



Workflow Automation with Microsoft Power Automate

Course ISI-1553A Two days Instructor-led

Introduction

Enhance your organization's productivity by automating repetitive tasks and simplifying business workflows using Microsoft Power Automate (formerly Microsoft Flow)

Microsoft Power Automate (formerly Flow) is a workflow automation tool built into Microsoft 365 to help businesses and users to automate repetitive tasks or trigger business processes without user intervention.

If you are new to Microsoft Power Automate, this course will give you a comprehensive introduction to help you to get up to speed with automating business processes in no time. Complete with hands-on tutorials, projects, and self-assessment questions, this course will show you how to configure automation workflows for business processes between hundreds of Microsoft and third-party applications. Once you understand how to use connectors, triggers, and actions to automate business processes, you'll get to grips with managing user inputs, documents, approvals, and database storage using efficient flow controls. This Power Automate book explains key concepts and takes you through creating your own flows step by step.

By the end of this two-day, instructor-led course, you'll have learned how to use Microsoft Power Automate to replace repetitive tasks with business workflow automation technology.

Beginning with Module 9, you will be building examples of flows for SharePoint, OneDrive, Teams, and more, and test them all out.

Key Features

- Create basic and advanced workflows for automating SharePoint lists and libraries, sending emails, push notifications, and much more
- Manage user inputs, documents, approvals, and database storage using flow controls
- Create flows that integrate with services both inside and outside the Microsoft 365 ecosystem

At Course Completion

After completing this course, students will be able to:

- Get to grips with the building blocks of Power Automate, its services, and core capabilities

Contact ISInc for more information at 916.920.1700 or by visiting our website at <http://www.isinc.com>



- Explore connectors in Power Automate to automate email workflows
- Discover how to create a flow for copying files between two cloud services
- Understand the business process, connectors, and actions for creating approval flows
- Find out how to integrate Power Automate with Microsoft Teams

Prerequisites

The course is for technologists, system administrators, and Power users with little or no Microsoft Power Automate experience. Familiarity with basic Microsoft 365 services is expected.

Student Materials

Each student receives a printed copy of all the material presented by the instructor.

Course Outline

Module 1: Introducing Power Automate

- What is Power Automate?

Module 2: Why Automate?

- Accuracy
- Tracking
- Speed

Module 3: To Consider

- Ownership and Storage
- Changes in SharePoint

Module 4: Power Automate Plans

- Which plan is needed?

Module 5: The Power Platform Admin Center

- Environments
- Data Policies

Module 6: Important Concepts

- The Power Automate Site
- Connectors
- Trigger
- Action

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Module 7: Built-in Flows

- Create an App Rule
- App Reminder
- Require Hub Association Approval
- Approve/Reject App Items
- Approve/Reject Pages

Module 8: Build a Flow

- Create a Flow
- Comment
- Save and Test
- Troubleshoot
- Share a Flow

Module 9: Modify a Reminder Flow

- The My Flows Page
- The Details Page
- Edit a Flow
- Scope
- Test Scheduled Flows

Module 10: Teams Message at New Task

- Start from Blank flow
- Dynamic or Hard-Coded Content?
- Enter Custom Values
- Test an Automated Flow

Module 11: Set Document Titles

- SharePoint Search
- Choose the Correct Dynamic Content
- Item Trigger Used for Files
- Delay
- Get File Properties

Module 12: Format E-mail Body

- HTML in E-mails
- E-mail Importance and Replies

Module 13: Get E-mail Input on New Items

- Renaming the Title Column
- Send an email Outside the Tenant

- Send email with options

Module 14: Move Requested Files to SharePoint

- OneDrive
- Use a Template
- Template Options
- Folder Selection
- Word Template with Form
- The Rating Column

Module 15: Content Approval Flow with E-mail

- Content Approval
- Template Actions vs Custom Actions
- Rich text
- Conditions

Module 16: Approval with a Custom Status Column

- Insert Flow step
- Hide non-approved items

Module 17: Approval Flow in a Mobile

- New step
- Bug
- Test
- Approval Actions

Module 18: E-mail Links

- Read or Edit
- Properties
- Version History
- Send Alert Form
- Online Document Creation

Module 19: Copy Survey Responses from Forms

- The Template
- Create item

Module 20: Merge Orders into a Tasks List

- Save as
- Send a Copy
- Export and Import Flows

Module 21: Roll Back Column Value Changes

- Introduction to Expressions
- The Null value
- Update Item issue

Module 22: Calculate Totals

- SharePoint Totals
- Expression Syntax
- Internal Names

Module 23: Progress Bars

- The Tasks List
- Progress Bar
- The Mul Expression
- Storage in Template and Custom "% Complete"

Module 24: Set Assignee Depending on Category

- Get Item and Get Items
- Filter Query
- Dynamic Content for Choice Column
- Apply to Each
- Claims

Module 25: Keep Two Lists in Sync

- Lookup Column
- Set Manager in the Staff List
- Update the Manager Value in the Staff List

Module 26: Contract Review Reminder

- Schedule- Recurrence
- Apply to Each
- Filter Query for Days after Today
- Underlying Info

Module 27: Scheduled Report

- Get Items
- Variables

Module 28: New Employee Tasks

- New Employee Tasks without a Settings List
- New Employee Tasks with a Settings List



Module 29: Event Reminder

- UTC and Local Times
- Expressions to find Today
- Check Apply to Each

Module 30: Send Emails with Attachments from Shared Mailbox

- Email Sender
- Append to Array Variable