SharePoint Automation with Power Automate

Target Audience

This course is designed for SharePoint administrators, business professionals, IT specialists, automation developers, and citizen developers who want to automate workflows within SharePoint using Microsoft Power Automate. It is ideal for those looking to streamline document management, approval processes, notifications, and data synchronization between SharePoint and other Microsoft 365 applications.

Course Objective

The objective of this course is to provide participants with the skills and knowledge to automate and optimize business processes within SharePoint using Power Automate. Participants will learn how to create automated workflows to enhance collaboration, improve document management, and integrate SharePoint with other Microsoft 365 services.

Course Outcome

- **Design and implement automated workflows** to streamline SharePoint document approvals, notifications, and task assignments.
- **Integrate SharePoint with Microsoft 365 applications** such as Outlook, Teams, and OneDrive to enhance collaboration and efficiency.
- **Monitor, troubleshoot, and optimize SharePoint automation solutions** by applying best practices in error handling, permissions management, and security compliance.

Course Outline

The course comprises **24-hours** of theory and labs and is divided into **8** different chapters. Each chapter will be followed by **hands-on lab exercises** to reinforce learning and gauge understanding of the topics covered.

Module 1. 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 2. Email with Power Automate

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

Module 3. Automate an Approval Process in Power Automate

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

Module 4. 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 5. 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 6. Best Practices for Error Handling in Power Automate Flows

- Introduction
- Configure run after option
- Power Automate analytics

Module 7. 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 8. 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