



Microsoft **Power Automate** with M365 for Business Automation

Target Audience

This course is designed for business professionals, IT administrators, automation specialists, and citizen developers who want to streamline business processes using Microsoft Power Automate within the Microsoft 365 ecosystem. It is ideal for those looking to automate tasks, improve productivity, and enhance collaboration across Microsoft 365 applications like SharePoint, Outlook, Teams, and OneDrive.

Course Objective

The objective of this course is to equip participants with the knowledge and skills to automate business workflows using Microsoft Power Automate with Microsoft 365. Participants will learn how to integrate and optimize automation across M365 applications to reduce manual effort, improve efficiency, and drive business productivity.

Course Outcome

- **Design and implement automated workflows** to streamline business processes using Power Automate within the Microsoft 365 environment.
- **Integrate Power Automate with M365 applications** like SharePoint, Teams, Outlook, and OneDrive to enhance collaboration and efficiency.
- **Monitor, troubleshoot, and optimize automated solutions** to ensure reliability, scalability, and security in business automation processes.

Course Outline

The course comprises **24-hours** of theory and labs and is divided into **9** different chapters. Each chapter will be followed by **hands-on lab exercises** to reinforce learning and gauge understanding of the topics covered.



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

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