



Microsoft Power Platform Functional Consultant

Course PL-200 Five days Instructor-led

Introduction

This course will teach you to use Microsoft Power Platform solutions to simplify, automate, and empower business processes for organizations in the role of a Functional Consultant. A Microsoft Power Platform Functional Consultant is responsible for creating and configuring apps, automations, and solutions. They act as the liaison between users and the implementation team. The functional consultant promotes utilization of solutions within an organization. The functional consultant may perform discovery, engage subject matter experts and stakeholders, capture requirements, and map requirements to features. They implement components of a solution including application enhancements, custom user experiences, system integrations, data conversions, custom process automation, and simple visualizations. This course contains a 1-day Applied Workshop. This workshop will allow you to practice your Functional Consultant skills by creating an end-to-end solution to solve a problem for a fictitious company. The solution will include a Microsoft Dataverse database, Power Apps canvas app, and Power Automate flows.

Audience Profile

A Microsoft Power Platform Functional Consultant is responsible for creating and configuring apps, automations, and solutions. They act as the liaison between users and the implementation team. The functional consultant promotes utilization of solutions within an organization. The functional consultant may perform discovery, engage subject matter experts and stakeholders, capture requirements, and map requirements to features. They implement components of a solution including application enhancements, custom user experiences, system integrations, data conversions, custom process automation, and simple visualizations.

At Course Completion

After completing this course, students will be able to:

- Ingest, clean, and transform data
- Model data for performance and scalability
- Design and create reports for data analysis
- Apply and perform advanced report analytics
- Manage and share report assets
- Create paginated reports in Power BI

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Prerequisites

This course assumes the students have the following experience or courses:

- Experience as an IT professional or student
- Working knowledge of Microsoft Power Platform and its key components
- Knowledge of Microsoft Dataverse (or general data modeling) and security concepts

Student Materials

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

Course Outline

Module 1: Describe the business value of the Microsoft Power Platform

- Explore Microsoft Power Platform
- Describe the business value of the Power Platform
- Explore connectors and Microsoft Dataverse
- Describe how Power Platform works with Microsoft 365 apps and services
- Explore how Power Platform works with Microsoft Teams
- Describe how Power Platform works with Microsoft Dynamics 365 apps
- Describe how Power Platform solutions consume Microsoft Azure services
- Explore how Microsoft Power Platform apps work together

Module 2: Create tables in Dataverse

- Table characteristics
- Table relationships
- Dataverse logic and security
- Dataverse auditing
- Dual-write vs. virtual tables
- Check your knowledge

Module 3: Manage tables in Dataverse

- Identify tables and table types in Dataverse
- Create a custom table
- Enable attachments within a table
- Licensing requirements for each table type
- Lab - Create a new custom table and enable attachments
- Check your knowledge

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Module 4: Create and manage columns within a table in Dataverse

- Define columns in Microsoft Dataverse
- Column types in Microsoft Dataverse
- Add a column to a table
- Create a primary name column
- Restrictions that apply to columns in a table
- Create an auto numbering column
- Create an alternate key
- Check your knowledge

Module 5: Create a relationship between tables in Dataverse

- Relate one or more tables - Introduction
- Relationship types that are available in Microsoft Dataverse
- Create a one-to-many relationship between tables
- Create a many-to-many relationship between tables
- Edit or delete relationships
- Check your knowledge

Module 6: Working with choices in Dataverse

- Define choice column
- Standard choices column
- Lab - Create a new choice or modify an existing choice
- Check your knowledge

Module 7: Get started with security roles in Dataverse

- Understand environment roles
- Adding or disabling an environment user
- Understand security concepts in Dataverse
- Understand user security roles and security role defaults
- Check the roles that a user belongs to
- Configure Dataverse teams for security
- Configure Dataverse group teams for security
- Check your knowledge

Module 8: Use administration options for Dataverse

- Use Microsoft Power Platform Admin Center portal
- Tenant storage capacity
- Advanced Customization options in Power Apps Portal
- Enable and disable auditing
- Check your knowledge

Module 9: Manage Dynamics 365 model-driven app settings and security

- Configure role-based security
- Manage teams and business units
- Explore settings and customizations

Module 10: Introduction to Microsoft Power Platform security and governance

- Identify Microsoft Power Platform environments
- Data Loss Prevention policies
- Microsoft Power Platform Center of Excellence Starter Kit
- Check your knowledge

Module 11: Get started with model-driven apps in Power Apps

- Introducing model-driven apps
- Components of model-driven apps
- Design model-driven apps
- Check your knowledge

Module 12: Configure forms, charts, and dashboards in model-driven apps

- Forms overview
- Form elements
- Configure multiple forms
- Use specialized form components
- Configure views overview
- Configure grids
- Use specialty views
- Configure charts overview
- Dashboards overview
- Use interactive streams and tiles
- Check your knowledge

Module 13: Get started with Power Apps canvas apps

- Power Apps building blocks
- Ways to build Power Apps
- Power Apps related technologies
- Additional Power Apps related technologies
- Designing a Power Apps app
- Check your knowledge

Module 14: Connect to other data in a Power Apps canvas app

- Overview of the different data sources
- Work with action-based data sources
- Power Automate is a companion to Power Apps
- Check your knowledge

Module 15: How to build the UI in a canvas app in Power Apps

- Use themes to quickly change the appearance of your app
- Branding a control
- Icons
- Images
- Personalization
- Using the tablet or phone form factors
- Check your knowledge

Module 16: Manage apps in Power Apps

- Power Apps review
- Check your knowledge

Module 17: Build your first app with Power Apps and Dataverse for Teams

- Create your first app with the hero template
- Customize your app with Power Apps Studio
- Publish your app
- Install template apps
- Check your knowledge

Module 18: Access Dataverse in Power Pages websites

- Use lists to display multiple Dataverse records
- Use forms to interact with Dataverse data
- Check your knowledge

Module 19: Authentication and user management in Power Pages

- Power Pages authentication settings
- User registration in Power Pages
- Authentication management for Power Pages users
- Power Pages authentication providers
- Check your knowledge

Module 20: Power Pages maintenance and troubleshooting

- Power Pages website maintenance
- Power Pages website troubleshooting
- Check your knowledge

Module 21: Define and create business rules in Dataverse

- Define business rules - Introduction
- Define the components of a business rule
- Create a business rule
- Check your knowledge

Module 22: Get started with Power Automate

- Introducing Power Automate
- Troubleshoot flows
- Check your knowledge

Module 23: Use the Admin center to manage environments and data policies in Power Automate

- Administer flows
- Export and import flows
- Learn how to distribute button flows
- Check your knowledge

Module 24: Use Dataverse triggers and actions in Power Automate

- Dataverse triggers
- Use triggers
- Work with Dataverse actions
- Check your knowledge

Module 25: Extend Dataverse with Power Automate

- Set up a flow and configure its trigger
- Email Dataverse record
- Add to-do items
- Test and run your flow
- Check your knowledge

Module 26: Introduction to expressions in Power Automate

- Get started with expressions
- Notes make things easier
- Types of functions



- Write complex expressions
- Check your knowledge

Module 27: Build your first Power Automate for desktop flow

- Set up the environment
- Explore Power Automate for desktop
- Create your first Power Automate for desktop flow
- Record Power Automate for desktop actions
- Edit and test recorded actions
- Check your knowledge

Module 28: Run a Power Automate for desktop flow in unattended mode

- Set up an unattended desktop flow
- Create a new cloud flow that calls an existing flow in unattended mode
- Perform a test run
- Best practices
- Check your knowledge

Module 29: Optimize your business process with process advisor

- Get familiar with process advisor
- Create your first recording
- Edit recordings and group actions
- Analyze recordings and interpret results
- Automation recommendations
- Check your knowledge

Module 30: Get started with Power Virtual Agents bots

- Get started working with environments
- Create bots and work with the Power Virtual Agents interface
- Create topics
- Test bots
- Publish bots and analyze performance
- Check your knowledge

Module 31: Enhance Power Virtual Agents bots

- Use Power Automate to add actions
- Transfer conversations to agents by using Omnichannel for Customer Service
- Create topics for existing support content
- Analyze bot performance
- Check your knowledge

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Module 32: Manage topics in Power Virtual Agents

- Work with bot topics
- Branch a topic
- System topics
- Create topics for existing support content
- Work with system fallback topics
- Manage topics
- Check your knowledge

Module 33: Manage Power Virtual Agents

- Environments in Power Virtual Agents
- Bot topics permissions
- Bot entities and flow permissions
- Monitor and diagnose
- Administer and manage
- Export and import bots
- Authentication
- Check your knowledge

Module 34: Get started building with Power BI

- Use Power BI
- Building blocks of Power BI
- Tour and use the Power BI service

Module 35: Get data with Power BI Desktop

- Overview of Power BI Desktop
- Explore Power BI Desktop
- Connect to data sources
- Get data from Excel
- Transform data to include in a report
- Combine data from multiple sources
- Clean data to include in a report
- Check your knowledge

Module 36: Model data in Power BI

- How to manage your data relationships
- Create calculated columns
- Optimize data models
- Create measures
- Create calculated tables
- Explore time-based data
- Check your knowledge

Module 37: Use visuals in Power BI

- Create and customize simple visualizations
- Create slicers
- Map visualizations
- Matrices and tables
- Create scatter, waterfall, and funnel charts
- Modify colors in charts and visuals
- Page layout and formatting
- Check your knowledge

Module 38: Explore data in Power BI

- Quick insights in Power BI
- Create and configure a dashboard
- Ask questions of your data with natural language
- Create custom Q&A suggestions
- Share dashboards with your organization
- Display visuals and tiles in full screen
- Edit tile details and add widgets
- Get more space on your dashboard
- Check your knowledge

Module 39: Publish and share in Power BI

- Publish Power BI Desktop reports
- Print and export dashboards and reports
- Introducing Power BI Mobile
- Create workspaces in Power BI
- Build apps
- Use apps
- Integrate OneDrive for Business with Power BI
- Publish to web
- Check your knowledge

Module 40: Manage solutions in Power Apps and Power Automate

- Add and remove apps, flows, and entities in a solution
- Edit a solution-aware app, flow, and table
- Build and deploy a complex solution with flows, apps, and entities
- Automate solution management
- Check your knowledge

Module 41: Load/export data and create data views in Dataverse

- View data in a table
- Create or edit views of data in a table
- Load data into a table
- Export data from a table
- Add, update, or delete data in a table by using Excel
- Import data using Power Query
- Generate a new dataflow from an Excel Template
- Dataflow and Azure integration
- Check your knowledge

Module 42: Get started with AI Builder

- Choose an AI capability
- Create your first model
- Ways to use your models
- Check your knowledge

Module 43: Manage models in AI Builder

- Model lifecycle
- Manage model versions
- Share your models
- Check your knowledge

Module 44: Use AI Builder in Power Automate

- AI Builder in Power Automate saves time
- Advanced usage of AI Builder in Power Automate
- Check your knowledge

Module 45: Functional Consultant skills

- Create entity relationship diagrams
- Create and document mock-ups
- Document functional requirements and artifacts
- Complete fit-gap analysis
- Discuss stakeholder management responsibilities
- Understand industry accelerators
- Define Application Lifecycle Management
- Participate in testing
- Evaluate options
- Define connectors
- Understand Power Apps component framework



Module 46: Solution Architect series: Plan application lifecycle management for Power Platform

- Key considerations for ALM
- Solutions
- Configuration and reference data
- Release process
- ALM with Azure DevOps
- Check your knowledge