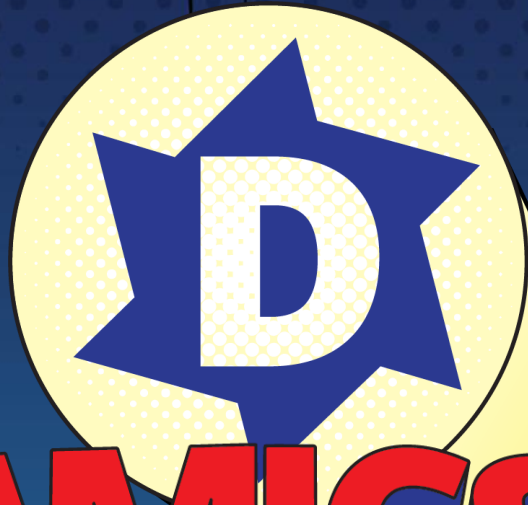


DYNAMICSCON PRESENTATION



DYNAMICSCON

15-17 March 2022



DynamicsCon.com

Crash Course in Power Apps portals

DYNAMICSCON

POWERED BY
DUG



Nick Doelman

TWITTER: @readyxrm

<https://readyxrm.blog>

<https://www.linkedin.com/in/nickdoelman/>

<https://github.com/readyxrm>

<https://docs.microsoft.com/powerapps/maker/portals/>

Senior Content Developer

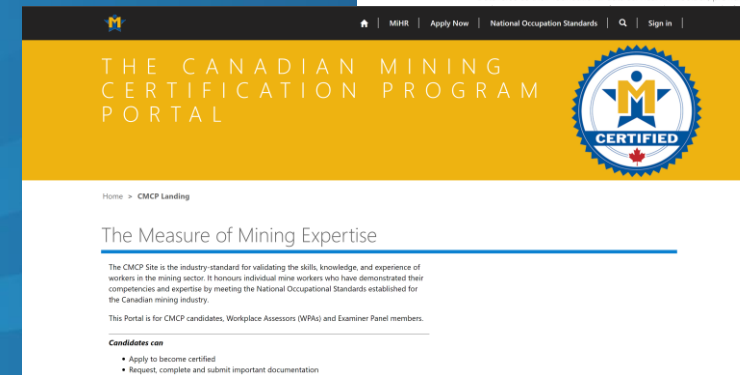
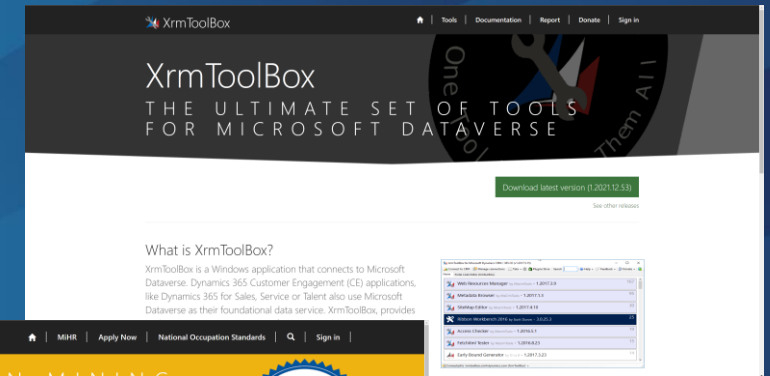


Agenda

- **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
 - Turn our portal in a mobile application
- **Questions?**

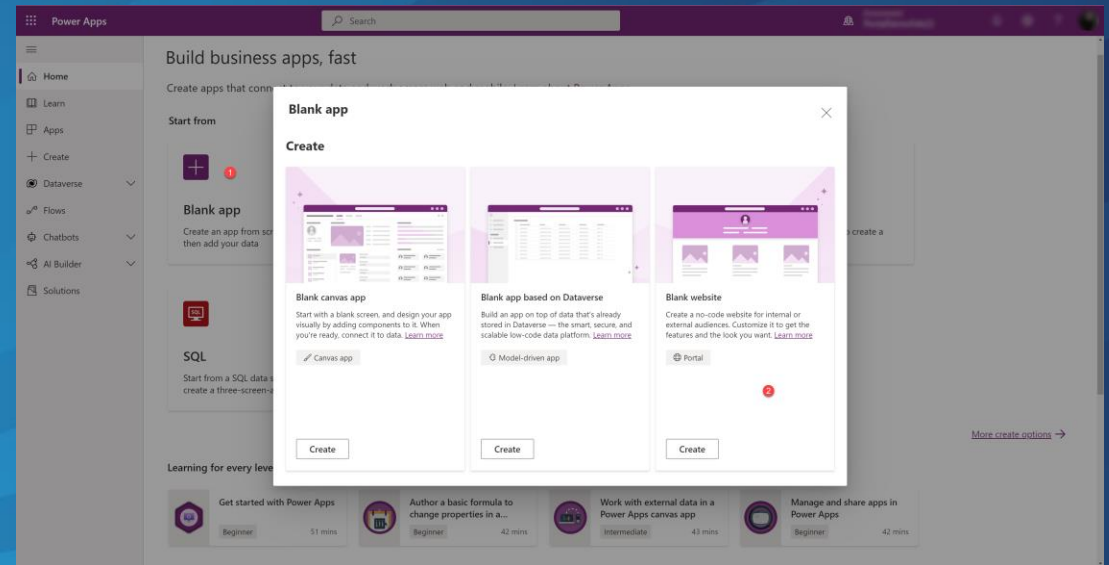
What are Power Apps portals?

- Choose an environment
- Dataverse required
- Start with a sandbox/trial
- Avoid provisioning on production until you are ready!!!



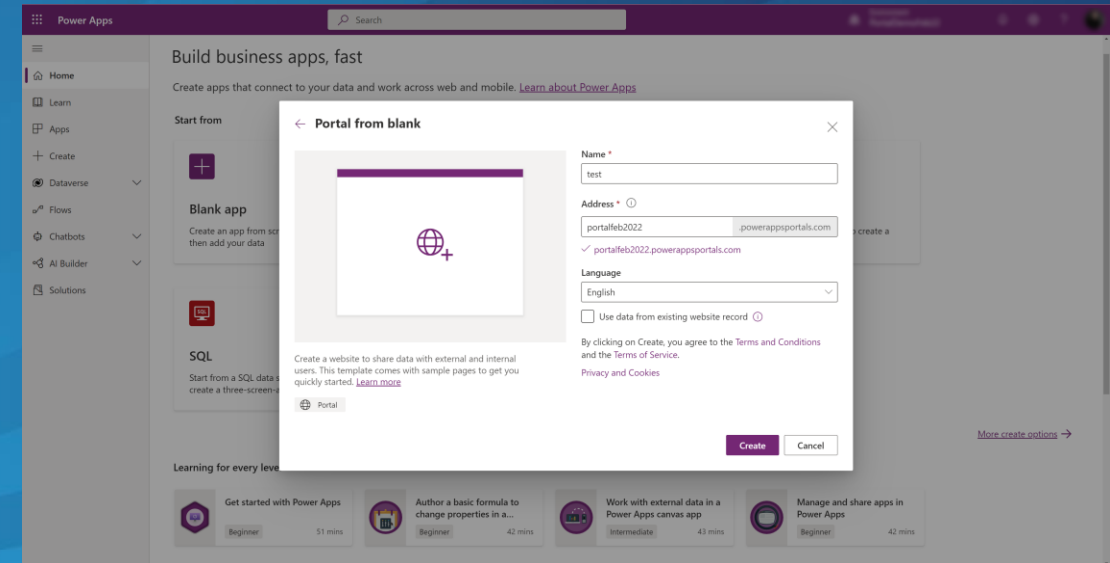
Provision a portal

- Choose an environment
- Dataverse required
- Start with a sandbox/trial
- Avoid provisioning on production until you are ready!!!



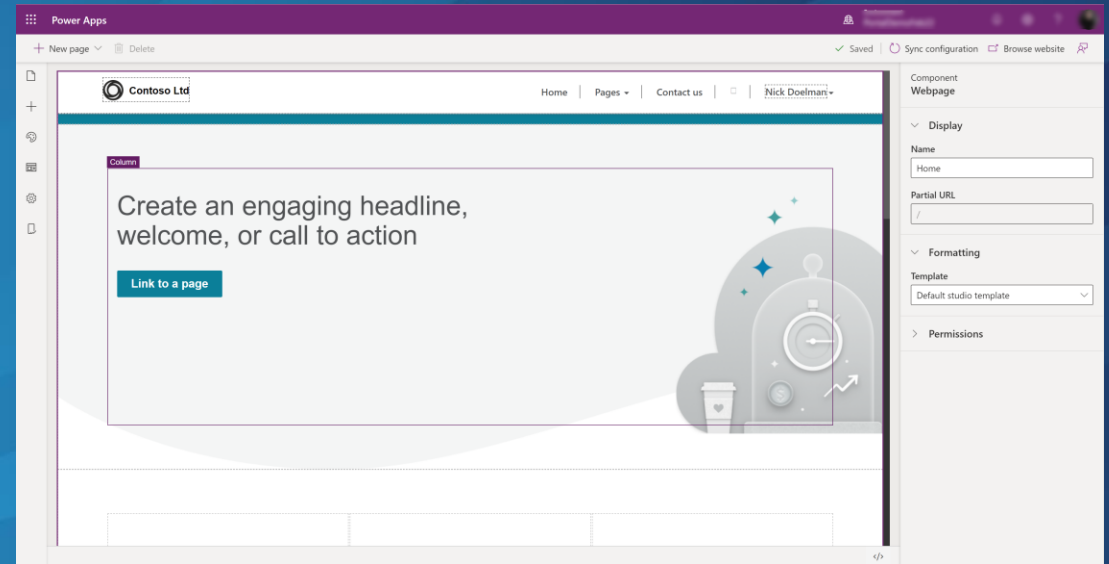
Provision a portal

- Give it a name
- Unique URL (can create custom one later)
- Re-provision a previous portal from an expired trial



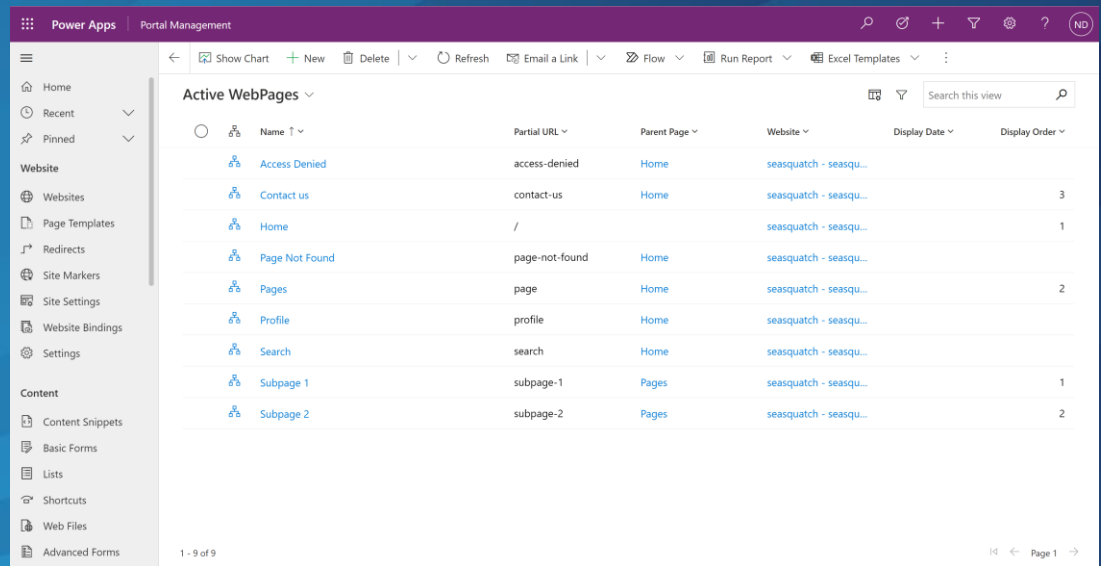
Tools: The portals Studio

- 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)

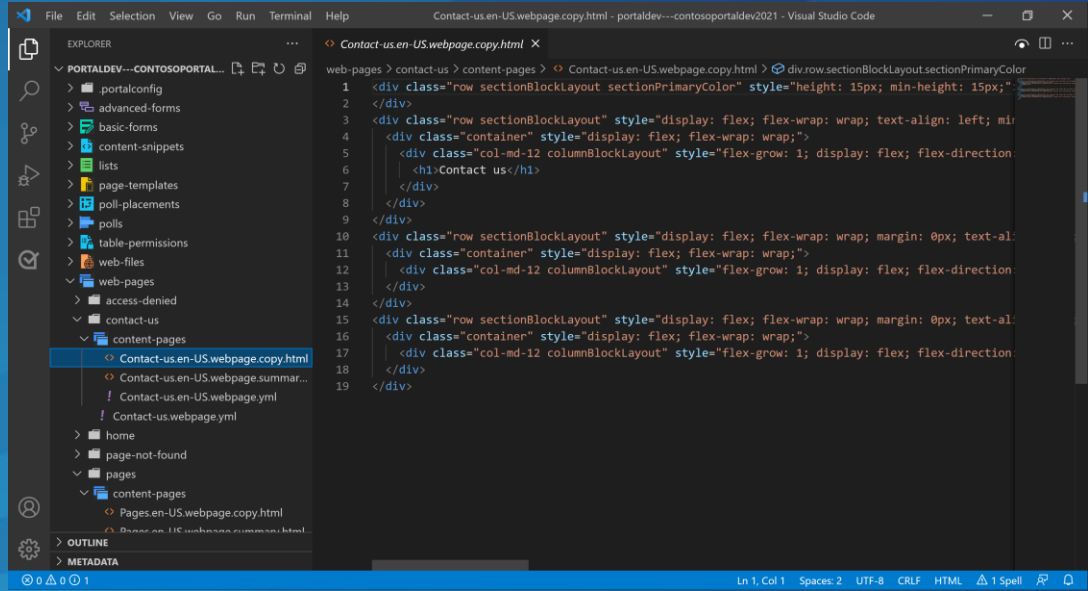


The screenshot displays the 'Portal Management' interface in Power Apps. The main view is titled 'Active WebPages' and shows a table with the following columns: Name, Partial URL, Parent Page, Website, Display Date, and Display Order. The table contains 10 rows of data, including 'Access Denied', 'Contact us', 'Home', 'Page Not Found', 'Pages', 'Profile', 'Search', 'Subpage 1', and 'Subpage 2'. A left-hand navigation pane lists various portal management options such as 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 interface also includes a search bar and a 'Search this view' option.

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

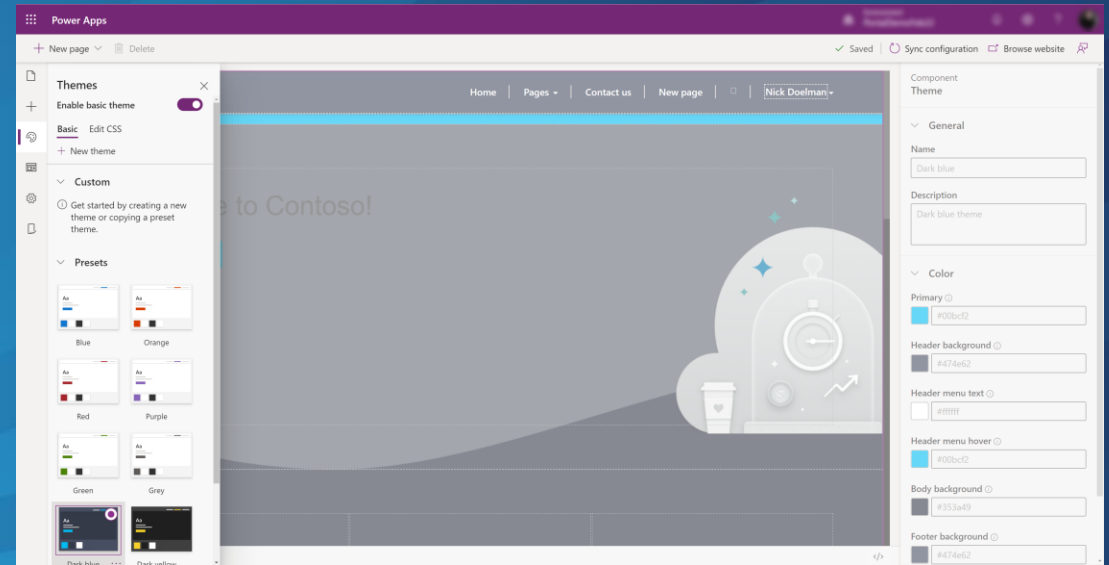
Tools: VS Code + Power Platform CLI

- 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



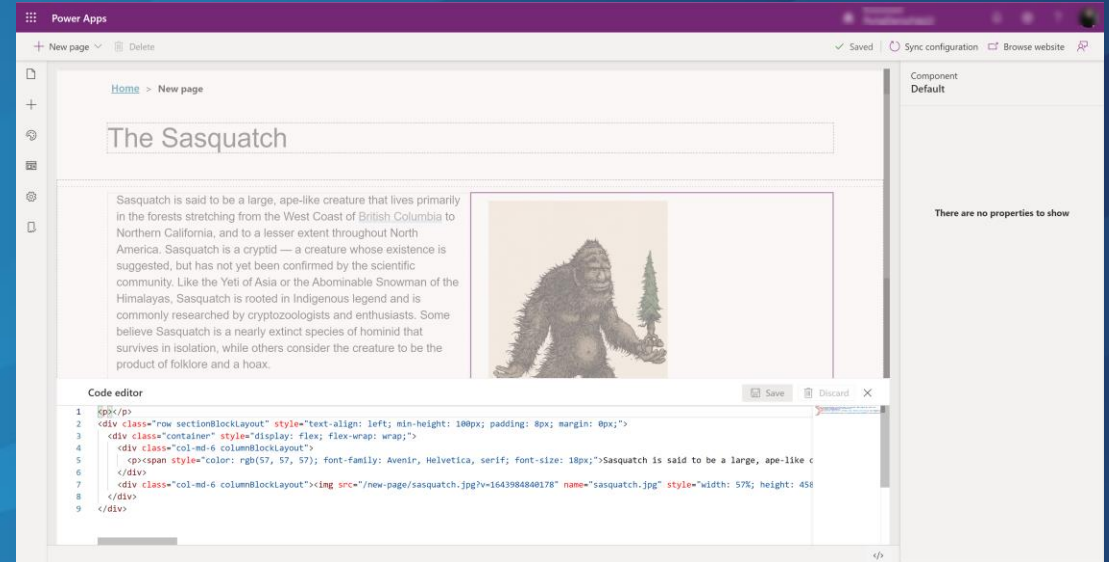
Branding and Styling

- 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

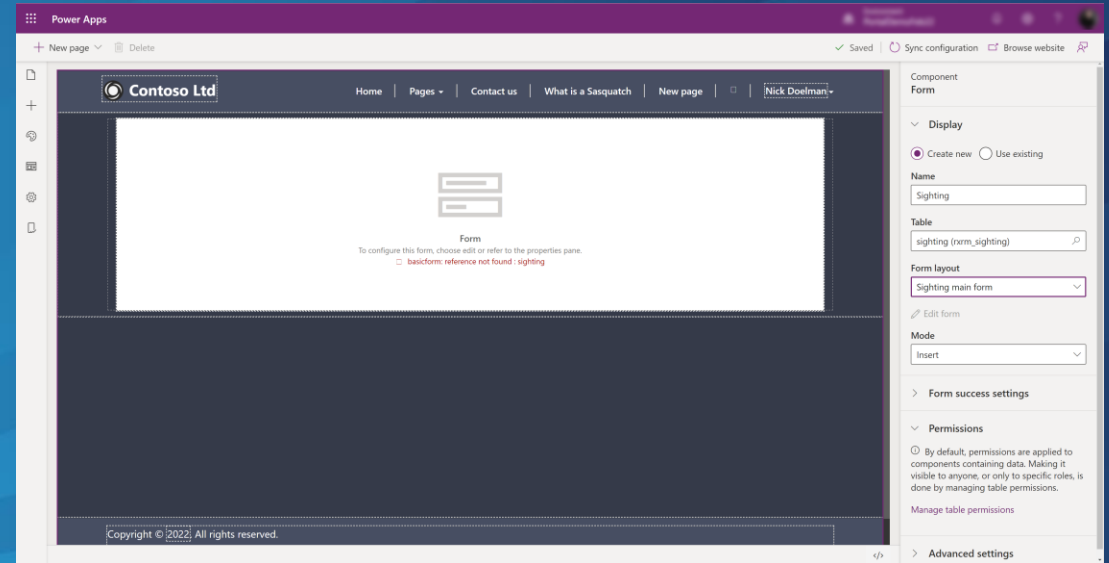
- Common requirement is to collect, view, and edit data
- Portals use Dataverse
- Portal components for viewing and working with data have foundation in model-driven app components (forms and views)

The top screenshot shows the Power Apps Form editor. The left pane displays a tree view for the 'Sighting main form' with sections for Header, General, and Footer. The main area shows the 'New sighting' form with a 'General' tab containing fields for Subject, Contact Email, and Date and Time of Sighting. The right pane shows the 'Sighting main form' properties, including the table name 'sighting', display name 'Sighting main form', and description 'A form for this entity.'

The bottom screenshot shows the Power Apps View editor. The left pane shows a list of table columns for 'sighting', including Contact, Created By, Created On, Modified By, Modified On, Owner, Owing Business Unit, Record Created On, Status, and Status Reason. The main area displays a table with columns for Subject, Details, Contact Email, and Date and Time of Sighting. The right pane shows the 'Active sightings' view settings, including a sort by 'Subject' and a filter for 'Status is Active'.

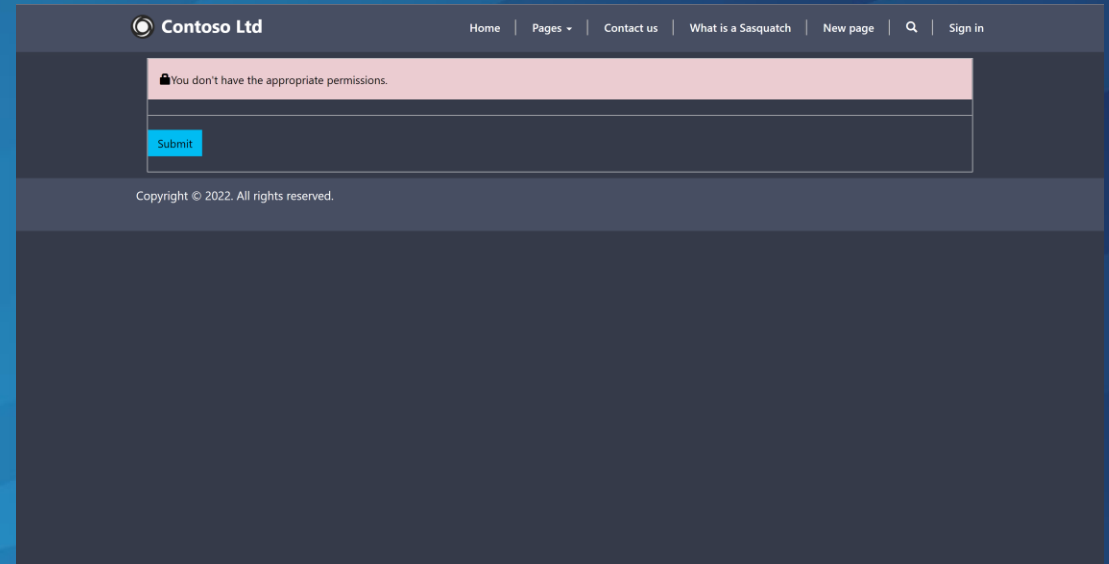
Working with Data

- 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	Write
Feedback	Active	Feedback (feedback)	Global access		<input type="checkbox"/>	<input type="checkbox"/>

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

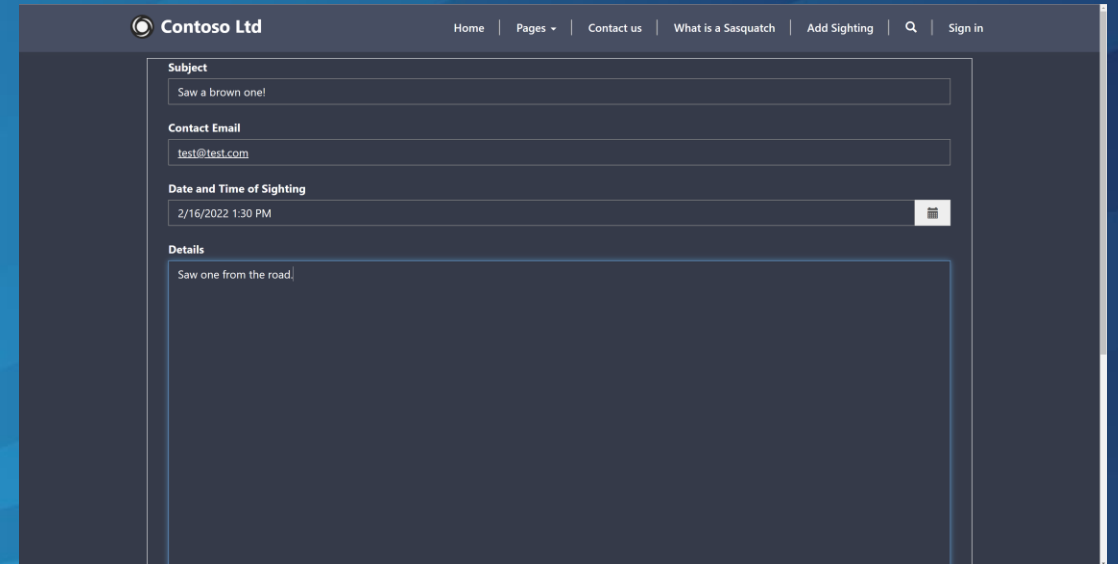
Roles

+ 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, and Sign in. The main form contains the following fields:

- Subject:** Saw a brown one!
- Contact Email:** test@test.com
- Date and Time of Sighting:** 2/16/2022 1:30 PM
- Details:** Saw one from the road.

Authenticated Portal Users

- Portal users = Dataverse Contacts
- Set up Authentication (e.g. Azure B2C, others)
- Invite existing contacts

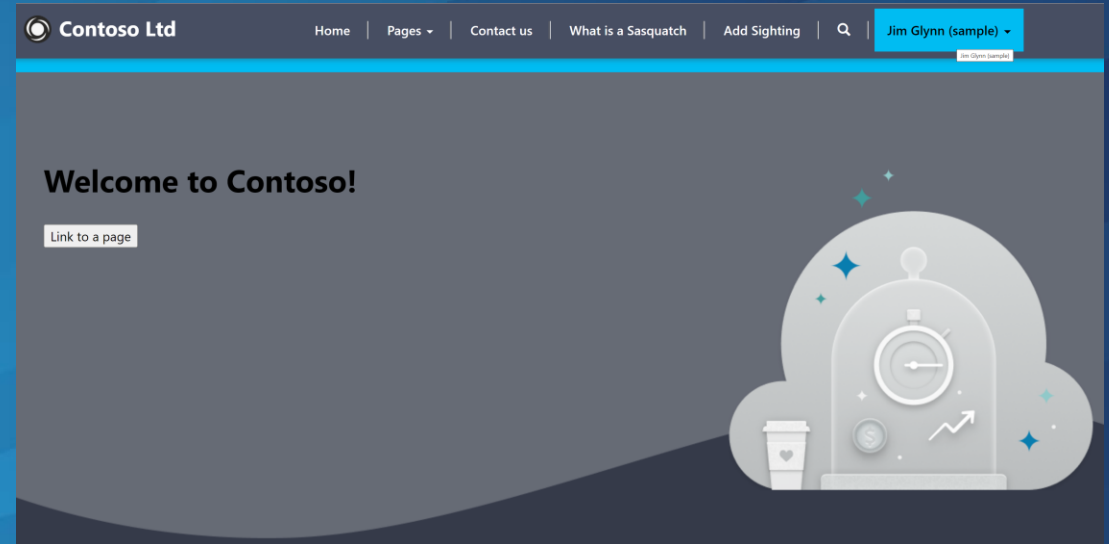
The image displays two screenshots related to portal user management. The top screenshot shows the 'Power Apps Portal Management' interface. On the left is a navigation pane with categories like Basic Forms, Lists, Shortcuts, Web Files, Advanced Forms, Web Link Sets, Portal Languages, Web Pages, Web Templates, Security, and Website Access. The main area shows an 'Invitation' for 'Jim Glynn (sample)'. The invitation details are as follows:

General	
Name	Jim Glynn (sample)
Expiry Date	---
Type	Single
Inviter	---
Owner/Sender	Nick Doelman

The bottom screenshot shows a user registration page for 'Contoso Ltd'. The page has a navigation bar with links for 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 main heading is 'Sign up with an invitation code'. There is 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 reads 'Copyright © 2022. All rights reserved.'

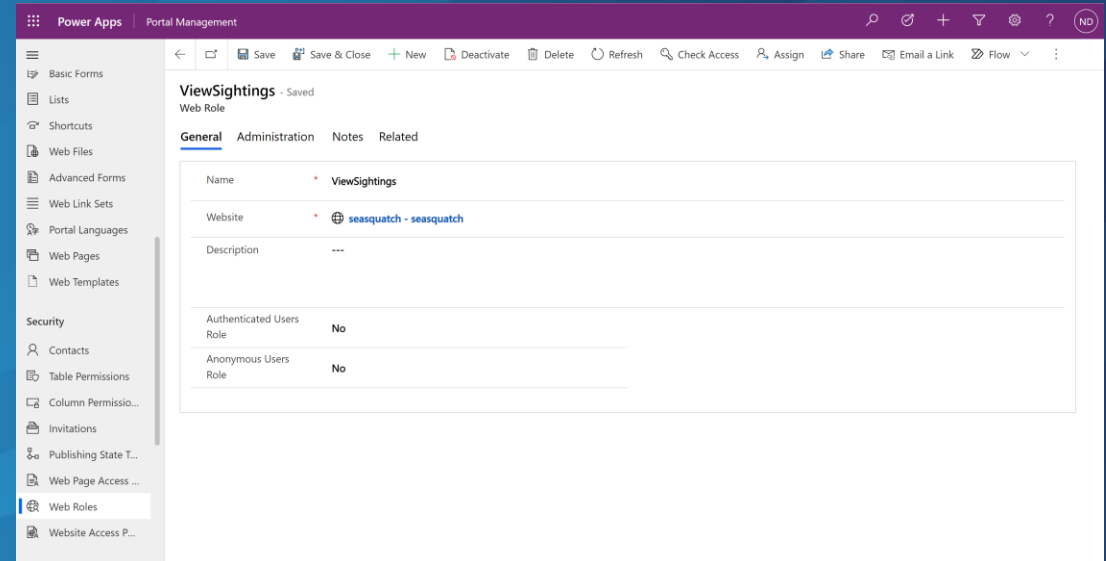
Authenticated Portal Users

- 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 two overlapping screenshots from the Power Apps environment. The top screenshot displays the configuration interface for a 'List' component. The 'Display' section is expanded, showing options to 'Create new' or 'Use existing'. The 'Name' field is set to 'My Sightings', and the 'Table' is set to 'sighting (rxm_sighting)'. The 'Views' dropdown is set to 'Active sightings'. The bottom screenshot shows a preview of the 'My Sightings' table view. The table has four columns: 'Subject', 'Details', 'Contact Email', and 'Date and Time of Sighting'. It contains two rows of 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

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Use Table Permissions to Filter Data

- Change access type
- Can be based on user (contact or account)
- Add child permissions for greater granularity

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

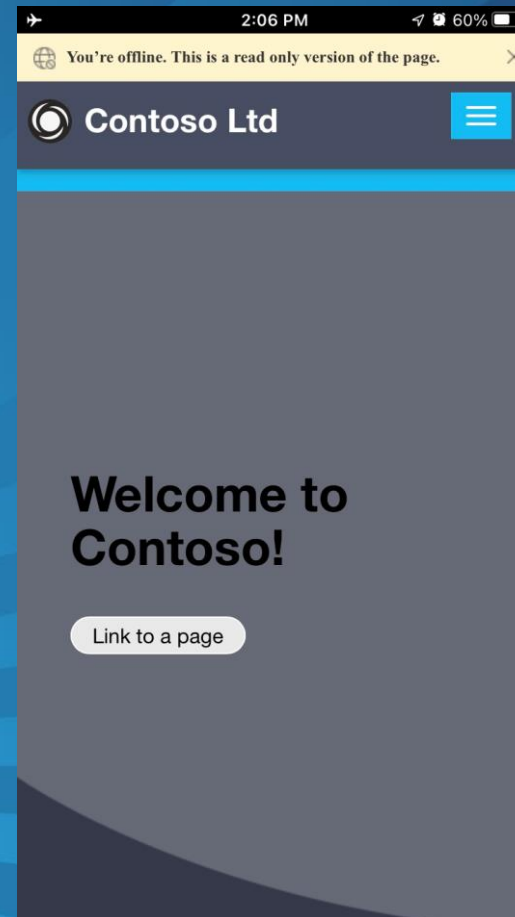
Save **Cancel**

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?



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