

Microsoft Power Automate with M365 for Business Automation

Course Description

This course is designed to teach participants how to use Power Automate to automate routine tasks and workflows in Microsoft 365 (M365). Through hands-on labs and instructor-led training, participants will learn how to build flows that integrate with popular M365 services like SharePoint, Teams, Outlook, and Excel. By the end of the course, participants will have the skills and knowledge needed to design, deploy, and manage their own custom workflows in M365.

Audience

This course is intended for professionals who are responsible for automating tasks and workflows in Microsoft 365. This may include IT administrators, business analysts, project managers, and other technical professionals.

Pre-requisite Knowledge/Skills

To get the most out of this course, participants should have a basic understanding of M365 services, including SharePoint, Teams, Outlook, and Excel. Participants should also have some experience with programming concepts, though no prior experience with Power Automate is necessary.

Course Objectives

By the end of this course, participants should be able to:

- Describe the benefits of using Power Automate in M365
- Create and modify flows in M365 using common connectors and templates.
- Use advanced concepts like parallel branches, conditional statements, and loops to create complex workflows.
- Manage and troubleshoot flows in M365 using built-in analytics and reporting tools
- Create and manage adaptive cards in Microsoft Teams
- Automate routine SharePoint tasks, including document reviews and approvals
- Automate routine Outlook tasks, including email management and scheduling
- Integrate Power Automate with Excel to automate data entry and manipulation tasks
- Maintain and administer Power Automate flows in M365

Course Outline

The course comprises 24-hours of theory and labs. It's divided into 9 different modules.

Module 1: Introduction to Power Automate and M365

- Overview of Power Automate and M365
- Benefits of using Power Automate in M365
- Getting started with Power Automate: Creating an account, connecting to M365, and navigating the interface
- Lab: Setup the Environment

Module 2: Basic Concepts of Power Automate

- Triggers, actions, and workflows
- Creating your first flow
- Data types and expressions
- Debugging and troubleshooting
- Lab: Create an Absence Process

Module 3: Building Flows in M365

- Creating and modifying flows in M365
- Common M365 flows: Approvals, notifications, and document automation
- Using M365 connectors: SharePoint, Teams, Outlook, Excel, and others
- Advanced concepts: Parallel branches, conditional statements, and loops
- Lab: Create Approval from Template

Module 4: Use and Manage Flows in Teams

- Scenario-specific flow templates
- Manage flows in Microsoft Teams
- Lab a: Send a message in Teams using Power Automate
- Lab b: Trigger a cloud flow from any message in Microsoft Teams

Module 5: Model Flows with Adaptive Cards in Microsoft Teams

- Overview of Adaptive Cards for Microsoft Teams
- Create your first adaptive card
- Sample of Adaptive Cards
- Lab a: Candidate feedback sample
- Lab b: Lead collection sample

- Lab c: Create a poll sample
- Lab d: Create a flow that uses adaptive Cards

Module 6: Basic SharePoint Flow Design Techniques

- Creating and managing simple SharePoint flows using templates and connectors
- Configuring SharePoint triggers and actions to automate routine tasks
- Using conditions and switches to create conditional logic
- Handling errors and exceptions in SharePoint flows
- Lab: Scheduling documentation reviews
 - Setup a policy library in SharePoint
 - Design a policy review schedule
 - Testing the policy review process

Module 7: Flow Design Techniques for Outlook

- Creating and managing simple flows using templates and connectors
- Configuring triggers and actions to automate routine Outlook tasks
- Using conditions and switches to create conditional logic
- Handling errors and exceptions in flows
- Lab: Automating Email Management with Power Automate and Outlook

Module 8: Creating a Power Automate Flow with Excel

- Excel Online (Business) connector
- Excel Online (OneDrive) connector
- Excel Online (SharePoint) connector
- Adding Excel as a data source
- Creating a new Excel file
- Getting data from an existing Excel file
- Updating an Excel file
- Deleting an Excel file
- Lab: Automating Data Entry with Power Automate and Excel

Module 9: Administration and Maintenance

- Maintaining a Power Automate

- View history and analytics
- Sharing a Power Automate
- Export and import Power Automates
- Office 365 administration for Power Automate
- Environments
- Data policies
- Data integration

- Lab: Maintaining your Power Automates

- Share a Power Automate with a colleague
- Disabling an active Power Automate
- Deleting a Power Automate