EvergreenWorx

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Administration Guide

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VIEWS

*Note: For more information on Views please visit the Microsoft Guide: [Create or edit a model-driven app view in Power Apps - Power Apps | Microsoft Learn]

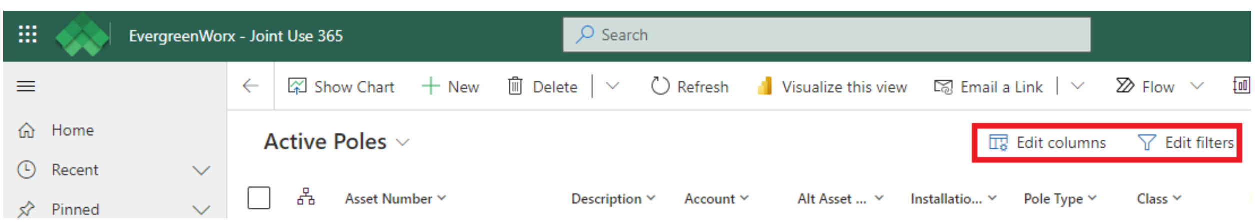
Views are used throughout the Power Platform to select and present data to end users. Views consist of a filter definition and a column definition. The most common use of views is to populate data grids. Whenever you are viewing a grid of records within Power Platform, the grid is using a view to determine which records to present and which columns are visible. These same views are also used by Chart and List-type widgets within Dashboards.

CREATING VIEWS

Views can be created from both the front end of the application as well as through the Maker Portal. Views can be created per user as well as shared globally with all users. Users must have the correct permissions in order to create new views and share them with others.

CREATING PERSONAL VIEWS

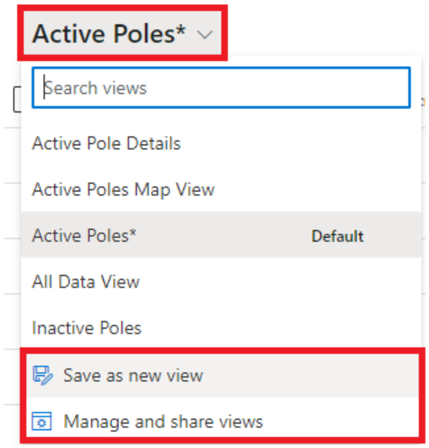
Views can be created by users and by default can only be seen by the user who created it. Note that these views cannot be used to populate Charts or Lists within dashboards as they are only visible to the user who created them. To create a new personal view, simply open a data grid with the entity you want to create a new view for and use the **Edit Columns** and/or **Edit Filter** buttons to customize the view to your liking.



Once you have made your edits, the name of the view will show an asterisk notifying you that the view has been altered and needs to be saved. To save the view, ***click*** the view drop down and select the "Save as New View" option.

From here you can name your custom view and give it a description.

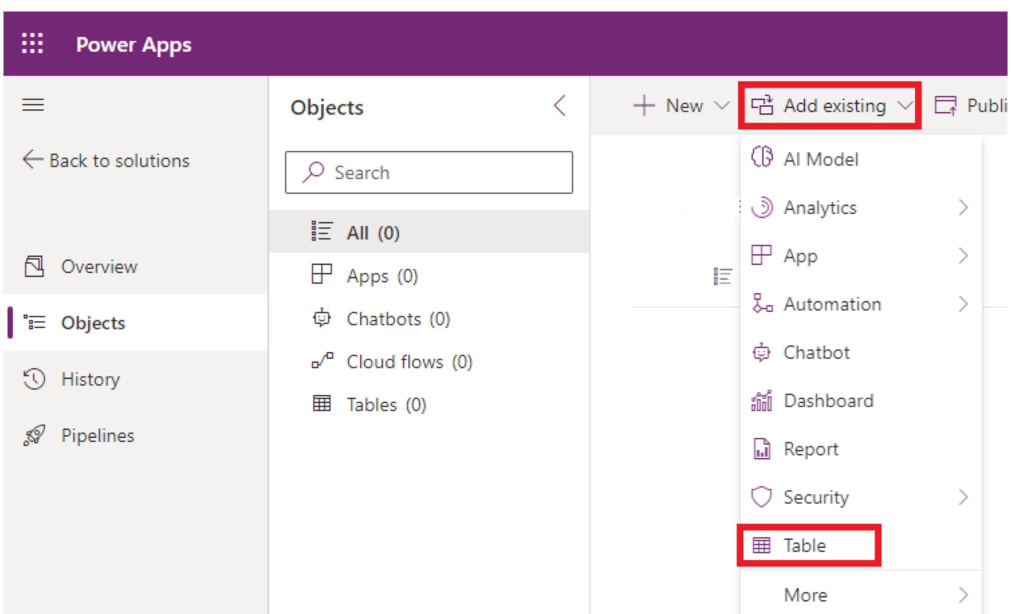
To share your newly created view, use the "Manage and Share Views" option from the view drop down. The system will allow you to share your newly created view with other users or teams. You can also pick a view to be your default view from within this management screen.



CREATING PUBLIC VIEWS

Public Views are available to everyone in the system and can be used to populate Chart and List widgets within dashboards. Public views are created and edited via the Maker Portal. You must make the edits in an unmanaged solution. Varasset recommends that you create your own custom solution to make these edits in, rather than making them directly in your "Default" solution. This makes management and deletion of these changes easier should the need arise.

To create a new public view for a particular table, open the unmanaged solution in which you want to store the new view. If this is the first time you are making modifications against a particular table (entity), you will first need to import the table into your custom solution. This is done by clicking the **Add Existing** action in the ribbon.



You will be presented with a list of all tables that exist within your current environment. Select the table/s you would like to create views for and ***click*** **Next**. The system will ask you which objects you want to import - for the purpose of view creation, it is our recommendation that you leave all options blank and only import the table. If you import all objects, it could create undesired dependencies between the solutions.

Once your table has been added to your solution, simply expand the table in the left navigation panel and ***click*** on **Views**. From here you can create your own public views. An important note is that once you have finished making your changes, you will need to publish the changes in order to see them in your application. This can be done from the ribbon within the Maker Portal - just run the **Publish All Customizations** action when looking at the list of solutions.

CHARTS

*Note: For more information on Charts please visit the Microsoft Guide: Create a model-driven app system chart

Charts can be used within the application to visualize data returned by a view. Charts can be viewed both from data grids of records and also imbedded within dashboards as a widget.

CREATING CHARTS

Charts are created via the Maker Portal and must be added to an unmanaged solution. As with custom views, we recommend creating these objects within your own custom solution rather than directly in the “Default” solution.

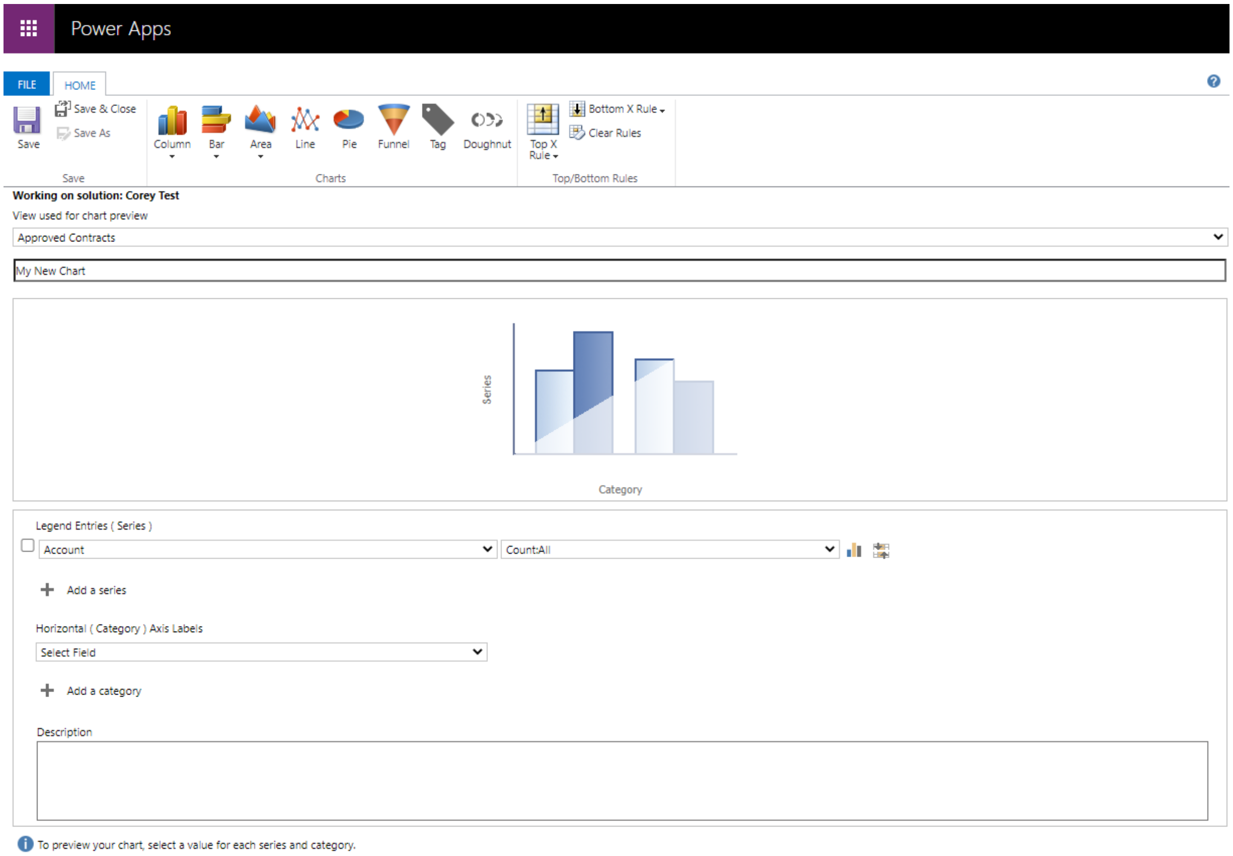
To create a new chart, open your unmanaged solution and import the table of the entity you want to create a chart for, if the table has not already been added to your solution.

Expand the table in the navigation panel on the left and ***click*** on **Charts**.

From the list of charts (the list will be empty if you have not created any custom charts yet), ***click*** the **New Chart** action in the ribbon at the top of the screen. The Chart Editor will open in a new tab. From here you can:

- select your chart type
- name your chart
- select the view to use to populate the data within the chart
- select your series (y-axis values)
- select your Category (x-axis values)
- and configure an aggregate to perform on the data

Once you have saved your chart, be sure to publish your customizations using the **Publish All Customizations** action from the ribbon on the Solutions screen.

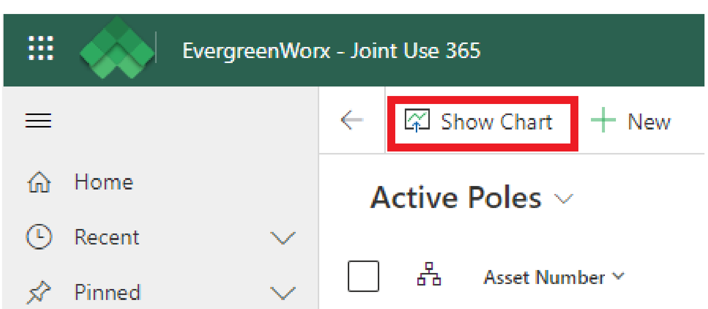


VIEWING CHARTS

Charts can be viewed from either a data grid within the application or added as a widget to a dashboard. We will cover both uses in this section.

VIEWING CHARTS ON DATA GRIDS

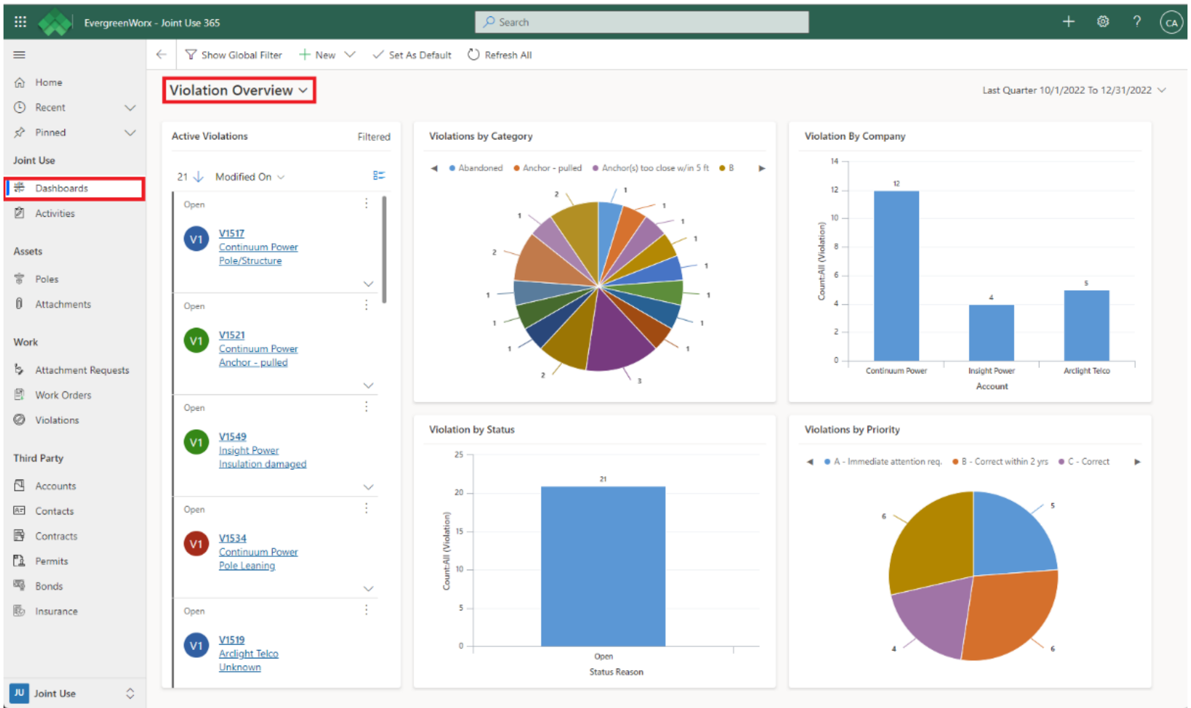
To view a chart from a data grid, simply open the data grid within the front end of the application and ***click*** the **Show Chart** button in the ribbon. This will open the charts panel and allow you to choose which chart you want to view.



When viewing charts in this manner, the chart will be populated with the data from the currently selected view. You can change the view to update the chart with new data.

VIEWING CHARTS ON DASHBOARDS

To view charts on dashboards, ***open*** the Dashboards window from the front end of the application and ***select*** the desired dashboard. We will cover adding charts to Dashboards in the next section.



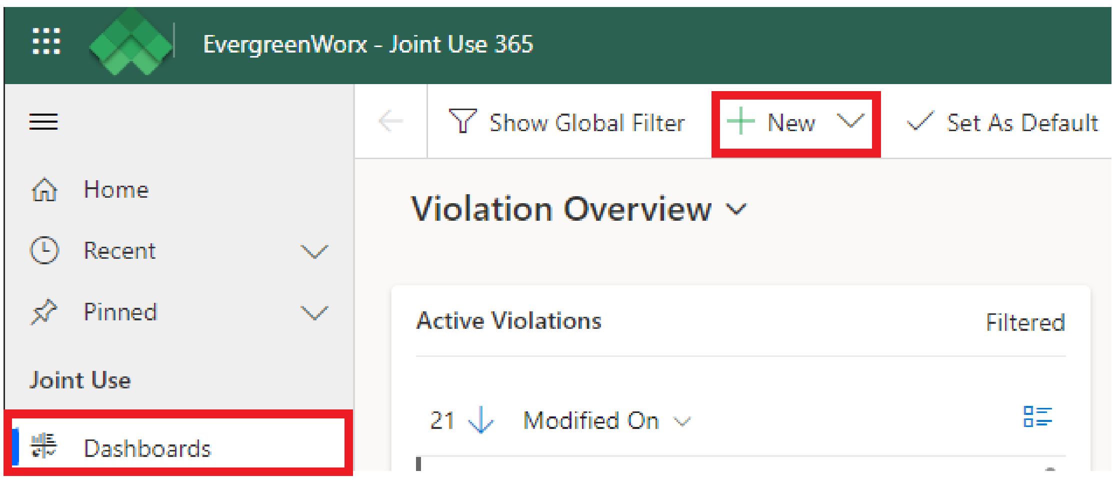
DASHBOARDS

*Note: For more information on Dashboards please visit the Microsoft Guide: [Create or edit model-driven app dashboards]

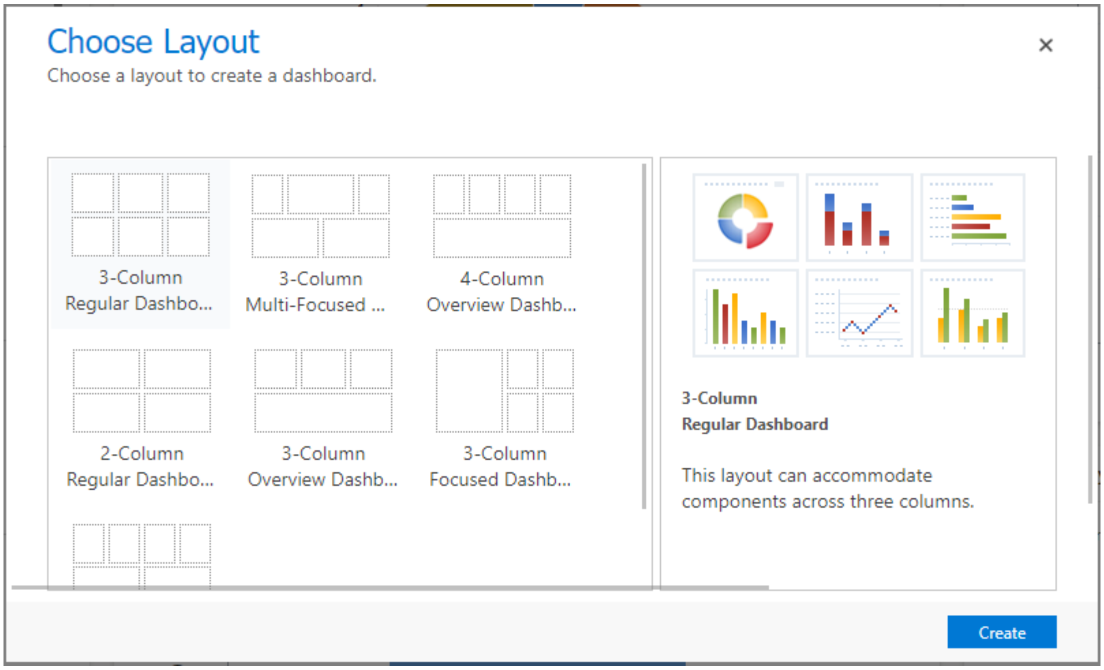
This section describes the process of creating new, and modifying existing, dashboards through both the front end of the application as well as through the Maker Portal.

CREATING DASHBOARDS FROM WITHIN THE APPLICATION

Dashboards can be created via the front end of the application by navigating to the Dashboard page and clicking the **New** button in the ribbon. You must have the correct permissions within the environment in order to perform this action.



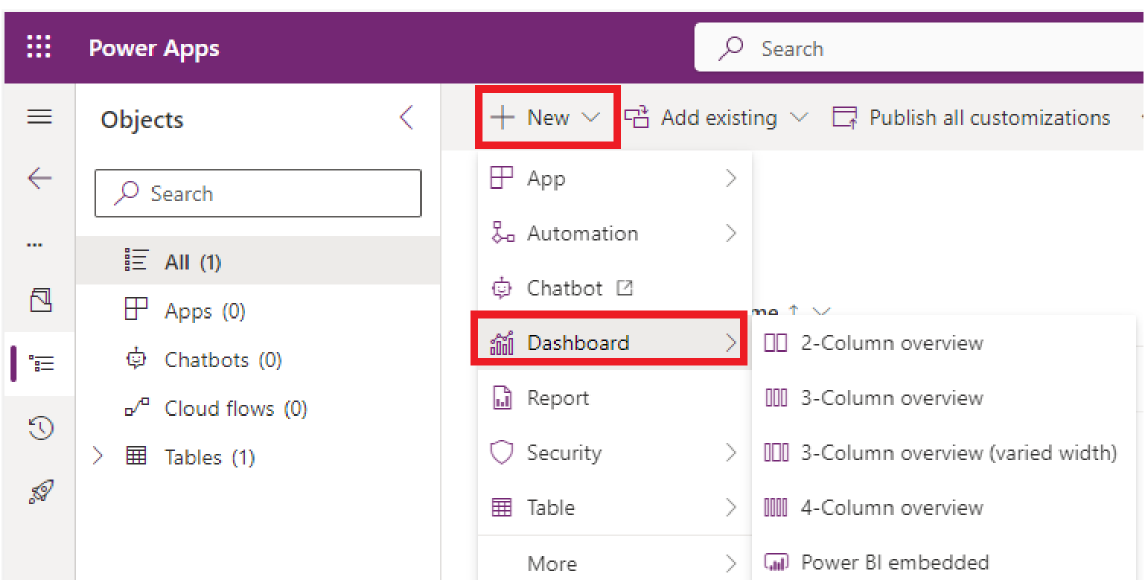
The system will prompt you to choose a layout for your new dashboard:



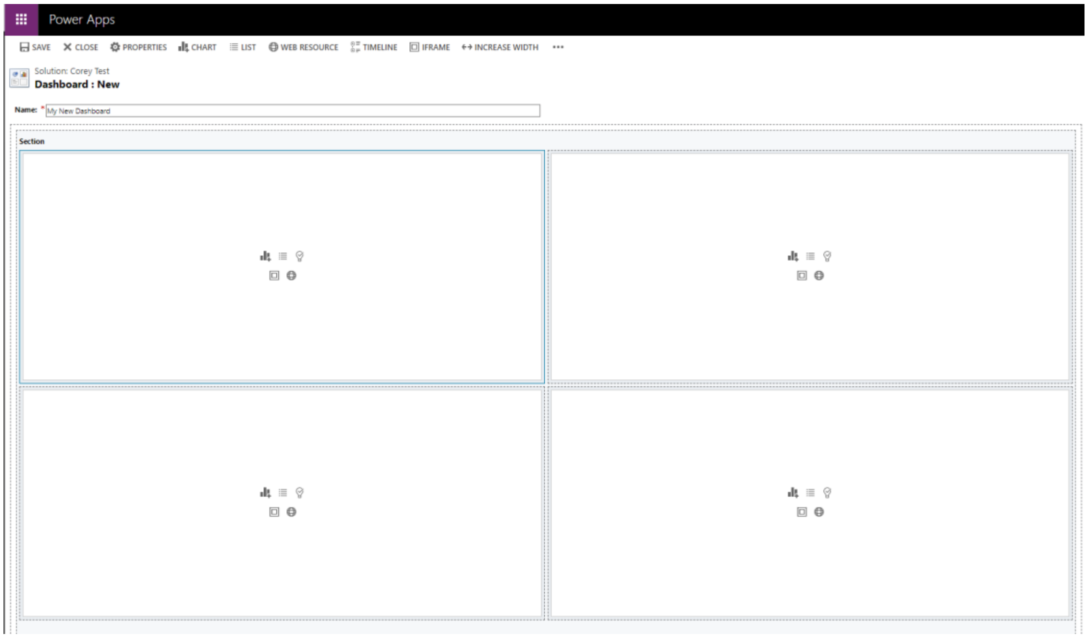
After choosing your layout, the Dashboard editor will be opened. From here you can add widgets to each section of your dashboard. Widgets can consist of Charts, Lists, Assistance, IFrames and Web Resources. The most commonly used widgets are Charts and Lists, which rely on pre-configured Views and Charts.

CREATING DASHBOARDS FROM THE MAKER PORTAL

Dashboards can also be added to your unmanaged solution via the Maker Portal. To add a new dashboard, navigate to the maker portal (https://make.powerapps.com/) and open your unmanaged solution within your environment. ***Click*** the **New** button in the ribbon and ***select*** **Dashboard**.



Once you have chosen your desired layout, the Dashboard editor will open, allowing you to add widgets to your new dashboard.

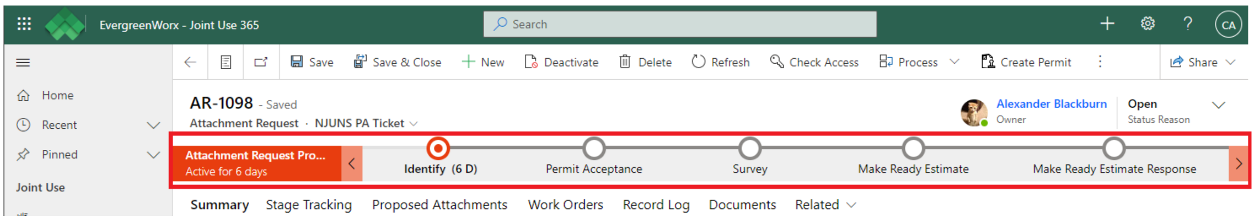


Be sure to save and publish your changes in order to see your new dashboard in the application.

BUSINESS PROCESS FLOWS

*Note: For more information on BPF please visit the Microsoft Guide: [Tutorial: Create a business process flow]

Business Process Flows (BPF) allow you to configure guided processes on selected entities. These processes consist of stages with underlying steps. When a record is subject to a BPF, the process is shown at the top of the record.

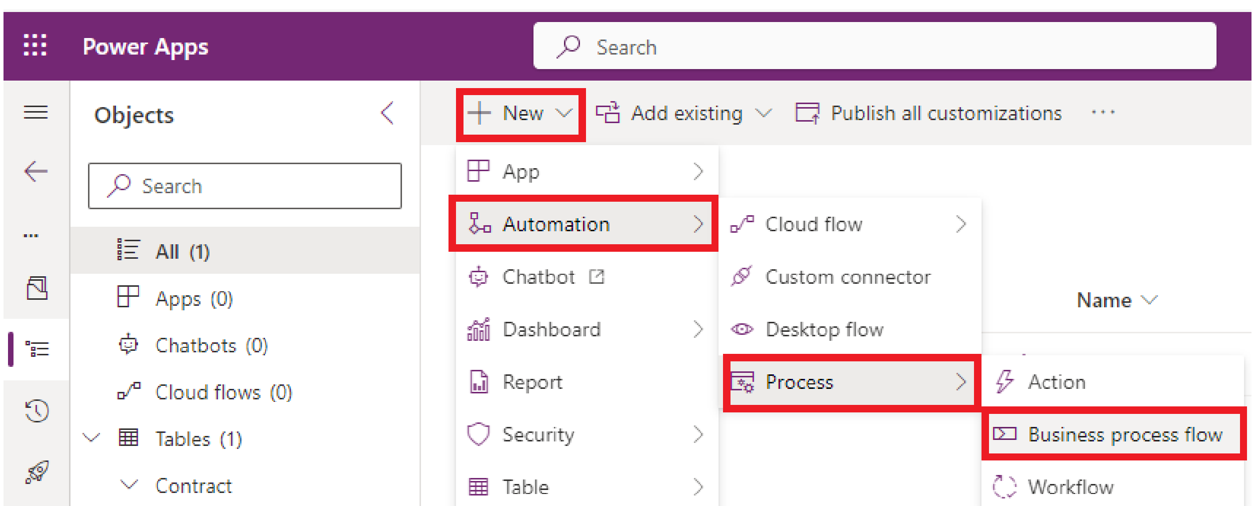


The current stage is shown with an orange circle and when clicked, will expose the steps necessary to move on to the next stage. Not all steps under the stage may be required - this is configured during the creation of the BPF.

CREATING A NEW BPF

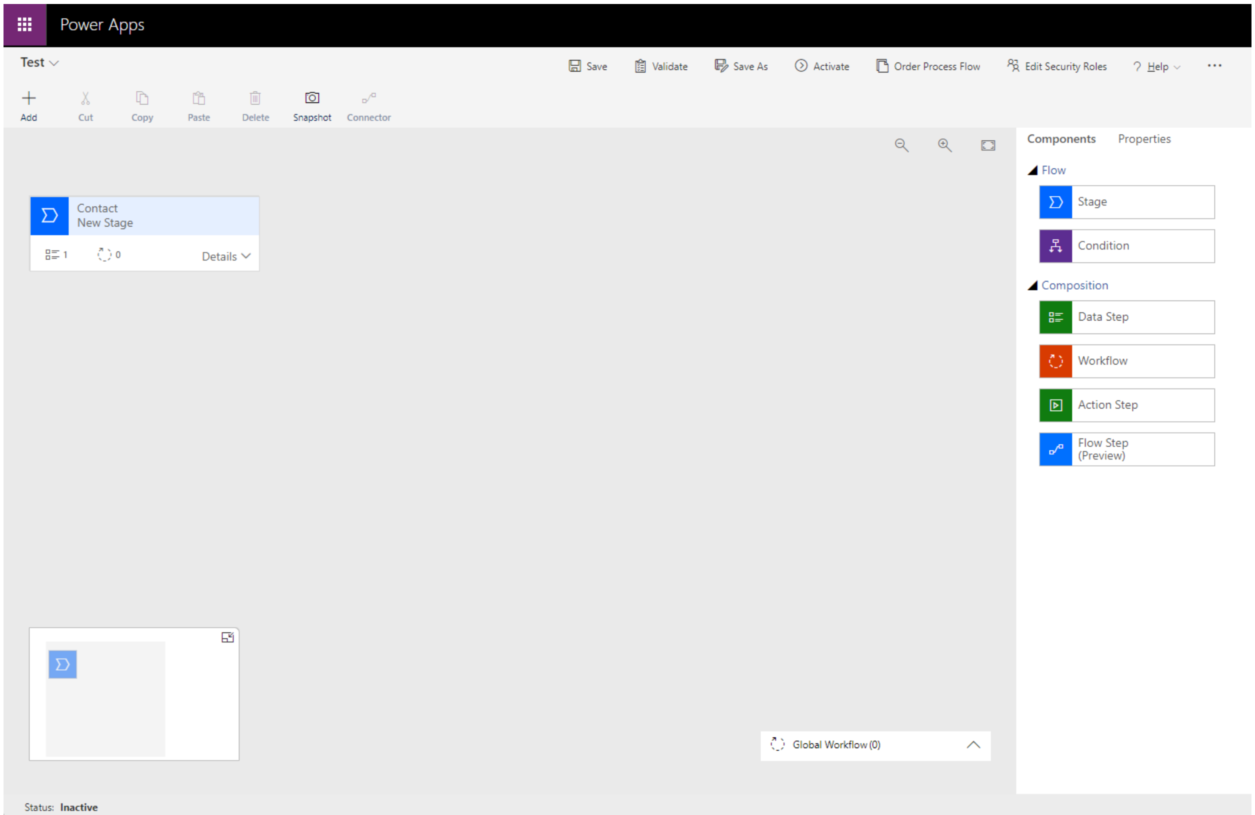
BPFs must be created inside an unmanaged solution. Navigate to your Maker Portal and open your unmanaged solution that you wish to add your BPF to. We recommend creating your own solution for this rather than making edits directly in the "Default" solution.

To create a new BPF, open your unmanaged solution and ***click*** **New** in the ribbon button. Then navigate to **Automation -> Process -> Business process flow**.

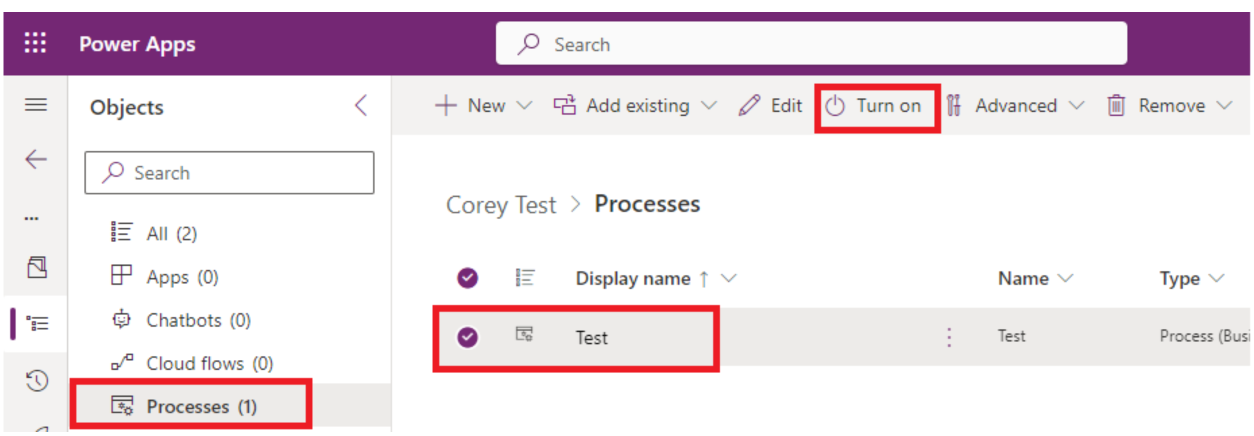


You will be presented with the BPF creation window, which asks you to name your new process and select the table (entity) to apply it to. Tables can have more than one process, but only one process can be run against an individual record at a time.

Once you have named your BPF and selected the table to create it against, ***click* Create**. This will open a new tab in your browser with the BPF editor. From here you can create and name stages and add steps.

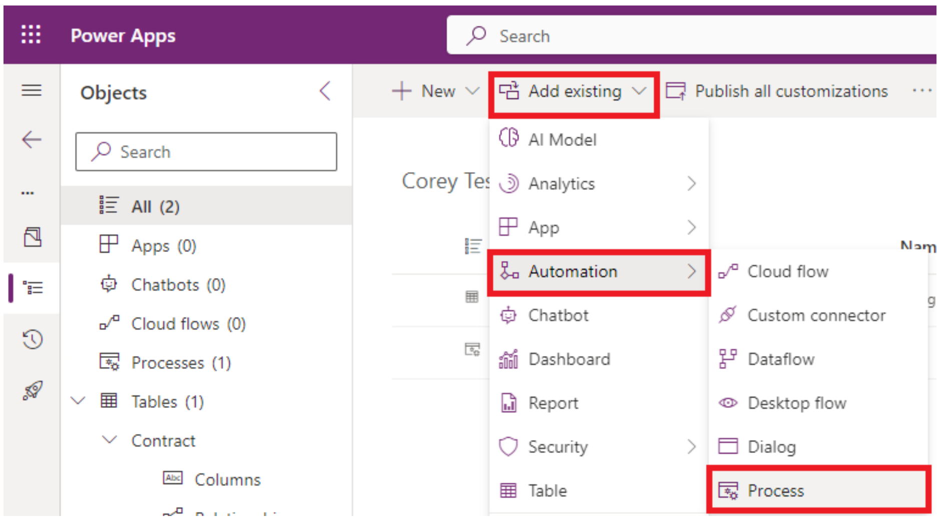


After you have saved your new BPF you will need to turn it on. Navigate back to your unmanaged solution and your new BPF should appear under **Processes**. ***Select*** your BPF and **click** the **Turn On** button at the top of the screen. Finally, be sure to **Publish Changes**.

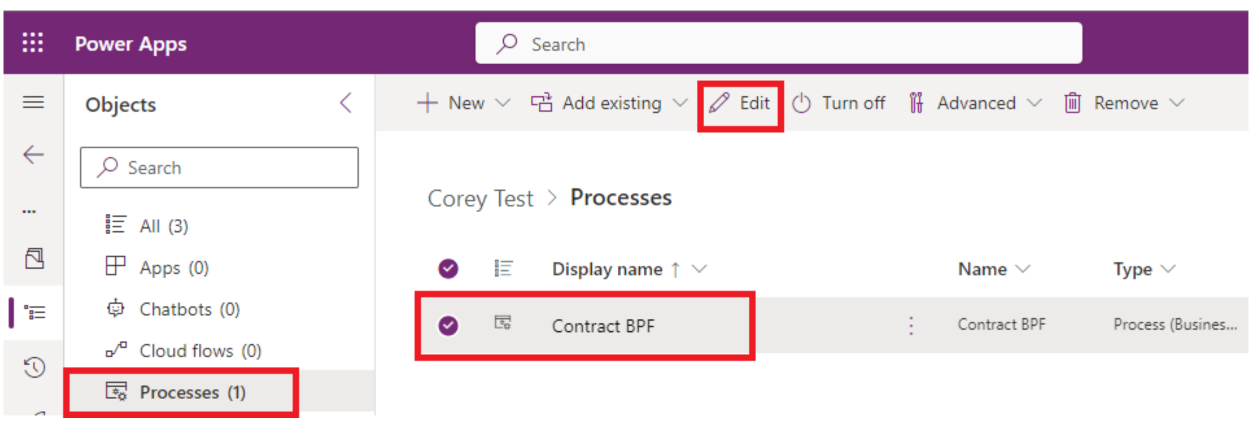


EDITING EXISTING BUSINESS PROCESS FLOWS

If you want to edit an existing process flow, you will need to do so through the Maker Portal. Navigate to your Maker Portal and open the unmanaged solution which contains the BPF you want to edit. If the BPF only exists in a managed solution, you can add it to your unmanaged solution by opening your unmanaged solution and clicking the **Add existing** action, then navigation to **Automation -> Process**.



You will be presented with a list of all existing processes within your environment. Find the one you want to edit and add it to your solution. Now you can select this process from within your unmanaged solution and make alterations to it.



Be sure to save and publish after making any alterations.