Microsoft Power Automate Flow, Desktop RPA & Copilot Integration

Course Description:

This comprehensive course provides an in-depth understanding of Microsoft Power Automate, Power Automate Desktop (RPA), and the advanced integration capabilities with Microsoft Copilot. Participants will explore end-to-end automation from cloud to desktop, gain hands-on experience in designing flows, and learn how to use AI-driven Copilot tools to build, refine, and troubleshoot workflows. The course blends core Power Platform functionality with real-world business automation scenarios to empower participants with the skills to streamline processes and increase efficiency using low-code solutions.

Audience Profile:

This course is designed for business users, automation professionals, IT administrators, developers, and solution architects who want to leverage Power Automate, RPA, and Copilot within the Microsoft Power Platform to build scalable, automated workflows and integrations across services.

Prerequisites:
- Basic understanding of Microsoft 365 applications
- Familiarity with business processes and workflows
- No prior coding experience required, but a willingness to explore automation tools is beneficial

Course Objectives:

By the end of this course, participants will be able to:
- Understand the Power Automate ecosystem and its integration with Power Apps
- Create automated and manual flows using triggers and actions
- Design and connect Power Apps with flows for enhanced user interaction
- Build complex and composite flows for advanced automation needs
- Automate data entry and processing tasks with AI Builder and Power Automate
- Utilize Power Automate Desktop to automate web and desktop tasks
- Use Microsoft Copilot to build, edit, and troubleshoot flows using natural language
- Explore process mining and automation insights with Copilot capabilities

Table of Contents (TOC):

Module 1: Introduction to Power Automate
- Understanding Microsoft Power Automate
- The synergy of Power Automate and Power Apps in the Power Platform
- Real-world applications and benefits of integration
- Setting up your environment
- Creating a Power Automate environment
- Configuring a Power Apps environment

Module 2: Exploring Power Automate Basics
- Getting started with Power Automate
- Understanding components of a flow
- Navigating the Power Automate interface
- Creating your first automated flow
- Understanding and configuring triggers
- Manual and automated triggers
- Introduction to actions and action types
- Configuring inputs and outputs

Module 3: Introduction to Power Apps Basics
- Canvas Apps fundamentals
- Data connections and sources
- Connecting Power Apps to SharePoint, SQL Server, Dataverse
- Power Apps and Power Automate integration
- Model-driven apps essentials
- Importing a solution

Module 4: Integrating Power Automate with Power Apps
- Triggering flows from Power Apps
- On-demand flow triggers with buttons and icons
- Passing data with parameters
- Using Flow control in Power Apps
- Triggering flows from within apps
- Flow execution control with wait conditions

Module 5: Building Complex Flows Integration with Apps

- Composite flows
- Combining multiple flows
- Understanding scope, input, and output
- Passing data between composite and child flows

Module 6: Automating Data Entry and Updates

- Designing data entry forms in Power Apps
- Customizing behavior, validation, and error handling
- Cascading dropdowns and dependent fields
- Automating data entry with flows
- Integrating AI Builder for extraction and classification
- Scheduled flows for updates
- Designing data update flows
- Flow buttons for updates
- Security for sensitive data

Module 7: Enhancing Power Automate Skills

- Complex conditions and branching
- Expressions and advanced logic
- Looping through data
- Introduction to custom connectors
- Creating and using custom connectors
- API and web service integration
- Utilizing variables in flows

Module 8: Building Basic Approval Workflows

- Introduction to approval processes
- Approval action configuration
- Approval steps and participant settings
- Using approval columns in SharePoint or Dataverse
- Designing leave request forms
- Approval flows with notifications
- Handling approvals in Power Apps

Module 9: Power Automate Desktop
- Introduction to desktop automation
- UI automation for web and desktop apps
- Streamlining repetitive tasks
- Integration: Power Apps → Cloud Flows → Desktop Flows

Module 10: Error Handling and Troubleshooting
- Common flow errors
- Troubleshooting with Scope and Terminate
- Error notification and logging
- Debugging with Run History and Flow Checker
- Using Monitor tool

Copilot Integration Modules

1. Introduction
- Overview of Copilot in Microsoft Power Platform
- Capabilities of Copilot in Power Automate

2. Copilot in Cloud Flows
- Creating flows using natural language
- Using cloud flows designer with Copilot
- Getting help from Microsoft Copilot Studio bot
- Using flows as plugins in Copilot for Microsoft 365

3. Describe and Refine Your Flow
- Building flows by conversation
- Iterative refinement with Copilot suggestions

4. Edit a Flow with Copilot
- Modifying existing flows
- Prompting Copilot to adjust actions and conditions

5. Exercise - Build a Cloud Flow Using Copilot
- Step-by-step guided exercise

- Best practices for Copilot-driven flow creation

6. Copilot in Process Mining
- Copilot in process mining ingestion
- Copilot in process analytics

7. Copilot in Desktop Flows
- Getting started with Copilot for desktop
- Creating desktop flows using "Record with Copilot"
- Writing scripts using natural language
- Repairing automation errors with Copilot
- Analyzing desktop flow activity

8. Copilot in Automation Center
- Retrieving past flow run data
- Assessing work queue performance
- Using Copilot to ask product-related questions