

KOENIG SOLUTIONS · COURSE OUTLINE

Microsoft Power Automate with M365 for Business Automation

Learn to design, build and manage automated workflows across Microsoft 365 apps using Power Automate.

24 Hours

DURATION

9

MODULES

40

TOPICS

16

HANDS-ON ACTIVITIES

COURSE OVERVIEW

This course covers the fundamentals of Power Automate within the Microsoft 365 environment, including triggers, actions, expressions, and building and debugging flows. It then addresses building flows across SharePoint, Teams, Outlook, and Excel, covering connectors, conditional logic, approvals, notifications, and document automation, as well as using and managing flows and adaptive cards within Microsoft Teams. Finally, it covers administration and maintenance of Power Automate, including sharing, exporting and importing flows, environments, data policies, and data integration.

WHO THIS COURSE IS FOR

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.

LEARNING OBJECTIVES

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.

- 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

TRAINING APPROACH

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.

9 Modules, 40 Topics

01

Lab

Introduction to Power Automate and M365

TOPICS

- 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

02

Lab

Basic Concepts of Power Automate

TOPICS

Triggers, actions, and workflows · Creating your first flow · Data types and expressions · Debugging and troubleshooting

03

Lab

Building Flows in M365

TOPICS

- 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

04

Lab a

Lab b

Use and Manage Flows in Teams

TOPICS

Scenario-specific flow templates · Manage flows in Microsoft Teams

05

Lab a

Lab b

Lab c

Lab d

Model Flows with Adaptive Cards in Microsoft Teams

TOPICS

- Overview of Adaptive Cards for Microsoft Teams
- Create your first adaptive card
- Sample of Adaptive Cards

06

Lab

Basic SharePoint Flow Design Techniques

TOPICS

- 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

07

Lab

Flow Design Techniques for Outlook

TOPICS

- 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

08

Lab

Creating a Power Automate Flow with Excel

TOPICS

- | | |
|---------------------------------------|--|
| ■ Excel Online (Business) connector | ■ Creating a new Excel file |
| ■ Excel Online (OneDrive) connector | ■ Getting data from an existing Excel file |
| ■ Excel Online (SharePoint) connector | ■ Updating an Excel file |
| ■ Adding Excel as a data source | ■ Deleting an Excel file |

Administration and Maintenance

TOPICS

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

HANDS-ON ACTIVITIES

Practise What You Learn

#	MODULE	ACTIVITY
01	Introduction to Power Automate and M365	Lab: Setup the Environment
02	Basic Concepts of Power Automate	Lab: Create an Absence Process
03	Building Flows in M365	Lab: Create Approval from Template
04	Use and Manage Flows in Teams	Lab a: Send a message in Teams using Power Automate Lab b: Trigger a cloud flow from any message in Microsoft Teams
05	Model Flows with Adaptive Cards in Microsoft Teams	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
06	Basic SharePoint Flow Design Techniques	Lab: Scheduling documentation reviews
07	Flow Design Techniques for Outlook	Lab: Automating Email Management with Power Automate and Outlook
08	Creating a Power Automate Flow with Excel	Lab: Automating Data Entry with Power Automate and Excel
09	Administration and Maintenance	LAB ■ Maintaining your Power Automates ■ Share a Power Automate with a colleague ■ Disabling an active Power Automate ■ Deleting a Power Automate

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

FLEXIBLE DELIVERY

Learn the Way That Suits You

Classroom Training

Live Online Classes (ILO)

Fly-Me-A-Trainer (FMAT)

Flexi (Self-Paced)

1-on-1 Training

Ready to Get Started?

Talk to a learning advisor about schedules, group training and customised delivery.

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