Workflow Automation with Power Automate Cloud and Desktop: Projects in Action

Course Description

The Automate course is designed to empower participants with the knowledge and skills to automate their business processes effectively using Microsoft Power Automate. Through a series of hands-on projects, participants will learn how to leverage Power Automate to streamline workflows, integrate applications, and automate repetitive tasks. The course focuses on practical projects, including combining multiple files and sending emails, monitoring and sorting emails, and forwarding emails with extracted information.

Audience

The Workflow Automation with Power Automate course is designed to empower participants with the knowledge and skills to automate their business processes effectively using Microsoft Power Automate. Through a series of hands-on projects, participants will learn how to leverage Power Automate to streamline workflows, integrate applications, and automate repetitive tasks. The course focuses on practical projects, including combining multiple files and sending emails, monitoring and sorting emails, and forwarding emails with extracted information.

Pre-requisite Knowledge/Skills

- Familiarity with Microsoft Office applications
- Basic understanding of workflow concepts
- Proficiency in using a computer

Course Objectives

Upon completion of this course, participants will be able to:

- Understand the capabilities and benefits of Power Automate Cloud and Power Automate Desktop
- Apply triggers and actions in Power Automate to automate tasks and workflows
- Integrate AI Builder with Power Automate for leveraging AI capabilities
- Create and train custom AI models using AI Builder
- Successfully execute practical projects involving file manipulation, email monitoring and sorting, and information extraction

Course Outline

The course comprises 24-hours of theory and labs. It's divided into 3 modules and 3 Projects.

Module 1: Introduction to Power Automate Cloud and Power Automate Desktop

- Power Automate Cloud overview
- Power Automate Desktop overview
- Key features and benefits
- Use cases and applications
- Integration between Power Automate Cloud and Power Automate Desktop
- Exercise: Lab - PDF Actions and Email Sending

Module 2: Establishing a Base for Triggers and Actions

- Introduction to Triggers and Actions in Power Automate
- Exploring Common Triggers in Power Automate Cloud
- Understanding Actions and their Functionality
- Overview of Power Automate Desktop Triggers and Actions
- Best Practices for Choosing Triggers and Actions in Projects
- Exercise: Lab - Email Actions in Power Automate Cloud

Module 3: Using AI Builder with Power Automate Cloud

- Introduction to AI Builder
- Overview of AI Builder and its capabilities
- Use cases for AI Builder in Power Automate
- Integration of AI Builder with Power Automate Cloud
- Getting Started with AI Builder
- Setting up AI Builder environment and prerequisites
- Exploring AI Builder components and models
- Creating and training custom AI models
- AI Builder Actions in Power Automate Cloud
- Understanding AI Builder actions in Power Automate
- Configuring AI Builder actions in workflows
- Utilizing AI Builder models for data extraction

Project 1: Automating Steps for Combining Multiple Files and Sending Email

- Introduction

- Step 1: Combining multiple files into one PDF file in each folder
- Step 2: Sending an email to a list of configured recipients with the combined file as an attachment

Project 2: Automating Steps for Monitoring and Sorting Emails

- Introduction
- Step 1: Auto monitoring an email box and marking emails as read
- Step 2: Taking actions based on email attachments
- Step 3.1: Handling emails with a single PDF attachment
- Step 3.2: Handling emails with multiple attachments
- Step 3.3: Handling emails with no attachments

Project 3: Forwarding Emails with Extracted Employee Information

- Introduction
- Step 1: Forwarding an email and its PDF attachment
- Step 2: Extracting Employee ID from the PDF attachment