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Module 5: Build Power Automate flows

Lab 5.1: Practice Lab – Create users

Scenario

You are a functional consultant for your organization Contoso. You are assigned to work on a project for your client Fabrikam. You will be continuing **your work on the model-driven Knowledge Admin** app. In this practice, you will be **creating a dashboard and modifying the app to include it**.

We need to add additional users to be able to use the application we have built. You will be adding three users to the tenant;

- **one manager** and
- **two additional users.**

Important Note: This lab will provide you with an **actual Office 365 tenant** and licenses for the **Power Platform applications** you will be using in this course.

You will only be provided with **one tenant for the practice labs in this course**. The settings and actions you take within this tenant **do not roll-back or reset**, whereas the virtual machine you are provided with does reset each time you close the lab session.

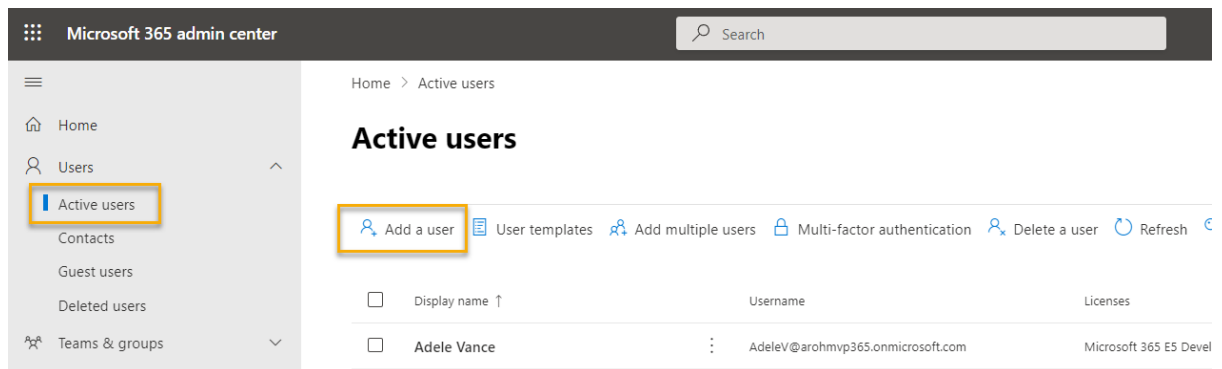
Please be aware that **Office 365 is evolving all the time**. The instructions in this document may be different from what **you experience in your actual Office 365 tenant**. It is also possible to experience a delay of several minutes before the virtual machine has network connectivity to begin the labs.

Exercise 1 – Add users and assign license to user

Task 1 – Create Users

In this task, you create users and assign licenses to them.

1. Navigate to <<https://admin.microsoft.com>>.
2. Login with your admin user, if prompted.
3. Expand **Users** and select **Active Users**.
4. Click **+ Add a user**.



5. Enter **User** for **First Name** and **One** for **Last Name**.
6. The **Display Name** will be populated for you.
7. Enter **UserOne** for **User Name**.
8. **Uncheck** the **Automatically create password** checkbox.
9. Enter **practice@1** for **Password**.

10. **Uncheck** the **Require this user change their password...** checkbox.

11. Select **Next**. Assign the **Microsoft Power Apps Plan 2 Trial** license.

The screenshot shows the 'Add a user' page with the 'Product licenses' step selected in the left-hand navigation pane. The main content area is titled 'Assign the licenses you'd like this user to have.' It includes a 'Select location' dropdown menu set to 'Singapore'. Below this, there is a section 'Licenses (1)*' with a list of available licenses. The 'Microsoft Power Apps Plan 2 Trial' license is selected, indicated by a blue checkmark and a yellow box. Other licenses listed include Dynamics 365 Sales Premium Viral Trial, Dynamics 365 Sales Professional, Microsoft 365 E5 Developer (without Windows and Audio Conferencing), Microsoft Power Automate Free, Power Apps per user plan, and Power BI Pro. A yellow circle with the number '1' is placed next to the 'Product licenses' step in the navigation pane, and a yellow circle with the number '2' is placed next to the 'Microsoft Power Apps Plan 2 Trial' license in the list.

12. Click **Next**. On the next page, click **Next** again. Finally, click **Finish adding**.

The screenshot shows the 'Add a user' page with the 'Review and finish' step selected in the left-hand navigation pane. The main content area is titled 'Review and finish' and displays the assigned settings for the user. It includes sections for 'Assigned Settings', 'Display and username', 'Password', 'Product licenses', and 'Roles (default)'. The 'Product licenses' section is highlighted with a yellow box and shows the location as 'Singapore', the license as 'Microsoft Power Apps Plan 2 Trial', and the apps as 'Flow P2 Viral, Common Data Service, PowerApps Trial, 1 more'. A yellow circle with the number '1' is placed next to the 'Product licenses' step in the navigation pane, and a yellow circle with the number '2' is placed next to the 'Finish adding' button at the bottom right of the page.

13. Click **Close**.

14. Repeat steps 4-16 for **User Two**.

Add a user

✓ Basics

● Product licenses

○ Optional settings

○ Finish

1

Assign the licenses you'd like this user to have.

Select location *

Singapore

Licenses (1)*

☒ Assign user a product license

☐ Dynamics 365 Sales Premium Viral Trial
9999 of 10000 licenses available

☐ Dynamics 365 Sales Professional
9999 of 10000 licenses available

☐ Microsoft 365 E5 Developer (without Windows and Audio Conferencing)
3 of 25 licenses available

☒ **Microsoft Power Apps Plan 2 Trial**
9997 of 10000 licenses available

☐ Microsoft Power Automate Free
9996 of 10000 licenses available

☐ Power Apps per user plan
These licenses do not need to be individually assigned

☐ Power BI Pro
0 of 1 licenses available

2

Back Next 3

15. Repeat steps 4-16 for **Manager User**.

Add a user

✓ Basics

● Product licenses

○ Optional settings

○ Finish

Select location *

Singapore

Licenses (1)*

☒ Assign user a product license

☐ Dynamics 365 Sales Premium Viral Trial
9999 of 10000 licenses available

☐ Dynamics 365 Sales Professional
9999 of 10000 licenses available

☐ Microsoft 365 E5 Developer (without Windows and Audio Conferencing)
3 of 25 licenses available

☒ **Microsoft Power Apps Plan 2 Trial**
9996 of 10000 licenses available

☐ Microsoft Power Automate Free
9996 of 10000 licenses available

☐ Power Apps per user plan
These licenses do not need to be individually assigned

☐ Power BI Pro
0 of 1 licenses available

☐ Power Virtual Agents Viral Trial
9999 of 10000 licenses available

☐ Create user without product license (not recommended)
They may have limited or no access to Office 365 until you assign a product license.

Back Next

16. Your new users should now be on the list of active users in Office.

Add a user

- ✓ Basics
- ✓ Product licenses
- ✓ Optional settings
- Finish

Assigned Settings
Review all the info and settings for this user before you finish adding them.

Display and username
Demo Manager User
manager@arohmvp365.onmicrosoft.com
[Edit](#)

Password
Type: Custom password
[Edit](#)

Product licenses
Location: Singapore
Licenses: Microsoft Power Apps Plan 2 Trial
Apps: Flow P2 Viral, Common Data Service, PowerApps Trial, 1 more
[Edit](#)

Roles (default)
User (no admin center access)
[Edit](#)

Profile info
None provided
[Edit](#)

[Back](#) [Finish adding](#)

Lab 5.2: Practice Lab - Create security role

Important Notice (Effective November 2020):

Scenario

You are a functional consultant for your organization Contoso. You are assigned to work on a project for your client Fabrikam. You will be continuing your work on the **model-driven Knowledge Admin** app. In this practice, you will be working with security roles.

Our users need to **have security roles assigned** so they can use the application we have built. Let's evaluate the **default role to see if it's a good fit**.

We notice there's nothing for our custom tables. After we determine what **changes should be made we will copy from an existing role and create a new role for users**.

Once created, we will **assign the new role to our users**. We will then create and assign an **application manager role**.

Exercise 1 – Evaluate and Create Security Roles

Task 1 – Evaluate Security Role

In this task, you will evaluate the Basic User security role.

1. Navigate to <https://admin.powerplatform.microsoft.com>
2. Select the **Environments**.

3. Select your **Practice** environment and click **Settings**.

The screenshot shows the Power Platform admin center interface. On the left is a navigation pane with 'Environments' selected. The main area shows the breadcrumb 'Environments > Aroh Shukla's Environment'. A 'Settings' button (gear icon) is highlighted with a yellow box and a '2' callout. The environment name 'Aroh Shukla's Environment' is highlighted with a yellow box and a '1' callout. Below the breadcrumb is a 'Details' section with the following information:

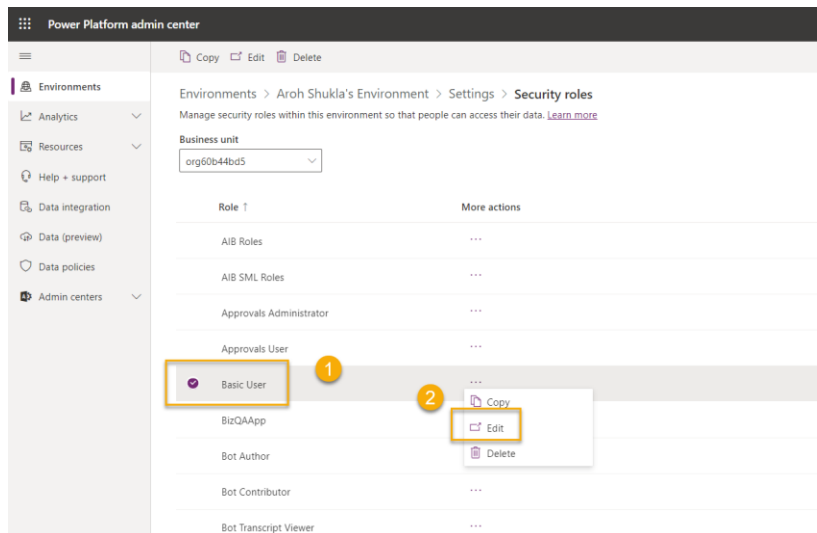
Details	
Environment URL	org60b44bd5.crm5.dynamics.com
State	Ready
Region	Asia
Refresh cadence	Frequent
Type	Developer
Security group	Not assigned
Organization ID	f2ec872d-1c5e-4bbd-bffd-3169b6d808e3

4. Expand the **Users + Permissions** section and select **Security Roles**.

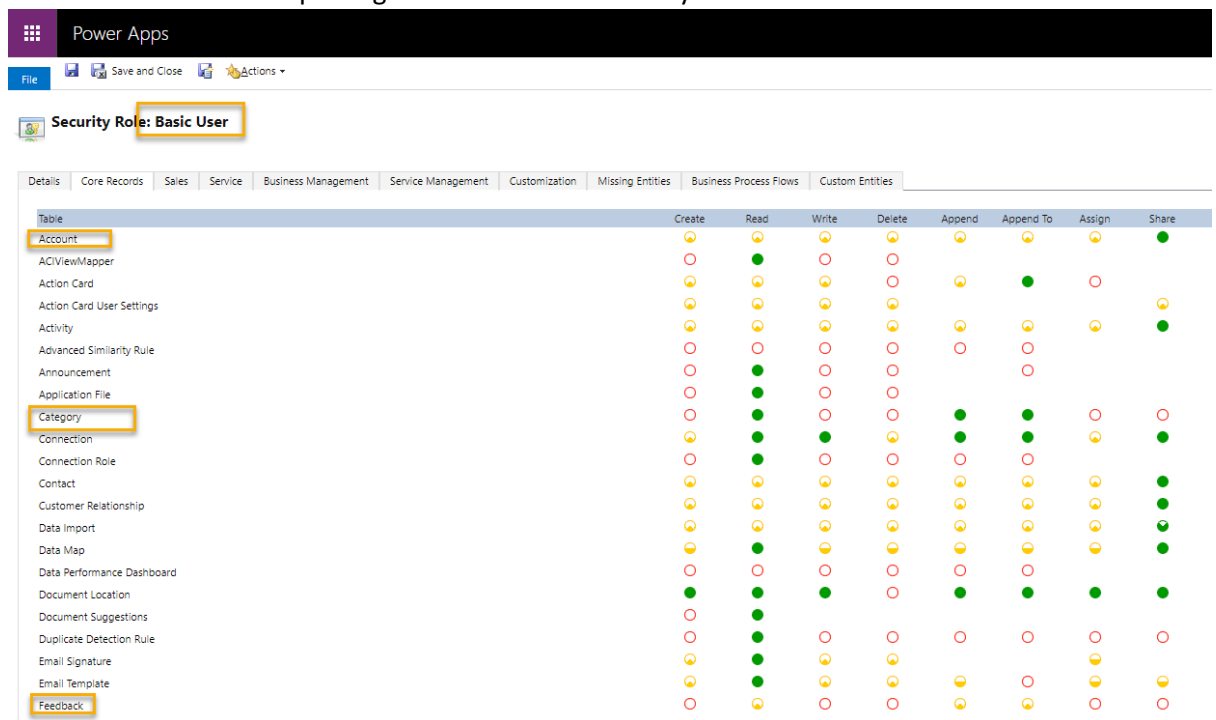
The screenshot shows the Power Platform admin center interface with the breadcrumb 'Environments > Aroh Shukla's Environment > Settings'. A search bar is present. The 'Users + permissions' section is expanded, and 'Security roles' is selected. The 'Users + permissions' section is highlighted with a yellow box and a '1' callout. The 'Security roles' option is highlighted with a yellow box and a '2' callout. The 'Security roles' section lists the following options:

- Application users
- Business units
- Hierarchy security
- License To Role mapping
- Mobile configuration
- Positions
- Security roles
- Teams
- Users

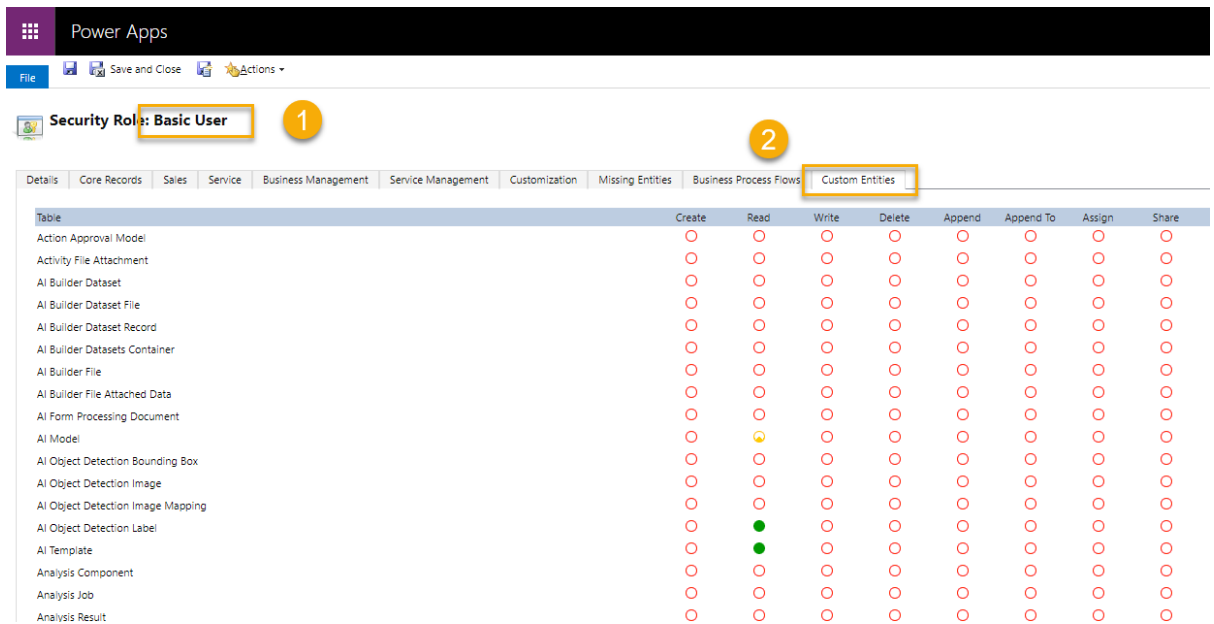
- Click to select the **Basic User** security role and click **Edit**.



- Select the **Core Records** tab.
- Scroll down and see the privileges the **Basic User** security role has to the **Core Records**.



- Select the **Custom Entities** tab.
- You will find that the **Basic User** security role doesn't have access to any of the custom entities you created.

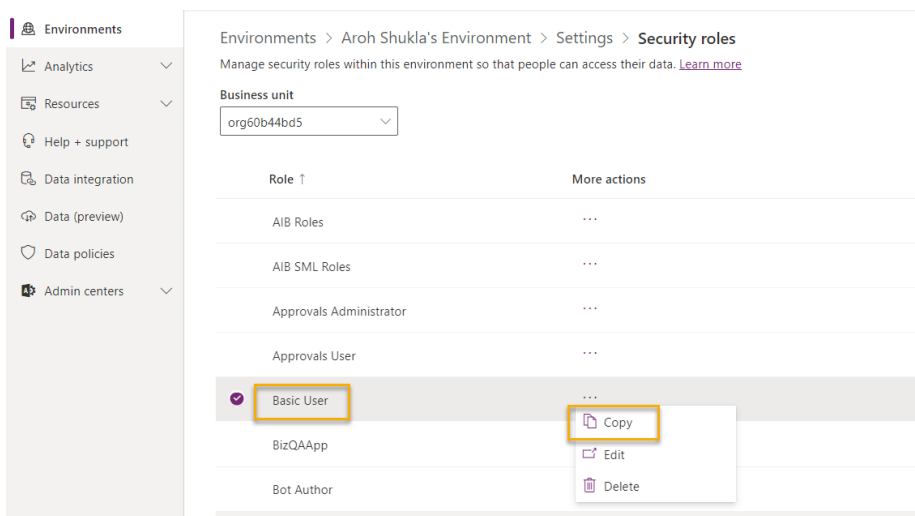


You can close this tab.

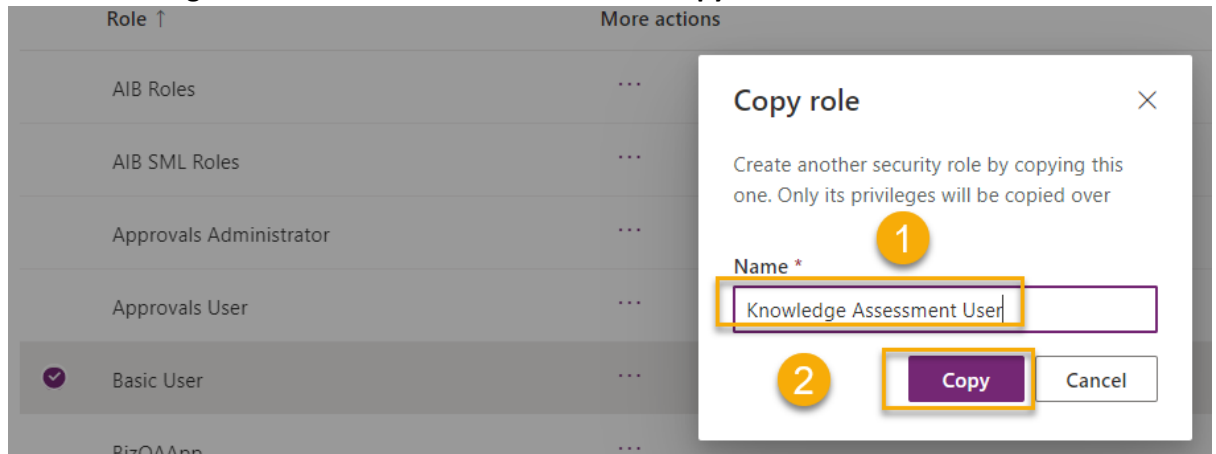
Task 2 – Copy from Existing Security Role

In this task, you will create a new security role by copying from the Microsoft Dataverse User security role.

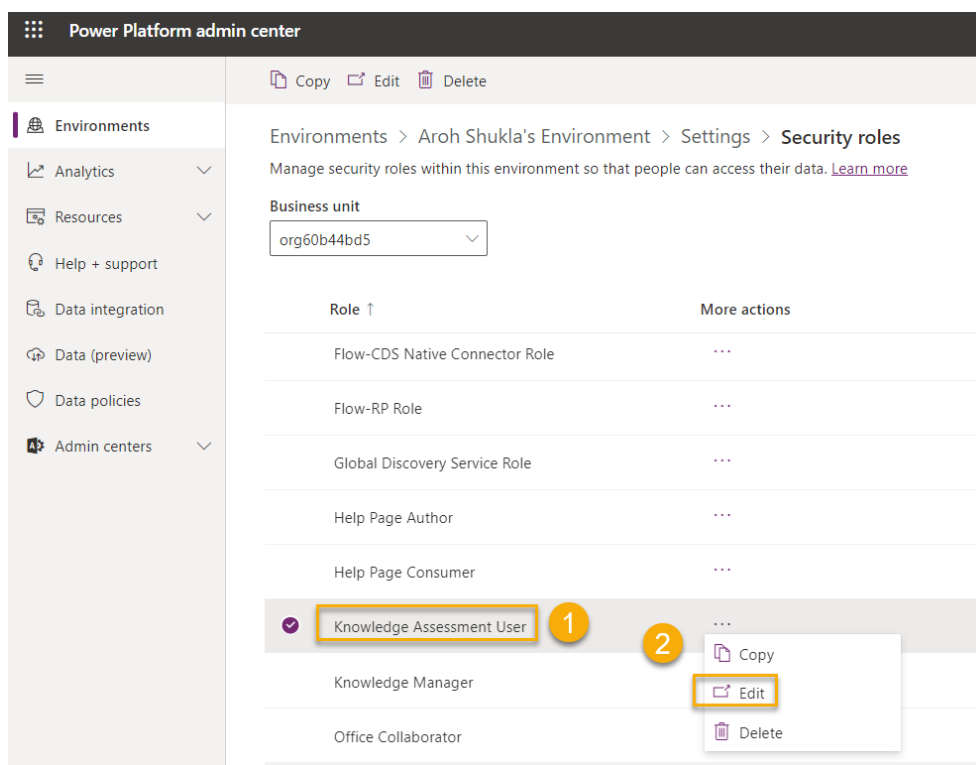
1. Click on the ellipses (...) for the **Basic User** security role and select **Copy**



2. Enter **Knowledge Assessment User** for **Name** and click **Copy**.

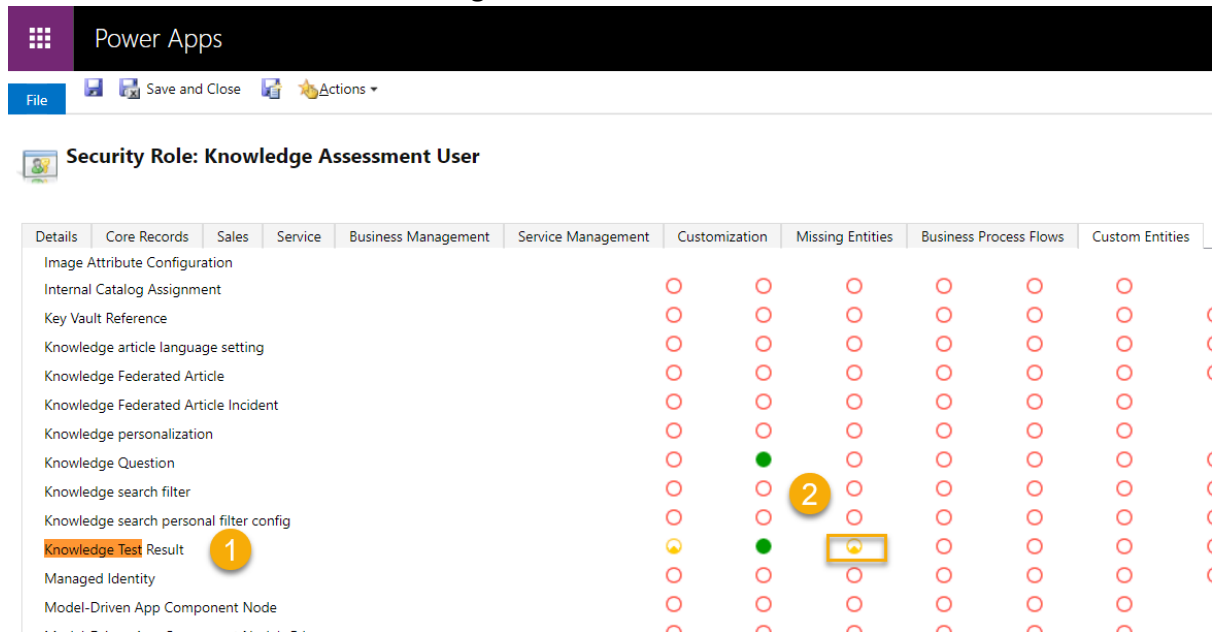


3. The new security role will be created. Select the role, select edit, and your new security role will open.



4. Select the **Custom Entities** tab.
5. Locate the **Knowledge Assessment** table and click on the Read access circle. The security role will get **User** access to the **Knowledge Assessment** table. Users with this security role will have **Read** privilege to the **rows owned by the user or are shared with the user**.
6. Click on the **Read** access circle again. The security role will now get **Business Unit** access. Users with this security role will get **Read** access to all **rows owned by the business unit the user belongs to**.

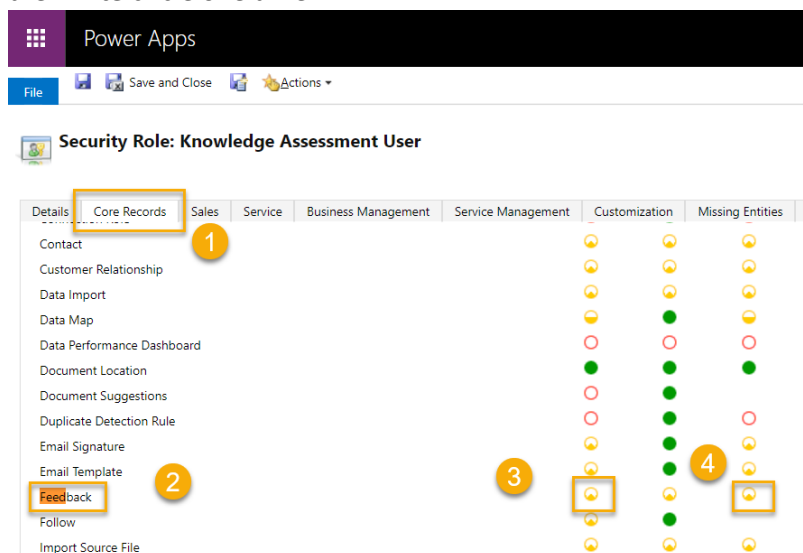
12. Locate the **Write** circle of the **Knowledge Test Result** table and click one time.



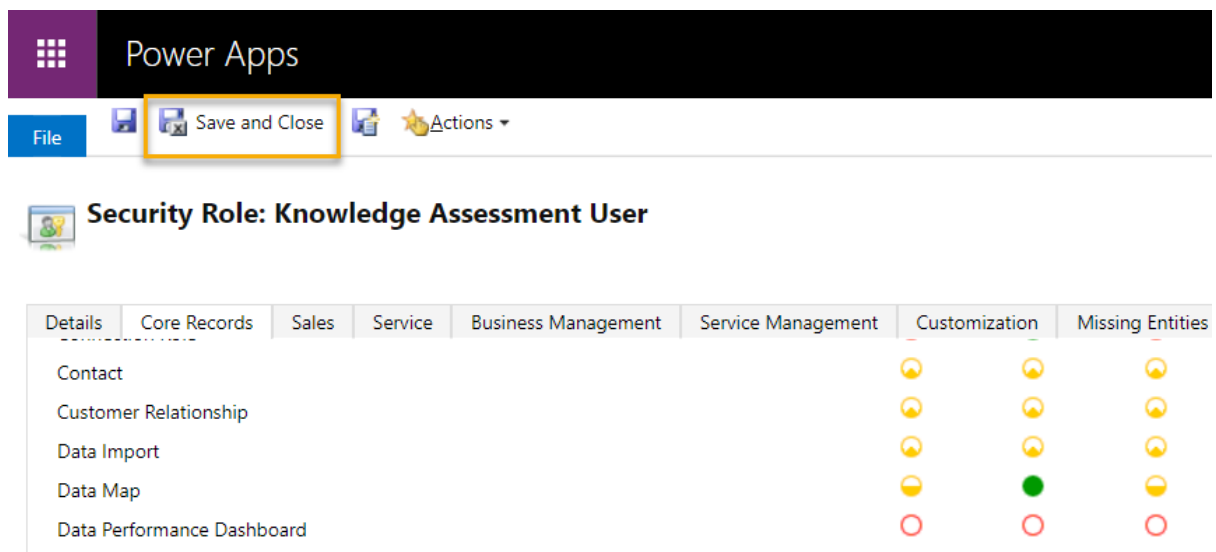
The security role will get organization-wide level **Read** privilege and user- level **Create/Write** privileges to the Knowledge Test Result table.

13. Select the **Core Records** tab.

14. Locate the **Feedback** table and click on the **Create** circle one time and click on the **Write** circle one time.



15. Click **Save and Close**.

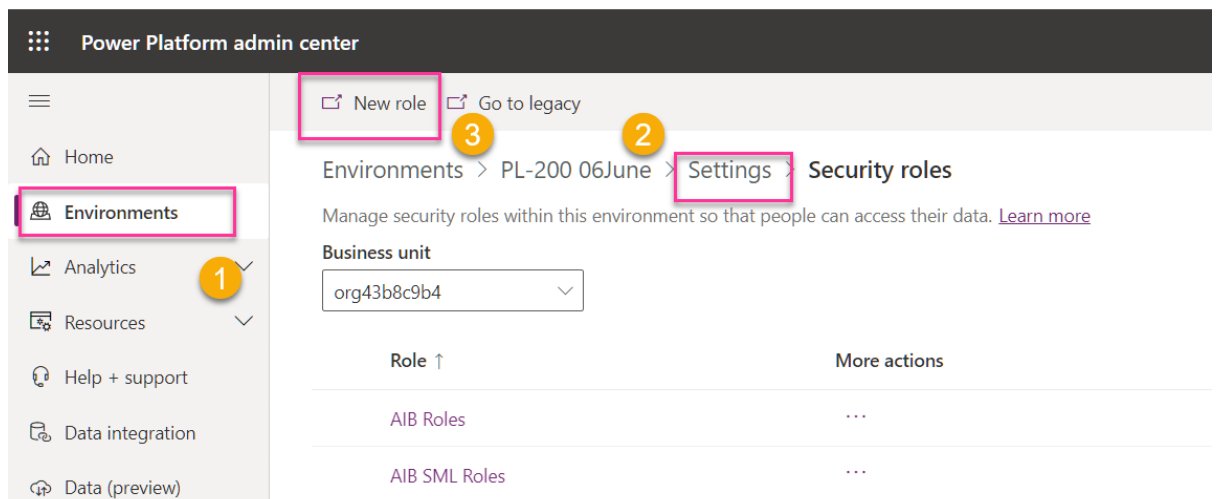
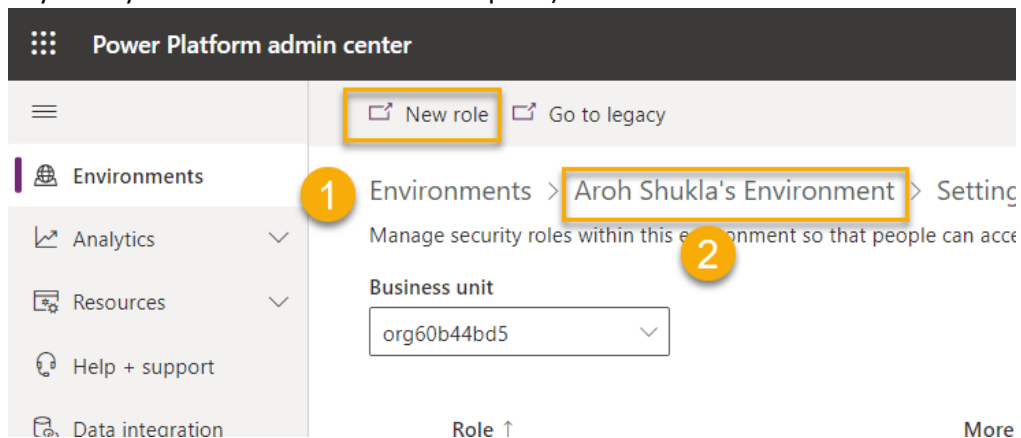


16. Navigate back to the Power Platform admin center security roles window.

Task 3 – Create Security Role

In this task, you will create a new security role for the application manager.

1. Make sure you are still on the **Roles** window and click **New role** (you may need to unselect any roles you have selected to see this option).



2. Enter **Knowledge Application Manager** for Role Name.

 Power Apps

File   Save and Close 

 **Security Role: New Security Role**

Details

Core Records

Sales

Service

Business Management

Service Management

Customizat

Role Name *

When role is assigned to a team
Team member gets all team privileges by default.
Team members can inherit team privileges directly based on access level. [Learn More](#)

Member's privilege inheritance ▼

3. Select the **Custom Entities** tab.
4. Locate the **Knowledge Assessment** table and click on the **table** name four times. The security role will get organization level of all privileges.

Security Role: New Security Role

Details	Core Records	Sales	Service	Business Management	Service Management	Customization	Missing Entities	Business Process Flows	Custom Entities
ConversationTranscript									
Custom API									
Data Lake Folder									
Data Lake Workspace									
Dataflow									
DataflowRefreshHistory									
Demo Knowledge Assessment									
Device Order									
Device Order 2									
Device Order 3									
Entity Image Configuration									
EntityRefreshHistory									

Click on this table 4 times

5. Locate the **Knowledge Question** table and click on the table name four times. The security role will get organization level of all privileges.

Security Role: New Security Role

Details	Core Records	Sales	Service	Business Management	Service Management	Customization	Missing Entities	Business Process Flows	Custom Entities
Healthcare Feedback									
Help Page									
Idea									
Image Attribute Configuration									
Internal Catalog Assignment									
Key Vault Reference									
Knowledge article language setting									
Knowledge Federated Article									
Knowledge Federated Article Incident									
Knowledge personalization									
Knowledge Question									
Knowledge search filter									
Knowledge search personal filter config									
Knowledge Test Result									

Click on table 4 times

6. Locate the **Knowledge Test Result** table and click on the table name four times. The security role will get organization level of all privileges.

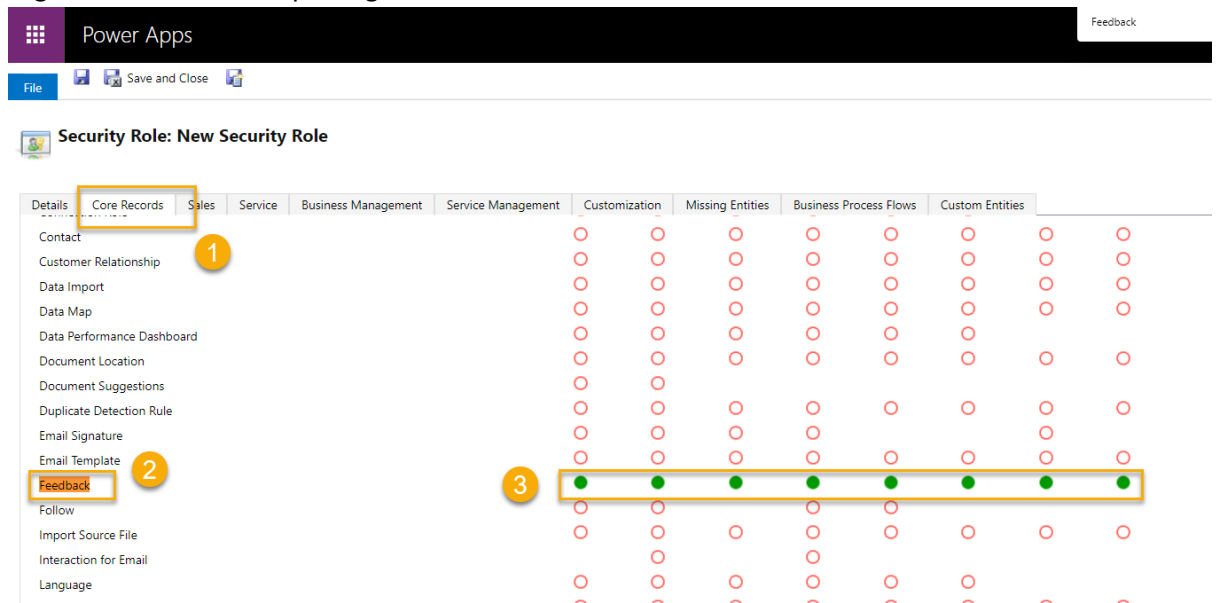
Healthcare Feedback									
Help Page									
Idea									
Image Attribute Configuration									
Internal Catalog Assignment									
Key Vault Reference									
Knowledge article language setting									
Knowledge Federated Article									
Knowledge Federated Article Incident									
Knowledge personalization									
Knowledge Question									
Knowledge search filter									
Knowledge search personal filter config									
Knowledge Test Result									
Managed Identity									
Model-Driven App Component Node									
Model-Driven App Component Node Edits									

1

2

7. Select the **Core Records** tab.

- Locate the **Feedback** table and click on the table name four times. The security role will get organization level of all privileges.



- Click **Save and Close**.
- Close the window.

Lab 5.3: Practice Lab – Configure a new business rule

Important Notice (Effective November 2020):

Scenario

You are a functional consultant for your organization Contoso.

You are assigned to **work on a model-driven Knowledge Admin app** for your client Fabrikam.

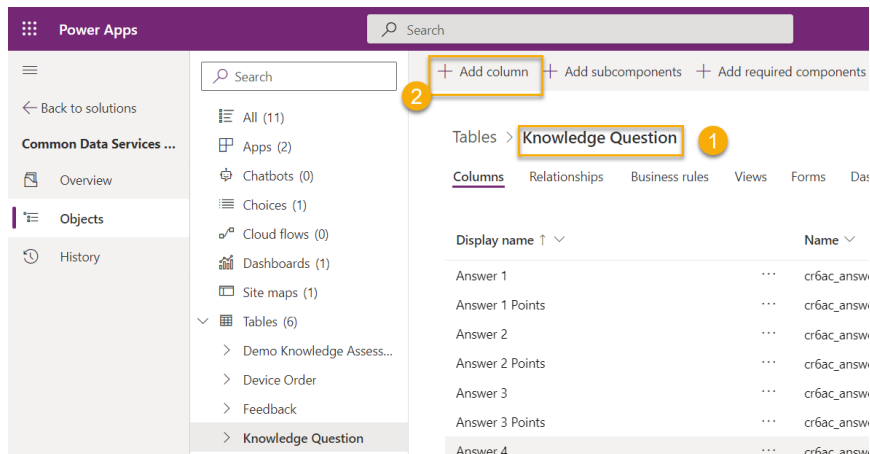
In this lab, you **will create columns and use business rules to control visibility of the columns without needing custom code**.

Exercise 1 - Prepare the solution

Task 1 – Add Columns to Knowledge Question

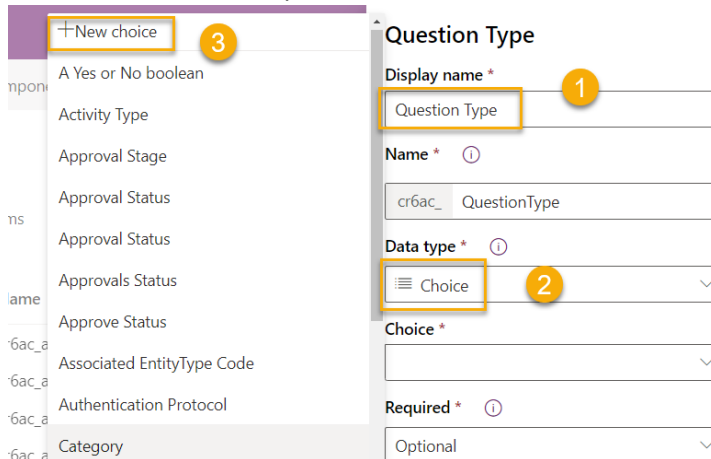
- Navigate to <https://make.powerapps.com>.
- Make sure you are in the **Practice** environment you created.
- Select **Solutions**.
- Click to open the **Common Data Services Default Solution**.
- Click to open the **Knowledge Question** table.

6. Click + Add Column.



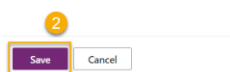
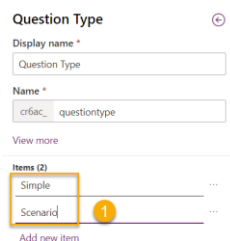
7. Enter **Question Type** for Display Name and select **Choice** for Data Type.

8. Click on the **Choice** dropdown and click + New Choice.



9. Enter **Simple** and click **Add New Item**.

10. Enter **Scenario** and click **Save**.



11. From the **Required** dropdown, select **Required**.

12. Click **Done**.

Question Type [X]

Display name *
Question Type

Name * ⓘ
cr6ac_ QuestionType

Data type * ⓘ
Choice

Choice *
Question Type
[Edit choice]

Default value
[No default value]

Required * ⓘ
Required

☒ Searchable ⓘ

Calculated or Rollup ⓘ + Add

Description ⓘ

Done Cancel

Data type * ⓘ
Choice

Behavior ⓘ
Simple

Required ⓘ
Business required

☒ Searchable ⓘ

☐ Selecting multiple choices is allowed

Sync with global choice? *
☐ Yes (recommended)
Can be used in multiple tables, and will stay updated everywhere.
☒ No
Creates a local choice that can only be used in one table. People using it can add new choices.

Choices
3
Label *
Simple
Scenario

Save Cancel 4

13. Click **+ Add Column**.

14. Enter **Scenario Description** for **Display Name**, select **Text Area** for **Data Type**, and click **Done**.

Scenario Description

×

Display name *

Scenario Description

Name *

cr6ac_ ScenarioDescription

Data type *

Text Area

Required *

Optional

☒ Searchable

Calculated or Rollup

+ Add

Description

Advanced options

▼

Done

Cancel

15. Click **Save Table**.

Task 2 – Add Columns to Knowledge Question Form

1. Make sure you still have the **Knowledge Question** table selected.
2. Select the **Forms** tab and click to open the **Main** form.

Tables	Knowledge Question 1								
Columns	Relationships	Business rules	Views	Forms 2	Dashboards	Charts	Keys	Commands	Data
Name ↑			Form type		Status		Type		
Information	...		3	Card	Active		Custom		
Information	...			Main	Active		Custom		
Information	...			QuickViewForm	Active		Custom		

- 3.
4. Drag the **Question Type** column from the **Table columns** and drop it above the **Question** column on the form.
5. Drag the **Scenario Description** column and drop it below the **Question Type** column.

Power Apps | Form

Back | Undo | Redo | Copy | Paste | Delete | Form field | Component | Form

Table columns

sc

+ New table column

☒ Show only unused table columns

New Knowledge Question

Knowledge Question

Answers General

New Section

Question Type

Scenario Description

6. With **Scenario Description** selected, check **Hide**.

New Knowledge Question

Knowledge Question

Answers General

New Section

Scenario Description

Scenario Description

Properties Events

Display options

Table column

Scenario Description

Label *

Scenario Description

☐ Hide label

☐ Hide on phone

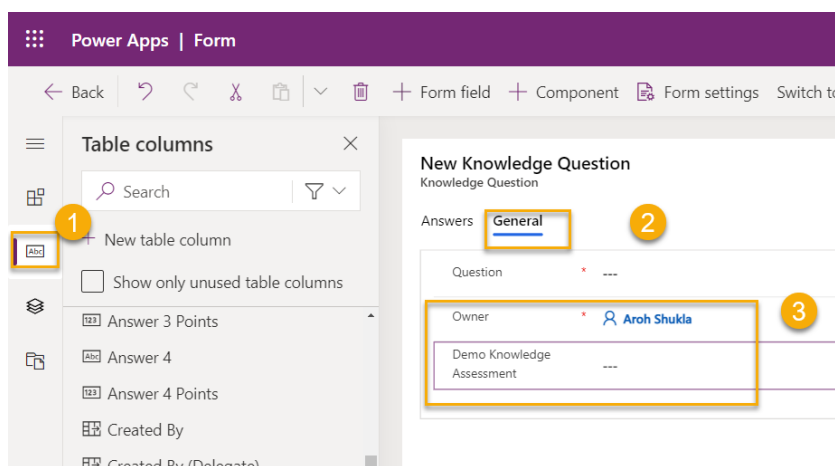
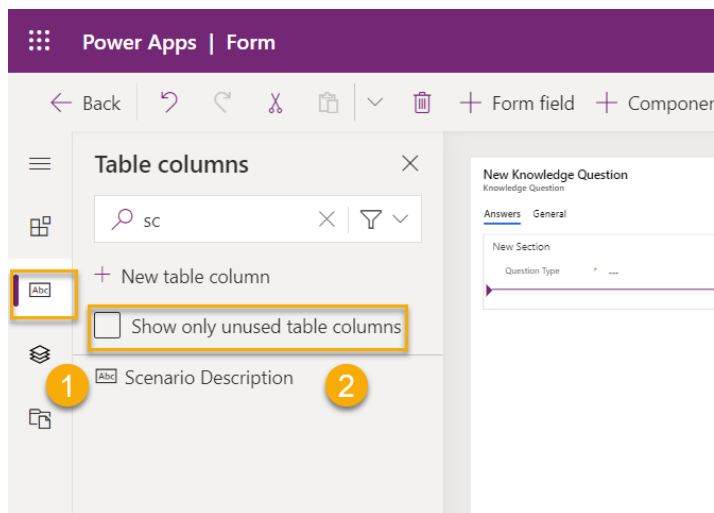
☒ Hide

☐ Lock

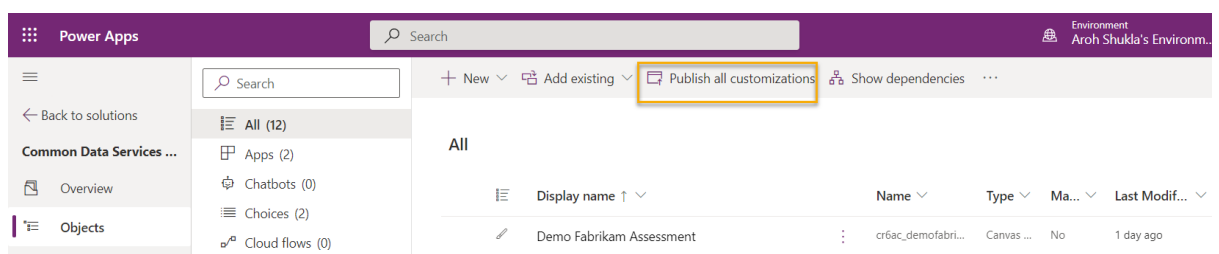
☐ Read-only

Formatting

7. Uncheck **Show only unused table columns** and drag the **Knowledge Assessment** column and drop it below the **Owner** column on the form.



8. Click **Save**.
9. Click **Publish**.
10. Click **Back**.
11. Click on the solution name **Common Data Services Default Solution** located in the navigation breadcrumbs.
12. Click **Publish all customizations**.

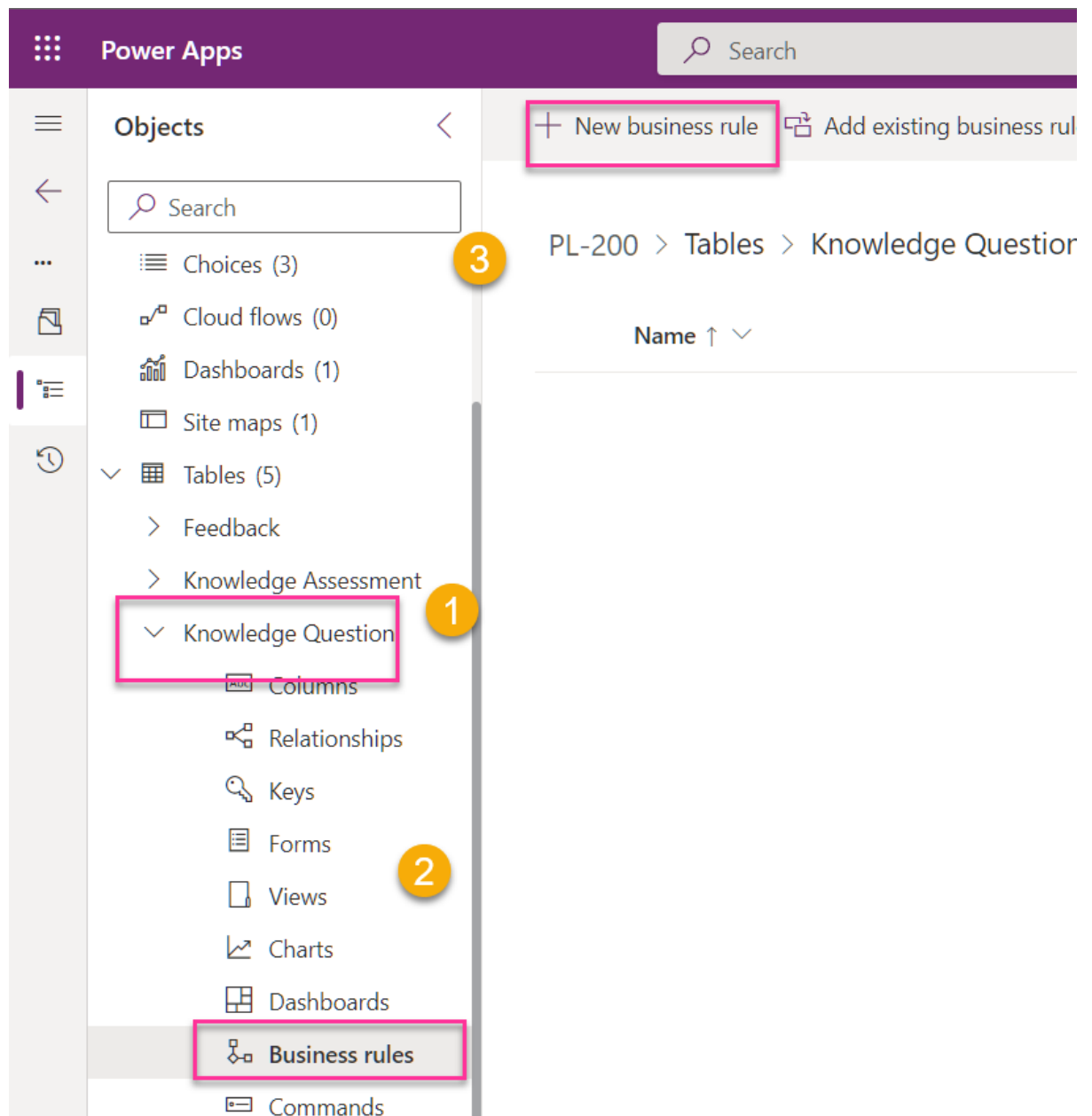
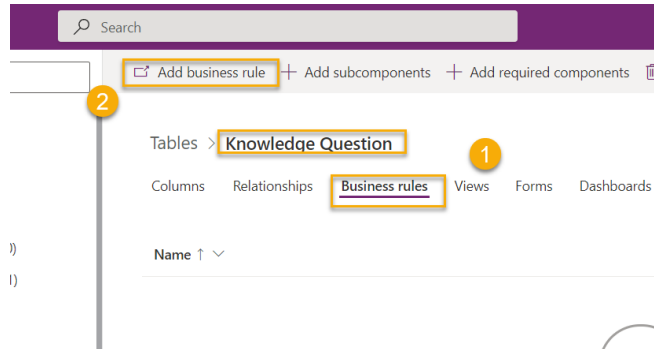


Exercise 2 – Create Business Rule

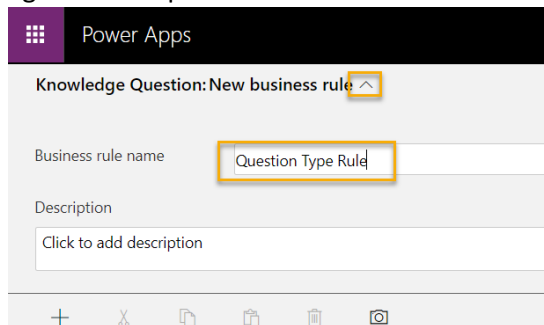
Task 1 – Create Question Type Business Rule

1. Navigate to <https://make.powerapps.com>.
2. Make sure you are in the **Practice** environment you created.

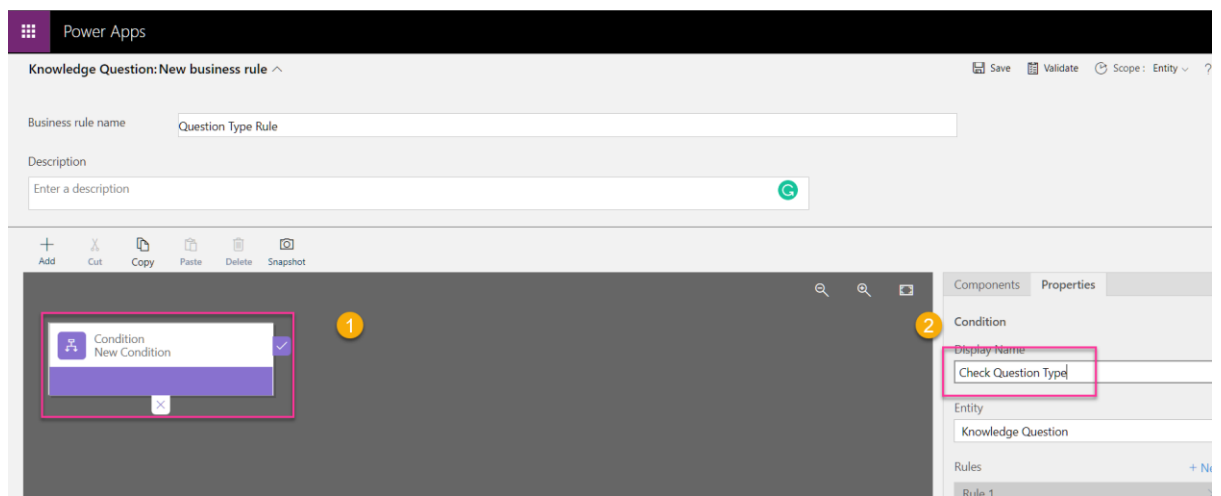
3. Select **Solutions**.
4. Click to open the **Common Data Services Default Solution**.
5. Click to open the **Knowledge Question** table.
6. Select the **Business Rules** tab and click **Add business rule**.



- Next to **New business rule** name at the top of the screen, select the **dropdown carrot**.
- Enter **Question Type Rule** for **Business Rule Name**. You can select the dropdown carrot again to collapse this section.



- Select the **Condition** and enter **Check Question Type** for **Display Name**.



- Go to the **Rules** section, select **Question Type** for **Field**, select **Equals** for **Operator**, select **Value** for **Type**, and select **Scenario** for **Value**.

11. Click **Apply**.

Components Properties

Condition

Display Name

Check Question Type

Entity

Knowledge Question

Rules + New

Source

Entity

Field

Question Type

Operator

Equals

Type

Value

Value

☐ Simple

☒ Scenario

Condition Expression (Text View)

(Question Type Equals [Scenario])

Apply Discard

Check the business rule as Text

Power Apps

Enter a description

Add Cut Copy Paste Delete Snapshot

Condition

Check Question Type

Business Rule (Text View)

IF

THEN

Question Type equals "Scenario"

Components Properties

Rule 1

Source

Entity

Field

Question Type

Operator

Equals

Type

Value

Value

☐ Simple

☒ Scenario

Condition Expression (Text View)

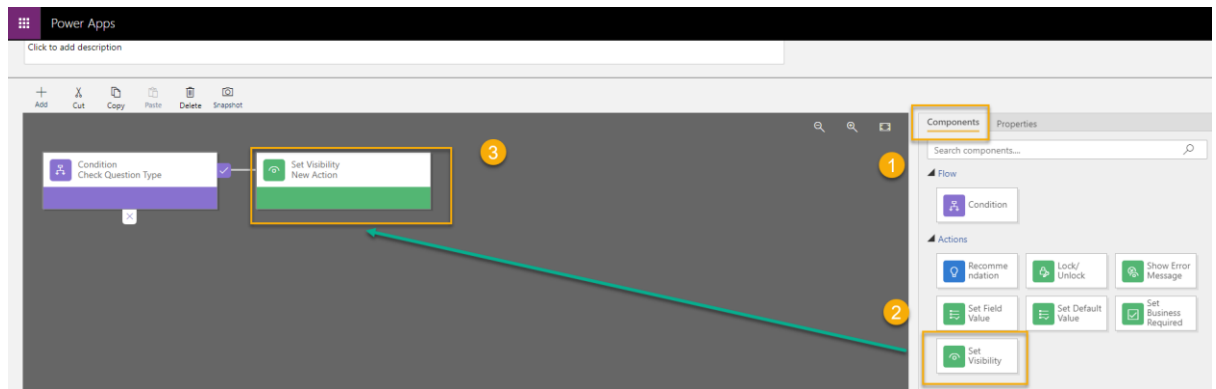
(Question Type Equals [Scenario])

Apply Discard

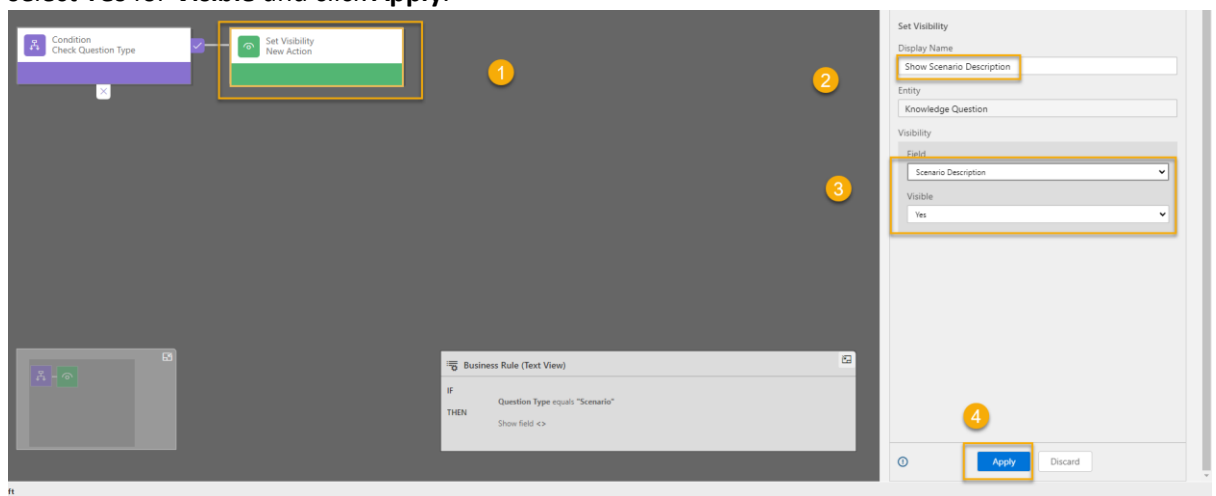
Draft

12. Select the **Components** tab.

13. Drag **Set Visibility** action and place it on the **True** side (on the right side) of the condition.

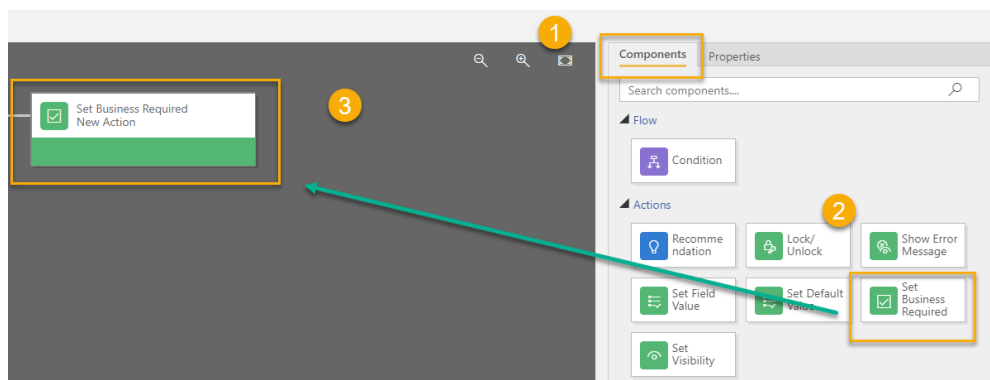


14. Enter **Show Scenario Description** for **Display Name**, select **Scenario Description** for **Field**, select **Yes** for **Visible** and click **Apply**.

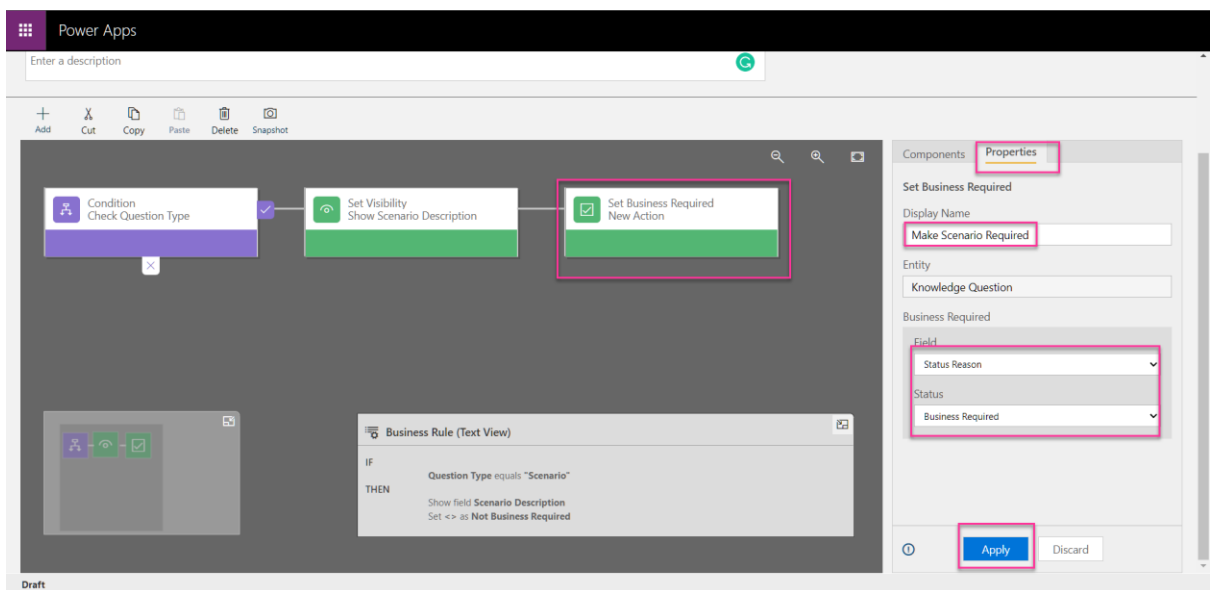
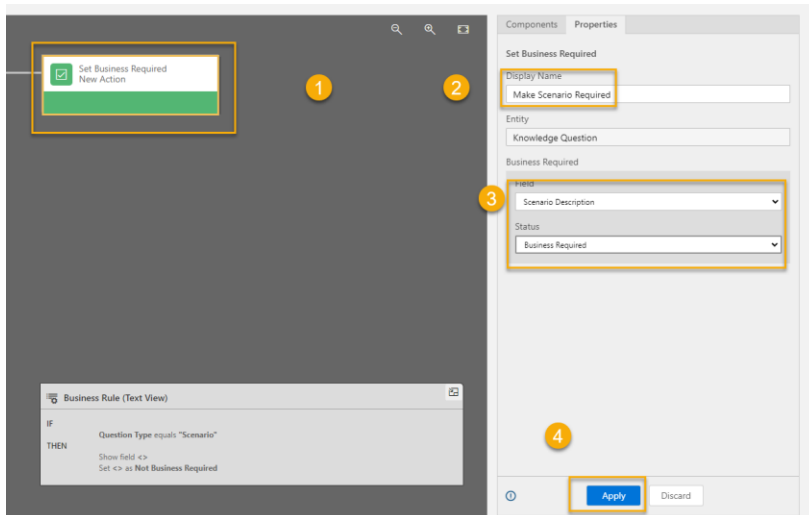


15. Select the **Components** tab.

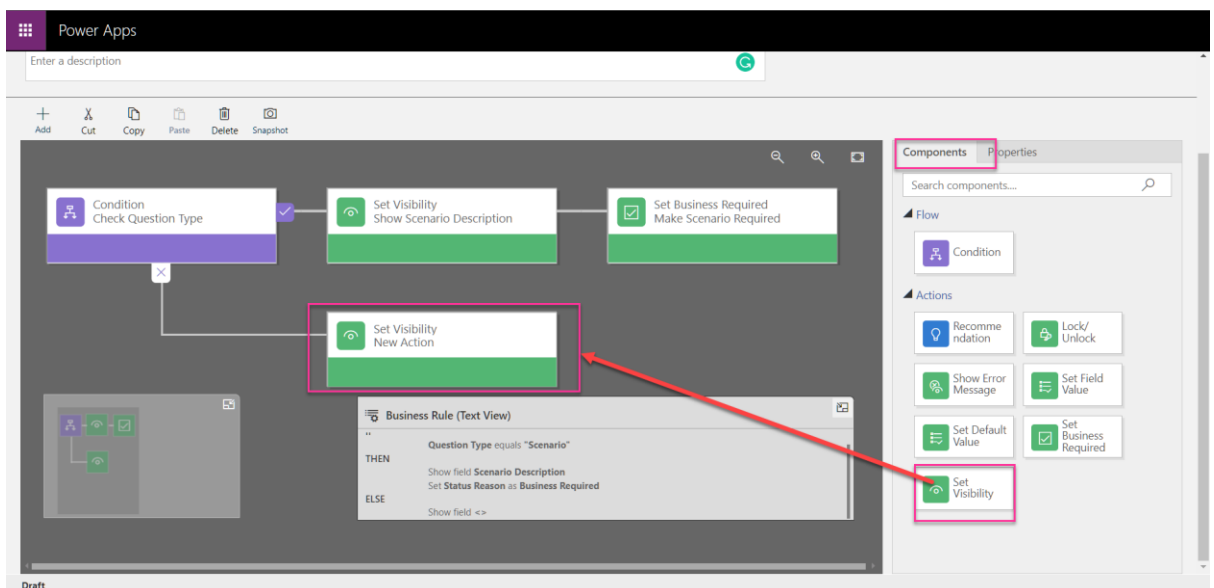
16. Drag **Set Business Required** action and place it after the **Show Scenario Description** action.



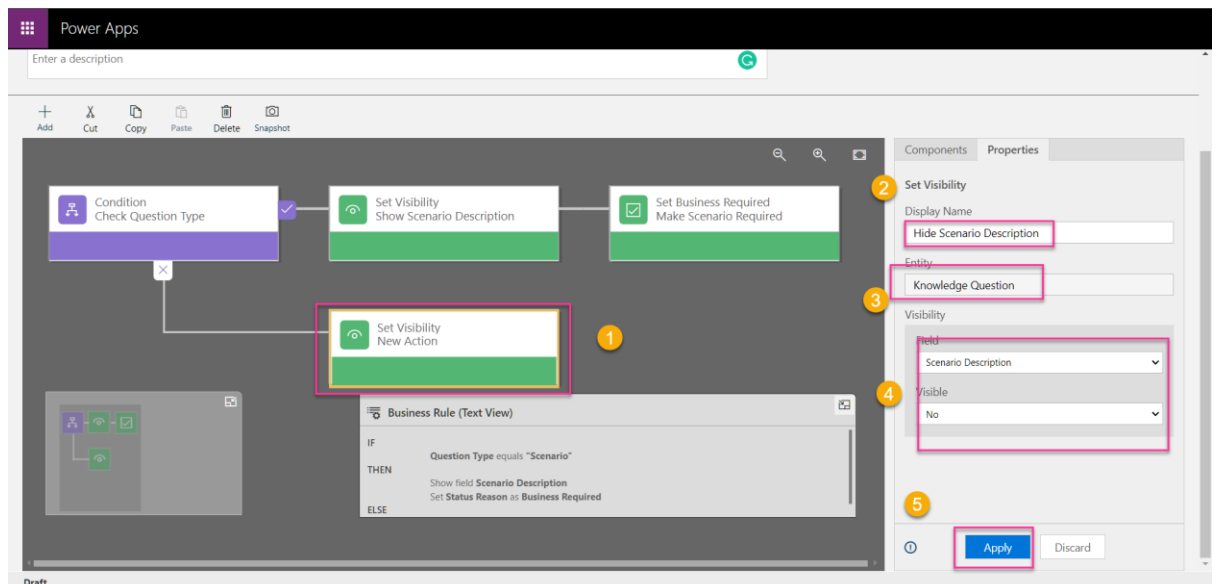
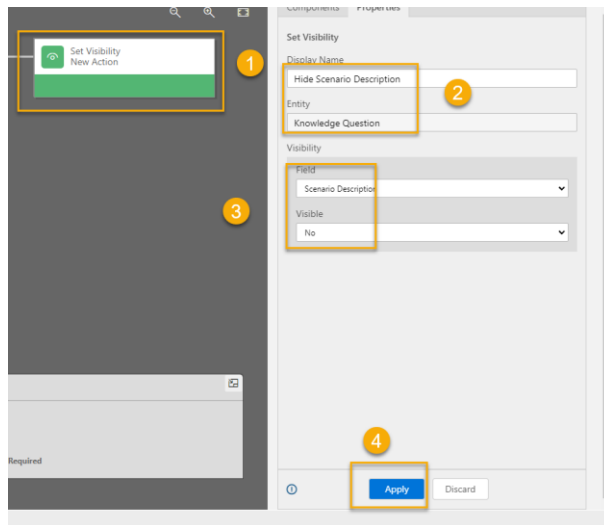
17. Select the new action, enter **Make Scenario Required** for **Display Name**, select **Scenario Description** for **Field**, select **Business Required** for **Status** and click **Apply**.



18. Drag **Set Visibility** action and place it on the **False side (below)** of the condition.

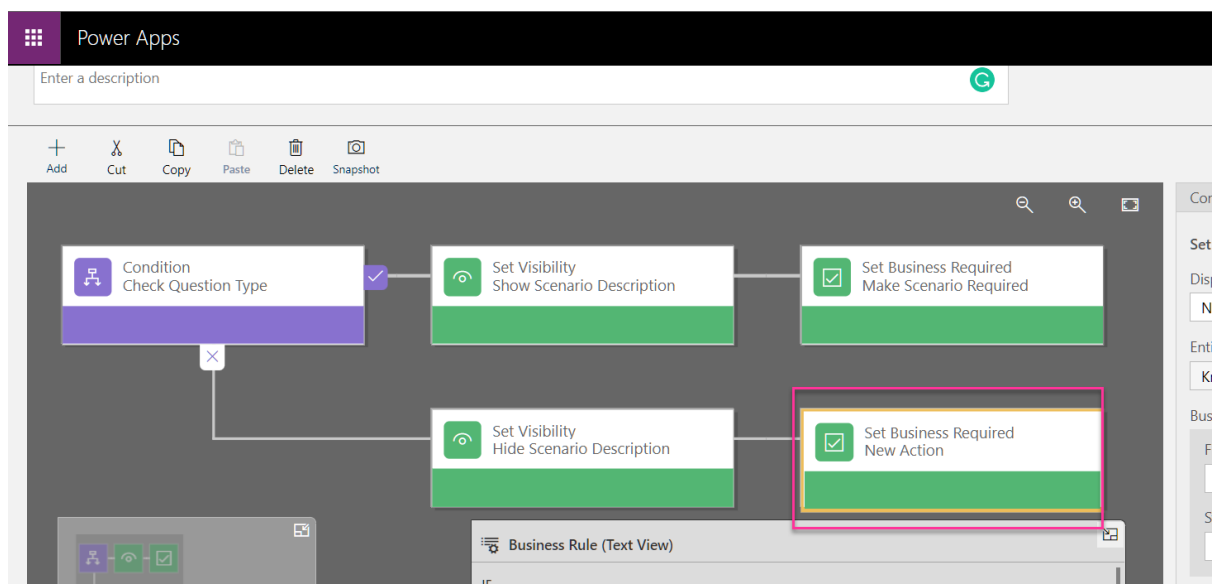
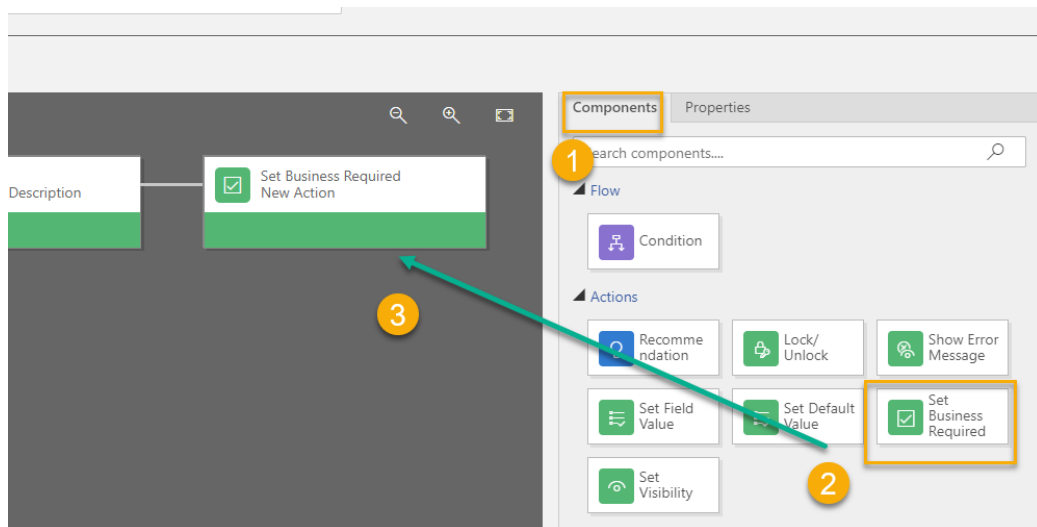


19. Enter **Hide Scenario Description** for **Display Name**, select **Scenario Description** for **Field**, select **No** for **Visible** and click **Apply**.

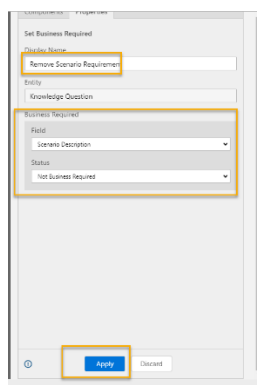


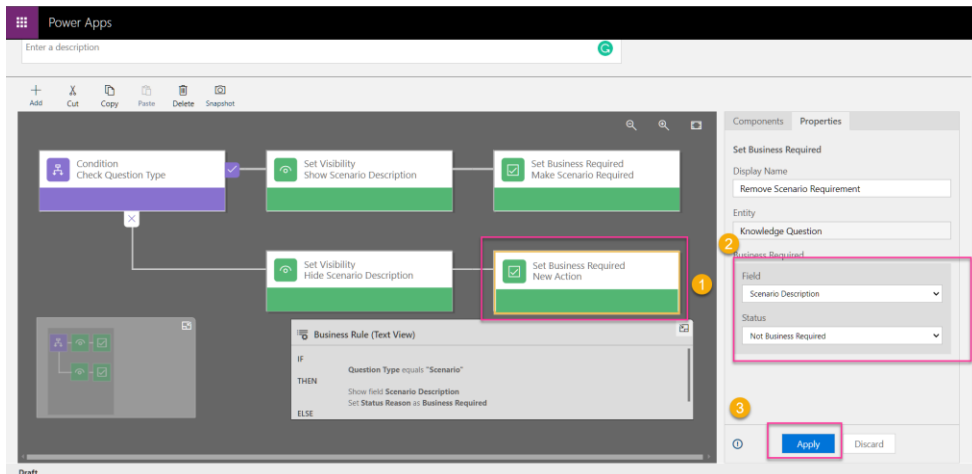
20. Select the **Components** tab.

21. Drag **Set Business Required** action and place it after the **Hide Scenario Description** action.



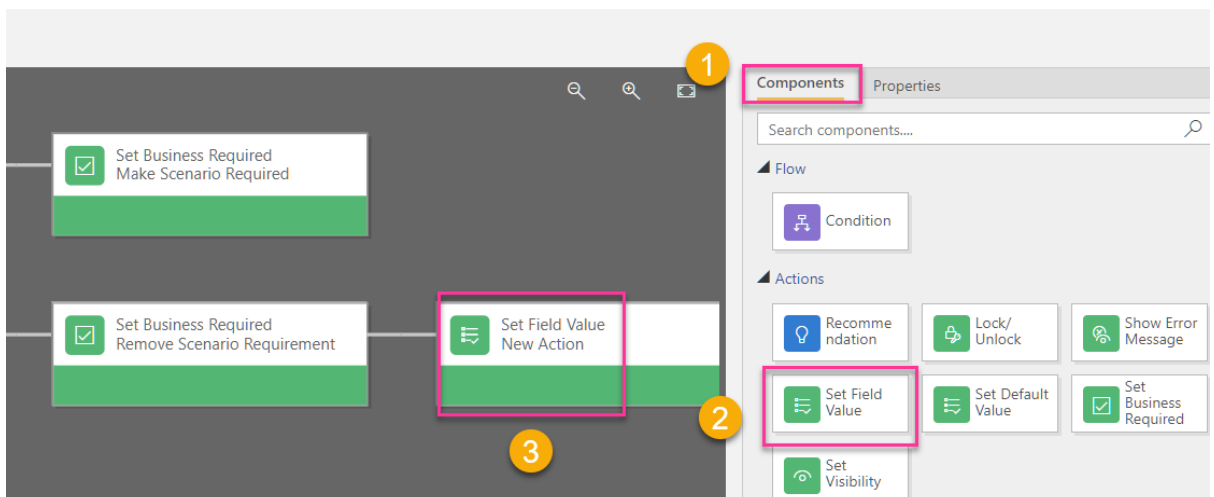
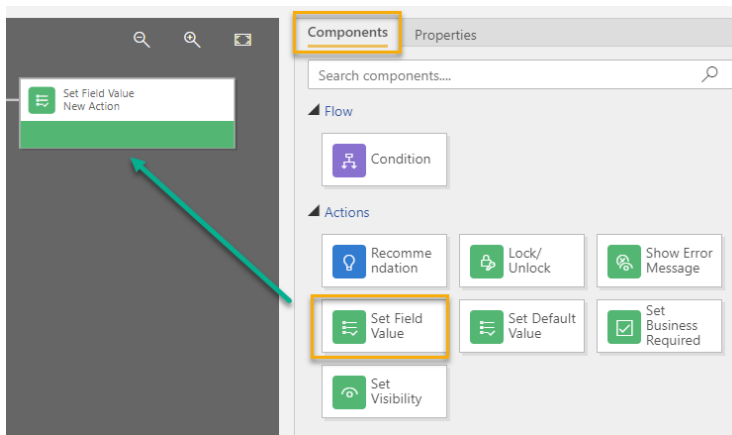
22. Select the new action, enter **Remove Scenario Requirement** for **Display Name**, select **Scenario Description** for **Field**, select **Not Business Required** for **Status** and click **Apply**.



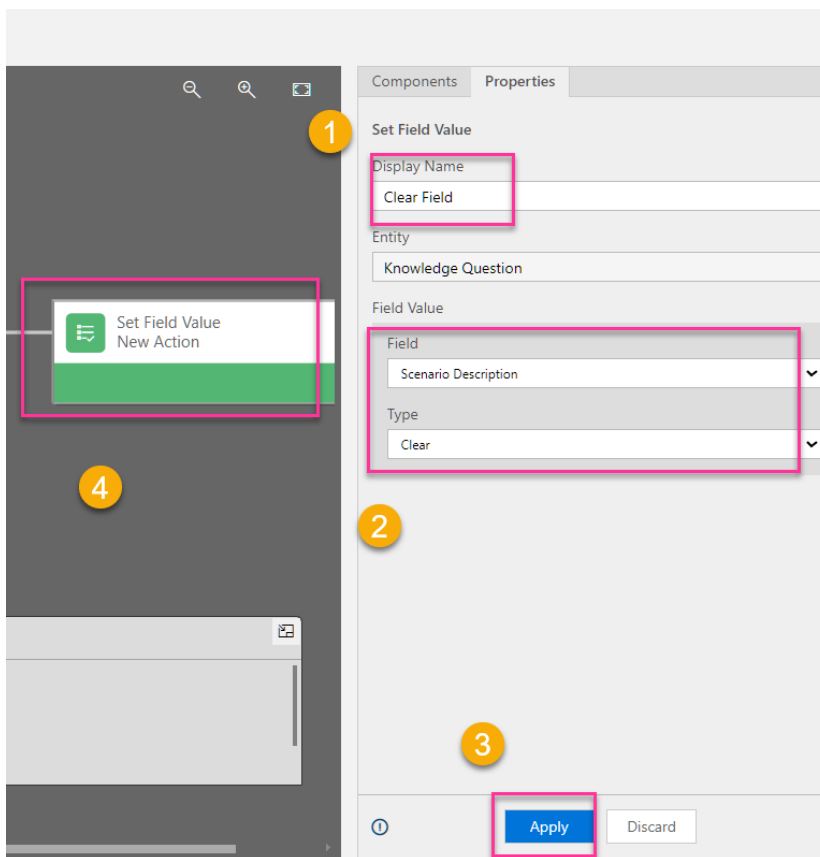
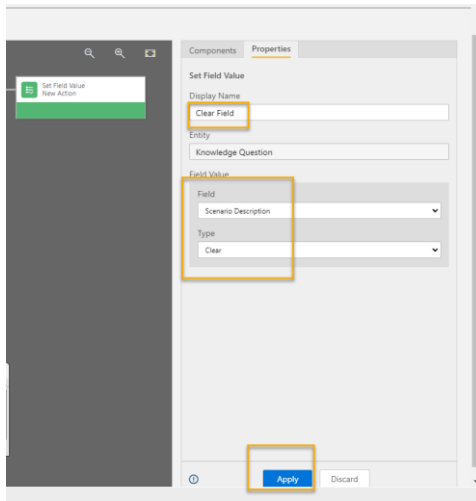


23. Select the **Components** tab.

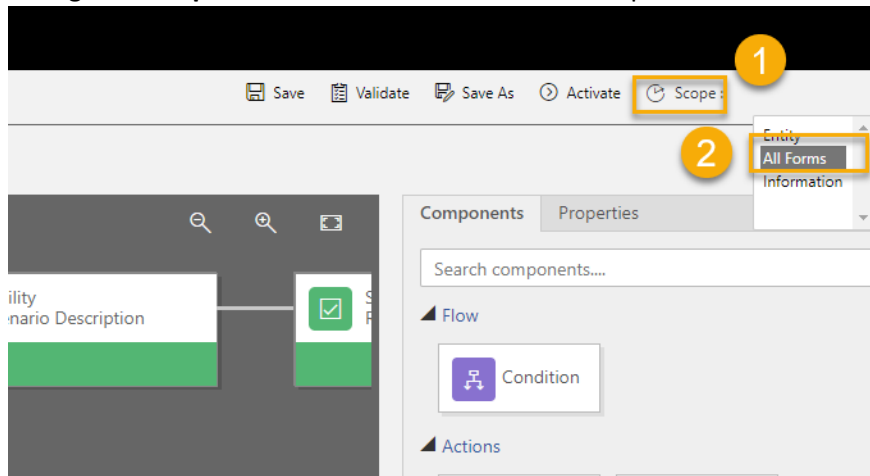
24. Drag **Set Field Value** action and place it after the **Remove Scenario Requirement** action.



25. Select the new action, enter **Clear Field** for **Display Name**, select **Scenario Description** for **Field**, select **Clear** for **Type** and click **Apply**.

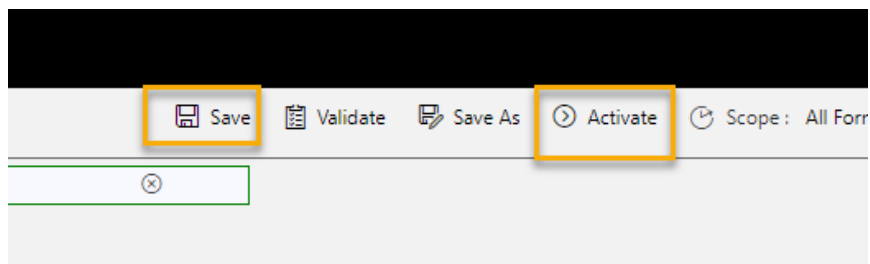


26. Change the **Scope** to **All Forms**. You can find the Scope in the command bar.

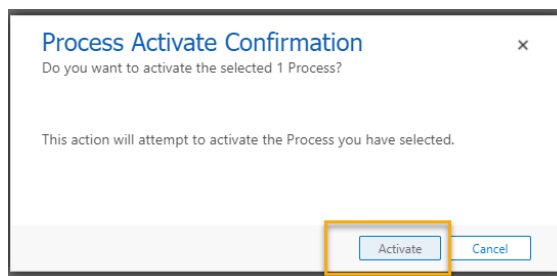


27. Click **Save**.

28. Click **Activate**.

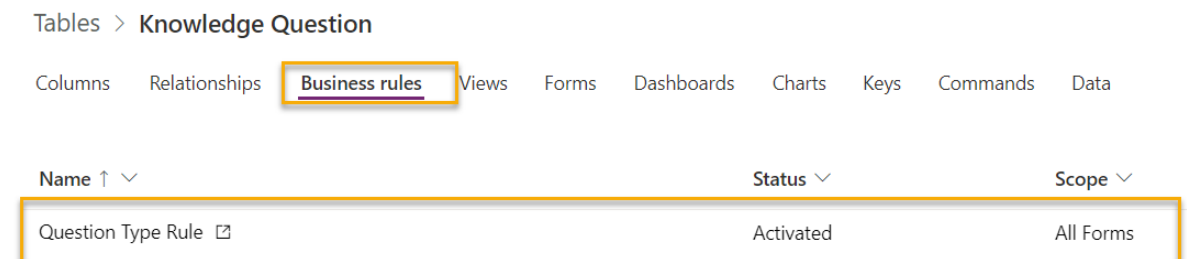


29. Confirm activation.



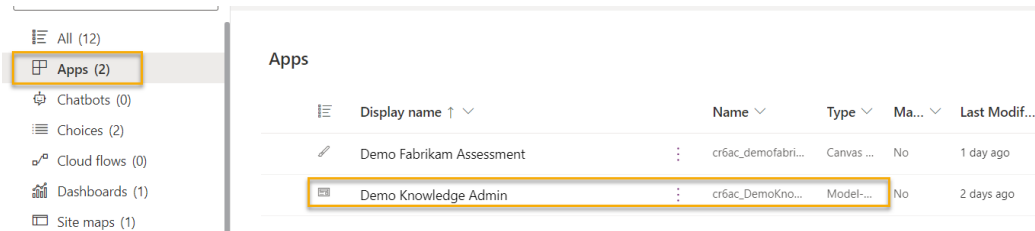
30. Close the business rule designer.

31. Click **Done**.

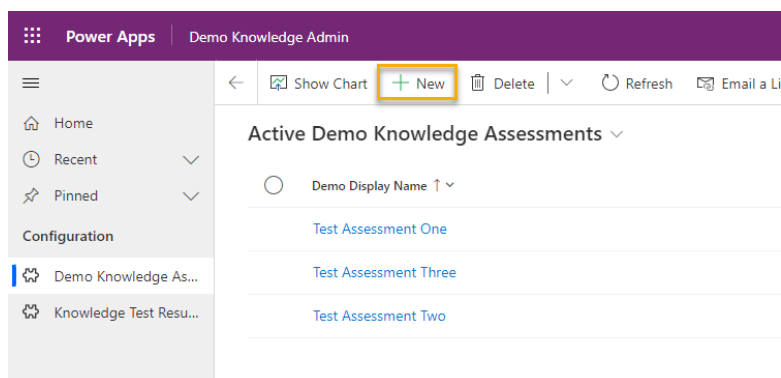
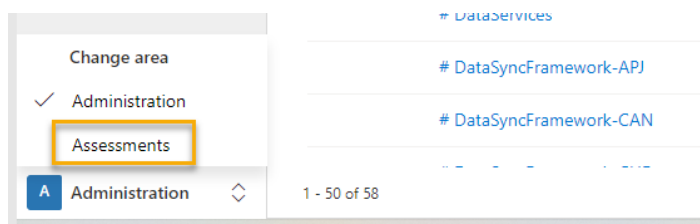


Task 2 – Test Business Rule

1. Navigate to <https://make.powerapps.com> and make sure you are in your **Practice** environment.
2. Select **Apps** and click on the **Knowledge Admin** Model-Driven application.



3. Navigate to **Knowledge Assessments** and click **+ New**.



4. Enter **Test Assessment Four** for **Title**, select today's date for **Start Date**, a month from today for **End Date**, and click **Save**.

Power Apps | Demo Knowledge Admin

Save Save & Close + New Flow

New Demo Knowledge Assessment - Unsaved

General Questions

Demo Display Name **Test Assessment Four**

Start Date 10/27/2021

End Date 11/27/2021

Difficulty **Beginner**

Owner * **Aroh Shukla**

5. Select the **Questions** tab.

Power Apps | Demo Knowledge Admin

Save Save & Close + New Deactivate Delete Refresh

Test Assessment Four - Saved
Demo Knowledge Assessment

General **Questions** Related

Knowledge Questions

Subgrid

Question ↑

What is the best animal?

What is the best color?

6. Click **+ New Knowledge Question**.

Power Apps | Knowledge Admin

Save Save & Close + New Deactivate Delete Refresh Check Access Assign Share Email a Link Flow Word Templates Run Report

Test Assessment Four - Saved
Knowledge Assessment

General **Questions** Related

New Section

Knowledge Questions

+ New Knowledge Question Add Existing Knowledge Refresh

Question ↑

Created On

7. Type **Test Question** for **Question**.

Test Assessment Four - Saved
Demo Knowledge Assessment

Aroh Shukla Owner 30 Days Remain

General **Questions** Related

Knowledge Questions

Subgrid

+ New Knowledge Ques... Refresh

Search this view

Question ↑ Created On ↓

What is the best animal?	10/25/2021 4:26 PM
What is the best color?	10/25/2021 4:25 PM
What is your job role?	10/25/2021 4:26 PM

8. Select **Scenario** for **Question Type**. The **Scenario** column will come to view, and it will be required.

Power Apps Demo Knowledge Admin

← Save Save & Close + New Flow

Question : Required fields must be filled in.

New Knowledge Question - Unsaved

Answers General

New Section

Question Type * **Scenario**

Owner * Aroh Shukla

Demo Knowledge Assessment Look for Demo Knowledge Assessment

9. Type **This is a test Scenario** in the **Scenario Description**.

Power Apps Demo Knowledge Admin

← Save Save & Close + New Deactivate Delete Refresh

This is a test Scenario - Saved
Knowledge Question

Answers **General** Related

Question * **This is a test Scenario**

Owner * Aroh Shukla

Demo Knowledge Assessment ---

10. Change the **Question Type** to **Simple**. The **Scenario** column will disappear.

11. Change the **Question Type** back to **Scenario**. The **Scenario Description** will come to view again and the text you entered will no longer be there.

12. Type **This is a test Scenario** for **Scenario Description**.

13. In the **Answers** section, enter **Test Answer One** for **Answer 1**, enter **20** for **Answer 1 Points**.

14. Click **Save**. You can close the model-driven app.

Lab 5.4: Practice Lab – Advanced business rules

Important Notice (Effective November 2020):

Scenario

You are a functional consultant for your organization Contoso.

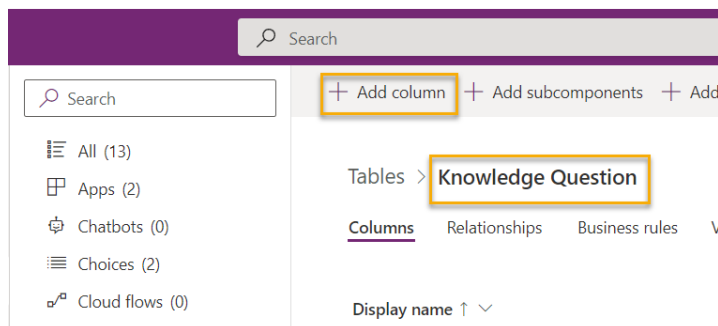
You are assigned to work on a model-driven Knowledge Admin app for your client Fabrikam and **need to add scoring functionality without code**. In this lab, you **will**

- a) create a calculated column,
- b) a rollup column, and
- c) a business rule.

Exercise 1 – Prepare the Solution

Task 1 – Add Field to Knowledge Question

1. Navigate to <https://make.powerapps.com>.
2. Select the **Practice** environment you created.
3. Select **Solutions**.
4. Click to open the **Common Data Services Default Solution**.
5. Click to open the **Knowledge Question** table.
6. Select the **Columns** tab and click **+ Add Column**.



7. Enter **Question Points** for **Display Name** and select **Whole Number** for **Data Type**.

- Click **+ Add** next to **Calculation or Rollup** and select **+ Calculation**.

Question Points

Display name *

Question Points

Name *

cre7f_ QuestionPoints

Data type *

Whole Number

Required *

Optional

☒ Searchable

Calculated or Rollup

+ Add

+ Calculation

+ Rollup

Description

Advanced options

Done Cancel

- Click **Save**.

Pending changes

In order to open the calculated column editor, you must first save the current table. Click Save below if you are ready to save the current table.

Save Cancel

- On the **Set Question Points** popup, click **+ Add Action**.
 - Type **answer1points** and select the suggested column.
 - Type **+**, type **answer2points** and select the suggested column.
 - Repeat it for **answer3points** and **answer4points**. Your action will look like the snippet below but with your unique organizational prefix.
- ```
cre7f_answer1points + cre7f_answer2points + cre7f_answer3points + cre7f_answer4points
```
- Save the action by clicking on the checkmark button.
  - Click **Save and Close**.

16. Click **Done**.

SAVE **SAVE AND CLOSE** **3**

CALCULATED FIELD

## Set Question Points

IF...THEN

CONDITION (OPTIONAL)

+ Add condition

ACTION

Set Question Points (whole number)

**1**

**2**

**3**

Tables > Knowledge Question

|                               |                   |             |          |
|-------------------------------|-------------------|-------------|----------|
| Knowledge Question            | cr6ac_knowle...   | Unique ...  | Standard |
| Modified By                   | modifiedby        | Lookup      | Standard |
| Modified By (Delegate)        | modifiedonbe...   | Lookup      | Standard |
| Modified On                   | modifiedon        | Date an...  | Standard |
| Owner                         | ownerid           | Owner       | Standard |
| Owning Business Unit          | owningbusine...   | Lookup      | Standard |
| Owning Team                   | owningteam        | Lookup      | Standard |
| Owning User                   | owninguser        | Lookup      | Standard |
| Question                      | cr6ac_questio...  | Text        | Custom   |
| <b>Question Points</b>        | cr6ac_questio...  | Whole ...   | Custom   |
| Question Type                 | cr6ac_questio...  | Choice      | Custom   |
| Record Created On             | overriddencre...  | Date Only   | Standard |
| Scenario Description          | cr6ac_scenario... | Text Area   | Custom   |
| Status                        | statecode         | Choice      | Standard |
| Status Reason                 | statuscode        | Choice      | Standard |
| Time Zone Rule Version Number | timezonerulev...  | Whole ...   | Standard |
| UTC Conversion Time Zone Code | utcconversion...  | Whole ...   | Standard |
| Version Number                | versionnumber     | Big Inte... | Standard |

**1**

**2**

Name \* **cr6ac\_ QuestionPoints**

Data type \* **Whole Number**

☒ Searchable

**Calculated or Rollup**

**Open calculation**

Description

Advanced options

Done Cancel

SAVE **SAVE AND CLOSE**

CALCULATED FIELD

## Set Question Points

IF...THEN

CONDITION (OPTIONAL)

+ Add condition

ACTION

Set **Question Points** to **((Answer 1 Points + Answer 2 Points) + Answer 3 Points) + Answer 4 Points**

SAVE SAVE AND CLOSE

CALCULATED FIELD

## Set Question Points

### IF...THEN

#### CONDITION (OPTIONAL)

+ Add condition

#### ACTION

Set Question Points (whole number)

= (cr6ac\_answer1points + cr6ac\_answer2points + cr6ac\_answer3points + cr6ac\_answer4points)



### Task 2 – Add column to Knowledge Question Form

1. Make sure you still have the **Knowledge Question** table selected.
2. Select the **Forms** tab and click to open the **Main** form.
3. Drag the **Question Points** column and drop it below the **Knowledge Assessment** column on the form.
4. Click **Save**.
5. Click **Publish**.
6. Click the back button.
7. Click on the solution name located in the navigation breadcrumbs.
8. Click **Publish all customizations**.

### Task 3 – Add Column to Knowledge Assessment

1. Click to open the **Knowledge Assessment** table.
2. Select the **Columns** tab and click + **Add column**
3. Enter **Total Points** for **Display Name** and select **Whole Number** for **Data Type**.
4. Click + **Add** next to **Calculation or Rollup** and select + **Rollup**.
5. Click **Save**.
6. Click + **Add Related Entity**.
7. Select **Knowledge Questions** for **Related** and click the checkmark.

8. Click **+ Add Aggregation**.
9. Select **SUM** for **Aggregation Function**, select **Question Points** for **Aggregated Related Entity Field**, and click the checkmark.
10. Click **Save and Close**.
11. Click **Done**.
12. Click on the solution name.
13. Click **Publish all customizations**.

#### Task 4 – Add Column to Knowledge Assessment Form

1. Select the **Knowledge Assessment** table.
2. Select the **Forms** tab and click on the Main form.
3. Drag the **Total Points** column and drop it below the **Difficulty** column on the form.
4. Click **Save**.
5. Click **Publish**.
6. Click the back button.
7. Click on the solution name located in the navigation breadcrumbs.
8. Click **Publish all customizations**.

#### Exercise 2 – Create Business Rule

##### Task 1 – Create Question Points Business Rule

1. Click to open the **Knowledge Question** table.
2. Select the **Business Rules** tab and click **Add Business Rule**.
3. Click on the carrot button next to **Knowledge Question: New business rule**.
4. Enter **Question Points Rule** for **Business Rule Name** and click on the carrot again to hide details.
5. Select the **Condition** and enter **Check Question Points** for **Display Name**.
6. Go to the **Rules** section, select **Answer 1 Points** for **Field**, select **Is Less Than or Equals to** for **Operator**, select **Value** for **Type**, enter **0** for **Value**, and click **Apply**.
7. Above the rule you just created, there is a **+ New** button to add a new rule. Click **+ New** to add a new rule in addition to the first rule.
8. Go to the **Rule 2**, select **Answer 2 Points** for **Field**, select **Is Less Than or Equals to** for **Operator**, select **Value** for **Type**, enter **0** for **Value**, and click **Apply**.
9. Click **+ New** rule.
10. Go to the **Rule 3**, select **Answer 3 Points** for **Field**, select **Is Less Than or Equals to** for **Operator**, select **Value** for **Type**, enter **0** for **Value**. And click **Apply**.
11. Click **+ New** rule.

12. Go to the **Rule 4**, select **Answer 4 Points** for **Field**, select **Is Less Than or Equals to** for **Operator**, select **Value** for **Type**, enter **0** for **Value**, and click **Apply**.
13. Select the **Components** tab.
14. Drag **Show Error Message** action and place it in **True** side of the Condition.
15. Select the action, enter **Show Points Error Message** for **Display Name**, select **Question** for **Field**, enter **At least one answer must have points more than zero**, and click **Apply**.
16. Click **Save**.
17. Click **Activate**.
18. Confirm the activation.
19. Close the business rule designer.
20. Click **Done**.

#### Task 2 – Test Business Rule

1. Navigate to <https://make.powerapps.com> and ensure that you are in your **Practice** environment.
2. Select **Apps** and click on the **Knowledge Admin** model-driven application.
3. Navigate to **Knowledge Assessments** and click to open the **Test Assessment Four**.
4. Select the **Questions** tab.
5. Click **+ New Knowledge Question**.
6. The error message for the points requirement will be displayed on the Question column.
7. Type **Test Two Question** for **Question**.
8. Select **Simple** for **Question Type**.
9. Click **Save**. You will not be able to save because of the points requirement.
10. Scroll down to the **Answers** section, enter **Test Answer One** for **Answer 1**, enter **20** for **Answer 1 Points**. The points requirement error will go away.
11. Click **Save**. The row will now be saved.
12. Scroll down to the **Answers** section again, enter **Test Answer Two** for **Answer 2**, and **0** for **Answer 2 Points**.
13. Enter **Test Answer Three** for **Answer 3**, and **10** for **Answer 3 Points**.
14. Enter **Test Answer Four** for **Answer 4**, and **50** for **Answer 4 Points**.
15. Click **Save**. Scroll up and locate the **Question Point** column. The calculated points should show in this column.
16. Click **+ New**.
17. Select **Simple** for **Question Type**, and enter **Test Three Question** for **Question**.

18. Scroll down to the Answers section.
19. Enter **Test Three Answer One** for **Answer 1**, and **25** for **Answer 1 Points**.
20. Enter **Test Three Answer Two** for **Answer 2**, and **80** for **Answer 2 Points**.
21. Enter **Test Three Answer Three** for **Answer 3**, and **10** for **Answer 3 Points**.
22. Enter **Test Three Answer Four** for **Answer 4**, and **0** for **Answer 4 Points**.
23. Click **Save and Close**.
24. Select **Knowledge Assessments** and click to open **Test Assessment 4**.
25. Scroll down to locate the **Total Points** column and click on the calculator icon.
26. Click **Recalculate**.
27. The column should now show the total points of all the questions.
28. You can close your model-driven app.

## Lab 5.5: Practice Lab – Create a flow

### Scenario

As a functional consultant at Contoso, you are continuing to work on a model-driven Knowledge Admin app for your client Fabrikam.

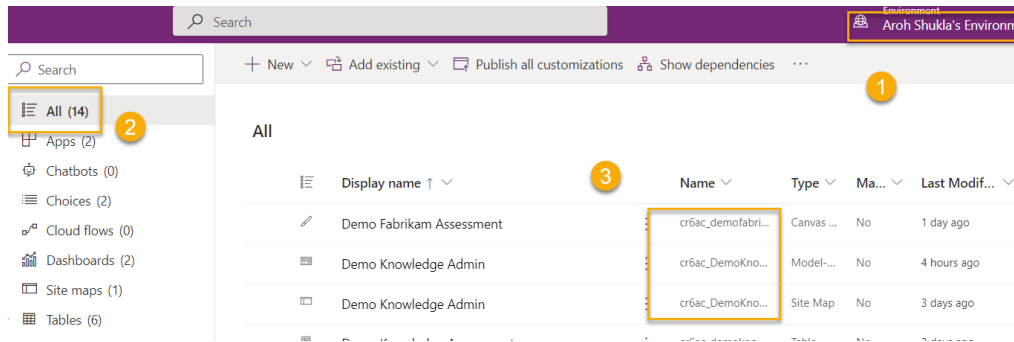
- Your client has **requested an automation that should run weekly without user involvement**.
- You **can't schedule a workflow without custom code** so you will need to use a **Microsoft Power Automate** cloud flow.
- In this lab, you will create a cloud flow to run weekly and test the flow.

### Exercise 1 – Create Microsoft Power Automate cloud flow

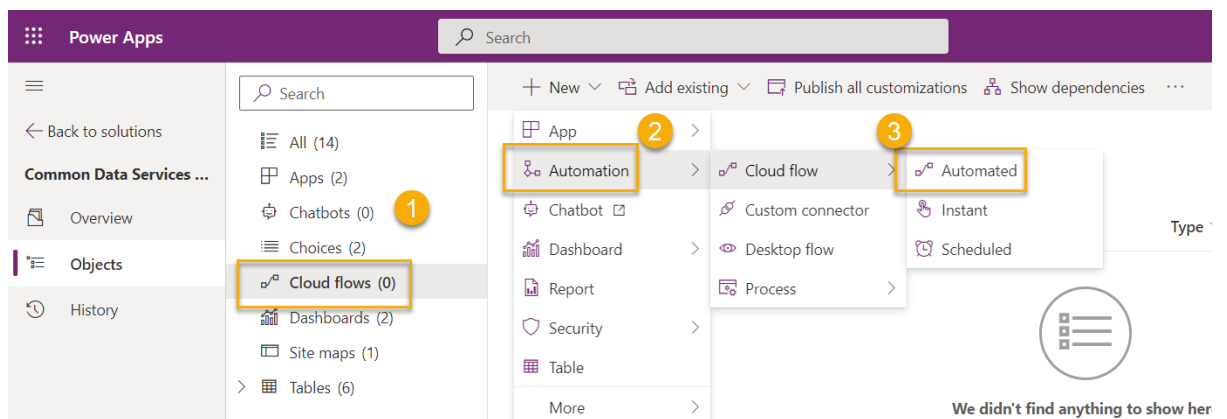
In this exercise, you will create a cloud flow that will run once a week. This flow will check if there are Knowledge Assessment with End Date of today or older and deactivate them.

#### Task 1 – Create a flow

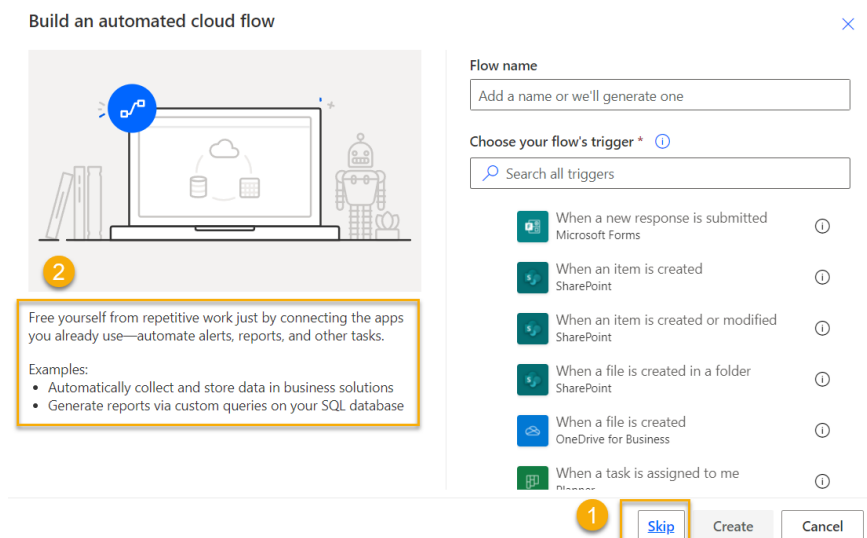
1. Navigate to <https://make.powerapps.com>.
2. Make sure you have your **Practice** environment selected.
3. Select **Solutions** and click to open the **Common Data Services Default Solution**.
4. Locate the **Name** column and make a note of the name **Prefix**. The prefix will look like **crXXX\_**.



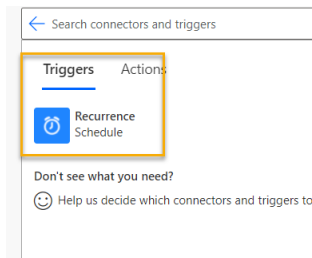
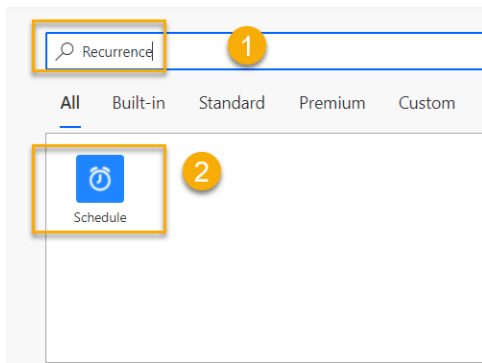
5. From the left hand menu, select **Flows**. (If you get a pop-up here, just choose your country/region and select **Get started**.)
6. Click **+ New Flow** and select **+ Automated cloud flow**.



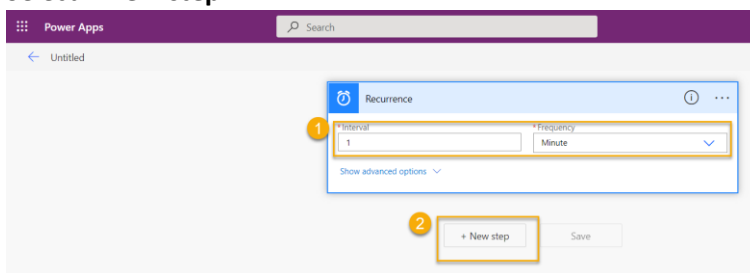
7. The pop-up will show common triggers that you can easily select to jump-start your flow configuration. Scroll through the options, but do not select anything. When you are ready, press **Skip**.



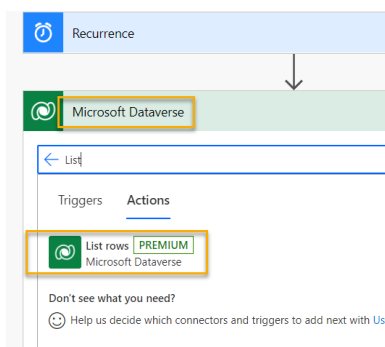
8. In the box that says **Search connectors and triggers**, type **Recurrence** Select the **Recurrence** option from the **Triggers** tab.



## 9. Select + New step.



## 10. Type **Microsoft Dataverse** into the search box.



## 11. Select **List rows** from the **Actions** box.

## 12. Select **Knowledge Assessments** for **Table name**.

## 13. Click on **Show advanced options**.

## 14. Select the **Filter rows** field and type the following:

crXXX\_enddate lt

Replace crXXX\_ with your unique prefix and type a **space** at the end of the expression.

Tables > Demo Knowledge Assessment 1

Columns Relationships Business rules Views Forms Dashboards Charts

| Display name ↑                        | Name                         | Data type  |
|---------------------------------------|------------------------------|------------|
| Created By                            | createdby                    | Lookup     |
| Created By (Delegate)                 | createdonbeh...              | Lookup     |
| Created On                            | createdon                    | Date an... |
| Days Remaining                        | cr6ac_daysre...              | Whole ...  |
| Demo Display Name Primary Name Column | cr6ac_demoi...               | Text       |
| Difficulty                            | cr6ac_difficulty             | Choice     |
| End Date                              | cr6ac_enddate <span>2</span> | Date Only  |
| Import Sequence Number                | importsequen...              | Whole ...  |

15. Select the **Expression** tab of the **Dynamics Content** pane. If you do not see the Dynamic Content pane pop up at this time, you may need to zoom out.

16. Type **utcNow()** and click **OK**. (There should be a space before the utcnow() expression in your formula.)

The screenshot shows the 'List rows' configuration pane. The 'Filter rows' field is set to 'cr6ac\_enddate It'. A blue button labeled 'Add dynamic content' is positioned to the right of the filter field. To the right of the main pane, the 'Dynamic content' pane is open, displaying the 'Expression' tab with the formula 'utcNow()' and an 'OK' button.

17. Click on the ellipses (...) on the **List Rows** step and select **Rename**.

18. Rename the step **Get Assessments**.

The screenshot shows the Power Apps canvas with a flow. The first step is 'Recurrence' (blue box) and the second step is 'Get Assessments' (green box). The 'Get Assessments' step is highlighted with a yellow box.

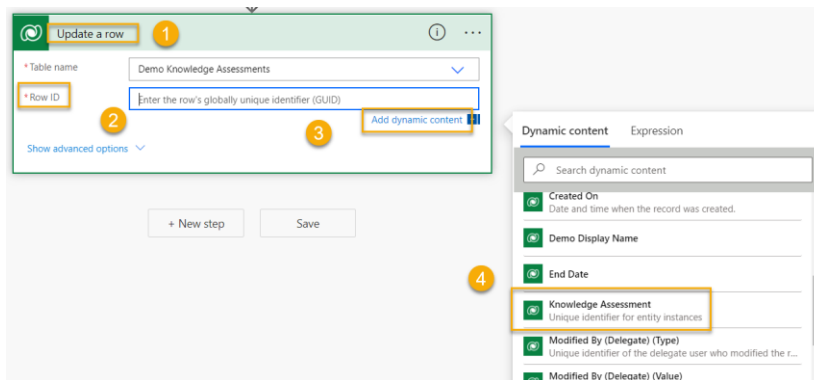
19. Click **+ New Step**.

20. Search for **Microsoft Dataverse** and select **Update a row**.

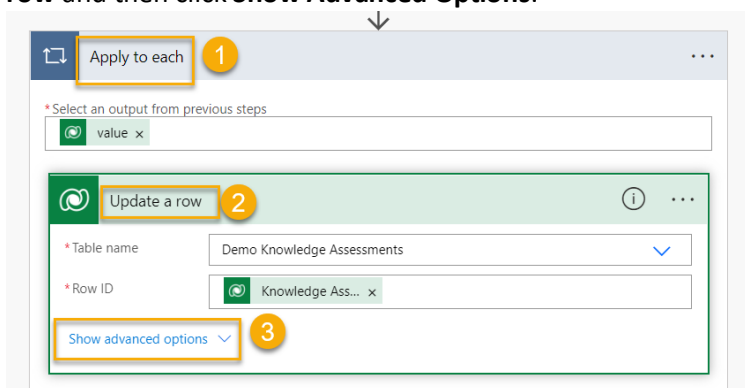
21. Select **Knowledge Assessments** for **Table name**.

22. Click to select the **Row ID** field.

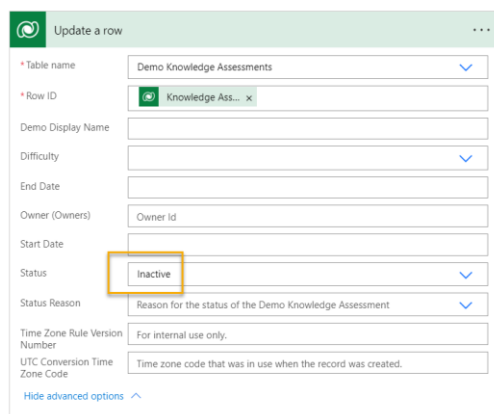
23. Select **Knowledge Assessment** from the **Dynamic Content** pane.



24. **Apply to Each** step will be added and **Value** will be selected for Output. Click on **Update a row** and then click **Show Advanced Options**.

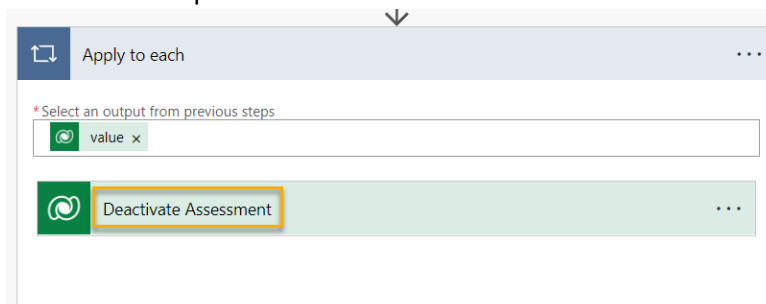


25. Locate the **Status** option set and select **Inactive**.

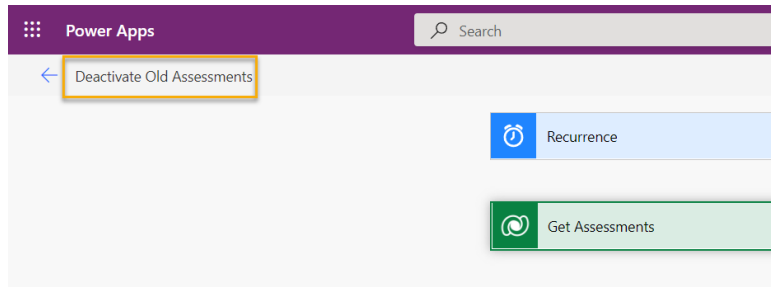


26. Click on the ellipses (...) for the **Update a row** step and select **Rename**.

27. Rename the step **Deactivate Assessment**.



28. Scroll up and click on the name of the flow by clicking **Untitled**.
29. Rename the flow **Deactivate Old Assessments**.
30. Click **Save**. Don't navigate away from the flow.



## Task 2 – Test your flow

1. Start a new browser window and navigate to <https://make.powerapps.com>.
2. Make sure you are in your **Practice** environment.
3. Select **Apps** and click to open the **Knowledge Admin** model-driven application.
4. Navigate to **Knowledge Assessments** and click to open the **Test Assessment Four**.
5. Locate the **End Date** field and select today's date.
6. Click **Save**.
7. Go back to the flow you created.
8. Click **Test**.
9. Select **Automatically**, and then select **With a recently used trigger**.
10. Select the latest run and click **Test**.
11. The flow should run and succeed.
12. Go back to the **Knowledge Admin** application.
13. Select **Knowledge Assessments**.
14. **Test Assessment Four** should now be missing from the view.
15. Click on the view name and select the **Inactive Knowledge Assessments** view.
16. The deactivated rows will now be in this view.
17. Go back to flow and click **Edit**.
18. Click on the **Recurrence** trigger.
19. Change the **Recurrence** from **Minute** to **Week**.
20. Click **Save**.
21. Go back to the **Knowledge Admin** application.
22. Select **Knowledge Assessments**.

23. Click on the view name and select the **Inactive Knowledge Assessments** view.
24. Click to open the **Test Assessment Four** record.
25. Click **Activate**.
26. Confirm activation.
27. Change the **End Date** to one month from today.
28. Click **Save**.

## Lab 5.6: Practice Lab – Build approval flow

### Scenario

Your client Fabrikam needs an approval process added to their model-driven Knowledge Admin app. The **approval process will notify the user's manager** to obtain an **approval or rejection** and handle the knowledge assessment appropriately.

In this lab, you will create a **Microsoft Power Automate cloud flow** to retrieve the appropriate **manager**, seek **their approval**, and edit the row based on the manager's decision.

### Exercise 1 – Prepare the solution

#### Task 1 – Add field to the Knowledge Assessment

1. Navigate to <https://make.powerapps.com>.
2. Ensure you are in the **Practice** environment you created.
3. Click **Solutions**.
4. Click to open the **Common Data Services Default Solution**.
5. Click to open the **Knowledge Assessment** table.
6. Click select the **Columns** tab and click **+ Add column**.
7. Create the column to the following specification:
  - Enter **Notify Manager** for **Display Name**.
  - Choose **Yes/No** for **Data Type**.

- Click **Done**.

Tables > Demo Knowledge Assessment

Columns Relationships Business rules Views Forms Dashboards Charts Keys Commands

| Display name ↑              | Name ↓           | Data type ↓ | Type ↓   |
|-----------------------------|------------------|-------------|----------|
| Created By                  | createdby        | Lookup      | Standard |
| Created By (Delegate)       | createdonbeh...  | Lookup      | Standard |
| Created On                  | createdon        | Date an...  | Standard |
| Days Remaining              | cr6ac_daysre...  | Whole ...   | Custom   |
| Demo Display Name           | cr6ac_demodi...  | Text        | Custom   |
| Difficulty                  | cr6ac_difficulty | Choice      | Custom   |
| End Date                    | cr6ac_enddate    | Date Only   | Custom   |
| Import Sequence Number      | importsequen...  | Whole ...   | Standard |
| <b>Knowledge Assessment</b> | cr6ac_demokn...  | Unique ...  | Standard |
| Modified By                 | modifiedby       | Lookup      | Standard |
| Modified By (Delegate)      | modifiedonbe...  | Lookup      | Standard |
| Modified On                 | modifiedon       | Date an...  | Standard |
| Owner                       | ownerid          | Owner       | Standard |
| Owning Business Unit        | owningbusine...  | Lookup      | Standard |
| Owning Team                 | owningteam       | Lookup      | Standard |

**Configuration for Knowledge Assessment:**

- Display name \***: Notify Manager
- Name \***: cr6ac\_ NotifyManager
- Data type \***: Yes/No
- Items**: Yes (selected), No
- Default value**: No
- Required \***: Optional
- Searchable**: ☒
- Calculated or Rollup**: ☐ + Add
- Description**

**Buttons**: Done, Cancel

8. Click **+ Add Column**.

9. Create the field to the following specification:

- Enter **Approval Status** for **Display Name**.
- Choose **Choice** for **Data Type**.
- Click on the **Choice** dropdown and choose **New choice**.
- Enter **Waiting** for the first item and click **Add New Item**.
- Enter **Approved** for the second item and click **Add New Item**.

- Enter **Rejected** for the third item and click **Save**.

Tables > Demo Knowledge Assessment

Columns Relationships Business rules Views Forms Dashboards Charts Keys Comm

| Display name ↑                                       | Name             | Data type  | Type     |
|------------------------------------------------------|------------------|------------|----------|
| Created By                                           | createdby        | Lookup     | Standard |
| Created By (Delegate)                                | createdonbeh...  | Lookup     | Standard |
| Created On                                           | createdon        | Date an... | Standard |
| Days Remaining                                       | cr6ac_daysre...  | Whole ...  | Custom   |
| Demo Display Name <small>Primary Name Column</small> | cr6ac_demodi...  | Text       | Custom   |
| Difficulty                                           | cr6ac_difficulty | Choice     | Custom   |
| End Date                                             | cr6ac_enddate    | Date Only  | Custom   |
| Import Sequence Number                               | importsequen...  | Whole ...  | Standard |
| Knowledge Assessment                                 | cr6ac_demokn...  | Unique ... | Standard |
| Modified By                                          | modifiedby       | Lookup     | Standard |
| Modified By (Delegate)                               | modifiedonbe...  | Lookup     | Standard |
| Modified On                                          | modifiedon       | Date an... | Standard |
| <b>Notify Manager</b>                                | cr6ac_notifym... | Yes/No     | Custom   |
| Owner                                                | ownerid          | Owner      | Standard |

Display name \*

Approval Status

Name \*

cr6ac\_approvalstatuska

View more

Items (3)

Waiting ...

Approved ...

Rejected ...

Add new item

Save Cancel

- Click **Done**.

## 10. Click **Save Table**.

### Task 2 – Add Column to Knowledge Assessment Form

1. Make sure you still have the **Knowledge Assessment** table selected.
2. Select the **Forms** tab and click on the **Main** form.

Search

Form settings + Add subcomponents + Add required components Delete t

Tables > Demo Knowledge Assessment

Columns Relationships Business rules Views **Forms** Dashboards Charts Keys G

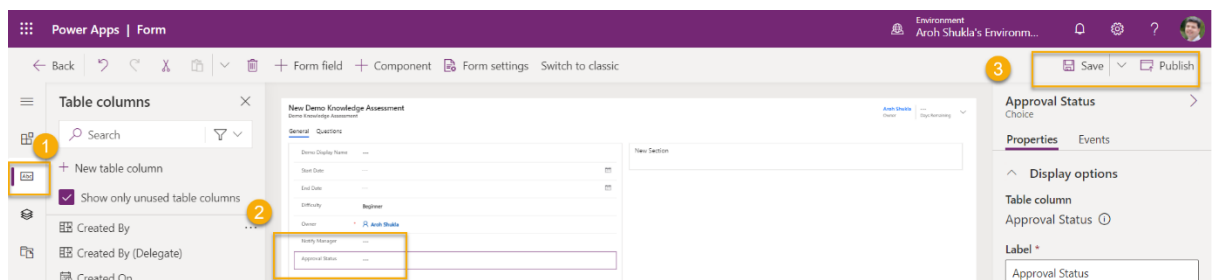
| Name ↑      | Form type    |
|-------------|--------------|
| Information | Card         |
| Information | Main         |
| Information | QuickViewFor |

1 2 3

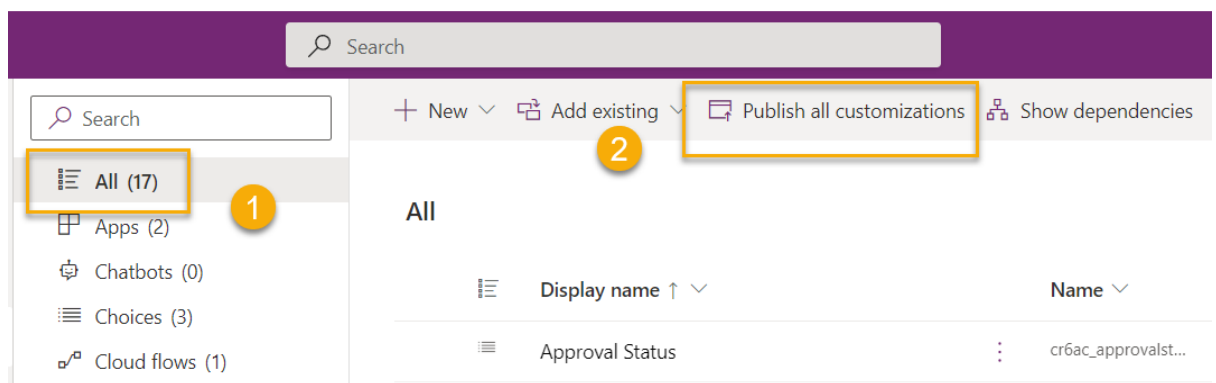
Save

3. Add the **Notify Manager** column to the form.
4. Add the **Approval Status** column to the form.
5. Click **Save**.

- Click **Publish**.



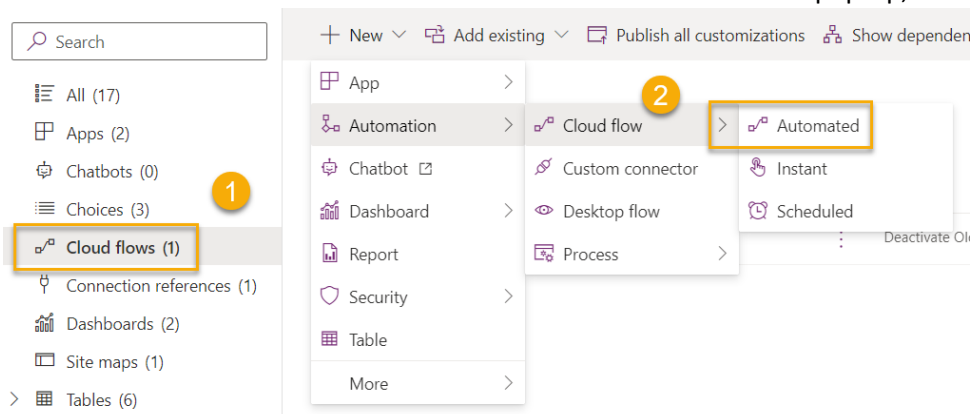
- Click the back button.
- Navigate back to the solution.
- Click **Publish All Customizations**.



## Exercise 2 – Create cloud flow

### Task 1 – Create cloud flow

- Navigate to <https://make.powerapps.com>.
- Make sure you are in the **Practice** environment you created.
- Select **Flows** and click **+ New**. Select **+ Automated cloud flow** In the pop-up, select **Skip**.



- Type into the search box **Microsoft Dataverse** and select **When a row is added, modified, or deleted**.

5. Select **Modified** for **Change type**, **Knowledge Assessments** for **Table Name**, and select **Business Unit** for **Scope**.

When a row is added, modified or deleted

\* Change type: Modified

\* Table name: Demo Knowledge Assessments

\* Scope: Business unit

Show advanced options

+ New step Save

6. Click **Show Advanced Options**.
7. Enter **crXXX\_notifymanager** for **Select columns**. Replace crxxx with your environment prefix.

Tables > Demo Knowledge Assessment

Columns Relationships Business rules Views Forms Dashboards

| Display name ↑               | Name ↓                     | Da |
|------------------------------|----------------------------|----|
| Approval Status              | cr6ac_approvalstatus       |    |
| Created By                   | createdby                  |    |
| Created By (Delegate)        | createdonbehalfby          |    |
| Created On                   | createdon                  |    |
| Days Remaining               | cr6ac_daysremaining        |    |
| Demo ... Primary Name Column | cr6ac_demodisplayname      |    |
| Difficulty                   | cr6ac_difficulty           |    |
| End Date                     | cr6ac_enddate              |    |
| Import Sequence Number       | importsequencenumber       |    |
| Knowledge Assessment         | cr6ac_demoknowledgeasse... |    |
| Modified By                  | modifiedby                 |    |
| Modified By (Delegate)       | modifiedonbehalfby         |    |
| Modified On                  | modifiedon                 |    |
| Notify Manager               | cr6ac_notifymanager        |    |

When a row is added, modified or deleted

\* Change type: Modified

\* Table name: Demo Knowledge Assessments

\* Scope: Business unit

Select columns: cr6ac\_notifymanager

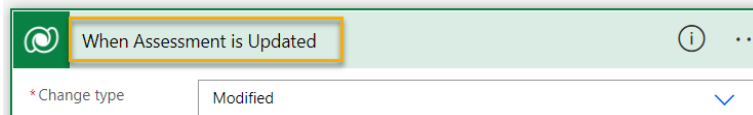
Filter rows: Enter an OData style filter expression to determine which rows can trigger the f

Delay until: Enter a time to delay the trigger evaluation, eg. 2020-01-01T10:10:00Z

Run as: Choose the running user for steps where invoker connections are used

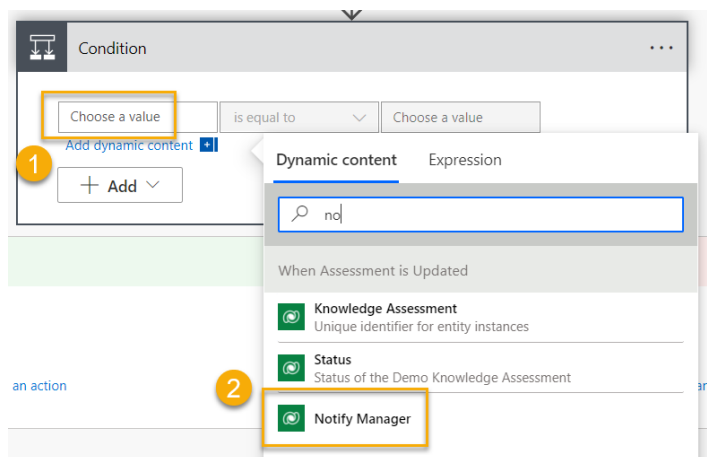
8. Click on the ellipses (...) and select **Rename**.

9. Rename the step **When Assessment is Updated**.

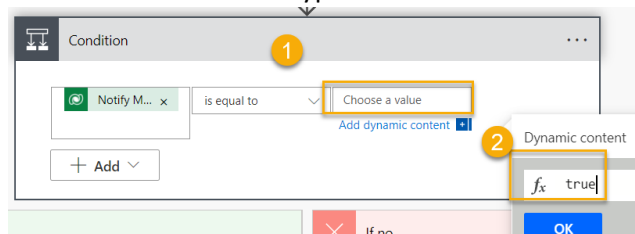


Task 2 – Add Condition

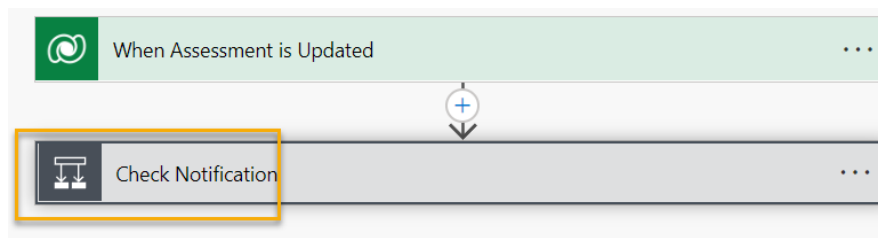
1. Click **+ New Step**.
2. Search for **Condition** and select **Condition** control.
3. Click on the **Choose a Value** field and select **Notify Manager** from the **Dynamic Content** pane.



4. Select **is equal to** for operator.
5. Select the last field and type **true**.



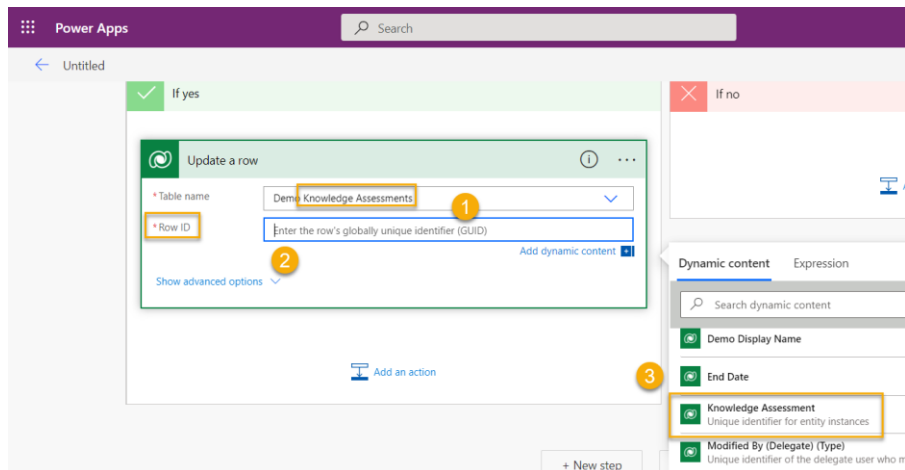
6. Click on the ellipses (...) of the condition and select **Rename**.
7. Rename the condition **Check Notification**.



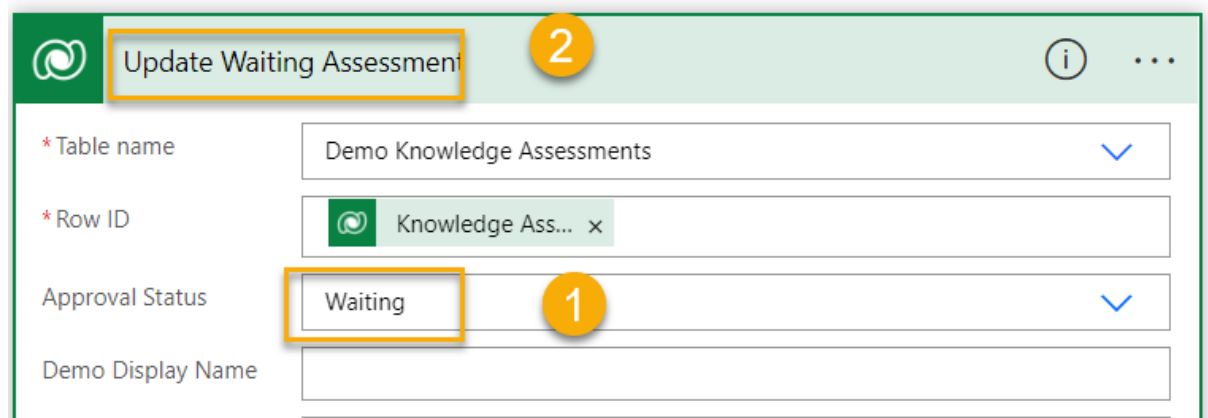
Task 3 – Update Waiting Assessment

1. Click **Add an Action** in the **If Yes** branch.
2. Click **Microsoft Dataverse** and select **Update a row**.
3. Select **Knowledge Assessments** for **Table Name**, and click on the **Row ID** field.

4. Select **Knowledge Assessment** from the **Dynamic Content** pane.

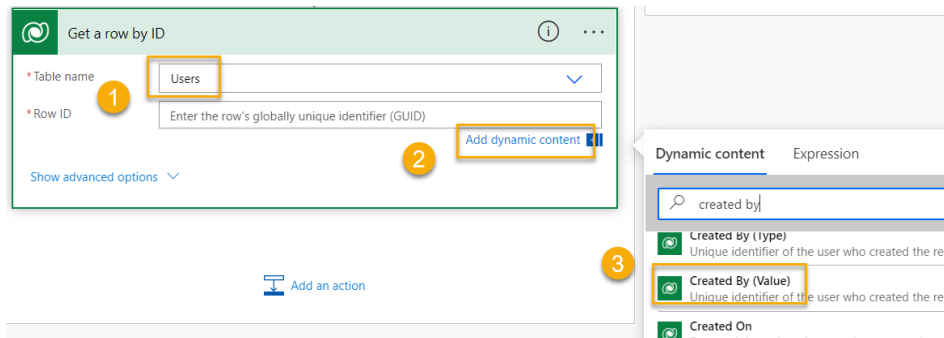


5. Click **Show Advanced Options**.
6. Locate the **Approval Status** field and select **Waiting**.
7. Click on the ellipses (...) of the step and select **Rename**.
8. Rename the step **Update Waiting Assessment**

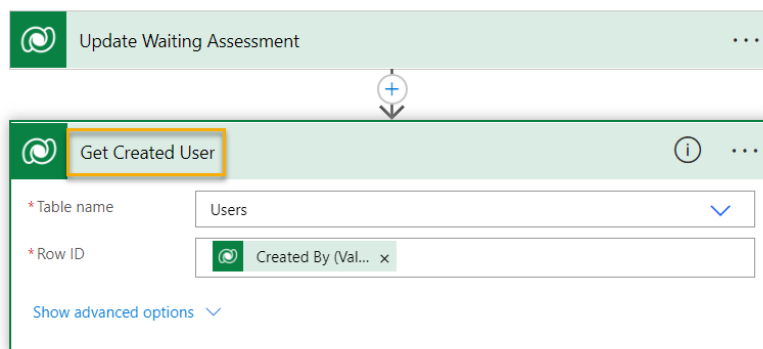


#### Task 4 – Get User

1. Click **Add an Action** within the **If Yes** branch.
2. Select **Microsoft Dataverse** and select **Get a row by ID**.
3. Select **Users** for **Table name**, and click in the **Row ID** field.
4. Select **Created By (Value)** from the **Dynamic Content** pane in the **Update Waiting Assessment** section (you may have to click **See more**).



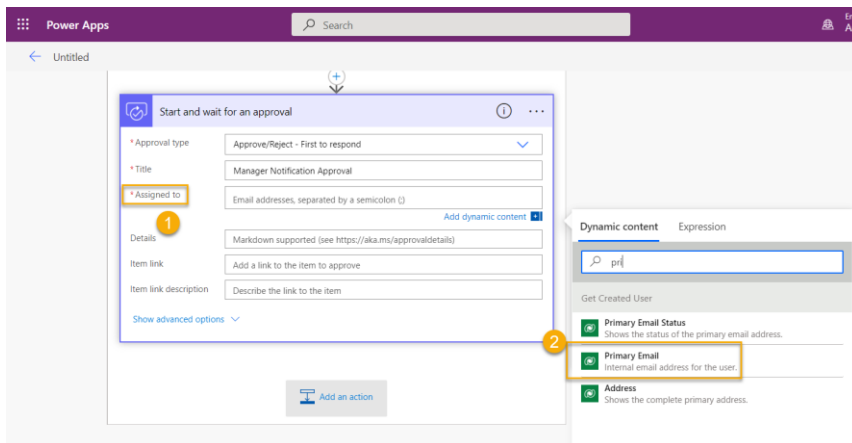
5. Click on the ellipses (...) of the **Get a row by ID** step and select **Rename**.
6. Rename the step **Get Created User**.



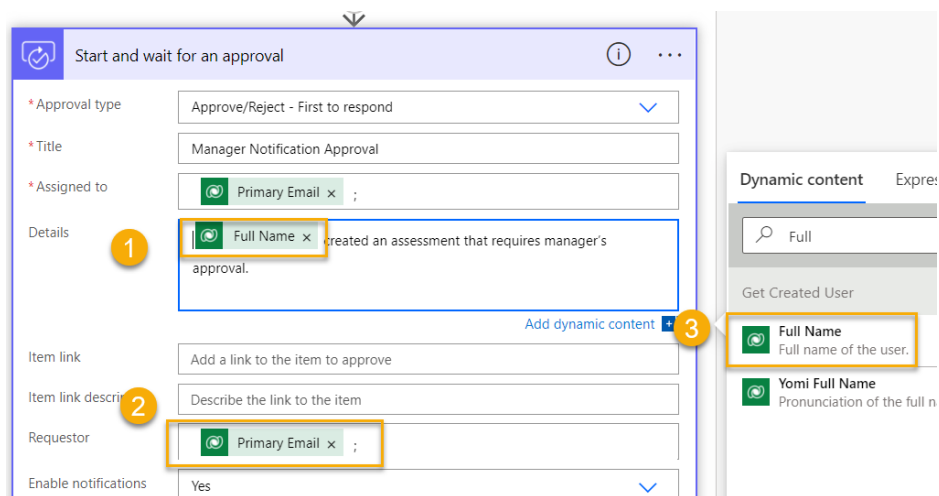
#### Task 6 – Start Approval

1. Click **Add an Action** to the **If Yes** branch.
2. Search for **Approvals** and select **Start and wait for an approval**.
3. Select **Approve/Reject – First to respond** for **Approval Type**.
4. Enter **Manager Notification Approval** for **Title**.
5. You will usually send the approval request to a manager or other decision makers, but in this lab, you will select the user you are logged in as. Select the **Assigned To** field.
6. Go to the **Dynamic Content** pane and scroll to the **Get Created User** section.

7. Select **Primary Email** from the **Get Created User** section.

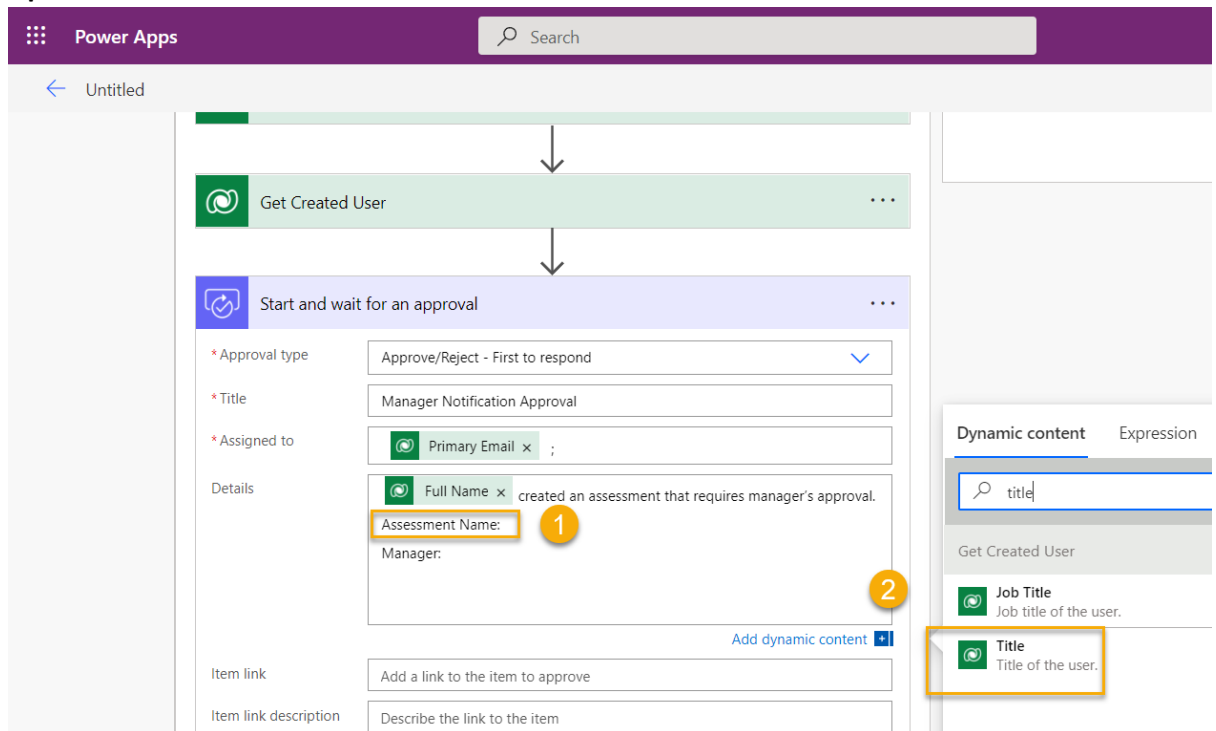


8. From the Advanced Options, select the **Requestor** field. Go to the **Dynamic Content** pane and select **Primary Email** from the **Get Created User** section.
9. Select the **Details** field, go to the **Dynamic Content** pane and select **Full Name** from the **Get Created User** section.
10. Add a space after the **Full Name** and type "created an assessment that requires manager's approval."



11. Press the enter key to start a new line.
12. Type **Assessment Name:**

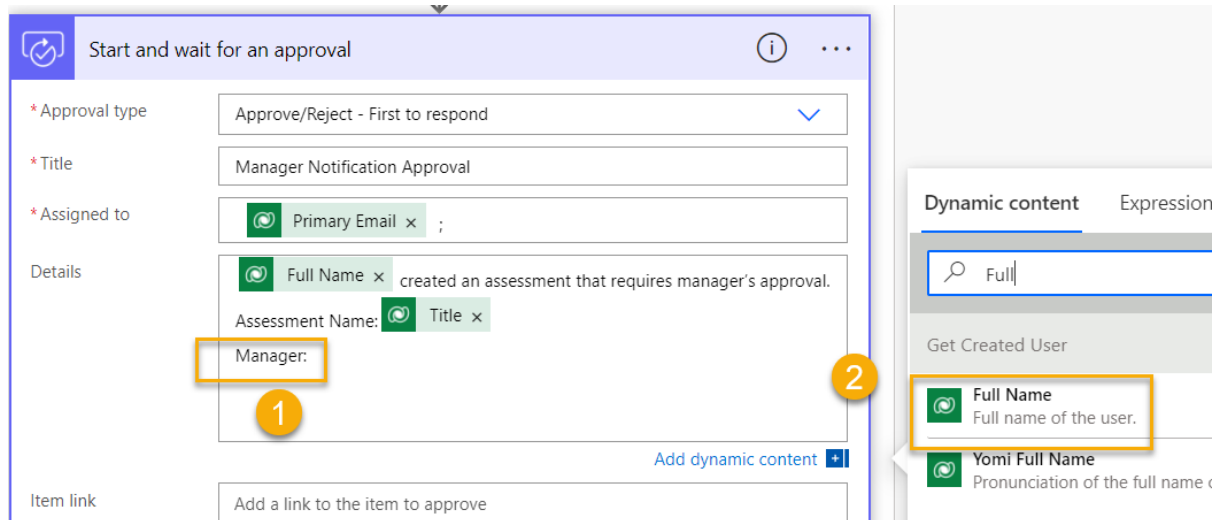
13. Go to the **Dynamic Content** pane and select **Title** from the **When Assessment is Updated** section.



14. Press enter key to start a new line.

15. Type **Manager:**

16. Go to the **Dynamic Content** pane, search for **Full Name**, and select **Full Name** from the **Get Created User** section.



17. It is good practice to include a link to the record that needs the approval. Start a new browser window and navigate to <https://make.powerapps.com>.

18. In your new window, make sure you are in your **Practice** environment.

19. Select **Apps** and click to open the **Knowledge Admin** application.

20. Open any Knowledge Assessment.
21. Find the **Pop Out** button located in bottom left of the form and click on it. (It will be in the bar at the very bottom of the page, and will be next to the status of the record.)
22. A new window will open. Copy the **URL** of the window.
23. Open a notepad and paste the URL.
24. The **URL** will look like the link below.

[https://practice.crm.dynamics.com/main.aspx?appid=97595509-8a00-458d-856d-1569b42d6282&pagetype=entityrecord&etn=cre7f\\_knowledgeassessment&id=540a380a-74f9-e811-a950-000d3a1bc3f6](https://practice.crm.dynamics.com/main.aspx?appid=97595509-8a00-458d-856d-1569b42d6282&pagetype=entityrecord&etn=cre7f_knowledgeassessment&id=540a380a-74f9-e811-a950-000d3a1bc3f6)

25. Copy everything before the last GUID.

[https://practice.crm.dynamics.com/main.aspx?appid=97595509-8a00-458d-856d-1569b42d6282&pagetype=entityrecord&etn=cre7f\\_knowledgeassessment&id=](https://practice.crm.dynamics.com/main.aspx?appid=97595509-8a00-458d-856d-1569b42d6282&pagetype=entityrecord&etn=cre7f_knowledgeassessment&id=)

26. Go back to the flow and select the **Item Link** field.
27. Paste the **URL** you copied into the **Item Link** field.
28. Go to the **Dynamic Content** pane, search for **Knowledge Assessment** and select **Knowledge Assessment** from either section.

#### Task 7 – Add Condition

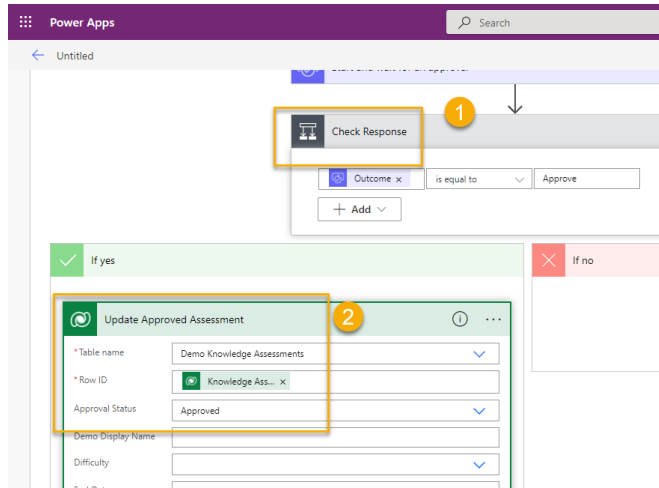
1. Click **Add an Action** of the **If Yes** branch.
2. Search for **Condition** and select **Condition** control.
3. Click on the first **Choose a value** field and select **Outcome** from the Dynamic Content pane.
4. Leave **Is Equals to** as the operator.
5. Click on the **Choose a Value** field and type **Approve**.
6. Click on the ellipses (...) of the condition and select **Rename**.
7. Rename the condition **Check Response**.

The screenshot shows a flow editor interface. At the top, a condition box is labeled 'Check Response' with a yellow box around it and a '2' callout. Below this, there are two fields: 'Outcome' with a dropdown arrow and a yellow box around it (with a '1' callout), and 'Approve' with a yellow box around it. Between these fields is the text 'is equal to' with a dropdown arrow. At the bottom left of the condition box is a '+ Add' button.

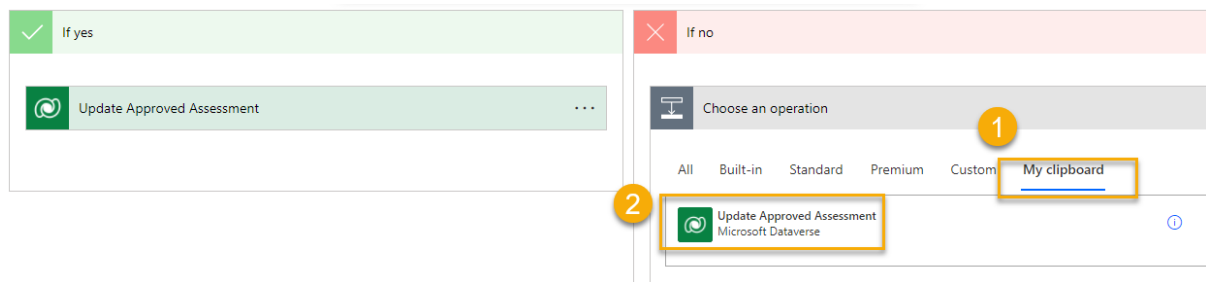
#### Task 8 – Update Approved Assessment

1. Click **Add an Action** of the **If Yes** branch of the **Check Response** condition.
2. Search for **Microsoft Dataverse** and select **Update a row**.
3. Select **Knowledge Assessments** for **Table name** and click on the **Row ID** field.
4. From the **Dynamic Content** pane, select **Knowledge Assessment**.

5. Click **Show advanced options**.
6. Locate the **Approval Status** field and select **Approved**.
7. Click on the ellipses (...) of the step and select **Rename**.
8. Rename the step **Update Approved Assessment**.

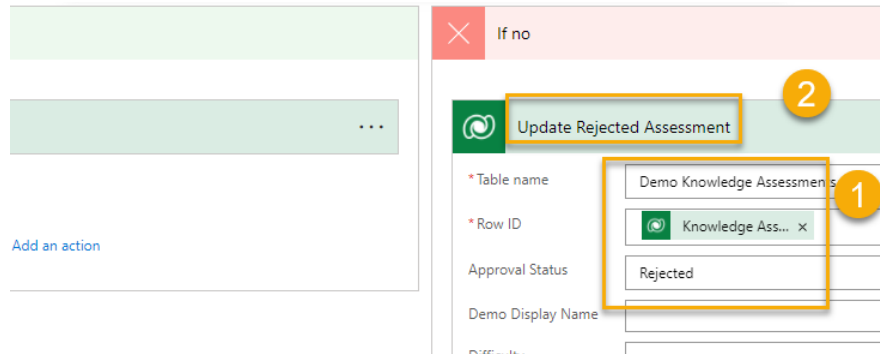


## Task 9 – Update Rejected Assessment



1. Click **Add an Action** of the **If No** branch of the **Check Response** condition.
2. Select **Microsoft Dataverse** and select **Update a row**.
3. Select **Knowledge Assessments** for **Table name** and click on the **Row ID** field.
4. Select **Knowledge Assessment** from the **Dynamic Content** pane.
5. Click **Show Advanced Options**.
6. Locate the **Approval Status** field and select **Rejected**.
7. Click on the ellipses (...) of the step and select **Rename**.
8. Rename the step **Update Rejected Assessment**.

9. Click **Save** to save the flow.



#### Task 10 – Test flow

1. Navigate to <https://make.powerapps.com>.
2. Make sure you are in your **Practice** environment.
3. Select **Apps** and click to open the **Knowledge Admin** application.
4. Open any Knowledge Assessment.
5. Locate the **Approval Status** and make sure no value is selected.
6. Locate the **Notify Manager** field and set it to **Yes**.
7. Click **Save**.
8. Click **Refresh** The **Approval Status** should change to **Waiting**.
9. Navigate to <https://flow.microsoft.com>.
10. Click **Sign in** if not already directed to homepage.
11. Make sure you are in your **Practice** environment.
12. Expand **Action items** and select **Approvals**.
13. You should see an approval with the title **Manager Notification Approval**. Click on the approval tile. This may take up to 15 minutes to show, due to provisioning.
14. The approval pane will open. Make sure the information in the details is what you expected.
15. Click on the **Link**.
16. The Knowledge Assessment row should open.
17. Close the Knowledge Assessment.
18. Select **Approve** in **Choose your response**.
19. Add a **Comment** and click **Confirm**.
20. Click **Done** to close the approval pane.
21. Select the **History** tab.
22. The approval should show up in this list as **Approved**.
23. Go back to the **Knowledge Admin** app.

24. Refresh the test assessment.
25. The **Approval Status** field should be set to **Approved**.

## Lab 5.7: Practice Lab – Build a business process flow

### Scenario

You have been building automations to support your client Fabrikam's knowledge assessment process.

The **client is concerned** that their users **won't be able to create new knowledge assessments without your help**.

You need to **create a guided process to interact with the user** and support their configuration of new assessments. In this lab, you will **enable the knowledge assessment entity** for business process flows and then **build a business process flow**.

### Exercise 1 – Prepare the Solution

#### Task 1 – Add Columns to Knowledge Assessment

1. Navigate to <https://make.powerapps.com>.
2. Make sure you are in the **Practice** environment you created.
3. Select **Solutions**.
4. Click to open the **Common Data Services Default Solution**.
5. Click to open the **Knowledge Assessment** table.
6. Click **+ Add Column**.

7. Enter **Passing Score (%)** for **Display Name**, select **Whole Number** for **Data Type** and click **Done**.

The screenshot shows the Dynamics 365 table configuration interface for the 'Knowledge Assessment' table. The 'Columns' tab is selected. A new column is being added, and the configuration panel on the right is visible. The 'Display name' is set to 'Passing Score (%)', the 'Data type' is set to 'Whole Number', and the 'Required' property is set to 'Optional'. The 'Done' button is highlighted.

| Display name           | Name                            | Data type       | Type     |
|------------------------|---------------------------------|-----------------|----------|
| Approval Status        | cr6ac_approvalstatus            | Choice          | Custom   |
| Created By             | createdby                       | Lookup          | Standard |
| Created By (Delegate)  | createdonbehalfby               | Lookup          | Standard |
| Created On             | createdon                       | Date and Time   | Standard |
| Days Remaining         | cr6ac_daysremaining             | Whole Number    | Custom   |
| Demo Display Name      | cr6ac_demodisplayname           | Text            | Custom   |
| Difficulty             | cr6ac_difficulty                | Choice          | Custom   |
| End Date               | cr6ac_enddate                   | Date Only       | Custom   |
| Import Sequence Number | importsequencenumber            | Whole Number    | Standard |
| Knowledge Assessment   | cr6ac_demoknowledgeassessmentid | Unique Ident... | Standard |
| Modified By            | modifiedby                      | Lookup          | Standard |
| Modified By (Delegate) | modifiedonbehalfby              | Lookup          | Standard |
| Modified On            | modifiedon                      | Date and Time   | Standard |
| Notify Manager         | cr6ac_notifymanager             | Yes/No          | Custom   |
| Owner                  | ownerid                         | Owner           | Standard |
| Owning Business Unit   | owningbusinessunit              | Lookup          | Standard |
| Owning Team            | owningteam                      | Lookup          | Standard |
| Owning User            | owninguser                      | Lookup          | Standard |
| Record Created On      | overriddencreatedon             | Date Only       | Standard |
| Start Date             | cr6ac_startdate                 | Date Only       | Custom   |
|                        | statecode                       | Choice          | Standard |

8. Click **+ Add Column**.

9. Enter **Create Questions** for **Display Name** and select **Yes/No** for **Data Type**.

10. Click **Done**.

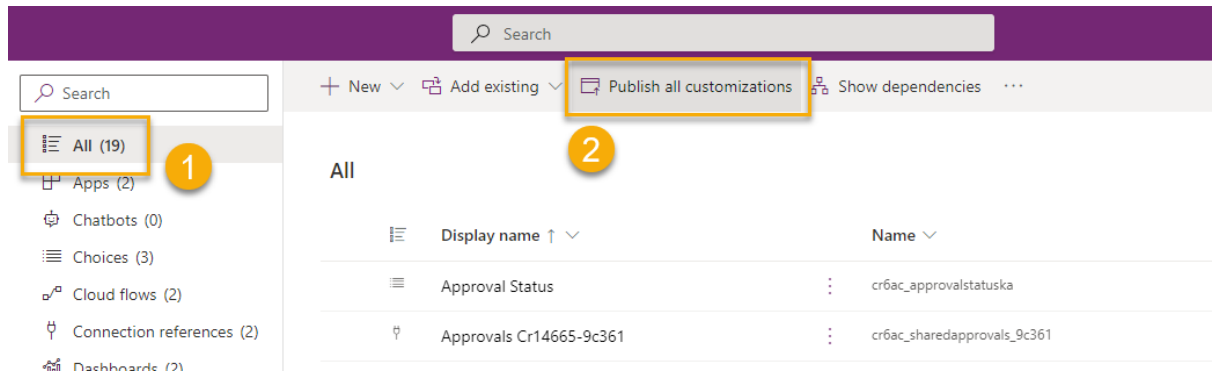
11. Click **Save Table**.

The screenshot shows the Dynamics 365 table configuration interface for the 'Knowledge Assessment' table. The 'Columns' tab is selected. A new column is being added, and the configuration panel on the right is visible. The 'Display name' is set to 'Create Questions', the 'Data type' is set to 'Yes/No', and the 'Required' property is set to 'Optional'. The 'Done' button is highlighted.

| Display name           | Name                            | Data type       | Type     |
|------------------------|---------------------------------|-----------------|----------|
| Approval Status        | cr6ac_approvalstatus            | Choice          | Custom   |
| Created By             | createdby                       | Lookup          | Standard |
| Created By (Delegate)  | createdonbehalfby               | Lookup          | Standard |
| Created On             | createdon                       | Date and Time   | Standard |
| Days Remaining         | cr6ac_daysremaining             | Whole Number    | Custom   |
| Demo Display Name      | cr6ac_demodisplayname           | Text            | Custom   |
| Difficulty             | cr6ac_difficulty                | Choice          | Custom   |
| End Date               | cr6ac_enddate                   | Date Only       | Custom   |
| Import Sequence Number | importsequencenumber            | Whole Number    | Standard |
| Knowledge Assessment   | cr6ac_demoknowledgeassessmentid | Unique Ident... | Standard |
| Modified By            | modifiedby                      | Lookup          | Standard |
| Modified By (Delegate) | modifiedonbehalfby              | Lookup          | Standard |
| Modified On            | modifiedon                      | Date and Time   | Standard |
| Notify Manager         | cr6ac_notifymanager             | Yes/No          | Custom   |
| Owner                  | ownerid                         | Owner           | Standard |
| Owning Business Unit   | owningbusinessunit              | Lookup          | Standard |
| Owning Team            | owningteam                      | Lookup          | Standard |
| Owning User            | owninguser                      | Lookup          | Standard |
| Passing Score (%)      | cr6ac_passingscore              | Whole Number    | Custom   |

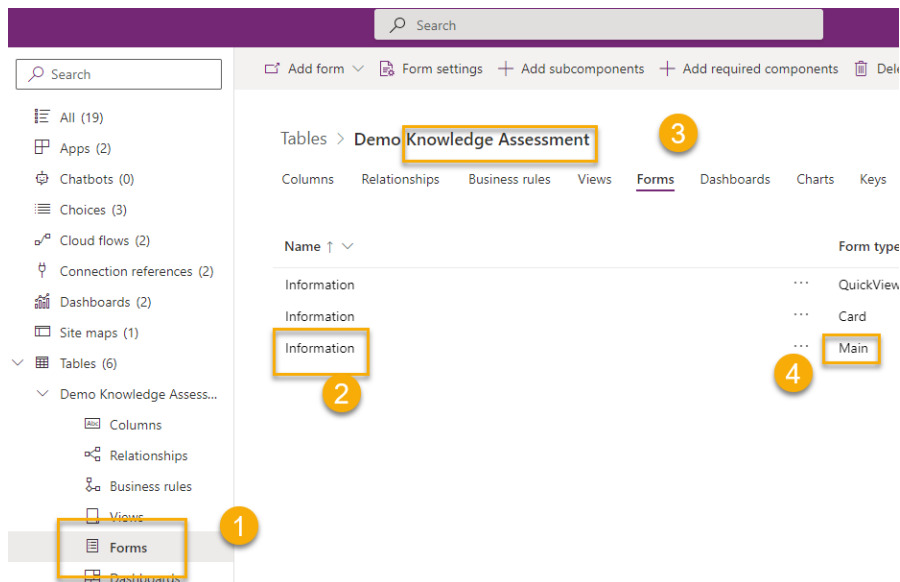
12. Navigate back to the solution.

13. Click **Publish all customizations**.



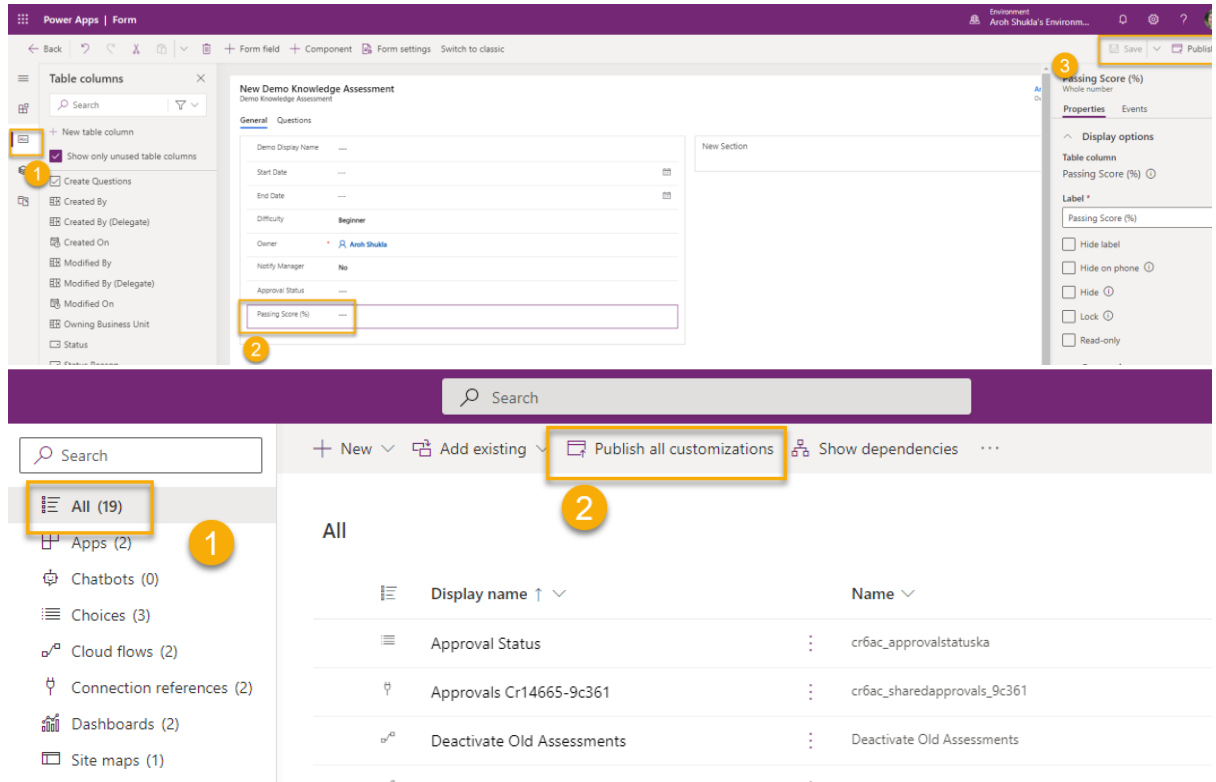
Task 2 – Add Column to Knowledge Assessment Form

1. Make sure you still have the **Knowledge Assessment** table selected.
2. Select the **Forms** tab and click on the **Main** form.



3. Add the **Passing Score (%)** column to the form.
4. Click **Save**.
5. Click **Publish**.
6. Click the back button.
7. Navigate back to the solution.

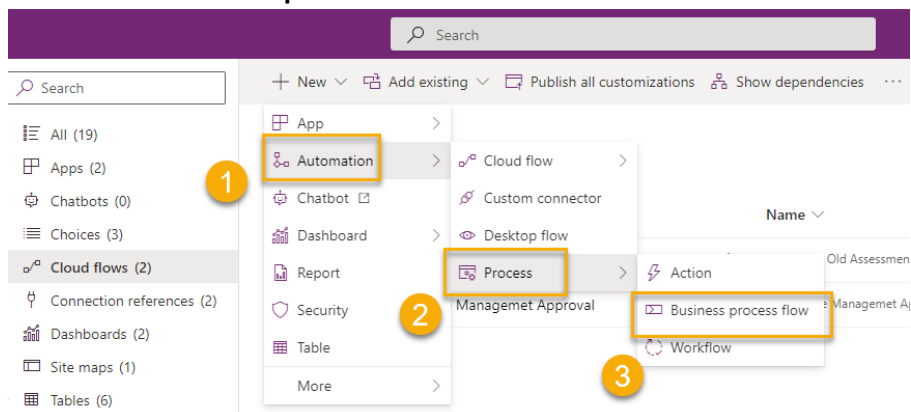
## 8. Click **Publish all customizations**.



## Exercise 2 – Create Business Process Flow

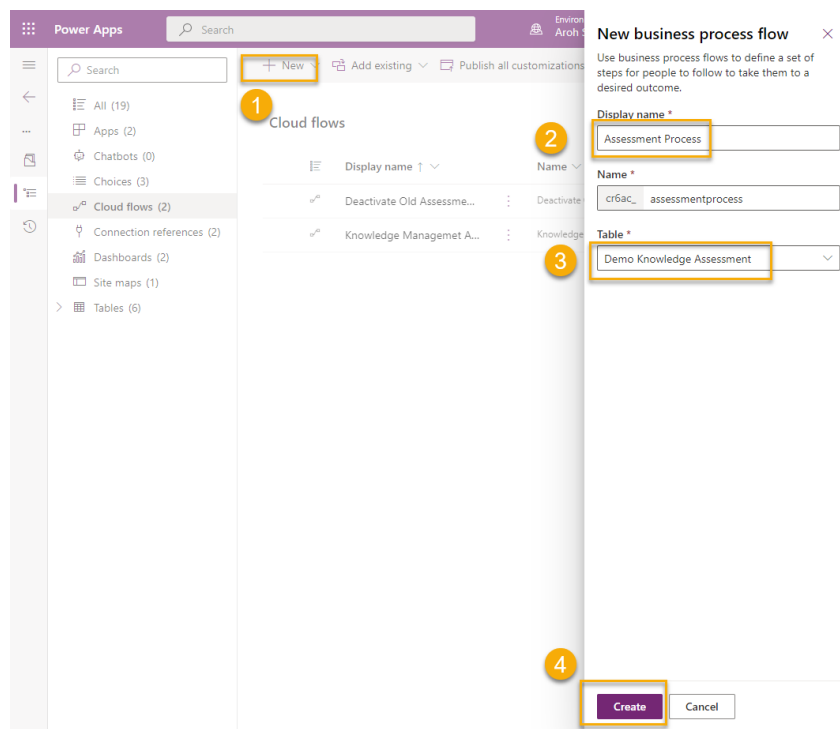
### Task 1 – Create Business Process Flow

1. Navigate to <https://make.powerapps.com> and make sure you are in your **Practice** environment.
2. Click **Flows**.
3. Switch to the **Business process flows** tab.

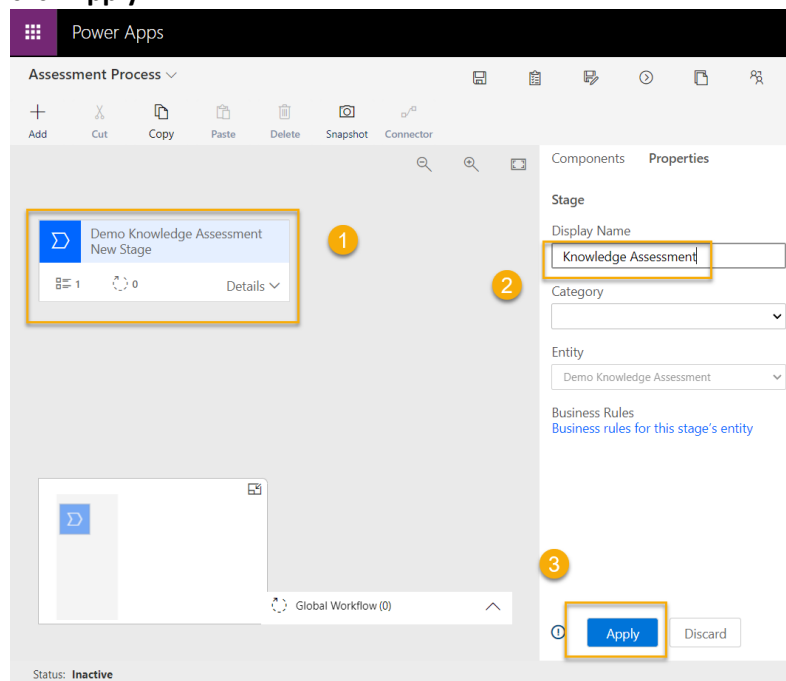


4. Click **+ New**.
5. Enter **Assessment Process** for Flow Name and choose **Knowledge Assessment** for table.

6. Click **Create**.



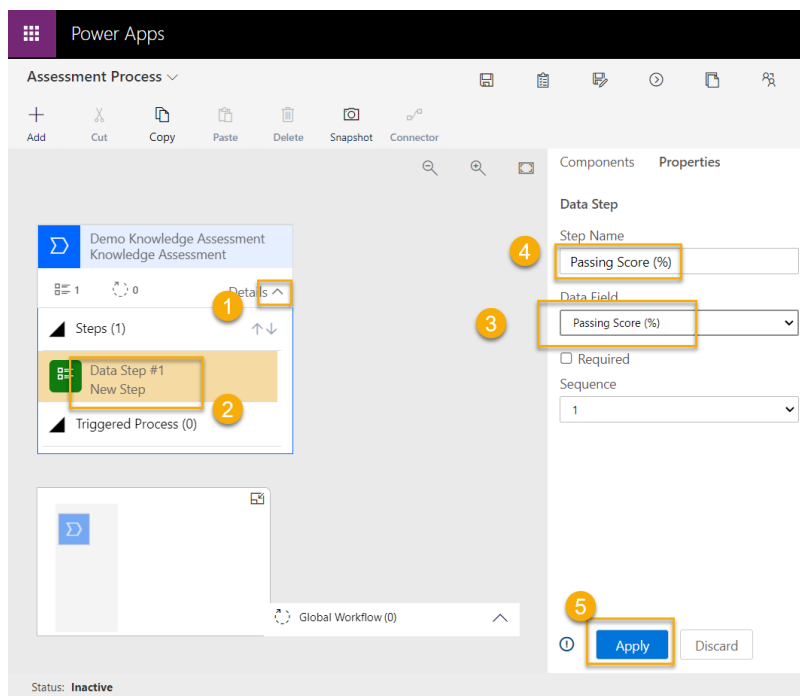
7. Select the stage and on **Properties** tab, enter **Knowledge Assessment** for **Display Name** and click **Apply**.



8. Click the **Details** on the **Knowledge Assessment** stage.

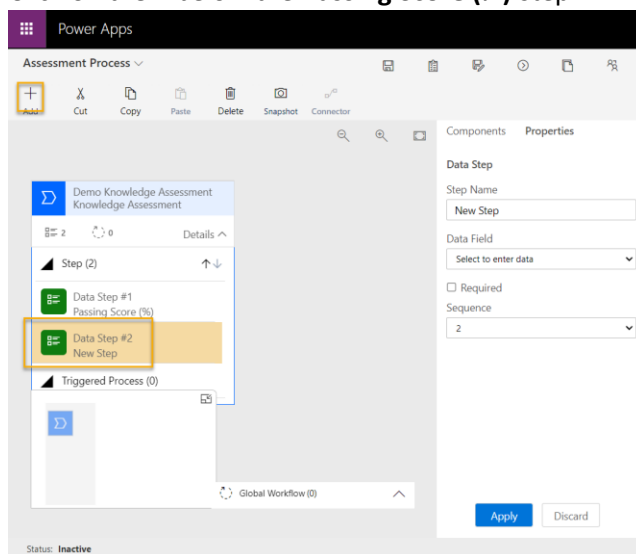
9. Select **Data Step #1**.

10. Select **Passing Score (%)** for **Data Field** and click **Apply**.



11. Click **+ Add** and select **Add Data Step**.

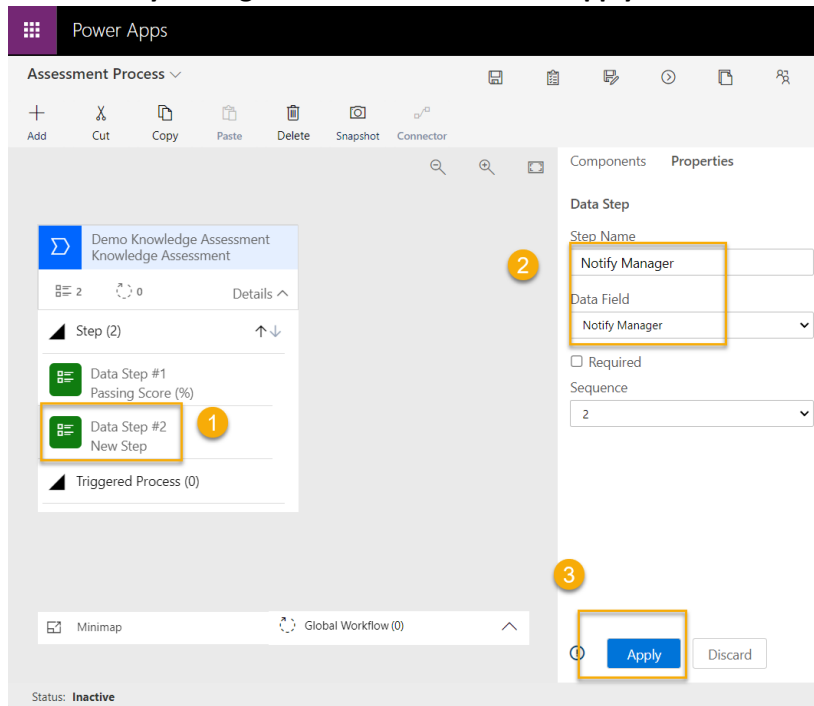
12. Click on the **+** below the **Passing Score (%)** step.



13. Select the **New Step**, select **Total Points** for **Data Field**, and click **Apply**.

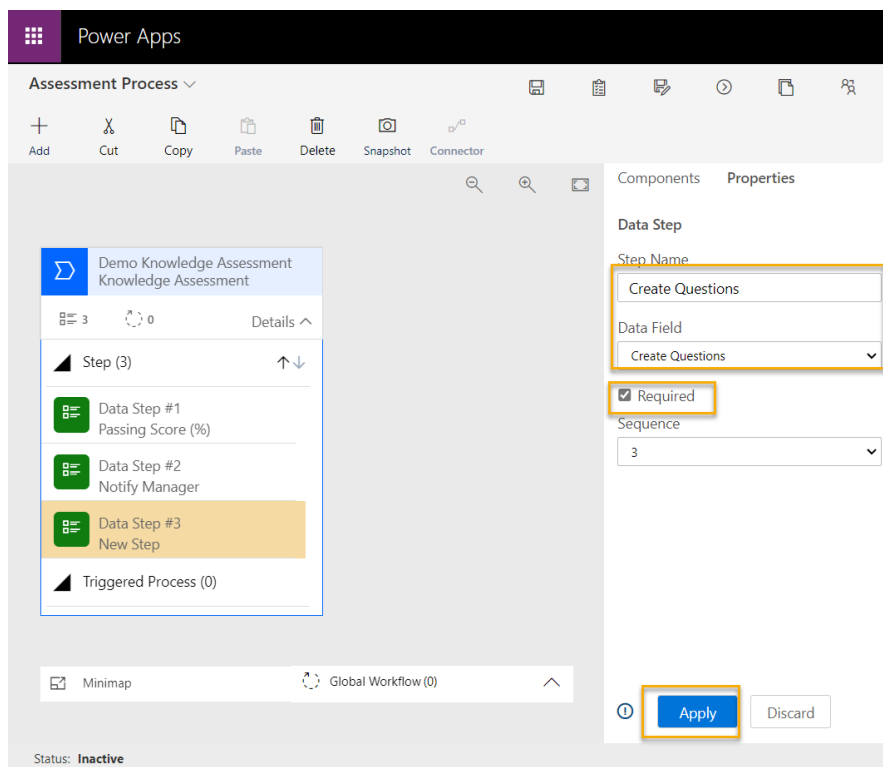
14. Select the **Components** tab, drag **Data Step** from the **Components** tab, and drop it below the **Total Points** step.

15. Select **Notify Manager** for **Data Field** and click **Apply**.

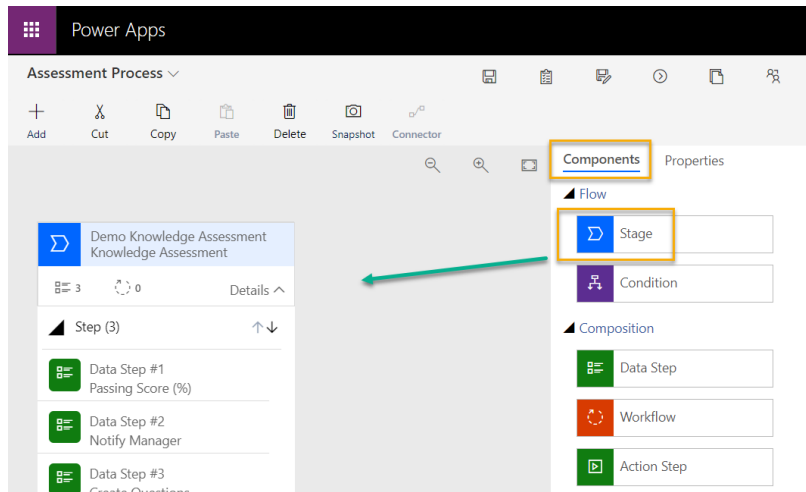


16. Drag **Data Step** from the **Components** tab and place it below the **Notify Manager** step.

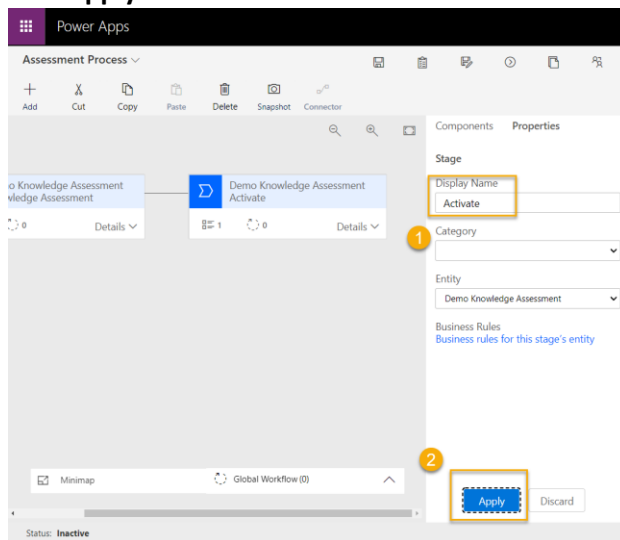
17. Select **Create Questions** for **Data Field**, check the **Required** checkbox, and click **Apply**.



18. Add a **new stage** to the right of the **Knowledge Assessment** stage by dragging from the components tab.



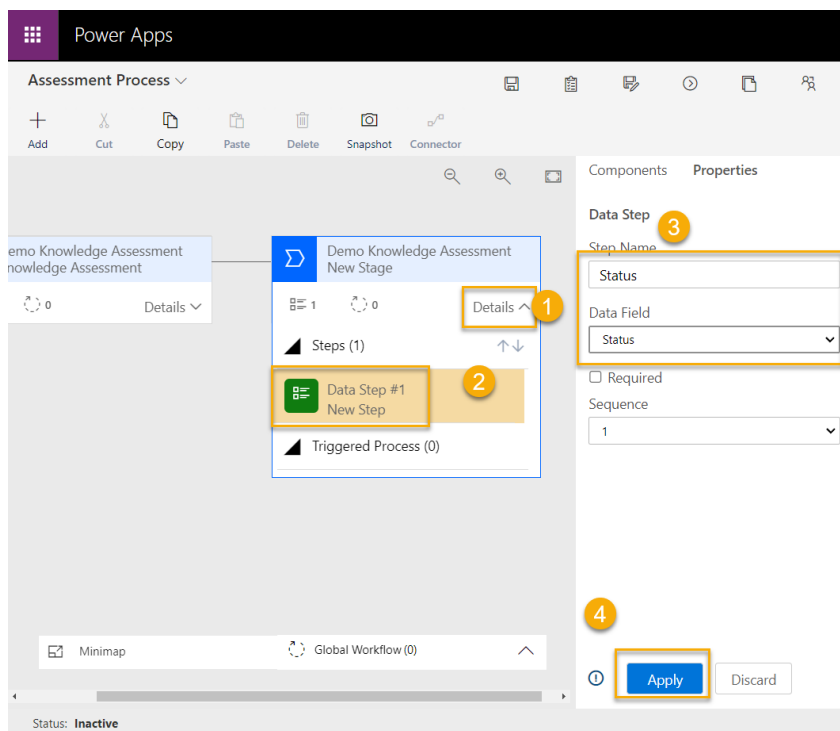
19. Select the new stage, go to the **Properties** tab, enter **Activate** for **Display Name**, and click **Apply**.



20. Click **Details** of the **Activate** stage.

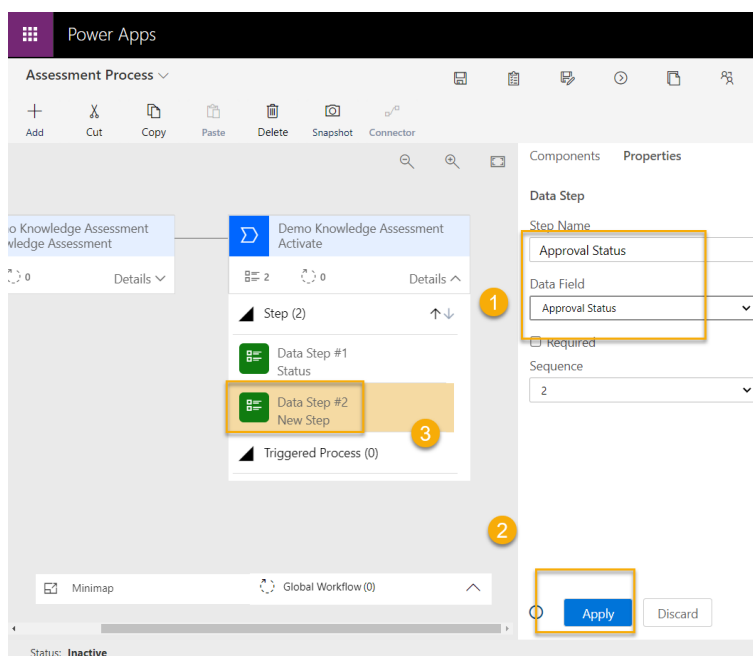
21. Select the **Data Step** inside the **Activate** stage.

22. Select **Status** for **Data Field** and click **Apply**.



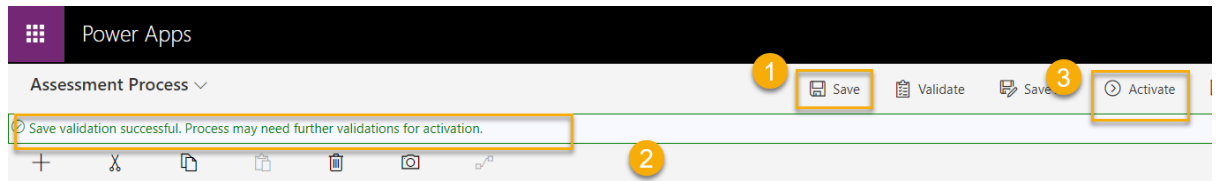
23. Select the **Components** tab, drag **Data Step** from the **Components** tab, and drop it below the **Status** step.

24. Select **Approval Status** for **Data Field** and click **Apply**.

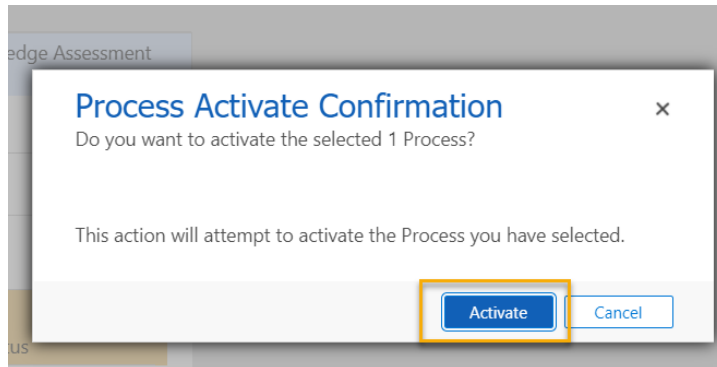


25. Click **Save** to save the **Business Process Flow**.

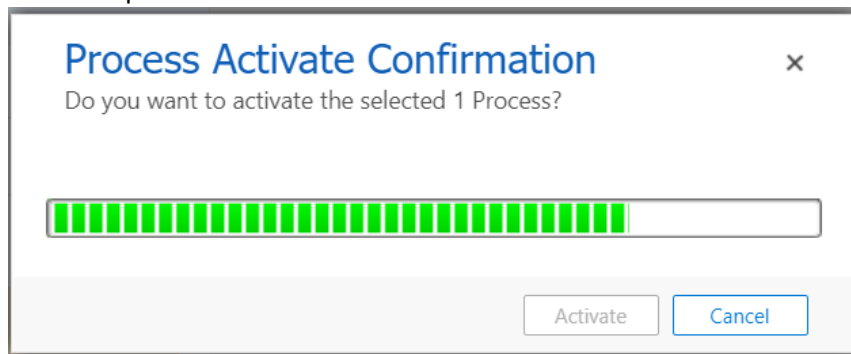
26. Click **Activate**.



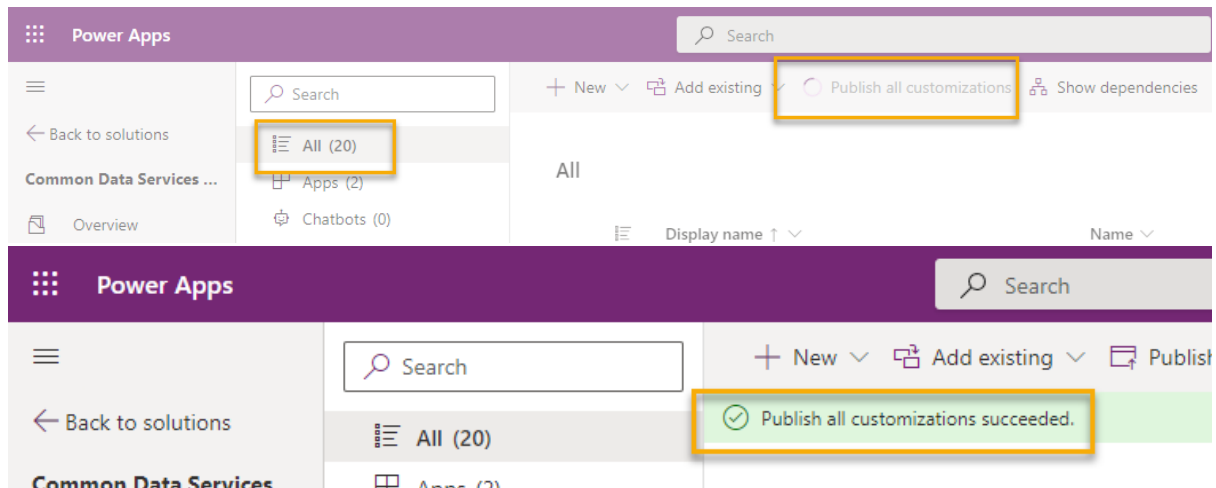
27. Confirm activation.



28. Close the process editor.



29. Publish all customizations



Task 2 – Test Business Process Flow

1. Navigate to <https://make.powerapps.com>.
2. Make sure you are in your **Practice** environment.

3. Select **Apps** and click to open the **Knowledge Admin** application.
4. Navigate to **Knowledge Assessments** and open **Test Assessment Four**.
5. Existing records will not pick up the Business Process Flow you created. Click **Process** on the command bar and select **Switch Process** (you may have to click the ellipses (...) to see this option).
6. Select the **Assessment Process** you created and click **OK**.
7. The **Assessment Process** should now be visible on the form.
8. Click **+ New**.
9. New rows should show the new Business Process Flow immediately.
10. Enter **BPF Test Assessment** for **Title** and click **Save**.
11. Select the **Questions** tab and click **+ New Knowledge Question**.
12. Select **Simple** for **Question Type**.
13. Enter **Process Test Question One** for **Question**.
14. Enter **Answer One** for **Answer 1** and **50** for **Answer 1 Points**.
15. Enter **Answer Two** for **Answer 2** and **80** for **Answer 2 Points**.
16. Enter **Answer Three** for **Answer 3** and **0** for **Answer 3 Points**.
17. Enter **Answer Four** for **Answer 4** and **0** for **Answer 4 Points**.
18. Click **Save**.
19. Click on the browser back button.
20. Click on the **Knowledge Assessment** stage of the Business Process Flow. The steps for this stage will come into view in a pop-up from the Business Process Flow bar.
21. In the window for the Knowledge Assessment stage, enter **80** for **Passing Score**.
22. Click on the **Total Points** calculator icon.
23. Click **Recalculate**.
24. The **Total Points** should get recalculated.
25. Select **Yes** for **Notify Manager**.
26. Select **Yes** for **Create Questions**. Then click **Next stage**.
27. The process should move to the **Activate** stage.
28. Start a new browser window and navigate to <https://flow.microsoft.com>.
29. Expand **Action Items** and select **Approvals**.
30. You should have one new approval waiting for you. Click on the approval.
31. The Approval pane will open. Select **Approve** in **Choose your response**.

32. Provide **Comments** and click **Confirm**.
33. Go back to **Knowledge Admin** application and click on the **Refresh** button.
34. Click on the **Activate** stage of the Business Process Flow.
35. The Approval Flow should complete the approval and set the **Approval Status** to **Approved**.

## Lab 5.8: Practice Lab – Build a branching business process flow

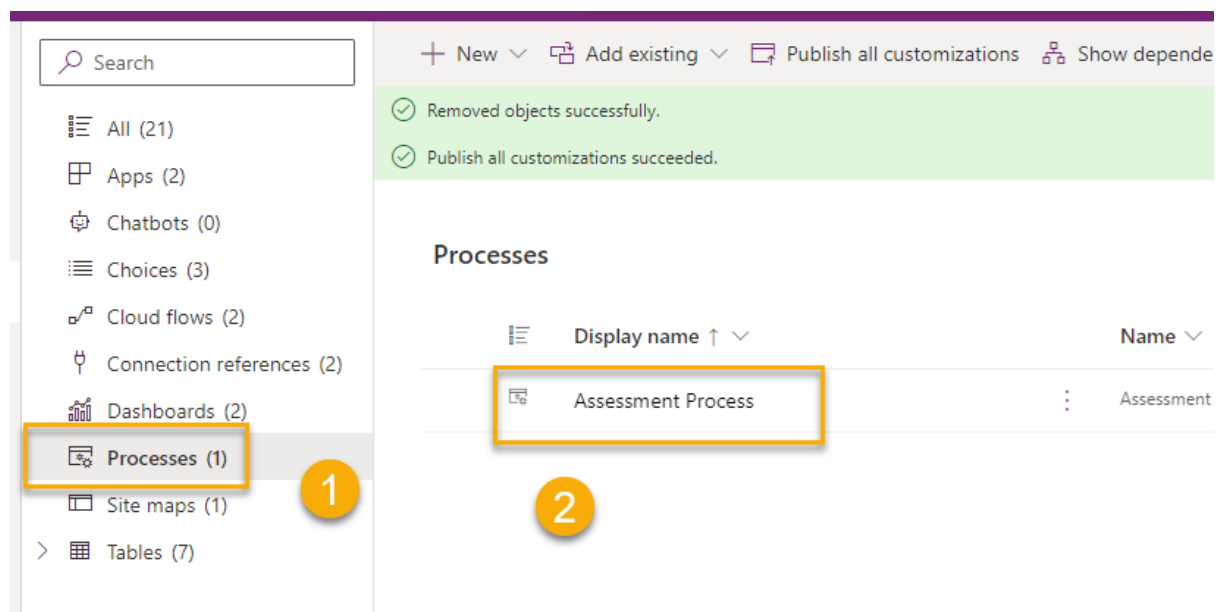
### Scenario

You have created several automation to support your **client's knowledge assessments process** and now it is time to **bring the final pieces together**. In this lab, you will **update the business process flow and add a business rule**.

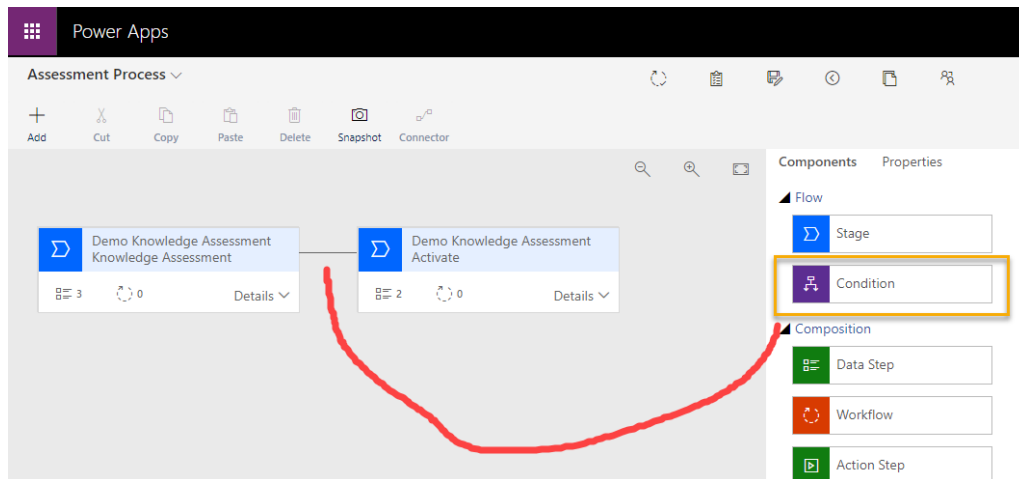
### Exercise 1 – Update Process

#### Task 1 – Update Business Process Flow

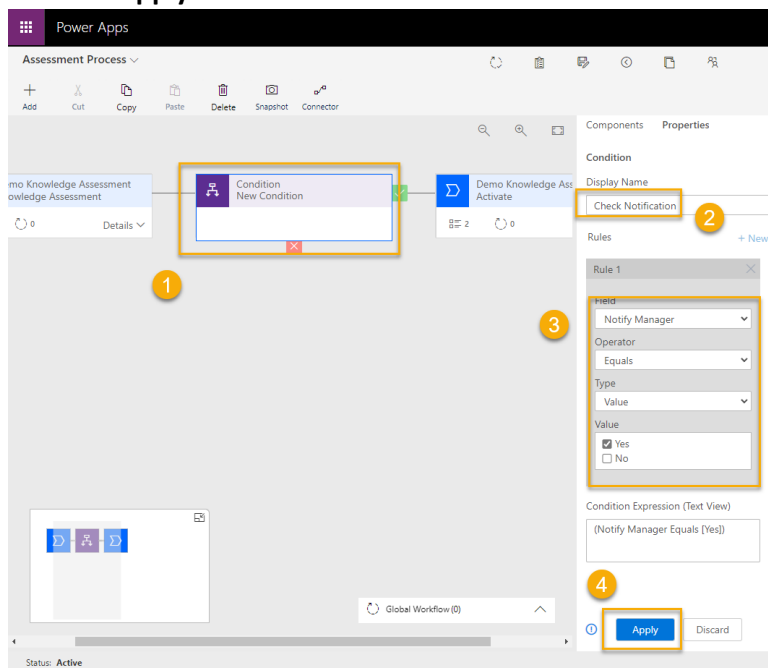
1. Navigate to <https://make.powerapps.com>.
2. Make sure you are in your **Practice** environment.
3. Select **Solutions**.
4. Click to open the **Common Data Services Default Solution**.
5. Click **Add existing** and select **Automation > Process**.
6. Select **Assessment Process** and click **Add**.
7. Click to open the **Assessment Process** process.



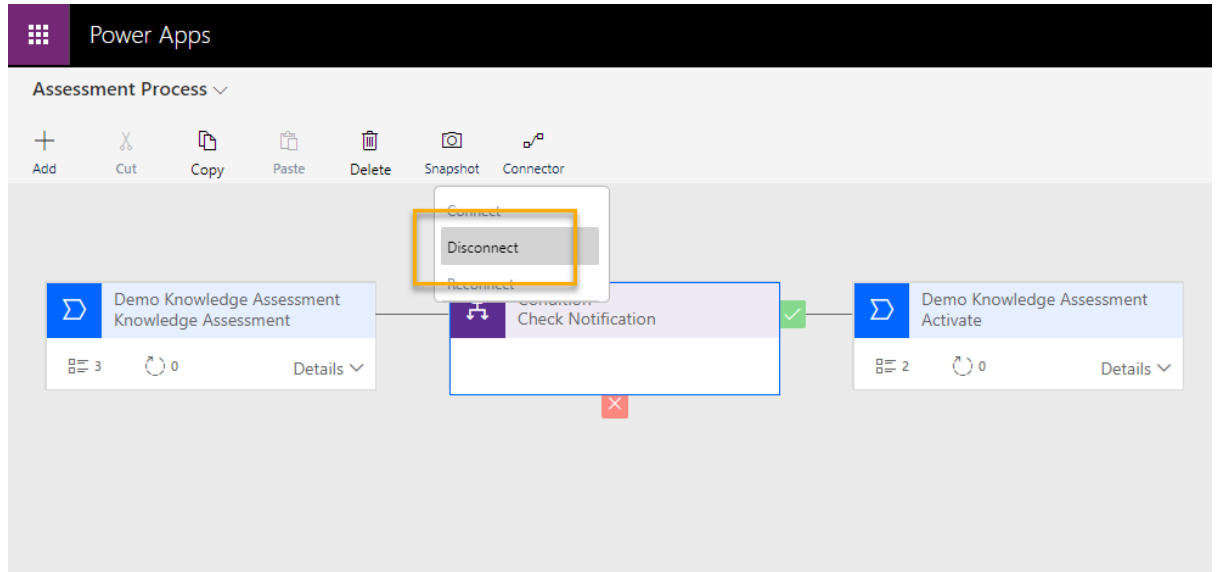
8. Select the **Components** tab, drag **Condition** and drop it in between the **two existing stages**.



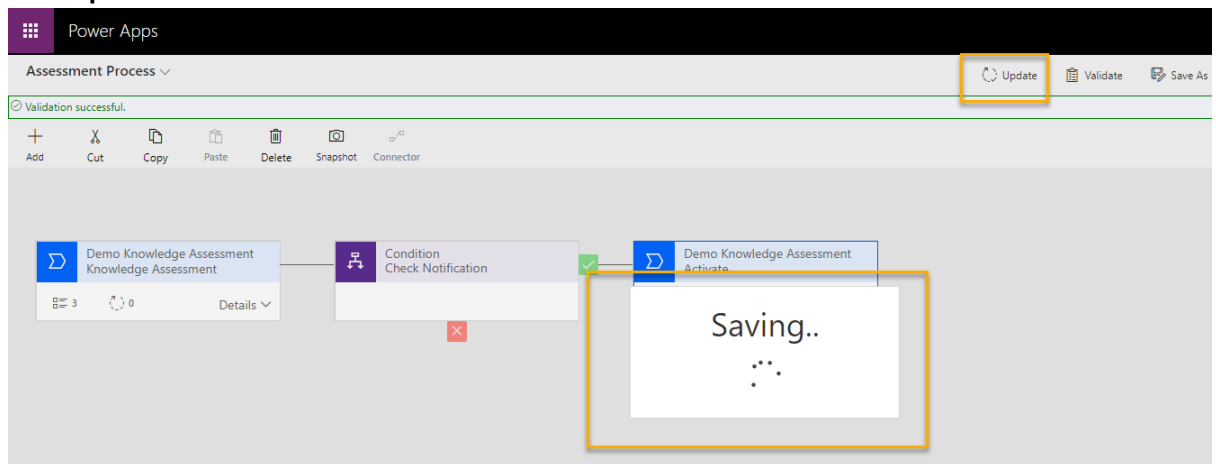
9. Select the **Condition**, select the **Properties** tab, and enter **Check Notification** for **Display Name**.
10. Go to **Rule 1**, select **Notify Manager** for **Field**, select **Value** for **Type**, select **Yes** for **Value**, and click **Apply**.



11. Select the **Condition**, click **Connector** and select **Disconnect**.



12. Click **Update**.

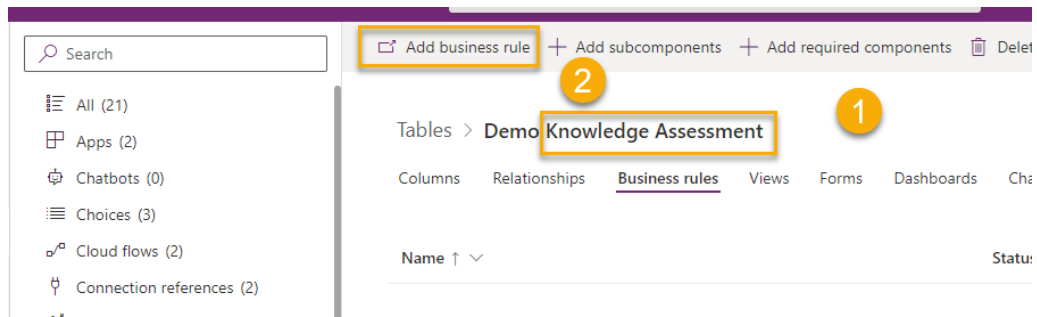


13. Close the process editor.
14. Click **Done**
15. Navigate back to the solutions and click **Publish all customizations**

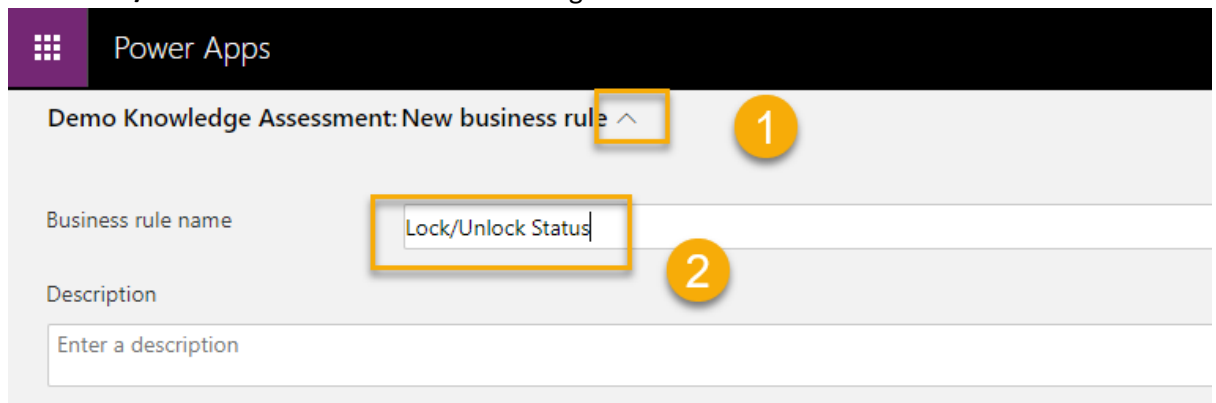
#### Task 2 – Add Business Lock Unlock Rule

1. Navigate to <https://make.powerapps.com>.
2. Make sure you are in your **Practice** environment.
3. Select **Solutions** and open the **Common Data Services Default Solution**.
4. Click to open the **Knowledge Assessment** table.

5. Select the **Business Rules** tab and click **Add Business Rule**.



6. Click on the **Show Details** carrot button next to the Business Rule name.
7. Enter **Lock/Unlock Status** and click the carrot again to **hide details**.



8. Select the **Condition**, go to the **Properties** tab, and enter **Check Notification** for **Display Name**.
9. Go to **Rule 1**, select **Notify Manager** for **Field**, select **Equals** for **Operator**, select **Value** for **Type**, select **Yes** for **Value**, and click **Apply**.

The screenshot shows a configuration window for a 'Condition'. On the left, a dark sidebar contains a list of items, with a 'Check Notification' item highlighted. This item is labeled with a yellow circle containing the number '2'. The main area is titled 'Condition' and contains the following fields:

- Display Name:** A text field containing 'Check Notification', highlighted with a yellow box.
- Entity:** A text field containing 'Demo Knowledge Assessment'.
- Rules:** A section with a '+ New' link and a list of rules. The first rule is expanded, showing a configuration form labeled with a yellow circle containing the number '3':
  - Source:** A dropdown menu with 'Entity' selected.
  - Field:** A dropdown menu with 'Notify Manager' selected, highlighted with a yellow box.
  - Operator:** A dropdown menu with 'Equals' selected.
  - Type:** A dropdown menu with 'Value' selected.
  - Value:** A section with two radio buttons: 'Yes' (selected) and 'No'.
- Condition Expression (Text View):** A text area containing '(Notify Manager Equals [Yes])'.
- Buttons:** At the bottom, there is a blue 'Apply' button and a grey 'Discard' button. The 'Apply' button is highlighted with a yellow box and labeled with a yellow circle containing the number '4'.

10. Add new **Rule** by clicking **+ New**.

11. Go to **Rule 2**, select **Approval Status** for **Field**, select **Does not Equal** for **Operator**, select **Value** for **Type**, and select **Approved** for **Value**.

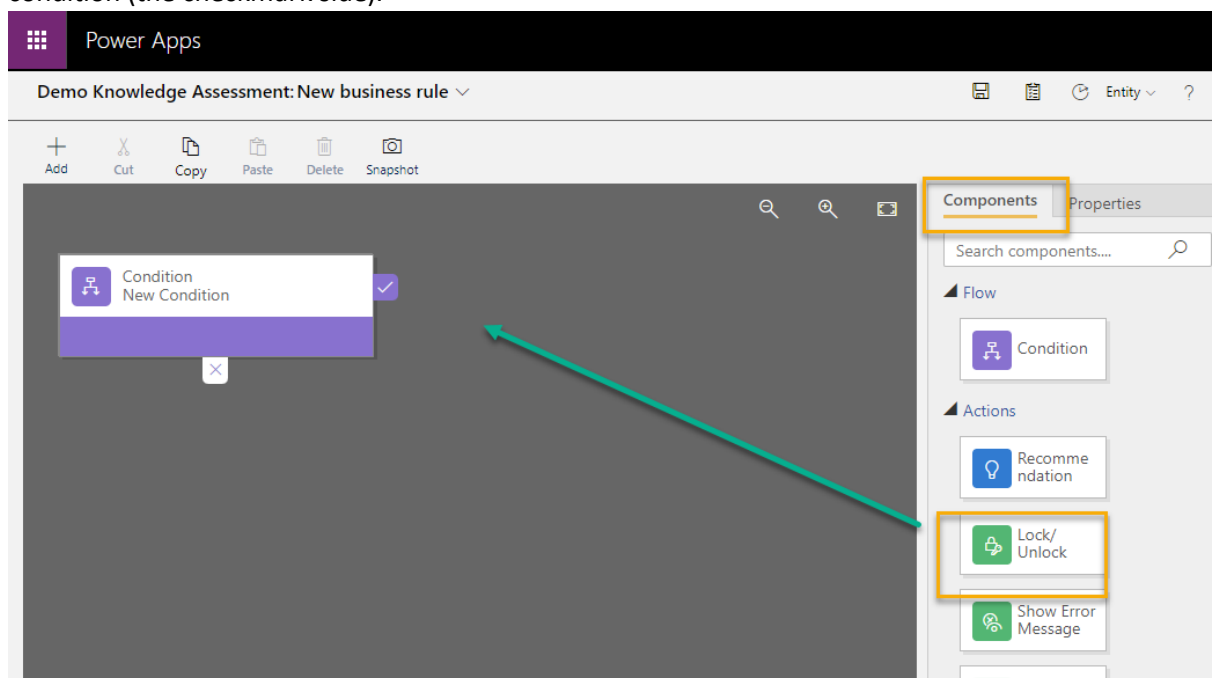
This screenshot shows a zoomed-in view of the 'Rules' section of the configuration window. It includes the following elements:

- Display Name:** 'Check Notification'.
- Entity:** 'Demo Knowledge Assessment'.
- Rules:** A section with a '+ New' button highlighted by a yellow box.
- Expanded Rule Configuration:**
  - Source:** 'Entity'.
  - Field:** 'Notify Manager'.
  - Operator:** 'Equals'.
  - Type:** 'Value'.
  - Value:** 'Yes' (selected).
- Condition Expression (Text View):** '(Notify Manager Equals [Yes])'.

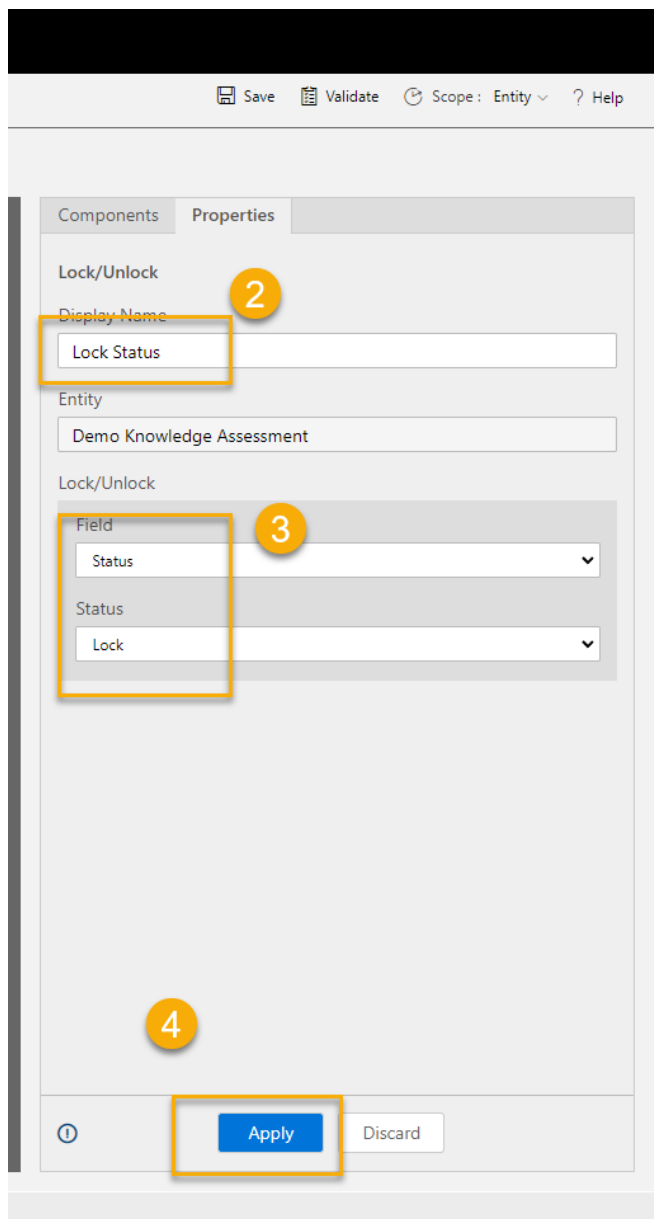
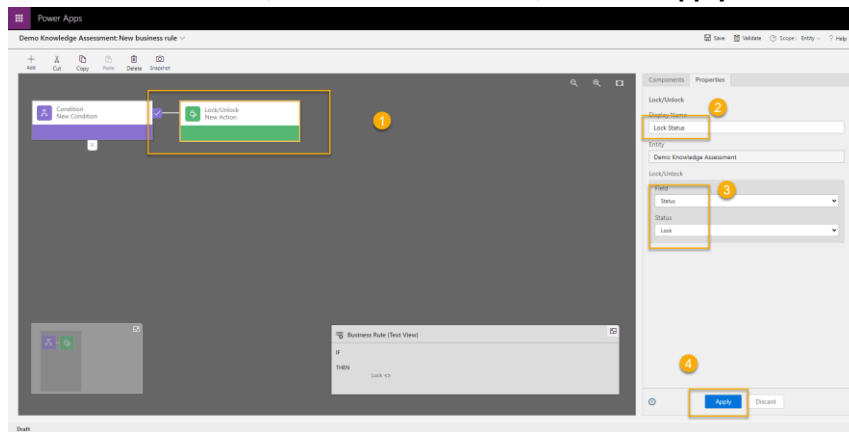
12. Make sure **And** is select for **Rule Logic** and click **Apply**.

A screenshot of a 'Rule Configuration' dialog box. The 'Source' dropdown is set to 'Entity'. The 'Field' dropdown is set to 'Approval Status'. The 'Operator' dropdown is set to 'Equals'. The 'Type' dropdown is set to 'Value'. The 'Value' section has three radio buttons: 'Waiting' (unchecked), 'Approved' (checked), and 'Rejected' (unchecked). The 'Rule Logic' dropdown is set to 'AND'. The 'Condition Expression (Text View)' shows the text: '(Notify Manager Equals [Yes]) AND (Approval Status [Approved])'. At the bottom, there are three buttons: an information icon, 'Apply' (highlighted with an orange box), and 'Discard'.

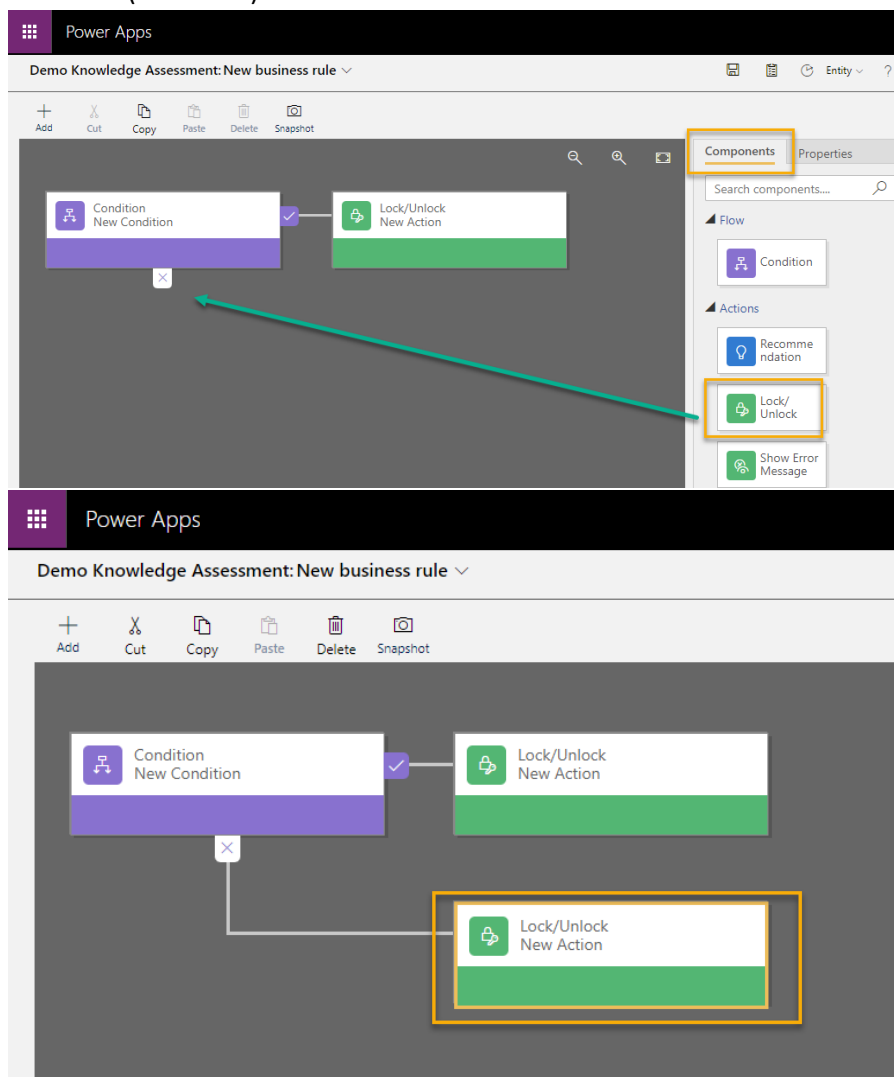
13. Select the **Components** tab, drag **Lock/Unlock** action and drop it on the **True** side of the condition (the checkmark side).



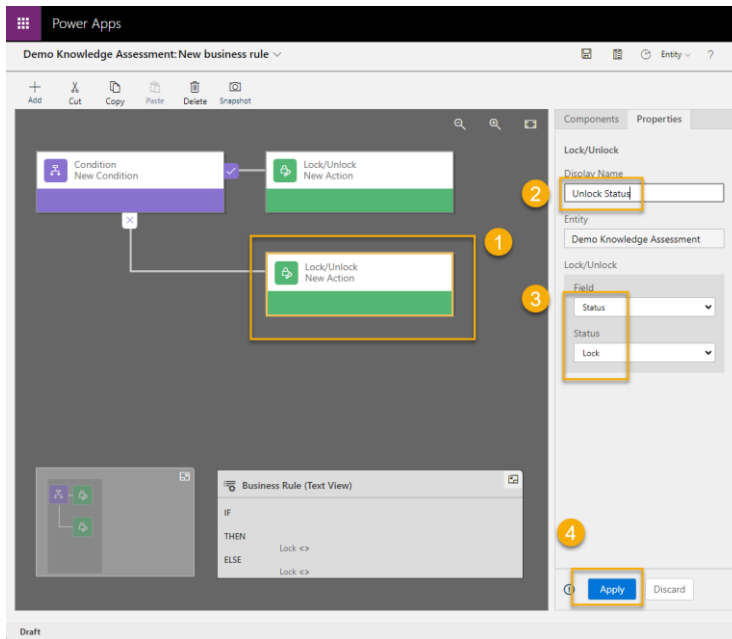
14. Select the **Lock/Unlock** action, go to the **Properties** tab, enter **Lock Status** for **Display Name**, select **Status** for **Field**, select **Lock** for **Status**, and click **Apply**.



15. Select the **Components** tab, drag **Lock/Unlock** action and drop it on the **False** side of the condition (the x side).



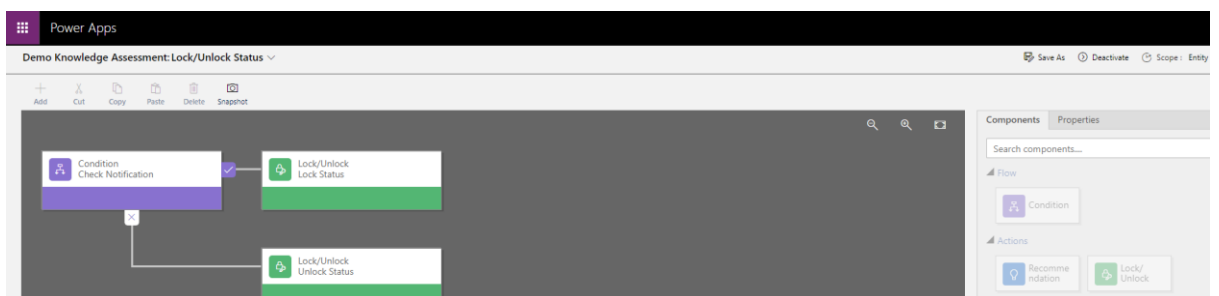
16. Select the second **Lock/Unlock** action, got to the **Properties** tab, enter **Unlock Status** for **Display Name**, select **Status** for **Field**, select **Unlock** for **Status**, and click **Apply**.



17. Click **Save**.

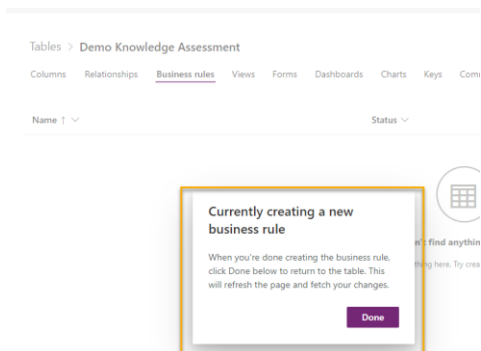
18. Click **Activate**.

19. Confirm activation.

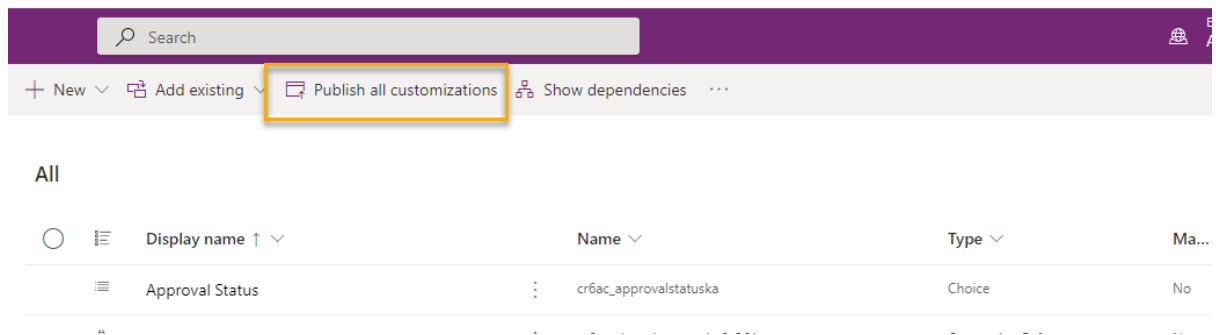


20. Close the process editor.

21. Click **Done**.



22. Navigate back to the solutions and click **Publish all customizations**



### Task 3 – Test the Updated Business process Flow

1. Navigate to <https://make.powerapps.com>.
2. Make sure you are in the **Practice** environment.
3. Select **Apps** and click to open the **Knowledge Admin** application.
4. Navigate to **Knowledge Assessments**.
5. Click **New**.
6. Enter **BPF Assessment Two** for **Title** and click **Save**.
7. Select the **Questions** tab and click **+ New Knowledge Question**.
8. Select **Simple** for **Question Type**.
9. Enter **Process Test Question** for **Question**.
10. Enter **Answer One** for **Answer 1** and **100** for **Answer 1 Points**.
11. Enter **Answer Two** for **Answer 2** and **0** for **Answer 2 Points**.
12. Enter **Answer Three** for **Answer 3** and **0** for **Answer 3 Points**.
13. Enter **Answer Four** for **Answer 4** and **65** for **Answer 4 Points**.
14. Click **Save**.
15. Click on the browser back button.
16. Your Business Process Flow should have just one stage.
17. Click on the **Knowledge Assessment** stage of then Business Process Flow. The steps for this stage will come to view.
18. Enter **80** for **Passing Score**.
19. Click on the **Total Points** calculator icon.
20. Click **Recalculate**.
21. The **Total Points** should get recalculated.
22. Select **Yes** for **Notify Manager**.

23. The Activate Stage should now be added to the Business Process Flow.
24. Select **Yes** for **Create Questions** and click **Next Stage**.
25. The process should move to the **Activate** stage.
26. The Business Rule should run and **Lock** the **Status** of the Assessment. Do not close this page.
27. Start a new browser window and navigate to <https://flow.microsoft.com/>.
28. Select **Action items** and then select **Approvals**.
29. You should have one approval waiting for you. Click on the approval.
30. The Approval pane will open. Select **Approve**.
31. Provide **Comments** and click **Confirm**.
32. Go back to **Knowledge Admin** application and click on the **Refresh** button.
33. Click on the **Activate** stage of the Business Process Flow.
34. The Approval Flow should complete the approval and set the **Status** to **Approved**.
35. The Business Rule should **Unlock** the **Status** field.
36. Click **Finish**.