



# SharePoint Flows: Automate Business Processes with Microsoft Flow

Course ISI-1413B Two Days - Instructor-led - Hands on

## Introduction

During this two-day, instructor led course students will learn how to use Microsoft Flow with SharePoint to automate business processes. Create automated workflows between your favorite applications and services to get notifications, synchronize files, collect data and more without help from developers. Learn SharePoint workflow fundamentals all the way to very advanced topics to help you meet your most complex workflow requirements.

## At Course Completion

After completing this course, students will gain the following knowledge and skills:

- Out-of-the-box and custom workflows
- How to integrate external data
- External events with pluggable workflow services
- Custom workflow actions and conditions
- Model your business process in Visio

## Prerequisites

This course requires no previous experience with workflow app development. Before attending this course, students should attend the following course or have equivalent skills and knowledge:

- SharePoint for Power Users

## Student Materials

The student kit includes a workbook and other necessary materials for this class.

## Course Outline

### Module 1: Why Automate

- Accuracy
- Tracking
- Speed

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



## **Module 2: Important to Consider**

- Storage
- Changes in SharePoint
- CamelCase Naming

## **Module 3: Flow Plans**

- Environments
- Premium Connectors
- Introduction to SharePoint Designer workflows

## **Module 4: The Flow Admin Center**

- Data Policies

## **Module 5: Important Concepts**

- Connectors
- Trigger
- Actions
- Hard-coded Text
- Dynamic Content
- Expressions

## **Module 6: Creating a Flow**

- The Flow Site
- Start from a Template
- Start from Blank
- Start from an Existing Flow
- New Step
- Create your First Flow
- Finalize the Flow
- Shape a Flow

## **Module 7: Example Flows**

- Set Document Titles
  - Theory
  - Flow for Existing Libraries
  - Flow for New Documents

## **Module 8: Set Document Titles**

- Set Document Titles
- Theory
- Flow for Existing Libraries
- Flow for New Documents

## **Module 9: Approval Flows**

- Approval with the Built-in 'Approved Status' Column
- Approved with a Custom Approval Status Column
- Approved Flow in a Mobile

## **Module 10: Get E-Mail Input on New Items**

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- Prerequisites
- Theory
- Steps

**Module 11: Calculate Totals**

- Prerequisites
- Theory
- Steps

**Module 12: Progress Bar**

**Module 13: Monthly Projects Report**

**Module 14: Format E-Mail Body**

**Module 15: E-Mail Lines**

**Module 16: Roll Back Column Changes**

**Module 17: Set Task Assigner Depending on Category**

**Module 18: Merge Orders Into a Task List**

**Module 19: Copy Subject Responses From Forms**

**Module 20: Copy Requested Dropbox Files to SharePoint**

**Module 21: New Employee Tasks with and without a Settings List**

**Module 22: Keep Two Lists in Sync**

**Module 23: Reminders**

- Event Reminder
- Contract Review Reminder

**Module 24: Send E-Mails with Attachments From Shared Mailbox**