KOENIG SOLUTIONS · COURSE OUTLINE

55304: Microsoft Dataverse for Teams

Learn to build tables, apps, chatbots, flows and reports in Microsoft Dataverse for Teams within Microsoft Teams.

6	79	28
MODULES	TOPICS	HANDS-ON ACTIVITIES

COURSE OVERVIEW

This course covers Microsoft Dataverse for Teams, including its licensing, limitations and integration with the Power Platform from within Microsoft Teams. It explains how to set up tables, columns, relationships and views to model data, and how to build apps using Power Apps to interact with that data. It also covers designing chatbots with Power Virtual Agents, automating processes with Power Automate, and creating reports on Dataverse data using Power BI Desktop.

WHO THIS COURSE IS FOR

Power Platform Makers | **Microsoft Teams Administrators** | **App Developers** | **Business Analysts** | **Citizen Developers**

LEARNING OBJECTIVES

- Explain Microsoft Dataverse for Teams and its licensing and limitations
- Describe how Dataverse for Teams integrates with the Power Platform
- Configure tables, columns, relationships and views in Dataverse
- Build apps using Power Apps with controls, formulas and variables
- Design chatbots using Power Virtual Agents with topics and triggers
- Implement automated flows using Power Automate
- Develop reports on Dataverse data using Power BI Desktop
- Publish and maintain apps, chatbots, flows and reports

COURSE SYLLABUS

6 Modules, 79 Topics

01

4 Activities

Installing, Upgrading, and Migrating to Windows 7

This module will introduce students to Microsoft Dataverse. Microsoft Dataverse has two offerings, a more comprehensive service that is available at a cost, known as Dataverse, and a free to use service that comes as part of your Microsoft Teams license called Microsoft Dataverse for Teams, which is consumed directly from within Microsoft Teams. We will learn about the differences between these services, what are the limitations of Microsoft Dataverse for Teams and when to use each service. We will then discover how Microsoft Dataverse for Teams can be leveraged by Microsoft Power Apps, Microsoft Power Virtual Agents, Power BI and Microsoft Power Automate. In this module we cover how to add the Power Apps for Teams app, directly to Microsoft Teams, which will become our hub for designing business solutions. We will also provide a brief overview of the Microsoft Teams interface to discuss key elements that are essential to Microsoft Dataverse for Teams creations.

LESSONS

- Microsoft Dataverse
- What is the Power Platform?
- Licensing for Microsoft Dataverse
- Licensing for the Power Platform
- What is Microsoft Dataverse for Teams?
- Database terminology
- Chatbots, apps and flows
- Usage scenarios and limitations
- Power BI in Microsoft Teams
- An overview of Microsoft Teams
- Where can you use Microsoft Teams?
- The desktop app interface
- Pining apps in Microsoft Teams

02

4 Activities

Setting up Tables

This module will cover how to set up tables in your Microsoft Dataverse for Teams environment. Each Team utilising Microsoft Dataverse for Teams has its own environment where you can design your database. You can create tables, columns, rows, views, and relationships to model your data. The tables that you design can be used to support your apps, chatbots, reports and flows, acting as a centralised data source that you can tap into. Ensuring your data tables are correctly configured and secured is essential for success in other areas of Microsoft Dataverse for Teams.

LESSONS

- Getting started with tables
- Creating an environment for a Team
- Creating a new table
- Table settings
- Adding columns
- Choice columns
- Adding rows of data
- Creating table relationships
- Designing new views
- Table security
- Deleting tables

03

5 Activities

Creating New Apps

In this module we will design the interfaces that your Team's members are going to use to add new rows of data to your tables. We will introduce you to Power Apps in Microsoft Teams which is tailored to work with Microsoft Dataverse for Teams. The app itself can be based on an existing sample or you can choose to create your own app. This module will also cover adding components to your apps, writing formulas, introducing media, and using variables. We will then show you how to test, publish and use our apps within a Team.

LESSONS

- An introduction to Power Apps
- Power Apps services
- The Power Apps interface
- Creating a new app from a sample
- Create a blank app
- Working with screens
- Connecting to data sources
- Adding and editing controls
- Introducing formulas
- Using variables
- Media
- Testing an app
- App settings
- Publish to Teams
- Broad distribution apps

04

6 Activities

Designing Chatbots

In this module we will cover using Power Virtual Agents within Microsoft Teams. Power Virtual Agents allows us to design chatbots. A chatbot is an interface where an individual can type in a question or request information or support. The chatbot will look at the entry and interpret a logical response. Power Virtual Agents allows us to design the pace of these conversations. The full tool allows chatbots to be designed for enterprise use and for external facing customers. Within Teams these chatbots are only applied to a Team but are free whereas the full tool is not. We will show you how to get started with designing a chatbot, implement logic, test, and publish a chatbot to a Team. As Microsoft Teams is a chat enriched platform, understanding how to build chatbots can help you field common conversations that emerge within your Team.

LESSONS

- An introduction to Power Virtual Agents
- Chatbot topics
- How do chatbots work in Teams?
- The Power Virtual Agents interface
- The authoring canvas
- Entities
- Creating a new chatbot
- Working with topics
- Setting up triggers
- Adding nodes
- Call a flow
- Testing your chatbot
- Publish a chatbot
- Using a chatbot in Microsoft Teams
- Maintaining a chatbot

05

4 Activities

Adding Automated Processes

With the ability to create chatbots and apps as well all the capabilities Teams has to offer, it can prove to be a challenge to form a narrative between these services. Enter Power Automate in Teams. Power Automate offers Teams users the option to create business processes that bring together services from across Microsoft 365 and Microsoft Dataverse for Teams. Power Automate in Teams prioritises workflows that interact with features in Teams, such as chat and channel posts. It can also interact with elements of Microsoft Dataverse for Teams. This module provides instructions on how to get new business processes up and running quickly, and how to customise workflows further to enhance their logic and reach.

LESSONS

- An introduction to Power Automate
- How does Power Automate help Microsoft Team users?
- Configuring Microsoft Teams flows
- Testing a flow
- Designing new flows or customising flows
- The Power Automate interface
- Working with actions
- Branching logic
- Connect a flow to Dataverse for Teams
- Expressions and variables
- Publish a flow
- Flow history and error resolution

06

5 Activities

Designing Reports

Data within our tables in Microsoft Dataverse for Teams can tell a story. But often displaying the data as a table does not offer an invested party much insight into this information. Microsoft Dataverse for Teams can connect to Power BI Desktop to allow you to design reports against the live data in your custom tables. Although there is a lot of value in this, it is worth noting that Power BI does require additional licensing for the service to work. In this module we will show you how to connect to your data tables in Microsoft Dataverse for Teams and use Power BI Desktop to design and publish an engaging report. Once published we will show you how to schedule the report to update on its own so that it is displaying up to date information.

LESSONS

- An introduction to Power BI
- The Power BI suite
- User based licensing
- Premium capacity workspaces
- Connecting to tables
- Queries and data modelling
- Designing reports
- Hide and rename columns
- Adding basic content
- Visualisations
- Publishing reports
- Scheduling a data refresh
- Share in Teams

HANDS-ON ACTIVITIES

Practise What You Learn

#	MODULE	ACTIVITY
01	**Installing, Upgrading, and Migrating to Windows 7**	**LAB 1: GETTING READY** ■ Download required materials for the labs ■ Login to Microsoft 365 ■ Create a Team ■ Pin apps
02	**Setting up Tables**	**LAB 1: CREATE TABLES AND RELATIONSHIPS** ■ Create multiple tables ■ Add columns ■ Create relationships between tables ■ Set table security
03	**Creating New Apps**	**LAB 1: CREATE A NEW APP** ■ Create a new app ■ Adding screens ■ Add controls and media ■ Implement formulas and variables ■ Test and publish the app
04	**Designing Chatbots**	**LAB 1: CREATE A CHATBOT** ■ Create a new chatbot ■ Design a topic ■ Add an entity ■ Working with nodes ■ Test your chatbot ■ Publish your chatbot
05	**Adding Automated Processes**	**LAB 1: CREATE A NEW FLOW** ■ Create a new Microsoft Team flow ■ Test the flow ■ Modify the flow in Power Automate ■ Publish and test your changes
06	**Designing Reports**	**LAB 1: CONNECT A CHATBOT TO A TABLE USING FLOW** ■ Design a new flow to access a table ■ Update a topic and add your flow ■ Complete the remaining topic notes ■ Test your enhanced bot and publish ■ Exploring Power BI Desktop

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

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