

SharePoint Automation with Power Automate

Course Description

This course provides comprehensive guidance on automating tasks in SharePoint using Power Automate. Participants will learn how to streamline processes, enhance collaboration, and improve efficiency by automating workflows within SharePoint sites. Through practical modules and hands-on exercises, participants will gain proficiency in creating flows, integrating with other services, managing approvals, handling errors, and troubleshooting performance issues.

Audience

This course is designed for SharePoint administrators, power users, business analysts, and anyone interested in automating processes within SharePoint. Prior experience with SharePoint and basic familiarity with Power Automate is beneficial but not required.

Pre-requisite Knowledge/Skills

- Basic understanding of SharePoint functionality.
- Familiarity with Microsoft 365 suite.
- Basic knowledge of workflow automation concepts

Course Objectives

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

- Set up SharePoint sites for automation using Power Automate.
- Create, customize, and manage flows to automate tasks within SharePoint.
- Integrate SharePoint with other services such as Microsoft 365 Outlook, HTTP connectors, and Azure AD.
- Implement approval processes and manage metadata efficiently.
- Apply best practices for email communication and error handling in Power Automate flows.
- Troubleshoot and optimize flow performance in SharePoint automation.
- Perform in-depth analysis and customization of SharePoint actions in Power Automate.
- Manage permissions, approvals, and document workflows effectively within SharePoint using Power Automate.

Course Outline

Module 0: Get Started

- Overview
- Set up your SharePoint site
- Create your first flow
- Connect your flow to other services
- Customize a form for a list

Module 1: Email with Power Automate

- SharePoint triggers
- Send emails using Microsoft 365 Outlook
- Send emails using Mail
- Save email content to SharePoint

Module 2: Automate an Approval Process in Power Automate

- Types of approval actions
- Respond to an approval
- Metadata from approvals
- Known issues and limits
- Exercise

Module 3: Overview of HTTP Connectors in Power Automate

- HTTP Webhook built-in connector
- HTTP with Azure AD connector
- When an HTTP request is received built-in connector

Module 4: Best Practices for Email in SharePoint and Power Automate

- Send on behalf of someone else
- Format the email body
- Approval email
- Attachments or links

Module 5: Best Practices for Error Handling in Power Automate Flows

- Introduction
- Configure run after option
- Power Automate analytics

Module 6: Integrate Power Automate with SharePoint HTTP Actions

- Introduction
- SharePoint REST service
- Use Power Automate to change a list in Microsoft Lists
- Use Power Automate to send an email from SharePoint
- Use OData filtering with SharePoint

Module 7: Troubleshoot Slow-running Flows in Power Automate

- Use the Compose and Variable actions to view data
- Power Automate analytics
- Microsoft Power Platform admin center
- Redesign your flow

Exercises:

1. In-depth analysis into Get items and Get files SharePoint actions for flows in Power Automate
2. Manage list item and file permissions with Power Automate flows
3. Working with the SharePoint Send HTTP Request flow action in Power Automate
4. Customize SharePoint page approvals to meet your needs
5. Require approval of documents in SharePoint using Power Automate
6. Manage owners and users in your Microsoft list flows with Power Automate