



Let's Reach For Excellence!

TAN DUC INFORMATION TECHNOLOGY SCHOOL JSC

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Microsoft Power Automate

Duration: 02 days

This course delivers an instructor-led product showcase for Microsoft Power Automate from start to finish in an engaging and practical way. Power Automate is a diverse product, turning business processes into automated, consistent and visual Power Automates. Power Automate is designed to interweave the various products in Office 365 as well as connect to other on-premises and web-based solutions. This course will give you the confidence to select the right actions and Power Automate logic for your business Power Automates.



AUDIENCE

The intended audience for this course would be those who have been using Office 365 for some time and are now looking at optimizing their existing business processes and designing new ones.

AT COURSE COMPLETION

After completing this course, students will be able to:

- Understand when to use Power Automate
- Describe the components of Power Automate and their correct use
- How to create and edit Power Automates
- Benefits of Power Automate
- Integration with Power Automate

COURSE OUTLINE

Module 1: An Introduction to Power Automate

Let's get started with an introduction to Microsoft Power Automate. Historically, automating business processes typically landed in the lap of a developer in the business, who has a good understanding of coding and the systems that they were connecting. However, more and more systems deployed to businesses are encouraging a bigger focus on end user design and management. With this culture change, end users are looking to further improve their business solutions. Power Automate brings Power Automate design to all audiences. It offers the building blocks for lightweight or business-critical processes. In this module, we cover an overview of the product and its application to Office 365 and third-party services.

Lessons

- What is Microsoft Power Automate?
- The benefits of automation
- How to get to Power Automate

Lab 1: Setup your tenant

- Setup Office 365
- Download Course Files
- Customize your App Launcher
- Create accounts for colleagues
- After completing this module, students will be able to:
- Know what Microsoft Power Automate is
- The Benefits of using Power Automate to automate processes
- How to access a Power Automate

Module 2: Getting Started with Power Automate

We begin our discovery of Microsoft Power Automate by building our first business process. We will discuss how to use templates to get started with Power Automate or how to use a blank template to start with no defined actions. Once in the product, we will give you a tour of the editor, Power Automate management page and the home screen to help you navigate around the product. Next, we will start to add, edit and remove actions from our Power Automate template in order to customize the Power Automate for a specific business need. Once ready we will publish and trigger the Power Automate to test that it works as expected.

We will finish this module by discussing how to turn a Power Automate on or off as well as deleting a Power Automate.

Lessons

- Using Power Automate templates
- Navigating in Power Automate
- Editing a Power Automate
- Publish and trigger a Power Automate
- Turn off or delete a Power Automate

Lab 1: Building processes in Office 365

- Create a Team with a channel
- Build an absence business process
- Testing the absence process
- Optional: Create Feedback Form
- Optional: Power Automate to Notify of Bad Ratings
- Optional: Test your Form and Power Automate
- After completing this module, students will be able to:
- How to use Power Automate templates
- How to navigate around Power Automate
- How to edit Power Automates
- How to publish and trigger Power Automates
- How to turn off or delete Power Automates

Module 3: Power Automate logic

Decision making during a business process is often a bottleneck. Waiting for decisions or information to steer the Power Automate towards its goal is dependent on how long the involved party spends on the task. This could be mitigated if the desired information is found declared elsewhere for example, as a document property or a form entry to name a few examples. Logic in a Power Automate allows existing information to push the Power Automate down multiple paths. This often speeds up Power Automate duration and minimizes human input. In this module, we will look at the core logic found in Power Automate and a practical application of each option.

Lessons

- Adding conditions
- Designing switches
- Using apply to each
- Configuring do until logic
- Adding a scope

Lab 1: Scheduling documentation reviews

- Setup a policy library in SharePoint
- Design a policy review schedule
- Testing the policy review process
- Optional: Notify if a file nears review
- After completing this module, students will be able to:

- How to add conditions in a Power Automate
- How to design switches for a Power Automate
- How to use apply to each
- How to configure do until logic
- How to add a scope

Module 4: Integration

Businesses will often use a selection of productivity tools and services beyond Office 365. Marketing teams may use Facebook and Twitter whereas a sales team may use Salesforce to manage their customers. Power Automate provides connectors for popular services allowing your processes to extend beyond Office 365 to other web services. Connections can even be made to on-premises servers, allowing your business systems house at the office to take part in your processes.

Lessons

- Standard and premium connectors
- Connecting to web services
- Using Power Automate with on-premises data

Lab 1: Using Power Automate and SQL to Review Sales

- Create a new orders list
- Designing the price check process
- Testing the price check process
- Optional: Update with managers
- After completing this module, students will be able to:
- How to use Standard and Premium connectors
- How to connect to web services
- How to use Power Automate with on-premises data

Module 5: Hands on LABs

- Lab 5-1. Building a time tracking flow
- Lab 5-2. Approvals (Part 1) - Travel Approval
- Lab 5-3. Flow Notifications and Conditions
- Lab 5-4. Flow control, variables, expressions
- Lab 5-5. Using the Microsoft Form Connector
- Lab 5-6. Task overdue
- Lab 5-7. Document generation with the Word Connector

Module 6: Administration and maintenance

In our last module for Microsoft Power Automate, we will be taking a look at how a business can manage their Power Automates once they have a good uptake of the product. We will begin by discussing managing individual Power Automates. This could be using history to discover the source of any issues and implement error handling as well as using the analytics to discover usage trends. We will discover how to share a Power Automate which is ideal for sharing the maintenance of a Power Automate with another colleague and how to import and export Power Automates. Finally, we will discuss how Office 365 administrators can shape the Power Automate experience with high-level settings that help ensure data segregation and security.

Lessons

- 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 1: Maintaining your Power Automates

- Share a Power Automate with a colleague
- Disabling an active Power Automate
- Deleting a Power Automate
- After completing this module, students will be able to:
- How to maintain a Power Automate
- How to view history and analytics for a Power Automate
- How to share a Power Automate
- How to export and import Power Automates
- How to administrate a Power Automate in Office 365
- How to use data policies in a Power Automate
- How to use data integration in a Power Automate