

# Admins designate SharePoint custom form Makers

*Austin Laugesen, Alan Castellanos Moreno*

# Admins designate SharePoint custom form Makers

## Problem

Enterprises using SharePoint custom form designated environments want to restrict resource creation to just custom forms.

- *Shell* deems the absence of this capability as a platform adoption blocker.
- Shell is used to SharePoint + InfoPath and InfoPath resources were created in a 'isolated' environment
- By default, custom forms save to default environment where everyone is a maker and can make non-custom forms.

Austin Laugesen

## Proposal

Use Dataverse RBAC to:

- i. Distinguish SharePoint Custom form from Canvas apps
- ii. Identify Makers w/ Custom form privileges (subset of Env. Maker privileges).

- This relies on RBAC constructs available to customers.
- This follows guidance from Dataverse SMEs (e.g. Paul Liew).
- Custom entity is a vehicle for distinguishing RBAC from 'normal canvas apps' and 'custom forms'.
- Canvas apps privileges still allow custom form creation.

N/A

## Plan

Publish custom solution w/ MSFT publisher.

PA RP recognizes SPO custom form privileges in Dataverse.

- When user creates/updates a SharePoint custom form, RP will confirm user has either SharePoint custom form or canvas app entity create, read, update privileges.

Alan Castellanos Moreno

## **Problem**

Enterprises using SharePoint custom form designated environments want to restrict resource creation to just custom forms.

## **Problem** What is our current experience?

- SharePoint users with 'edit' permissions in SharePoint sites/lists can create SharePoint custom forms in default environment.
- To address a Shell Oil Co. adoption blocker, Power Apps enabled Admins to designate an environment, other than default, where SharePoint custom forms can be saved.
  - Documentation to [Designate SharePoint custom form environment](#)
- Users with Environment Maker privileges can build any Power Platform resource (flow, arbitrary canvas app) in the SharePoint custom form designated environment.

## **Problem** What are customers telling us?

- Shell Oil Co. wants to enable a world where (the absence of the following features is an adoption blocker):
  - only SharePoint custom forms exist in the SharePoint custom form designated environment.
  - Makers don't see SharePoint custom form designated environments in Maker Portal.
  - [Proposal - SharePoint custom form environment discovery](#).

## **Problem** Who will this help, and how will we know?

- Admins will feel more comfortable deploying Power Apps when we introduce isolating custom form creation to the designated custom form environment.
  - Large enterprises (20,000 MAU) using a governance feature will increase.
  - This accrues to a core Enterprise trust workstream OKR.

# Proposal

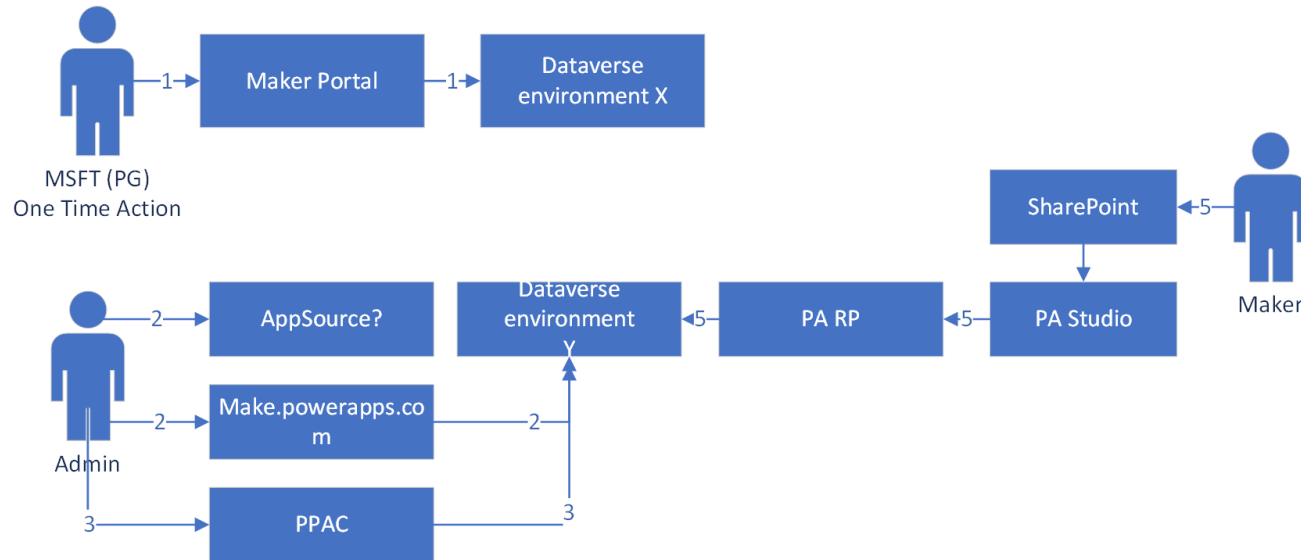
Use Dataverse RBAC to:

i. Distinguish SharePoint Custom form from Canvas apps

ii. Identify Makers w/ Custom form privileges (subset of Env. Maker privileges).

## Proposal

### How should the experience work overall?



1. Microsoft (PG) publishes a custom solution with SharePoint custom form Maker role w/ SPO custom form entity. *(The platform already supports this.)*
2. Admin imports Microsoft published custom solution to their SharePoint custom form designated environment.
3. Admin assigns SharePoint custom form Maker security roles to users.
4. SharePoint Custom form Makers (w/o) 'Environment Maker' role do not see SPO designated form env in Maker Portal.
5. Makers enter custom form authoring experiences via SharePoint. *(The platform already supports this.)*



## Proposal

## Step-by-step experience

Use case 1: Microsoft (PG) publishes a custom solution with SharePoint custom form Maker role w/ SPO custom form entity. (*The platform supports this.*)

*The following screenshots are for illustration. They must be followed with the Microsoft publisher account.*

## Proposal

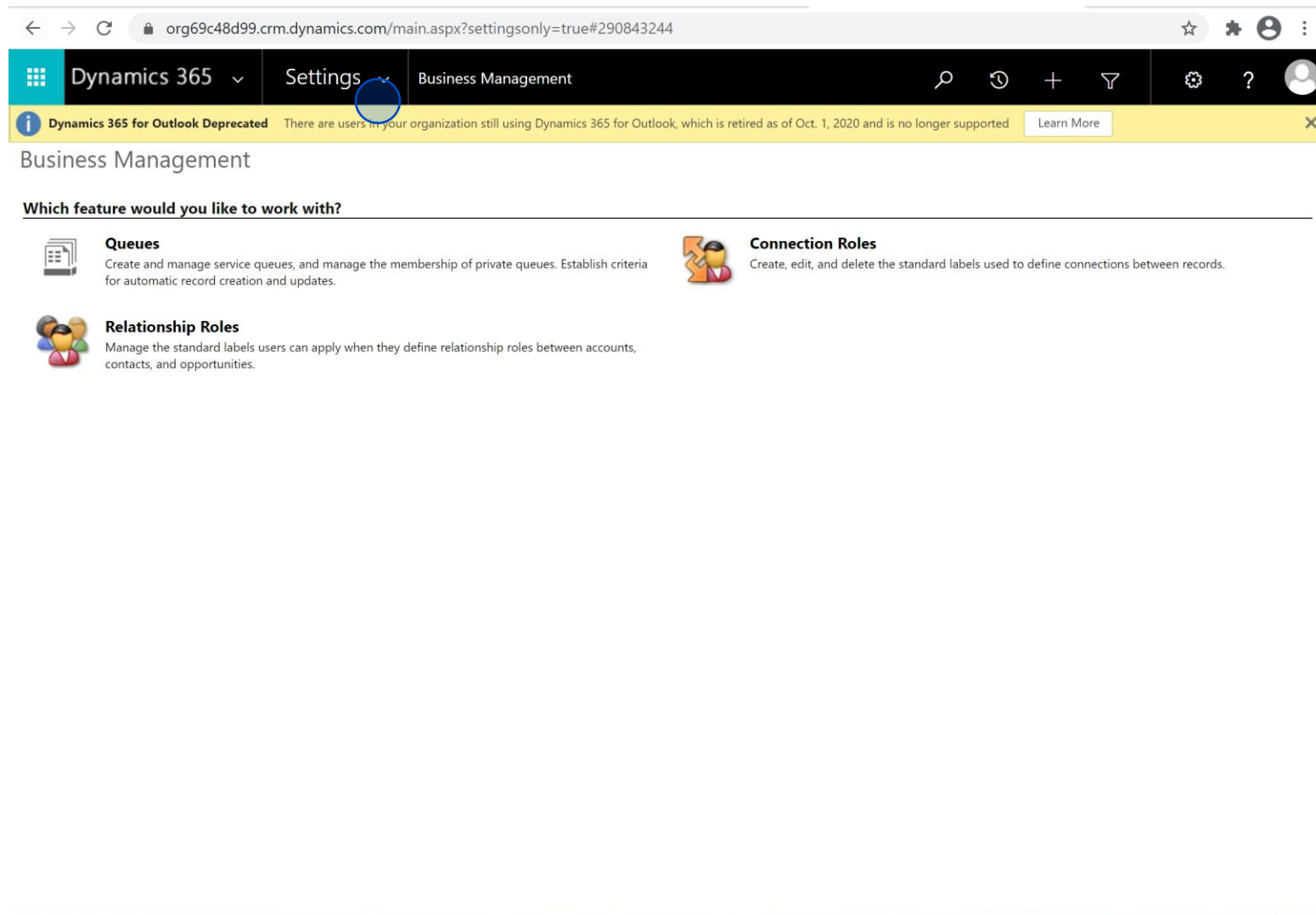
### Step-by-step experience

Use case 1.a: Create a custom entity 'SharePoint Custom Form'.

*This entity can be used to distinguish custom forms from 'normal' canvas apps.*

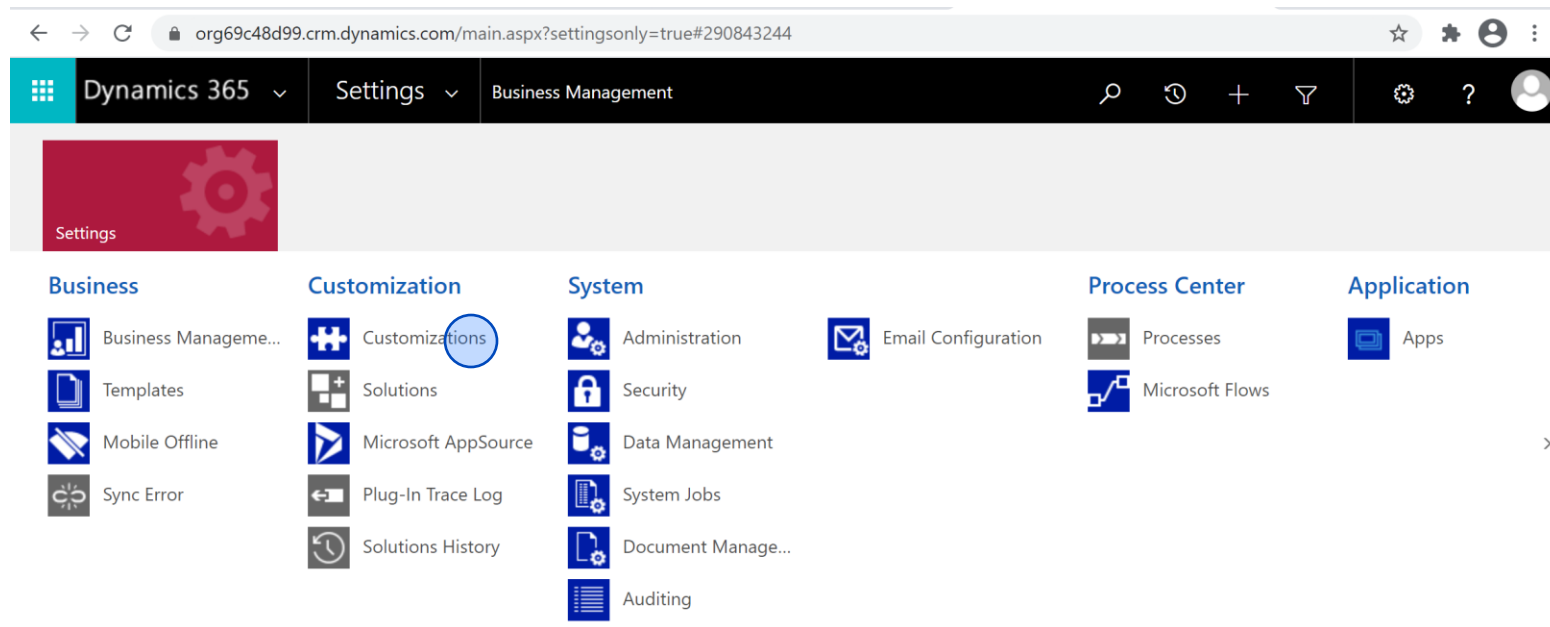
# Proposal

## Step-by-step experience



# Proposal

## Step-by-step experience



# Proposal

## Step-by-step experience

Dynamics 365

Settings

Customizations


Dynamics 365 for Outlook Deprecated

There are users in your organization still using Dynamics 365 for Outlook, which is retired as of Oct. 1, 2020 and is no longer supported


Learn More

Customization


Which feature would you like to work with?




**Customize the System**  
Create, modify, or delete components in your organization. Components include entities, fields, relationships, forms, reports, processes, and others.




**Solutions**  
Create, modify, export, or import a managed or unmanaged solution.



**Themes**  
Adjust your organization's colors. Create, change, or delete themes that are used in your organization.



**Publishers**  
Create, modify or delete a solution publisher.



**Developer Resources**  
View information or download files that help you develop applications and extensions for Microsoft Dynamics 365.

# Proposal

## Step-by-step experience

org69c48d99.crm.dynamics.com/main.aspx?settingsonly=true#870458249

Solution: Default Solution - Microsoft Dynamics 365 - Google Chrome

org69c48d99.crm.dynamics.com/tools/solution/edit.aspx?id=%7bfd140aaf-4df4-11dd-bd17-0019b9312238%7d#

Power Apps

Dynamics 365 for Outlook Deprecated

There are users in your organization still using Dynamics 365 for Outlook, which is retired as of Oct. 1, 2020 and is no longer supported. [Learn More](#)

File Save and Close Show Dependencies Export Solution Translations Publish All Customizations Actions Help

Solution: Default Solution

Information

Solution Default Solution

Entities

- Account
- Action Card Action ...
- Activity
- Address
- AI Builder Dataset
- AI Builder Dataset F...
- AI Builder Dataset R...
- AI Builder Datasets ...
- AI Builder File
- AI Builder File Attac...
- AI Configuration AI ...
- AI Form Processing ...
- AI Model AI Model
- AI Object Detection...
- AI Object Detection...
- AI Object Detection...
- AI Object Detection...
- AI Template AI Temp...
- Analysis Component
- Analysis Job
- Analysis Result
- Analysis Result Detail
- ApplicationUser
- Appointment

Component Type All

New Delete Publish Show Dependencies Solution Layers Managed Properties

	Display Name ↑	Name	Type	State	Customizable...	Des ↻
			Solution Component ...	Managed	False	
	accessChecker_closeDialog.js	accessChecker_closeDi...	Web Resource	Managed	True	
	accessChecker_icon	accessChecker_icon	Web Resource	Managed	False	
	accessChecker_openDialog.js	accessChecker_openD...	Web Resource	Managed	True	
	accesscontrolpolicy (bot)	accesscontrolpolicy (b...	Solution Component ...	Managed	False	
	Account	account	Entity	Managed	True	Busin
	Account Manager	Account Manager	Connection Role	Managed	True	
	Account Reconnect	Account Reconnect	Email Template	Managed	True	Use tl
	Account Summary	Account Summary	Report (Reporting Ser...	Managed	True	View

1 - 50 of 5878 (0 selected)

Page 1

# Proposal

## Step-by-step experience

org69c48d99.crm.dynamics.com/main.aspx?settingsonly=true#870458249

Solution: Default Solution - Microsoft Dynamics 365 - Google Chrome

org69c48d99.crm.dynamics.com/tools/solution/edit.aspx?id=%7bfd140aaf-4df4-11dd-bd17-0019b9312238%7d#

Power Apps

Dynamics 365 for Outlook Deprecated

There are users in your organization still using Dynamics 365 for Outlook, which is retired as of Oct. 1, 2020 and is no longer supported. [Learn More](#)

File Save and Close Show Dependencies Export Solution Translations Publish All Customizations Actions Help

Solution: Default Solution

Information

Solution Default Solution

Entities

- Account
- Action Card Action ...
- Activity
- Address
- AI Builder Dataset
- AI Builder Dataset F...
- AI Builder Dataset R...
- AI Builder Datasets ...
- AI Builder File
- AI Builder File Attac...
- AI Configuration AI ...
- AI Form Processing ...
- AI Model AI Model
- AI Object Detection...
- AI Object Detection...
- AI Object Detection...
- AI Object Detection...
- AI Template AI Temp...
- Analysis Component
- Analysis Job
- Analysis Result
- Analysis Result Detail
- ApplicationUser
- Appointment

Component Type All

New Delete Publish Show Dependencies Solution Layers Managed Properties

Type	State	Customizable...	Des
Solution Component ...	Managed	False	
Checker_closeDi...	Web Resource	Managed	True
Checker_icon	Web Resource	Managed	False
Checker_openD...	Web Resource	Managed	True
controlpolicy (b...	Solution Component ...	Managed	False
nt	Entity	Managed	True Busin
nt Manager	Connection Role	Managed	True
nt Reconnect	Email Template	Managed	True Use t
nt Summary	Report (Reporting Ser...	Managed	True View

Page 1

# Proposal Step-by-step experience

Entity: New - Google Chrome

org69c48d99.crm.dynamics.com/tools/systemcustomization/entities/manageentity.aspx?appSolutionId=%7bFD140AAF-4DF4-11DD-BD17-0019B9312238%7d

Power Apps

File Save and Close Help

Working on solution: Default Solution

Which feature

New Information

Common

- Information
- Forms
- Views
- Charts
- Fields
- Keys
- 1:N Relationships
- N:1 Relationships
- N:N Relationships
- Business Rules

Entity Definition

General Primary Field

Display Name \*

Plural Name \*

Name \*

Primary Image

Color

Description

☐ Virtual Entity

Data Source [None]

Ownership \* User or Team

☐ Define as an activity entity.

☒ Display in Activity Menus

Areas that display this entity

☐ Training ☐ Settings

Process

☐ Business process flows (fields will be created) +

Communication & Collaboration

- ☐ Feedback +
- ☐ Notes (includes attachments) +
- ☐ Activities +
- ☐ Connections +
- ☐ Sending email (If an email field does not exist, one will be created) +
- ☒ Mail merge
- ☐ Document management
- ☐ Access Teams
- ☐ Queues +

☐ Automatically move records to the owner's default queue when a record is created or assigned.



# Proposal Step-by-step experience

Entity: New - Google Chrome

org69c48d99.crm.dynamics.com/tools/systemcustomization/entities/manageentity.aspx?appSolutionId=%7bFD140AAF-4DF4-11DD-BD17-0019B9312238%7d

Power Apps

File Save and Close

Working on solution: Default Solution

Which feature

Common

- Information
- Forms
- Views
- Charts
- Fields
- Keys
- 1:N Relationships
- N:1 Relationships
- N:N Relationships
- Business Rules

Entity Definition

Display Name \* SharePoint custom form

Plural Name \* SharePoint custom forms

Name \* new\_sharepointcustomform

Primary Image

Color

Description

Virtual Entity

Data Source [None]

Ownership \* User or Team

Define as an activity entity.

Display in Activity Menus

Areas that display this entity

Training Settings

Process

Business process flows (fields will be created) †

Communication & Collaboration

- Feedback †
- Notes (includes attachments) †
- Activities †
- Connections †
- Sending email (If an email field does not exist, one will be created) †
- Mail merge
- Document management
- Access Teams
- Queues †

Automatically move records to the owner's default queue when a record is created or assigned.

Make sure Ownership is 'User or Team'

# Proposal Step-by-step experience

org69c48d99.crm.dynamics.com/biz/roles/edit.aspx?\_CreateFromId=%7baa6cc300-2088-eb11-a812-000d3a9b10cb%7d&\_CreateFromType=710...

Power Apps

File Save and Close Actions Help

Security Role: SharePoint Custom Form maker Working on solution: SharePoint custom form maker

Details	Core Records	Sales	Service	Business Management	Service Management	Customization	Missing Entities	Business Process Flows	Custom Entities
RevokeInheritedAccessRecordsTracker									
Rich Text Attachment									
RPA Sessions									
Search provider									
Search Telemetry									
Service Configuration									
Setting Definition									
SharePoint custom form									
SLA KPI									
Solution Component Data Source									
Solution Component Summary									
Solution Health Rule									
Solution Health Rule Argument									
Solution Health Rule Set									
Solution History									
Solution History Data Source									
StageSolutionUpload									
Sync Flow Errors									
TeamMobileOfflineProfileMembership									
UserMobileOfflineProfileMembership									
Workflow Binary									

Key

- None Selected
- User
- Business Unit
- Parent: Child Business Units
- Organization

See the SharePoint custom form entity appears in 'Custom Entities' tab.

Use case 1.b: Create a solution (and add custom security role and custom entity)

# Proposal

## Step-by-step experience

The screenshot shows the Microsoft Power Apps 'Solutions' page. The 'New solution' button is circled in blue. The page displays a list of solutions with the following columns: Display name, Name, Created, Version, and Managed externally. The solutions listed are:

Display name	Name	Created	Version	Managed externally
SharePoint custom form maker	SharePointcu...	3/18/2021	1.0.0.0	
Center of Excellence - Core Components	CenterofExce...	2/17/2021	1.89	
Power Apps Checker Base	msdyn_Powe...	12/19/2020	1.2.0.34	
Power Apps Checker	msdyn_Powe...	12/19/2020	1.2.0.34	
Contextual Help Base	msdyn_Cont...	12/19/2020	1.0.0.12	
Contextual Help	msdyn_Cont...	12/19/2020	1.0.0.12	
Common Data Services Default Solution	Crb4d19	12/19/2020	1.0.0.0	
Default Solution	Default	12/19/2020	1.0	

Create a solution

# Proposal

## Step-by-step experience

make.powerapps.com/environments/Default-d17715d1-8ff9-43aa-990f-7de0141c3058/solutions

Contoso Electronics Power Apps Search

Environment: Contoso (default)

+ New solution ← Import Open AppSource Publish all customizations ... All Search

### Solutions

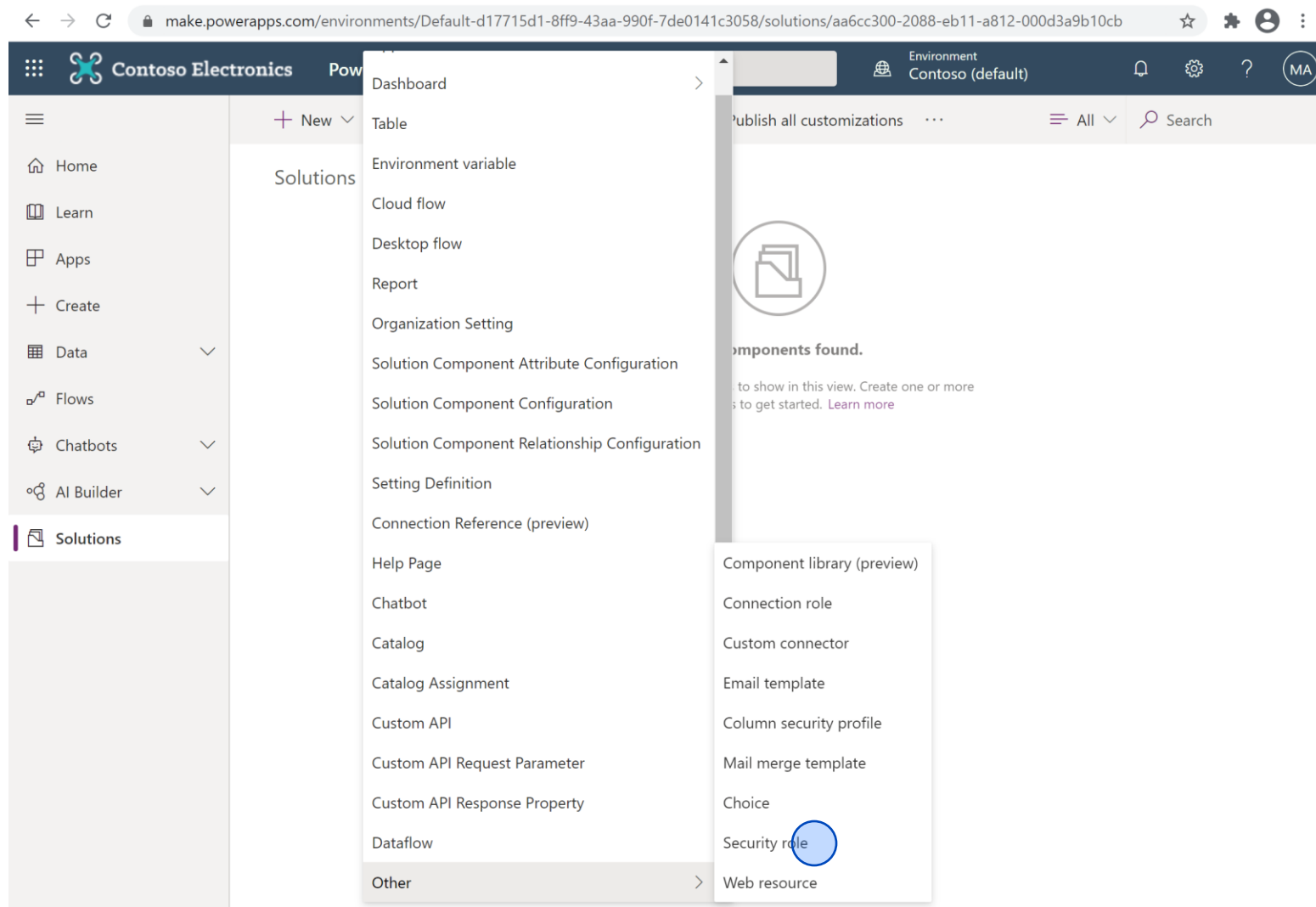
Display name	Name	Created ↓	Version	Managed external...
SharePoint custom form maker	SharePointcu...	3/18/2021	1.0.0.0	🔒
Center of Excellence - Core Components	CenterofExce...	2/17/2021	1.89	🔒
Power Apps Checker Base	msdyn_Powe...	12/19/2020	1.2.0.34	🔒
Power Apps Checker	msdyn_Powe...	12/19/2020	1.2.0.34	🔒
Contextual Help Base	msdyn_Cont...	12/19/2020	1.0.0.12	🔒
Contextual Help	msdyn_Cont...	12/19/2020	1.0.0.12	🔒
Common Data Services Default Solution	Crb4d19	12/19/2020	1.0.0.0	🔒
Default Solution	Default	12/19/2020	1.0	🔒

https://make.powerapps.com/environments/Default-d17715d1-8ff9-43aa-990f-7de0141c3058/solutions

Add a security role to the solution

# Proposal

## Step-by-step experience



# Proposal

## Step-by-step experience

← → ↺ org69c48d99.crm.dynamics.com/biz/roles/edit.aspx?appSolutionId={aa6cc300-2088-eb11-a812-000d3a9b10cb}&id=b5fee653-2088-eb11-a812... ☆ ⚙️ 👤 ⋮

Power Apps

File Save and Close Actions Help

**Security Role: SharePoint Custom Form maker** Working on solution: SharePoint custom form maker

Details Core Records Sales Service Business Management Service Management Customization Missing Entities Business Process Flows Custom **Entities**

Role Name \* SharePoint Custom Form maker Business Unit \* org69c48d99

**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 Direct User (Basic) access level and ▾

**Key**

○ None Selected	👤 User	🏢 Business Unit	🟢 Parent: Child Business Units	🟢 Organization
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Name the security role

# Proposal Step-by-step experience

org69c48d99.crm.dynamics.com/biz/roles/edit.aspx?\_CreateFromId=%7baa6cc300-2088-eb11-a812-000d3a9b10cb%7d&\_CreateFromType=710...

Power Apps

File Save and Close Actions Help

**Security Role: SharePoint Custom Form maker** Working on solution: SharePoint custom form maker

Details	Core Records	Sales	Service	Business Management	Service Management	Customization	Missing Entities	Business Process Flows	Custom Entities
RevokeInheritedAccessRecordsTracker									
Rich Text Attachment									
RPA Sessions									
Search provider									
Search Telemetry									
Service Configuration									
Setting Definition									
SharePoint custom form									
SLA KPI									
Solution Component Data Source									
Solution Component Summary									
Solution Health Rule									
Solution Health Rule Argument									
Solution Health Rule Set									
Solution History									
Solution History Data Source									
StageSolutionUpload									
Sync Flow Errors									
TeamMobileOfflineProfileMembership									
UserMobileOfflineProfileMembership									
Workflow Binary									

**Key**

- None Selected
- User
- Business Unit
- Parent: Child Business Units
- Organization

Set permissions for the SharePoint custom form entity.



# Proposal

## Step-by-step experience

The screenshot shows the Microsoft Power Apps interface. The top navigation bar includes the 'Contoso Electronics' logo, 'Power Apps', a search bar, and the environment 'Contoso (default)'. The left sidebar shows navigation options: Home, Learn, Apps, Create, Data, Flows, Chatbots, AI Builder, and Solutions (which is currently selected). The main area displays the 'Solutions' page for 'SharePoint custom form maker'. At the top of this area is a toolbar with buttons: '+ New', '+ Add existing' (circled in blue), 'Edit', 'Remove', 'Publish', and a menu icon. Below the toolbar is a table of solutions. The table has columns: 'Display name', 'Name', 'Type', 'Managed...', 'Modified', and 'Owner'. One solution is listed: 'SharePoint Custom Form m...' with a three-dot menu icon to its right. This menu is open, showing options: 'Edit', 'Remove', 'Publish', 'Add required components', 'Managed properties', 'Show dependencies', and 'See solution layers'.

Display name	Name	Type	Managed...	Modified	Owner
SharePoint Custom Form m...	SharePoint Custom Form maker	Security Role	🔒	13 sec ago	-

Add the custom entity to the solution

# Proposal

## Step-by-step experience

← → ↺ 🔒 make.powerapps.com/environments/Default-d17715d1-8ff9-43aa-990f-7de0141c3058/solutions/aa6cc300-2088-eb11-a812-000d3a9b10cb ☆ ⚙️ 👤 ⋮

⋮

Add existing tables

✕

Select tables from other solutions or tables that aren't in solutions yet. Adding tables that aren't already in solutions will also add them to Common Data Service.

🔍 Table ▾ share ✕

Display name ▾	Name	Managed...	Owner	Status
Document Location	sharepointdocumentlocation	🔒	-	-
SharePoint custom form	new_sharepointcustomform	🔒	-	-
Sharepoint Document	sharepointdocument	🔒	-	-
SharePoint Site	sharepointsite	🔒	-	-

Next

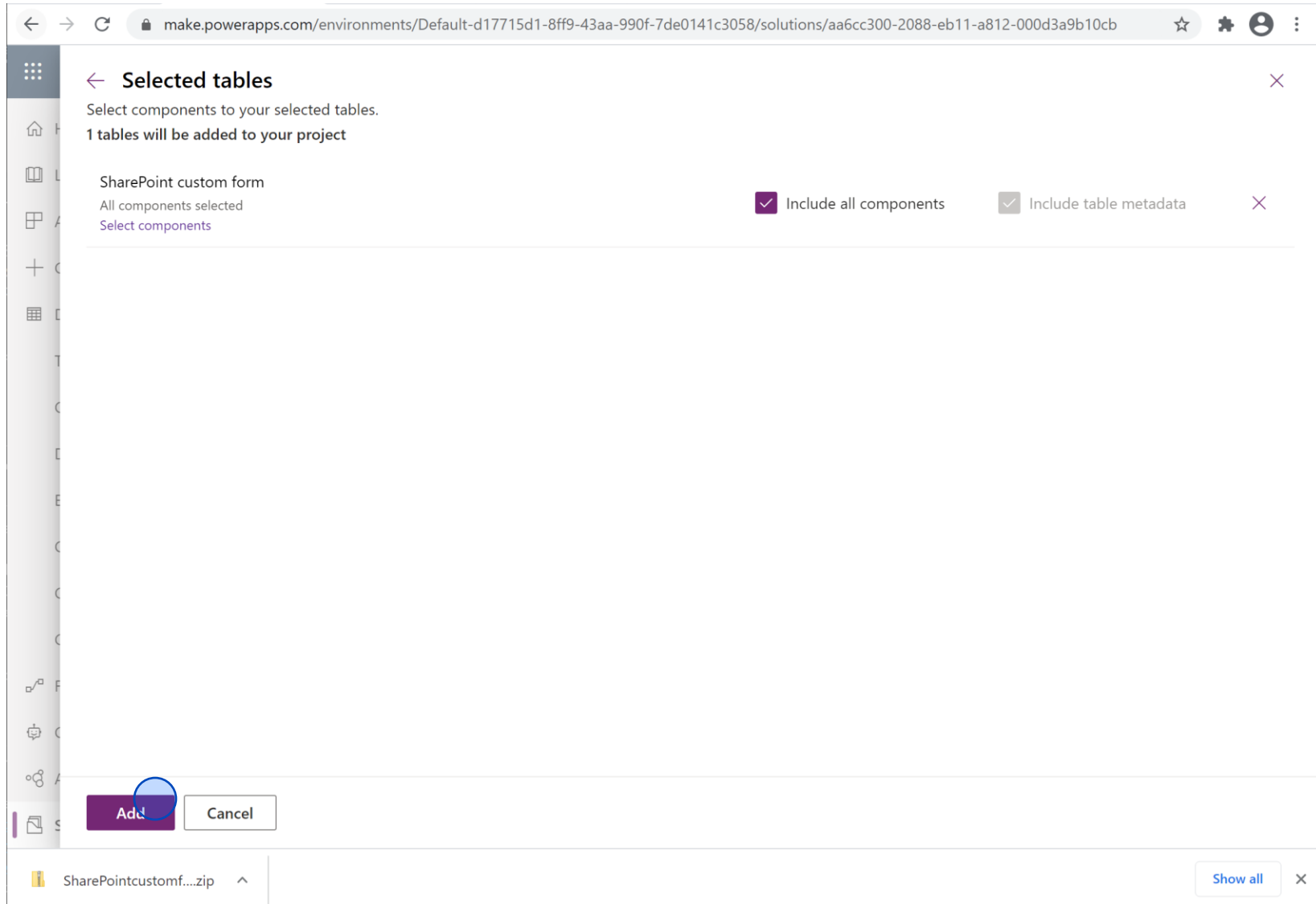
Cancel

📁 SharePointcustomf....zip ^

Show all ✕

# Proposal

## Step-by-step experience



# Proposal

## Step-by-step experience

The screenshot shows the Microsoft Power Apps interface. The left sidebar contains navigation options: Home, Learn, Apps, Create, Data (selected), Tables, Choices, Dataflows, Export to data lake, Connections, Custom Connectors, Gateways, Flows, Chatbots, AI Builder, and Solutions. The main area displays the 'Solutions' page for 'SharePoint custom form maker'. At the top, there are buttons for '+ New', '+ Add existing', 'Delete', 'Export', and 'Publish all customizations'. Below this is a table listing the solution components.

Display name	Name	Type	Managed...	Modified	Owner	Status
SharePoint custom form	new_sharepointcusto	Table	🔒	17 min ago	-	-
SharePoint Custom Form ...	SharePoint Custom Fc	Security Role	🔒	14 min ago	-	-

At the bottom of the screen, there is a file explorer bar showing 'SharePointcustomf....zip' and a 'Show all' button.

Observe – the required solution components are in the solution: custom entity and custom security role.

Use case 1.c: Publish the solution and export the solution

# Proposal

## Step-by-step experience

The screenshot shows the Microsoft Power Apps interface. The top navigation bar includes the 'Contoso Electronics' logo, 'Power Apps' text, a search bar, and the environment 'Contoso (default)'. The left sidebar contains navigation links: Home, Learn, Apps, Create, Data, Flows, Chatbots, AI Builder, and Solutions (which is currently selected). The main area displays a list of solutions under the heading 'Solutions'. A context menu is open for the 'SharePoint custom form maker' solution, with the 'Export' option highlighted by a blue circle. The table of solutions is as follows:

Display name	Name	Created ↓	Version	Managed externa...
SharePoint custom form maker	SharePointcu...	3/18/2021	1.0.0.0	🔒
Center of Excellence - Core Components		2/17/2021	1.89	🔒
Power Apps Checker Base		2/19/2020	1.2.0.34	🔒
Power Apps Checker		2/19/2020	1.2.0.34	🔒
Contextual Help Base		2/19/2020	1.0.0.12	🔒
Contextual Help		2/19/2020	1.0.0.12	🔒
Common Data Services Default Solution		2/19/2020	1.0.0.0	🔒
Default Solution		2/19/2020	1.0	🔒

# Proposal Step-by-step experience

make.powerapps.com/environments/Default-d17715d1-8ff9-43aa-990f-7de0141c3058/solutions

Contoso Electronics Power Apps Search

Environ Conto

+ New solution Edit Delete Export Solution checker Show dependen

### Solutions

	Display name	Name	Created ↓
✓	SharePoint custom form maker	SharePointcu...	3/18/2021
	Center of Excellence - Core Components	CenterofExce...	2/17/2021
	Power Apps Checker Base	msdyn_Powe...	12/19/2020
	Power Apps Checker	msdyn_Powe...	12/19/2020
	Contextual Help Base	msdyn_Cont...	12/19/2020
	Contextual Help	msdyn_Cont...	12/19/2020
	Common Data Services Default Solution	Crb4d19	12/19/2020
	Default Solution	Default	12/19/2020

### Before you export

**Publish all changes**

If you made changes to this solution that you'd like to export, publish them now. [Learn more](#)

**Publish**

**Check for issues**

You haven't checked this solution yet. We recommend running the solution checker to rule out performance and stability issues. [Learn more](#)

**Run**

**Next** **Cancel**

# Proposal

## Step-by-step experience

←

→

↺

make.powerapps.com/environments/Default-d17715d1-8ff9-43aa-990f-7de0141c3058/solutions/aa6cc300-2088-eb11-a812-000d3a9b10cb

☆ ⚙️ 👤 ⋮

⋮

Contoso Electronics

Power Apps

🔍 Search

Environment  
Contoso (default)

🔔 ⚙️ ? MA

☰

Home

Learn

Apps

+

Create

📊 Data

📄 Flows

🗣️ Chatbots

🧠 AI Builder

📁 Solutions

+ New

+ Add existing

✎ Edit

🗑 Remove

📄 Publish

⋮

All

🔍 Search

✔️ Published customizations successfully.

Solutions > SharePoint custom form maker

✔️	Display name	Name	Type	Managed...	Modified	Owner
✔️	SharePoint Custom Form m...	SharePoint Custom Form maker	Security Role	🔒	39 sec ago	-



# Proposal Step-by-step experience

make.powerapps.com/environments/Default-d17715d1-8ff9-43aa-990f-7de0141c3058/solutions

Contoso Electronics Power Apps Search

New solution Edit Delete Export Solution checker Show dependencies

### Solutions

Display name	Name	Created ↓
✓ SharePoint custom form maker	SharePointcu...	3/18/2021
Center of Excellence - Core Components	CenterofExce...	2/17/2021
Power Apps Checker Base	msdyn_Powe...	12/19/2020
Power Apps Checker	msdyn_Powe...	12/19/2020
Contextual Help Base	msdyn_Cont...	12/19/2020
Contextual Help	msdyn_Cont...	12/19/2020
Common Data Services Default Solution	Crb4d19	12/19/2020
Default Solution	Default	12/19/2020

### Export this solution

Version number\* ⓘ  
Current version 1.0.0.0  
1.0.0.1

**Export as**

☒ Managed (recommended) ⓘ  
The solution is moving to a test or production environment. [Learn more](#)

☐ Unmanaged  
The solution is moving to another development environment or source control. [Learn more](#)

Export Cancel

## Proposal Step-by-step experience

The screenshot shows the Microsoft Power Apps interface. The left sidebar contains navigation links: Home, Learn, Apps, Create, Data, Flows, Chatbots, AI Builder, and Solutions (highlighted). The top navigation bar includes the 'Contoso Electronics' logo, 'Power Apps' text, a search bar, and environment information ('Environment: Contoso (default)'). Below the navigation bar, a toolbar offers actions: '+ New solution', 'Edit', 'Delete', 'Export', 'Solution checker', and 'Show dependencies'. A green notification banner at the top of the main content area states: 'Solution "SharePoint custom form maker" exported successfully and will download soon.' The main content area displays a table of solutions.

Display name	Name	Created ↓	Version	Managed externa...
✓ SharePoint custom form maker	SharePointcu...	3/18/2021	1.0.0.1	🔒
Center of Excellence - Core Components	CenterofExce...	2/17/2021	1.89	🔒
Power Apps Checker Base	msdyn_Powe...	12/19/2020	1.2.0.34	🔒
Power Apps Checker	msdyn_Powe...	12/19/2020	1.2.0.34	🔒
Contextual Help Base	msdyn_Cont...	12/19/2020	1.0.0.12	🔒
Contextual Help	msdyn_Cont...	12/19/2020	1.0.0.12	🔒
Common Data Services Default Solution	Crb4d19	12/19/2020	1.0.0.0	🔒
Default Solution	Default	12/19/2020	1.0	🔒

At the bottom of the interface, a download bar shows a file icon, the filename 'SharePointcustomf....zip', and a 'Show all' button.

The exported solution is the solution customers will need to import to get the SharePoint custom form entity and SharePoint custom form maker security role.

Use case 2: Admin imports Microsoft published custom solution to their SharePoint custom form designated environment.

# Proposal

## Step-by-step experience

make.powerapps.com/environments/37309613-5c63-4a83-905e-89733fa1774c/solutions

Contoso Electronics Power Apps Search Environment new\_target\_env\_2

+ New solution ← Import Open AppSource Publish all customizations ... All Search

### Solutions

Display name	Name	Created ↓	Version	Managed externa...
Power Apps Checker Base	msdyn_Powe...	2/27/2021	1.2.0.34	🔒
Power Apps Checker	msdyn_Powe...	2/27/2021	1.2.0.34	🔒
Contextual Help Base	msdyn_Cont...	2/27/2021	1.0.0.12	🔒
Contextual Help	msdyn_Cont...	2/27/2021	1.0.0.12	🔒
Common Data Services Default Solution	Cr686ac	2/27/2021	1.0.0.0	🔒
Default Solution	Default	2/27/2021	1.0	🔒

SharePointcustomf....zip Show all X

In practice, an admin must select an environment they set as the 'designated SharePoint custom form environment' and the environment must have Dataverse.

# Proposal

## Step-by-step experience

The screenshot shows the Microsoft Power Apps web interface. The browser address bar displays the URL: `make.powerapps.com/environments/37309613-5c63-4a83-905e-89733fa1774c/solutions`. The page header includes the 'Contoso Electronics' logo, 'Power Apps' text, and a search bar. The left sidebar contains navigation links: Home, Learn, Apps, Create, Data (with a sub-menu arrow), Tables, Choices, Dataflows, Export to data lake, Connections, Custom Connectors, Gateways, Flows, Chatbots, AI Builder, and Solutions (which is currently selected). The main content area shows the 'Solutions' page with a toolbar containing 'New solution', 'Import', and 'Open AppSo'. Below the toolbar is a table of solutions:

Display name
Power Apps Checker Base
Power Apps Checker
Contextual Help Base
Contextual Help
Common Data Services Default Solution
Default Solution

An 'Import a solution' dialog box is overlaid on the right side of the screen. It has a title bar with a close button (X). The dialog contains the following text and elements:

- Select a file**
- Drag and drop or browse for the solution file to import.
- A 'Browse' button, which is highlighted with a blue circle in the image.
- The text 'No file chosen' next to the 'Browse' button.
- At the bottom of the dialog are two buttons: 'Next' and 'Cancel'.

At the bottom of the browser window, a file explorer bar shows a file named 'SharePointcustomf....zip' with an upward arrow icon. To the right of this bar is a 'Show all' button and a close button (X).

# Proposal

## Step-by-step experience

←

→

↺

make.powerapps.com/environments/37309613-5c63-4a83-905e-89733fa1774c/solutions

☆

⚙

👤

⋮

⋮

Contoso Electronics

Power Apps

🔍 Search

🏠 Home

📖 Learn

📱 Apps

+ Create

📊 Data

Tables

Choices

Dataflows

Export to data lake

Connections

Custom Connectors

Gateways

📄 Flows

🗣 Chatbots

🧠 AI Builder

**📁 Solutions**

+ New solution

↶ Import

📁 Open AppSolution

Solutions

Display name
Power Apps Checker Base
Power Apps Checker
Contextual Help Base
Contextual Help
Common Data Services Default Solution
Default Solution

Import a solution

×

Select a file

Drag and drop or browse for the solution file to import.

Browse

SharePointcustomformmaker\_1\_0\_0\_1\_managed.zip

Next

Cancel

📁 SharePointcustomf....zip

⌵

Show all

×

# Proposal

## Step-by-step experience

The screenshot shows the Microsoft Power Apps interface. On the left is a navigation pane with a search bar and a list of categories: Home, Learn, Apps, Create, Data (with a sub-menu showing Tables, Choices, Dataflows, Export to data lake, Connections, Custom Connectors, Gateways), Flows, Chatbots, AI Builder, and Solutions. The 'Solutions' category is selected. The main area displays a list of solutions under the heading 'Solutions'. The list includes: Display name, Power Apps Checker Base, Power Apps Checker, Contextual Help Base, Contextual Help, Common Data Services Default Solution, and Default Solution. On the right, an 'Import a solution' dialog box is open, showing details for a solution named 'SharePointcustomformmaker'. The details include: Name (SharePointcustomformmaker), Type (Managed), Publisher (CDS Default Publisher), Version (1.0.0.1), and Patch (No). At the bottom of the dialog are 'Import' and 'Cancel' buttons. A blue circle highlights the 'Import' button. The browser address bar at the top shows the URL: make.powerapps.com/environments/37309613-5c63-4a83-905e-89733fa1774c/solutions. The bottom status bar shows a file named 'SharePointcustomf....zip' and a 'Show all' button.

make.powerapps.com/environments/37309613-5c63-4a83-905e-89733fa1774c/solutions

Contoso Electronics Power Apps Search

New solution Import Open AppSo

### Solutions

Display name
Power Apps Checker Base
Power Apps Checker
Contextual Help Base
Contextual Help
Common Data Services Default Solution
Default Solution

### Import a solution

Details

Name  
SharePointcustomformmaker

Type  
Managed

Publisher  
CDS Default Publisher

Version  
1.0.0.1

Patch  
No

Advanced settings ▾

Import Cancel

SharePointcustomf....zip Show all

# Proposal

## Step-by-step experience

The screenshot shows the Microsoft Power Apps interface. The browser address bar displays the URL: `make.powerapps.com/environments/37309613-5c63-4a83-905e-89733fa1774c/solutions`. The top navigation bar includes the 'Contoso Electronics' logo, 'Power Apps', a search bar, and the environment name 'new\_target\_env\_2'. The left sidebar contains navigation links: Home, Learn, Apps, Create, Data (with a sub-menu), Tables, Choices, Dataflows, Export to data lake, Connections, Custom Connectors, Gateways, Flows, Chatbots, AI Builder, and Solutions (which is currently selected). The main content area is titled 'Solutions' and features a table of existing solutions. Above the table, a red-bordered notification bar states: 'Currently importing solution "SharePoint custom form maker".' The table has columns for 'Display name', 'Name', 'Created', 'Version', and 'Managed external...'. The table lists six solutions, all created on 2/27/2021. At the bottom of the page, a file upload bar shows 'SharePointcustomf....zip' with a 'Show all' button and a close icon.

make.powerapps.com/environments/37309613-5c63-4a83-905e-89733fa1774c/solutions

Contoso Electronics Power Apps Search Environment new\_target\_env\_2

+ New solution ← Import Open AppSource Publish all customizations ... All Search

Currently importing solution "SharePoint custom form maker".

### Solutions

Display name	Name	Created ↓	Version	Managed externa...
Power Apps Checker Base	msdyn_Powe...	2/27/2021	1.2.0.34	🔒
Power Apps Checker	msdyn_Powe...	2/27/2021	1.2.0.34	🔒
Contextual Help Base	msdyn_Cont...	2/27/2021	1.0.0.12	🔒
Contextual Help	msdyn_Cont...	2/27/2021	1.0.0.12	🔒
Common Data Services Default Solution	Cr686ac	2/27/2021	1.0.0.0	🔒
Default Solution	Default	2/27/2021	1.0	🔒

SharePointcustomf....zip Show all X



# Proposal Step-by-step experience

make.powerapps.com/environments/37309613-5c63-4a83-905e-89733fa1774c/solutions

Contoso Electronics Power Apps Search Environment new\_target\_env\_2

+ New solution ← Import Open AppSource Publish all customizations ... All Search

✓ Solution "SharePoint custom form maker" imported successfully.

### Solutions

Display name	Name	Created ↓	Version	Managed externa...	
SharePoint custom form maker	...	SharePointcu...	3/18/2021	1.0.0.1	🔒
Power Apps Checker Base	...	msdyn_Powe...	2/27/2021	1.2.0.34	🔒
Power Apps Checker	...	msdyn_Powe...	2/27/2021	1.2.0.34	🔒
Contextual Help Base	...	msdyn_Cont...	2/27/2021	1.0.0.12	🔒
Contextual Help	...	msdyn_Cont...	2/27/2021	1.0.0.12	🔒
Common Data Services Default Solution	...	Cr686ac	2/27/2021	1.0.0.0	🔒
Default Solution	...	Default	2/27/2021	1.0	🔒

SharePointcustomf....zip Show all

# Proposal

## Step-by-step experience

← → ↻ org5f490b99.crm.dynamics.com/main.aspx?settingsonly=true#690862741 ☆ ⚙️ 👤 ⋮

**Dynamics 365** ▾ **Settings** ▾ **Security** 🔍 ⌛ + ⏏ ⚙️ ? 👤

**Dynamics 365 for Outlook Deprecated** There are users in your organization still using Dynamics 365 for Outlook, which is retired as of Oct. 1, 2020 and is no longer supported [Learn More](#) ✕

### Security Roles

**Business Unit:** org5f490b99 ▾

New | | | | More Actions ▾

<input type="checkbox"/>	Name ↑	Business Unit	↻
	FileStoreService App Access	org5f490b99	▲
	Global Discovery Service Role	org5f490b99	
	Help Page Author	org5f490b99	
	Help Page Consumer	org5f490b99	
	Knowledge Manager	org5f490b99	
	Orchestrator	org5f490b99	
	Service Reader	org5f490b99	
	Service Writer	org5f490b99	
	SharePoint Custom Form maker	org5f490b99	
	Solution Checker	org5f490b99	
	System Administrator	org5f490b99	
	System Customizer	org5f490b99	▼

1 - 26 of 26 (0 selected) | All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z | ⏪ Page 1 ⏩

SharePointcustomf....zip ^ [Show all](#) ✕

Go to Dataverse security views to make sure the SharePoint custom form maker security role and SharePoint custom form entity appear after the import.

# Proposal

## Step-by-step experience

The screenshot shows the 'Security Role: SharePoint Custom Form maker' configuration page in Microsoft Dynamics 365. The page is titled 'Security Role: SharePoint Custom Form maker' and indicates 'Working on solution: Default Solution'. The interface includes a top navigation bar with 'Power Apps' and 'Dynamics 365' tabs, and a left sidebar with 'Business' and 'Security' sections. The main content area displays a table of permissions for various entities, organized into tabs: Details, Core Records, Sales, Service, Business Management, Service Management, Customization, Missing Entities, Business Process Flows, and Custom Entities. The 'Details' tab is currently selected, showing a list of entities with columns for different permission types (indicated by red circles). The entities listed include Notification, OData v4 Data Source, Organization Setting, OrganizationDataSyncSubscription, OrganizationDataSyncSubscriptionEntity, Package, PDF Setting, ProcessStageParameter, ProvisionLanguageForUser, RevokeInheritedAccessRecordsTracker, Rich Text Attachment, Search provider, Search Telemetry, Service Configuration, Setting Definition, SharePoint custom form, SLA KPI, Solution Component Data Source, Solution Component Summary, Solution Health Rule, Solution Health Rule Argument, Solution Health Rule Set, and Solution History. The 'SharePoint custom form' entity is highlighted with a yellow background. A 'Key' section is visible at the bottom left.

Entity	Details	Core Records	Sales	Service	Business Management	Service Management	Customization	Missing Entities	Business Process Flows	Custom Entities
Notification										
OData v4 Data Source										
Organization Setting										
OrganizationDataSyncSubscription										
OrganizationDataSyncSubscriptionEntity										
Package										
PDF Setting										
ProcessStageParameter										
ProvisionLanguageForUser										
RevokeInheritedAccessRecordsTracker										
Rich Text Attachment										
Search provider										
Search Telemetry										
Service Configuration										
Setting Definition										
SharePoint custom form										
SLA KPI										
Solution Component Data Source										
Solution Component Summary										
Solution Health Rule										
Solution Health Rule Argument										
Solution Health Rule Set										
Solution History										

In the SharePoint custom form maker security role, see that the SharePoint custom form entity exists (with relevant privileges).

Use case 3: Admin assigns SharePoint custom form Maker security roles to users.

# Proposal

## Step-by-step experience

The screenshot shows the Power Platform admin center interface for 'Contoso Electronics'. The breadcrumb navigation path 'Environments > new\_target\_env\_2 > Settings > Security roles > SharePoint Custom Form maker' is highlighted with a red box. Above this path, the 'Add people' button is also highlighted with a red box. A green success message states: 'Successfully added 1 user and 0 teams to the SharePoint Custom Form maker security role.' Below the breadcrumb, the business unit 'org5f490b99' is listed. A table displays the assigned user:

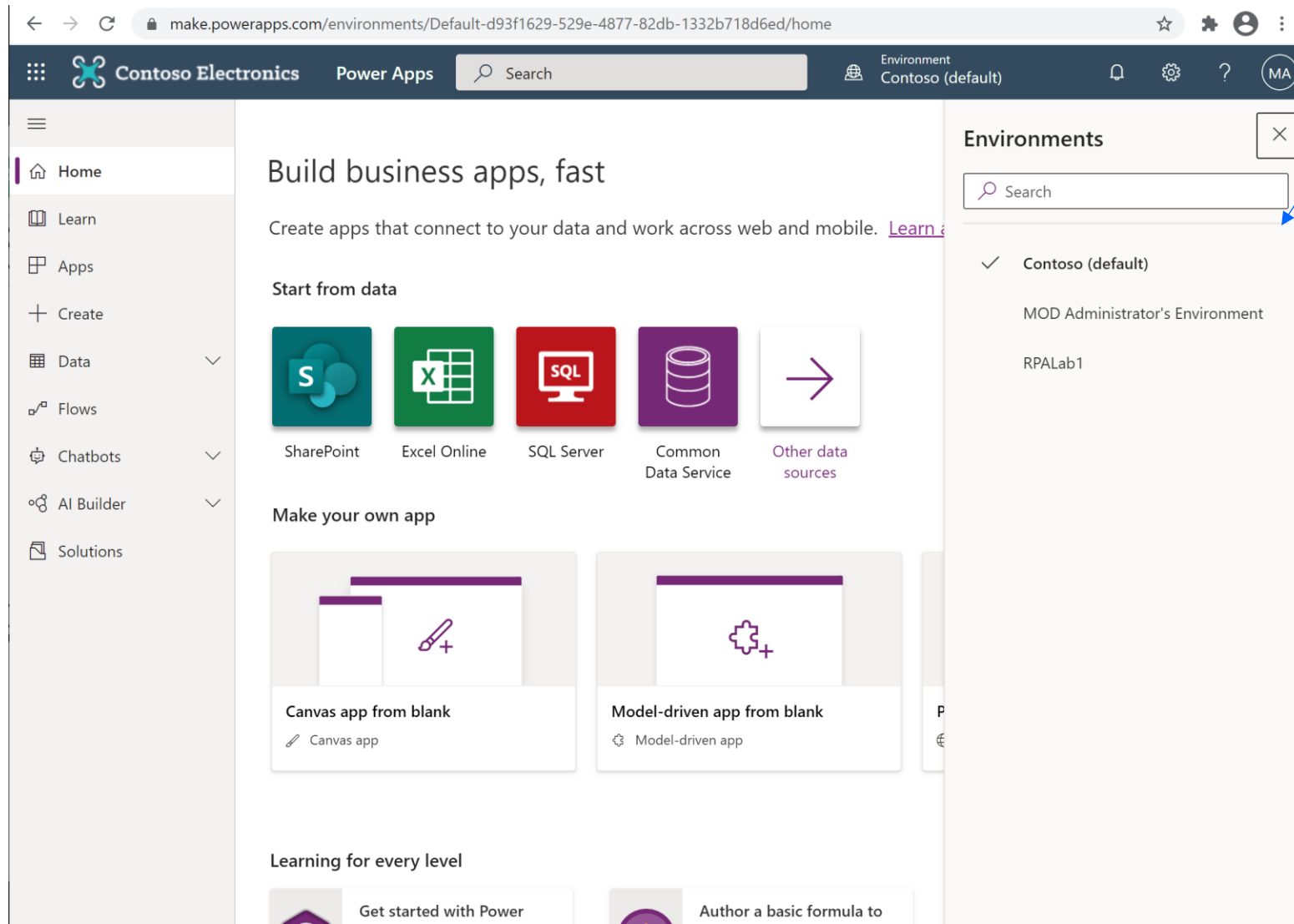
Name ↑	Type	Username
Megan Bowen	Individual	MeganB@M365x114276.OnMicrosoft.com

At the bottom of the page, there is a 'Feedback' button and a taskbar showing two 'SharePointcustomf....zip' files.

Observe that, in PPAC, an admin can assign users the “SharePoint custom form Maker” security role.

Use case 4: SharePoint Custom form Makers (w/o) 'Environment Maker' role do not see SPO designated form env in Maker Portal.

## Proposal Step-by-step experience



- Makers (non-admins) with only the SharePoint custom form Maker role (in the SharePoint designated environment) are expected to NOT see the designated environment in this environment list.

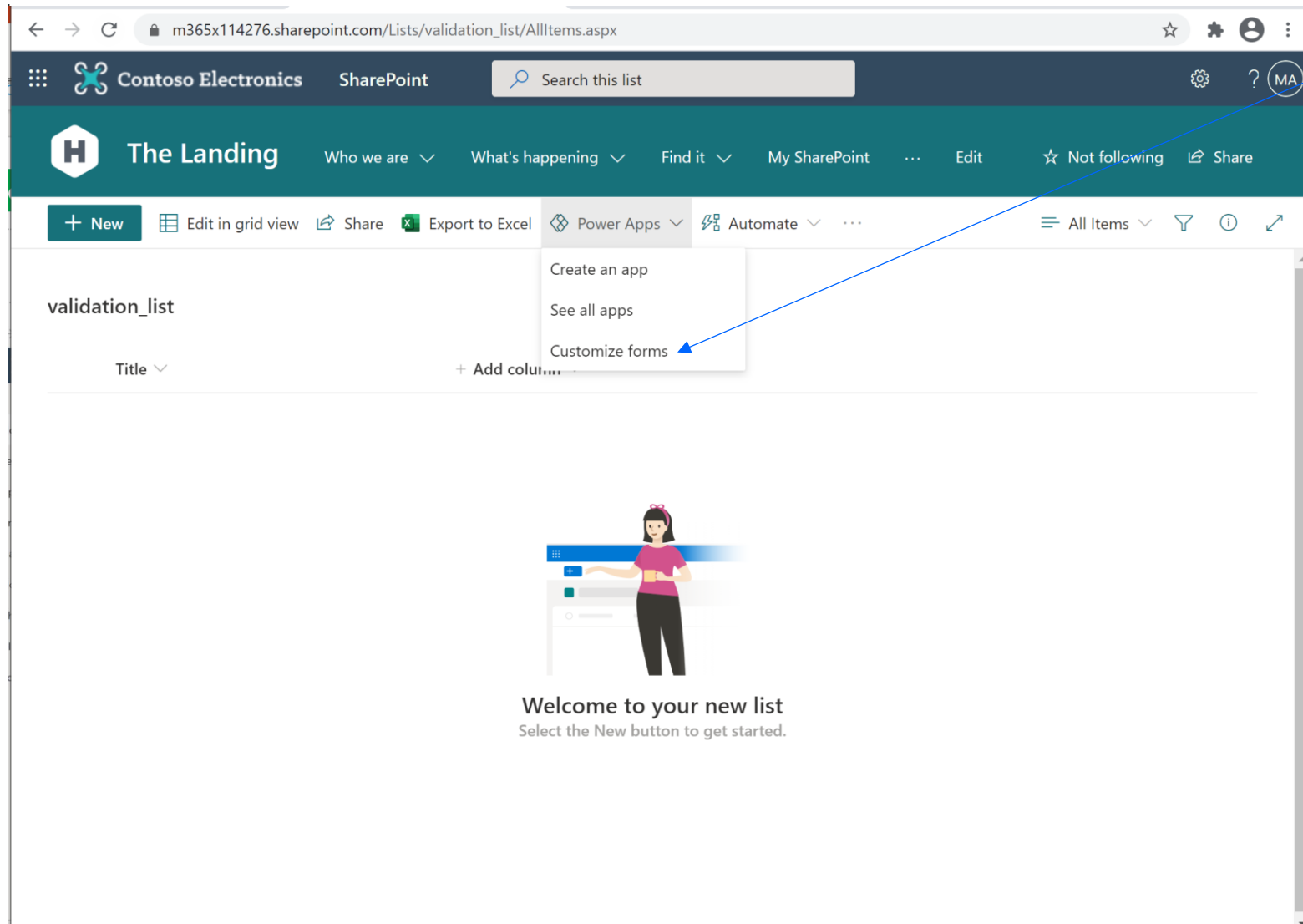
## Proposal

## Step-by-step experience

Use case 5: Makers enter custom form authoring experiences via SharePoint. (This exists today.)



## Proposal Step-by-step experience



- Users will be able to create/edit custom forms if they have either the:

- canvas app entity create/update privileges or
- SharePoint custom form entity create/update privileges

This is to ensure the original 'Environment Maker' security role is still respected.

## **Proposal** Feedback

- Met with Shell to understand their problem and the scenario they want to enable.
- Work w/ ENGs to develop a proposal to address Shell's requirements. [Proposal - SharePoint custom form environment discovery](#).
- Review the proposal with Shell, answered a few Q&As but ultimately got approval (in mail) on our proposal.

## **Plan**

Publish custom solution w/  
MSFT publisher.

PA RP recognizes SPO custom  
form privileges in Dataverse.

**Plan**

**Stack-ranked priorities**

Houston we are go for launch!

