PowerAppsC...	4/24/2021	1.2.0.74	ⓘ	Checked by publisher
Contextual Help Base	msdyn_ContextualH...	4/24/2021	1.0.0.12	ⓘ	Checked by publisher
Contextual Help	msdyn_ContextualH...	4/24/2021	1.0.0.12	ⓘ	Checked by publisher
Common Data Services Default Solution	Cr01d22	4/24/2021	1.0.0.0	ⓘ	Hasn't been run
Default Solution	Default	4/24/2021	1.0	ⓘ	Not supported for analysis

### 4. On the Import a solution pop-out, click **Browse** and select PVAinaDaySolution.zip from your training resources. Click **Next**.



5. You will get this confirmation screen. Click Next again to continue.



6. You will need to establish connections for the Office 365 Users and Common Data Service connectors. Select the dropdown for the Office 365 Users connection and click + New Connection.

The screenshot shows the Power Apps Solutions page. On the left, there's a navigation bar with Home, Learn, Apps, Create, Data, Flows, Chatbots, AI Builder, and Solutions. The Solutions section is selected. A list of solutions is displayed with columns for Display name, Name, Created, Version, and Managed ext. Solutions listed include AI Sample Data, Asset Checkout, Innovation Challenge, Fundraiser, Power Apps Checker Base, Power Apps Checker, Contextual Help Base, Contextual Help, Common Data Services Default Solution, and Default Solution. On the right, a modal window titled 'Import a solution' is open. It shows the environment as PVATest. It has a 'Refresh' button and a 'Connections' section with a note about re-establishing connections. It lists '2 updates needed'. Under 'Connections', there are two items: 'Office 365 Users' (selected) and 'Common Data Service (current environment)'. A red box highlights the 'Select a connection' dropdown menu.

7. This will open a new tab, with the Office 365 Users connection displayed. Click Create

The screenshot shows the 'Connections > New connection' dialog for the Office 365 Users provider. The dialog title is 'Office 365 Users Microsoft'. It displays a brief description: 'Office 365 Users Connection provider lets you access user profiles in your organization using your Office 365 account. You can perform various actions such as get your profile, a user's profile, a user's manager or direct reports and also update a user profile.' Below the description, there's a 'Name' field with 'SharePoint Microsoft' selected. At the bottom, there are 'Cancel' and 'Create' buttons, with the 'Create' button highlighted by a red box.

8. You will then get a pop-up window to sign in. Sign in to your account using the admin credentials, wait for the connection to be authenticated. You will then see it connected.

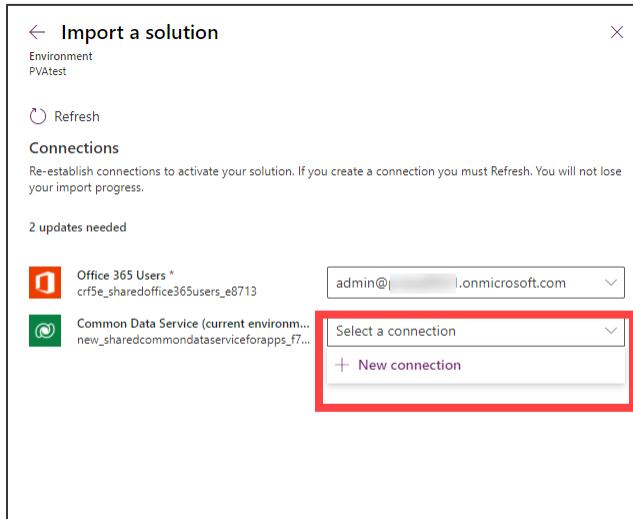
The screenshot shows the 'Connections in PVAtest' page in the Power Apps portal. On the left, there's a navigation menu with options like Home, Learn, Apps, Create, Data, Tables, Choices, Dataflows, and Export to data lake. The main area displays a table with columns for Name, Modified, and Status. A single connection is listed:

Name	Modified	Status
admin@pvaiad0521.onmicrosoft.com Office 365 Users	39 sec ago	Connected

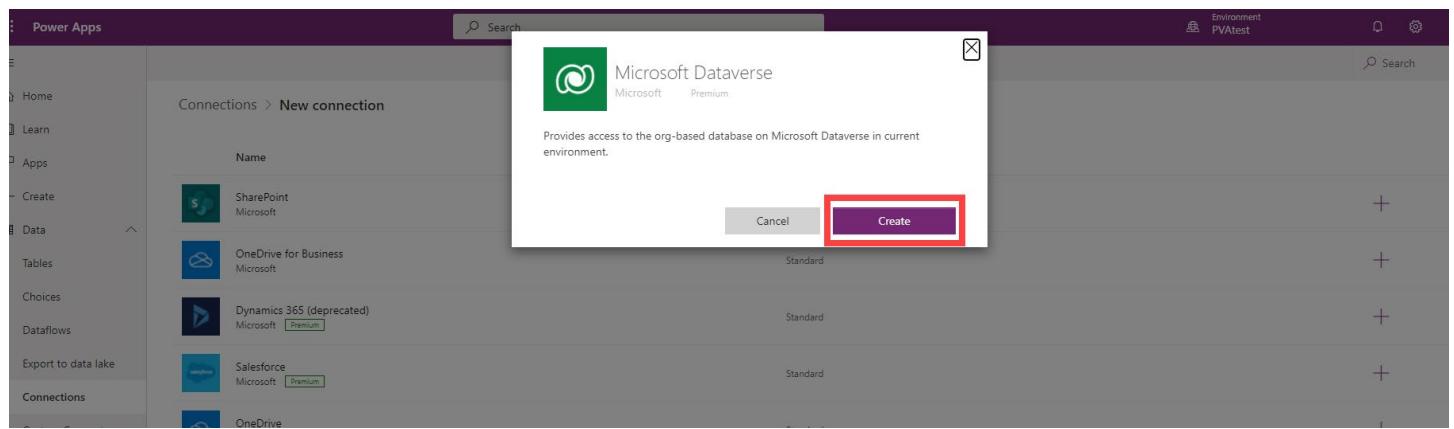
9. Close this tab and return to the main tab where you were importing your solution. Click on Refresh to apply changes. You will then see your admin login in the dropdown next to the Office 365 Users connector

The screenshot shows the 'Solutions' page in the Power Apps portal. The sidebar includes options like Home, Learn, Apps, Create, Data, Flows, Chatbots, AI Builder, and Solutions. The main area lists various solutions with columns for Display name, Name, Created, Version, and Managed ext. A modal dialog titled 'Apply changes' is overlaid on the page, containing instructions to refresh connections and two buttons: 'Refresh' (highlighted with a red box) and 'Cancel'. In the background, a separate 'Import a solution' dialog is open, showing two selected connections: 'Office 365 Users' and 'Common Data Service (current environment)'.

10. Repeat this for the Common Data Service connector. Select + New Connection

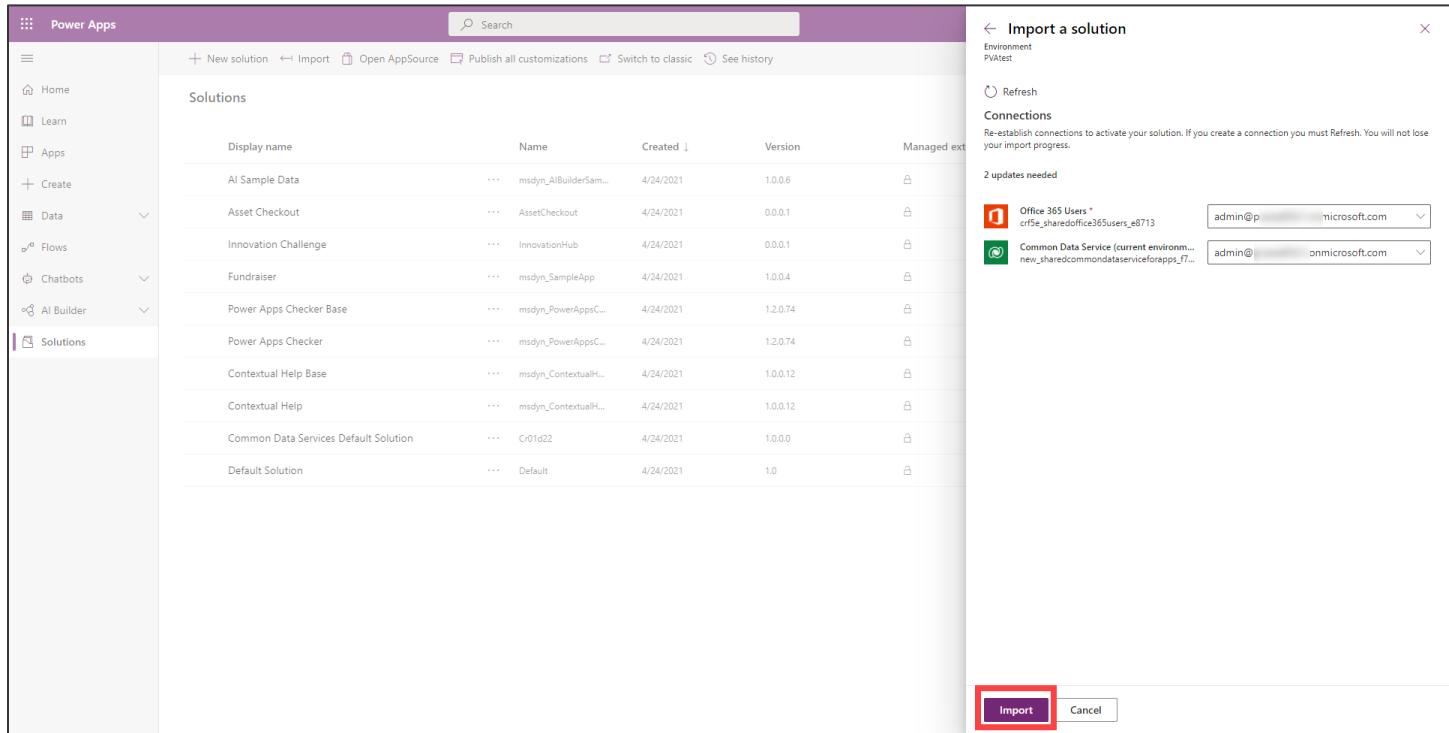


11. Click Create on the Microsoft Dataverse connector, and sign in to authenticate when prompted.

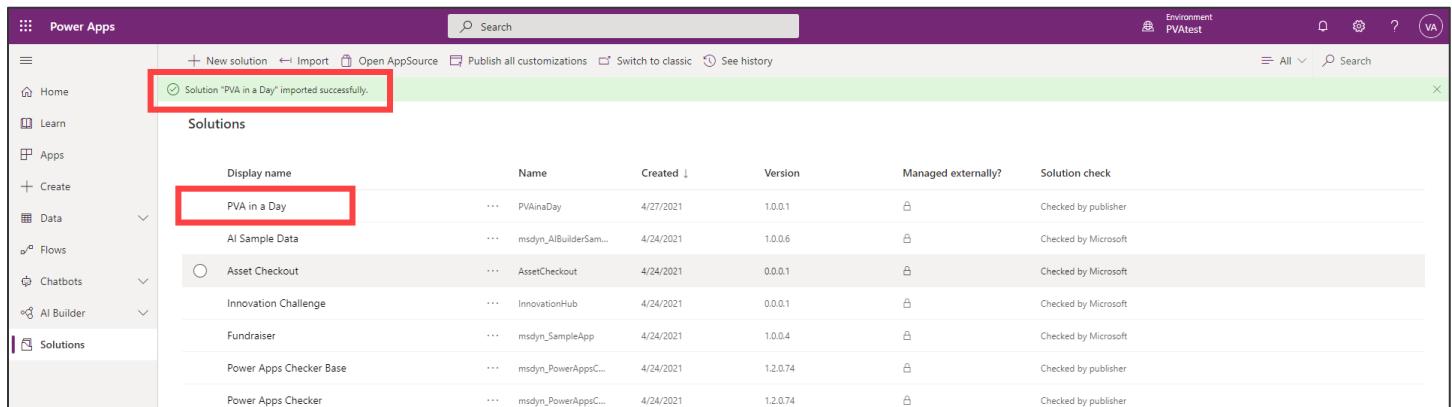


12. You will now have both the Microsoft Dataverse and Office 365 Users connectors connected. Close the tab, return to your main tab and refresh to apply changes.

13. Now click Import to finish importing the solution



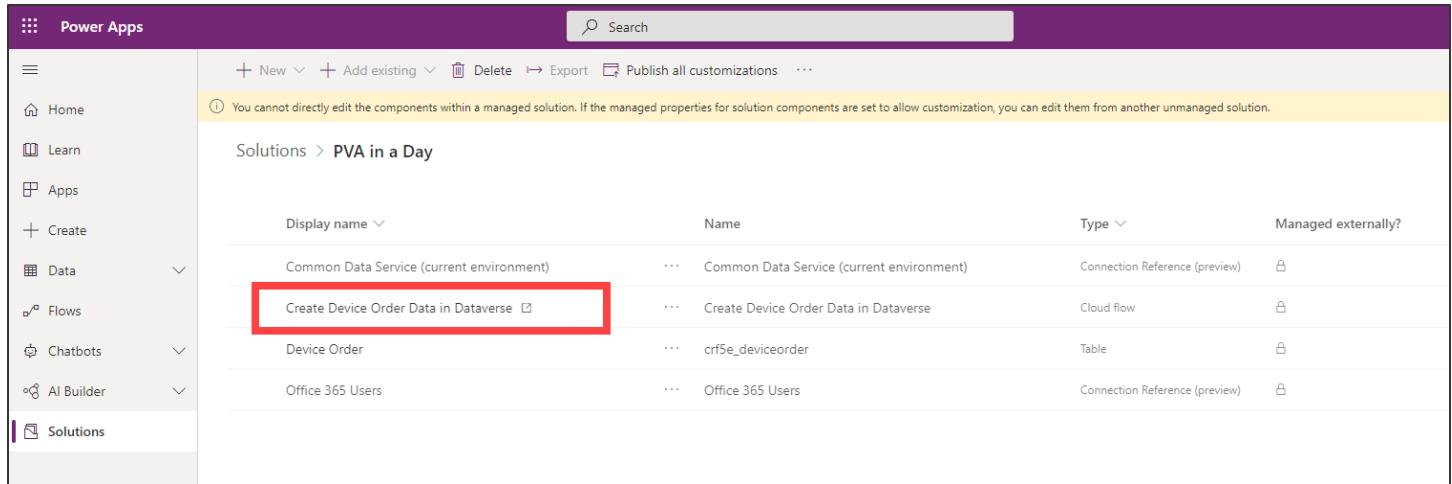
14. You will get a notification message saying "Currently importing solution PVA in a Day". Once the import is complete, you will see the PVA in a Day solution in the Solutions section of your main Power Apps window.



## Task 6: Generate data for participants to use

You will now use the flow that you imported in the solution to generate data for participants to use in the lab. This flow will create a device order record for each user in the system, so that in Lab 5 they can retrieve a device order based on their email.

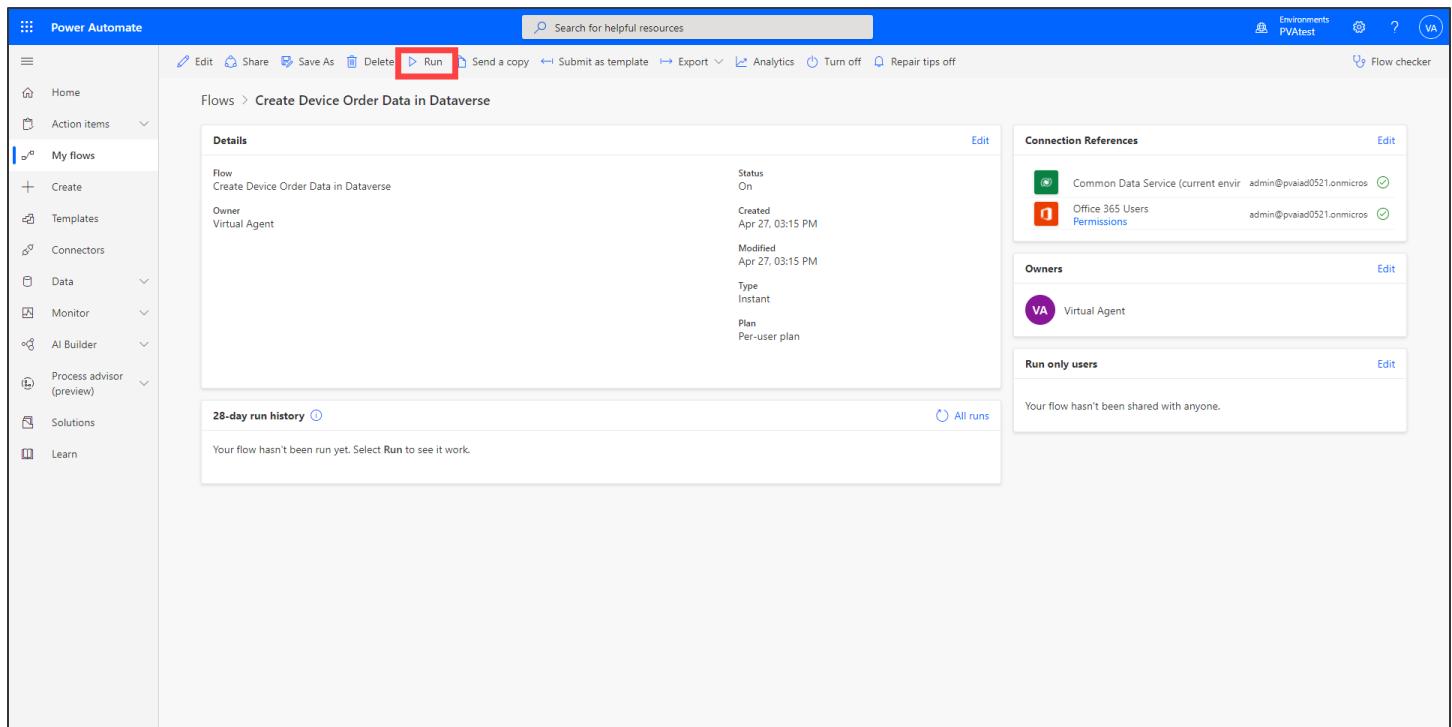
1. Click on the PVA in a Day solution to open it
2. Click on the flow: Create Device Order Data in Dataverse. This will open the flow in a new tab.



The screenshot shows the 'Solutions' section of the Power Apps portal. A specific flow named 'Create Device Order Data in Dataverse' is highlighted with a red box. The flow details are as follows:

Display name	Name	Type	Managed externally?
Common Data Service (current environment)	Common Data Service (current environment)	Connection Reference (preview)	<input type="checkbox"/>
Create Device Order Data in Dataverse	Create Device Order Data in Dataverse	Cloud flow	<input type="checkbox"/>
Device Order	crfSe_deviceorder	Table	<input type="checkbox"/>
Office 365 Users	Office 365 Users	Connection Reference (preview)	<input type="checkbox"/>

3. Click on Run to run the flow



The screenshot shows the 'Flows' section of the Power Automate portal. The 'Create Device Order Data in Dataverse' flow is selected. The 'Run' button in the top toolbar is highlighted with a red box. The flow details are as follows:

Flow	Status
Create Device Order Data in Dataverse	On

Owner: Virtual Agent

Details (continued):

- Created: Apr 27, 03:15 PM
- Modified: Apr 27, 03:15 PM
- Type: Instant
- Plan: Per-user plan

Connection References:

- Common Data Service (current envir) - admin@pvaaid0521.onmicrosoft.com
- Office 365 Users - admin@pvaaid0521.onmicrosoft.com

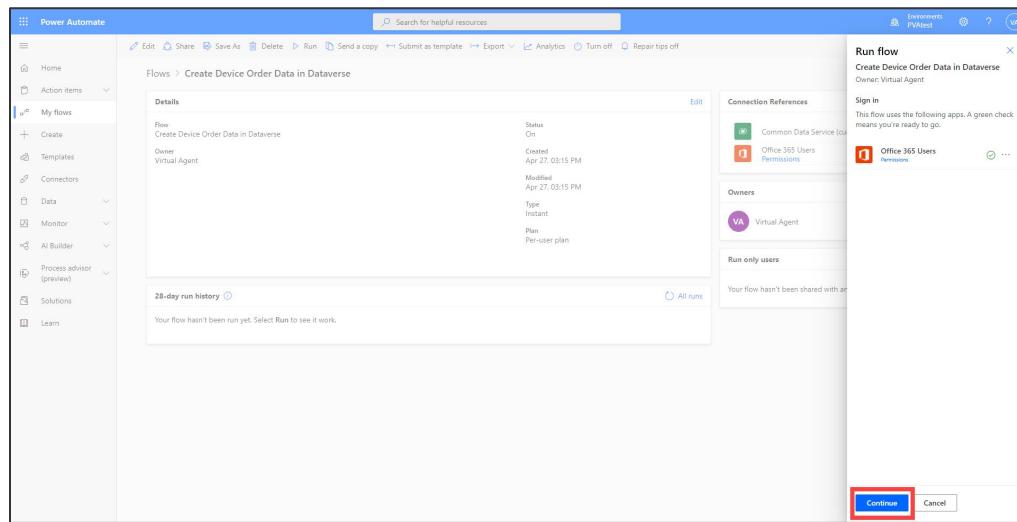
Owners:

- Virtual Agent

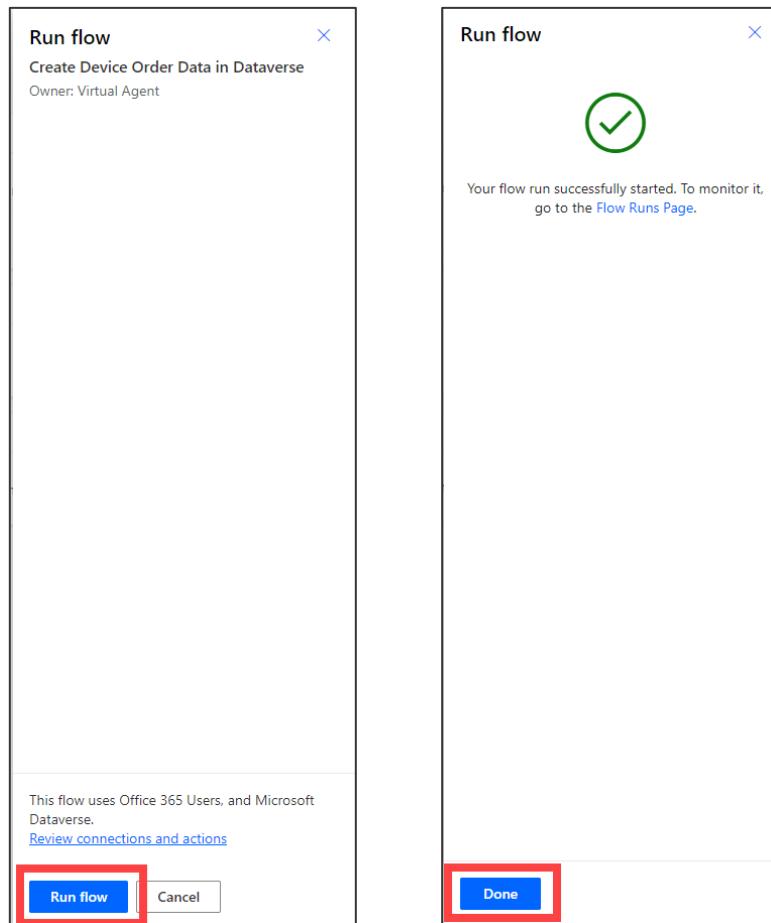
Run only users:

Your flow hasn't been shared with anyone.

4. You will be prompted to sign in, and should see a green tick showing the Office 365 Users connector is already authenticated. Click Continue.



5. Click Run flow, and then Done (when you get the green tick to show your flow run has successfully started).



6. Give the flow a few minutes to run. You can click the refresh button to check on progress

The screenshot shows the Power Automate interface for a flow named 'Create Device Order Data in Dataverse'. The 'Details' section shows the flow is 'On' and was created on April 27, 03:15 PM. The 'Run history' section displays a single run from April 27, 03:33 PM, which is currently 'Running'. A red box highlights the 'All runs' button at the top right of this section.

7. When it has run successfully you can close the Power Automate tab.

The screenshot shows the same Power Automate interface after the flow has completed. The 'Run history' section now shows the single run from April 27, 03:33 PM has completed successfully, indicated by a green 'Succeeded' status. A red box highlights this 'Succeeded' status.

8. To check that your data has been created, navigate to Data – Tables and find the Device Order table.

The screenshot shows the Power Apps interface with the 'Data' section selected in the left sidebar. In the main area, the 'Tables' section is selected, and the 'Device Order' table is highlighted with a red box. The top navigation bar includes options like '+ New table', 'Data', 'Export to data lake', and 'AI Builder'. A search bar at the top right contains the filter 'device', also highlighted with a red box. The table details show it's named 'Device Order', has a type of 'Standard', and is customizable.

9. Click on the table name to open it, then click on the data tab. You will see the rows of data that have been created by the flow.

The screenshot shows the 'Device Order' table data view. The 'Data' tab is selected in the top navigation bar. The table displays multiple rows of data, each representing a device order. The columns include 'Device Name', 'Customer Phone', 'Is Warranty Active', 'Requested By', 'Request Date', 'Price', and 'Created On'. The first few rows show entries for 'Microsoft - Surface Pro 64GB' with phone numbers starting with '555-1234'. The data tab is highlighted with a red box.

10. Congratulations! You are all set for the training!

## Lab survey

We would appreciate your feedback on Power Virtual Agents and on this hands-on-lab, such as the quality of documentation and the usefulness of the learning experience.

Please use the survey at <https://aka.ms/PVAiaDSurvey> to share your feedback.

You may provide feedback for each module as you complete it or at the end once you've completed all the modules.

## Terms of Use

By using this document, in whole or in part, you agree to the following terms:

### **Notice**

Information and views expressed in this document, including (without limitation) URL and other Internet Web site references, may change without notice. Examples depicted herein, if any, are provided for illustration only and are fictitious. No real association or connection is intended or should be inferred. This document does not provide you with any legal rights to any intellectual property in any Microsoft product.

### **Use Limitations**

Copying or reproduction, in whole or in part, of this document to any other server or location for further reproduction or redistribution is expressly prohibited. Microsoft provides you with this document for purposes of obtaining your suggestions, comments, input, ideas, or know-how, in any form, ("Feedback") and to provide you with a learning experience. You may use this document only to evaluate its content and provide feedback to Microsoft. You may not use this document for any other purpose. You may not modify, copy, distribute, transmit, display, perform, reproduce, publish, license, create derivative works from, transfer, or sell this document or any portion thereof. You may copy and use this document for your internal, reference purposes only.

### **Feedback**

If you give Microsoft any Feedback about this document or the subject matter herein (including, without limitation, any technology, features, functionality, and/or concepts), you give to Microsoft, without charge, the right to use, share, and freely commercialize Feedback in any way and for any purpose. You also give third parties, without charge, the right to use, or interface with, any Microsoft products or services that include the Feedback. You represent and warrant that you own or otherwise control all rights to such Feedback and that no such Feedback is subject to any third-party rights.

### **DISCLAIMERS**

CERTAIN SOFTWARE, TECHNOLOGY, PRODUCTS, FEATURES, AND FUNCTIONALITY (COLLECTIVELY "CONCEPTS"), INCLUDING POTENTIAL NEW CONCEPTS, REFERENCED IN THIS DOCUMENT ARE IN A SIMULATED ENVIRONMENT WITHOUT COMPLEX SET-UP OR INSTALLATION AND ARE INTENDED FOR FEEDBACK AND TRAINING PURPOSES ONLY. THE CONCEPTS REPRESENTED IN THIS DOCUMENT MAY NOT REPRESENT FULL FEATURE CONCEPTS AND MAY NOT WORK THE WAY A FINAL VERSION MAY WORK. MICROSOFT ALSO MAY NOT RELEASE A FINAL VERSION OF SUCH CONCEPTS. YOUR EXPERIENCE WITH USING SUCH CONCEPTS IN A PHYSICAL ENVIRONMENT MAY ALSO BE DIFFERENT.

THIS DOCUMENT, AND THE CONCEPTS AND TRAINING PROVIDED HEREIN, IS PROVIDED "AS IS", WITHOUT WARRANTY OF ANY KIND, WHETHER EXPRESS, IMPLIED, OR STATUTORY, INCLUDING (WITHOUT LIMITATION) THE WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, TITLE, AND NONINFRINGEMENT. MICROSOFT DOES NOT MAKE ANY ASSURANCES OR REPRESENTATIONS WITH REGARD TO THE ACCURACY OF THE RESULTS, THE OUTPUT THAT DERIVES FROM USE OF THIS DOCUMENT OR THE CONCEPTS, OR THE SUITABILITY OF THE CONCEPTS OR INFORMATION CONTAINED IN THIS DOCUMENT FOR ANY PURPOSE.

MICROSOFT POWER VIRTUAL AGENTS (1) IS NOT INTENDED OR MADE AVAILABLE AS A MEDICAL DEVICE FOR THE DIAGNOSIS OF DISEASE OR OTHER CONDITIONS, OR IN THE CURE, MITIGATION, TREATMENT OR PREVENTION OF DISEASE, OR OTHERWISE TO BE USED AS A COMPONENT OF ANY CLINICAL OFFERING OR PRODUCT, AND NO LICENSE OR RIGHT IS GRANTED TO USE MICROSOFT POWER VIRTUAL AGENTS FOR SUCH PURPOSES, (2) IS NOT DESIGNED OR INTENDED TO BE A SUBSTITUTE FOR PROFESSIONAL MEDICAL ADVICE, DIAGNOSIS, TREATMENT, OR JUDGMENT AND

SHOULD NOT BE USED AS A SUBSTITUTE FOR, OR TO REPLACE, PROFESSIONAL MEDICAL ADVICE, DIAGNOSIS, TREATMENT, OR JUDGMENT, AND (3) SHOULD NOT BE USED FOR EMERGENCIES AND DOES NOT SUPPORT EMERGENCY CALLS. ANY CHATBOT YOU CREATE USING MICROSOFT POWER VIRTUAL AGENTS IS YOUR OWN PRODUCT OR SERVICE, SEPARATE AND APART FROM MICROSOFT POWER VIRTUAL AGENTS. YOU ARE SOLELY RESPONSIBLE FOR THE DESIGN, DEVELOPMENT, AND IMPLEMENTATION OF YOUR CHATBOT (INCLUDING INCORPORATION OF IT INTO ANY PRODUCT OR SERVICE INTENDED FOR MEDICAL OR CLINICAL USE) AND FOR EXPLICITLY PROVIDING END USERS WITH APPROPRIATE WARNINGS AND DISCLAIMERS PERTAINING TO USE OF YOUR CHATBOT. YOU ARE SOLELY RESPONSIBLE FOR ANY PERSONAL INJURY OR DEATH THAT MAY OCCUR AS A RESULT OF YOUR CHATBOT OR YOUR USE OF MICROSOFT POWER VIRTUAL AGENTS IN CONNECTION WITH YOUR CHATBOT, INCLUDING (WITHOUT LIMITATION) ANY SUCH INJURIES TO END USERS.