The Modern Excel
Power Automate Essentials

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Power Automate Essentials– The Practical Skills

A customizable course according to your company's requirements.

Duration

8 hours

Objectives

1. Introduction to Power Automate

2. Basic Flow Building Blocks

3. Data Operations in Power Automate

4. Building Approval Workflows

5. Integration with Microsoft 365 Apps

6. Power Automate Best Practices

7. Real-world Applications and Case Studies

This a completely hand-on lecture! No PowerPoint- students will be practicing on SharePoint and excel throughout the lecture.

Outline of Power Automate Essentials Course

1. Introduction to Power Automate

1.1 Understanding Power Automate

- Overview of Power Automate and its capabilities
- Introduction to no-code automation concepts

1.2 Power Automate Interface

- Navigating the Power Automate environment
- Exploring the main components and features

1.3 Getting Started with Flows

- Creating a simple flow from a template
- Understanding triggers and actions in Power Automate

2. Basic Flow Building Blocks

2.1 Understanding Connectors

- Exploring pre-built connectors for popular apps
- Connecting to common data sources

2.2 Triggers in Power Automate

- Introduction to event-based triggers
- Setting up automated flows triggered by specific events

2.3 Actions and Conditions

- Adding actions to flows for data manipulation
- Implementing conditional logic for decision-making

3. Data Operations in Power Automate

3.1 Data Transformations

- Basic data transformations using expressions
- Handling dynamic content in flow actions

3.2 Working with Variables

- Introduction to variables in Power Automate
- Storing and retrieving values during flow execution

3.3 Using Expressions for Calculations

- Utilizing expressions for basic calculations
- Customizing data based on flow requirements

4. Building Approval Workflows

4.1 Approval Actions in Power Automate

- Setting up approval workflows with built-in actions
- Configuring approval steps and responses

4.2 Adaptive Cards for Approvals

- Introduction to Adaptive Cards for interactive approvals
- Customizing approval request notifications

4.3 Handling Approval Responses

- Designing flow logic based on approval outcomes
- Managing parallel approvals and escalations

5. Integration with Microsoft 365 Apps

5.1 Automating Email Notifications

- Creating automated email notifications using Power Automate
- Handling attachments and dynamic content in emails

5.2 Calendar Events and Reminders

- Setting up flows for calendar events and reminders
- Syncing events across Microsoft 365 applications

5.3 Document Automation with SharePoint

- Automating document creation and management in SharePoint
- Creating flows for document approval processes

6. Power Automate Best Practices

6.1 Flow Testing and Debugging

- Strategies for testing and debugging flows
- Handling common errors and troubleshooting

6.2 Efficiency and Performance Optimization

- Best practices for creating efficient and performant flows
- Reducing execution time and resource usage

6.3 Flow Documentation and Version Control

- Documenting flows for better collaboration
- Managing versions and updates in Power Automate

7. Real-world Applications and Case Studies

7.1 Building a Simple Business Process Flow

- Designing a basic business process automation flow
- Addressing real-world use cases and challenges

7.2 Industry-specific Scenarios

- Analyzing industry-specific flow scenarios
- Customizing flows for specific business requirements

7.3 Q&A and Troubleshooting Session

- Addressing participant questions and common challenges
- Providing guidance on advanced flow scenarios