

Course Details

Course Code: PL-200T00

Duration: 5 days

Notes:

- This course syllabus should be used to determine whether the course is appropriate for the students, based on their current skills and technical training needs.
- Course content, prices, and availability are subject to change without notice.
- Terms and Conditions apply

Elements of this syllabus are subject to change.

About this course

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 may contain 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.

Prerequisites

- 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

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Describe the business value of the Microsoft Power Platform

Learn about the components of Microsoft Power Platform, the business value for customers, and how the technology works with other Microsoft products.

This module helps prepare you for Exam PL-100: Microsoft Power Platform App Maker.

Learning objectives

In this module, you will:

- Examine Microsoft Power Platform.
- Describe the business value of the Power Platform.
- Explore connectors in Power Platform.
- Review using Microsoft Dataverse to organize business data.
- Examine how Power Platform works together with Microsoft 365 apps and services.
- Explore solutions using Power Platform Microsoft Teams.
- Describe how Power Platform works with Dynamics 365.
- Describe how Power Platform solutions can consume Azure Services.
- Explore how Power Platform apps work together to create solutions.

Get Started with Power Pages

Power Pages provide a great way to allow internal and external audiences to view and interact with data from Microsoft Dataverse or Dynamics 365, and should be a consideration as a pillar in an organization's overall web strategy. This learning path introduces you to Power Pages that can be quickly provisioned to serve a variety of different audiences and workloads. We also cover fundamentals of Power Pages architecture, components, features, tooling, and security.

Prerequisites

- Power Pages trial subscription.

Create and use analytics reports with Power BI

This learning path introduces you to Power BI and teaches you to use and build business intelligence reports.

This learning path can help you prepare for the Microsoft Certified: Microsoft Power Platform App Maker Associate certification.

This learning path helps prepare you for Exam PL-400: Microsoft Power Platform Developer, Exam PL-200: Microsoft Power Platform Functional Consultant.

Prerequisites

- Familiarity with Excel
- Access to the Power BI service
- Power BI Desktop

Manage workspaces and datasets in Power BI

In this Learning Path, you'll learn how to publish Power BI reports to the Power BI service. You'll also learn how to create workspaces, manage related items, and data refreshes for up-to-date reports. Additionally, implement row-level security to restrict user access to relevant data without the need for multiple reports.

This learning path can help you prepare for the Microsoft Certified: Data Analyst Associate certification.

This learning path helps prepare you for Exam PL-300: Microsoft Power BI Data Analyst.

Prerequisites

- None

Create tables in Dataverse

Dataverse lets you securely store and manage data that's used by business applications. Standard and custom tables within Dataverse provide a secure and cloud-based storage option for your data.

This module helps prepare you for Exam PL-100: Microsoft Power Platform App Maker.

Learning objectives

This module explains how to:

- Create tables with Dataverse
- Import data into a Dataverse database

Manage tables in Dataverse

Dataverse tables are similar to tables in a database. Every instance of a Dataverse database includes a base set of tables that provide structure for data that is commonly used by business applications.

Learning objectives

In this module, you'll learn about:

- Tables in Dataverse.
- Types of tables that are available in Dataverse.
- Creating a custom table.
- Enabling attachments within a table.
- Which licensing requirements to apply to use each type of table.

Create and manage columns within a table in Dataverse

Do you want to create new data columns or use existing standardized columns for your business solutions? This module will show you how to manage or create new columns within a table in Dataverse.

This module helps prepare you for Exam PL-100: Microsoft Power Platform App Maker.

Learning objectives

In this module, you will:

- Learn what a column is in Dataverse.
- Learn about the types of columns that are available in Dataverse.
- Add a column to a table.
- Learn what a primary name column is in Dataverse.
- Identify restrictions that are associated with columns.
- Create an auto-numbering column.
- Create an alternate key.

Create a relationship between tables in Dataverse

Do you need to create relationships between tables? This module will show how and why you can separate data into tables and how to relate between tables to build complex and robust business solutions. It will also explain the different kinds of relationships that you can define between tables in Dataverse.

Learning objectives

In this module, you'll learn:

- Why you should segment data that is used by your solutions into many tables.
- Why you need to relate one table to another.
- How to build relationships between tables.

- How to select the proper relationship type when you're building solutions with Dataverse.

Working with choices in Dataverse

Do you want to create standardized choice lists that you can use across all of your Power Apps? This module will show you how to create new or use standard choice lists called choices in Dataverse.

Learning objectives

In this module, you will:

- Learn about choices.
- Explore the standard choices.
- Create a new choice or modify an existing one.

Get started with security roles in Dataverse

Do you want to use security roles to limit user permissions? This module will show you how you can set permissions to limit access to an environment. Or limit which users can view, edit, or delete data in an environment within Dataverse.

This module helps prepare you for Exam PL-100: Microsoft Power Platform App Maker.

Learning objectives

In this module, you will:

- Learn about security roles and apply them to users in an environment.
- Learn how to add users to an environment.
- Understand security concepts in Dataverse
- Identify default security roles.
- Create a custom role.
- Create a custom security role and assign it to entities and users.
- Learn how to configure Dataverse teams for security
- Learn how to configure Dataverse group teams for security

Use administration options for Dataverse

Do you need to use administration options that are available for Dataverse? This module will show you how you can use solutions within Dataverse and administer environments.

Learning objectives

In this module, you'll learn how to:

- Administer Dataverse.
- Identify the different portals that are available for Dataverse.

Manage Dynamics 365 model-driven app settings and security

In this module, students will learn about the role-based security model. They will also learn how to explore and navigate Dynamics 365 settings and configure a theme for the application.

Learning objectives

At the end of this module, you will be able to:

- Manage role-based security
- Explore customization functionality and customize themes

Introduction to Microsoft Power Platform security and governance

Do you want to learn about how to help secure and govern Microsoft Power Platform apps like Power Automate and Power Apps? This module focuses on introducing Microsoft Power Platform environments and their role in creating Data Loss Prevention (DLP) policies by using examples and use cases. A brief introduction and overview of tools will also be discussed, including Microsoft Power Platform and Power Automate Admin experiences and Microsoft Power Platform Center of Excellence (COE) toolkit.

This module helps prepare you for Exam PL-500: Microsoft Power Automate RPA Developer, Exam PL-500: Microsoft Power Automate RPA Developer, Exam PL-100: Microsoft Power Platform App Maker.

Learning objectives

In this module, you will:

- Access Microsoft Power Platform admin experiences.
- Create simple environment and tenant wide DLP policies.
- Discover and identify the differences between the Business data group and the No-business data group.
- Learn about the differences between out-of-the-box Power Automate Admin

experiences and Microsoft Power Platform Center of Excellence toolkit.

Get started with model-driven apps in Power Apps

Model-driven app design is an approach that focuses on quickly adding components to your apps. These components include dashboards, forms, views, and charts. With little or no code, you can make apps that are simple or complex.

This module helps prepare you for Exam PL-100: Microsoft Power Platform App Maker.

Learning objectives

In this module, you will:

- Learn about model-driven app design
- Create a model-driven app

Configure forms, charts, and dashboards in model-driven apps

In this module, you'll learn about forms, grids, views, charts, and dashboards that can be used in model-driven apps.

Learning objectives

This module explains how to:

- Use form elements and controls
- Configure forms
- Use specialized form components
- Use editable grids
- Identify views and use public views
- Learn how to configure charts
- Learn how to configure dashboards

Get started with Power Apps canvas apps

Learn the basics of Power Apps and how you can use it in your organization.

Learning objectives

In this module, you will:

- Explore how Power Apps can make your business more efficient.
- Learn how to use different technologies to perform different tasks in Power Apps.
- Learn about the different ways to build an app in Power Apps.
- Create your first app from data in an Excel workbook.

Connect to other data in a Power Apps canvas app

Do you need to connect to data that isn't tabular? This module will help with that. It includes discussion of action-based connectors, Flow, and user data.

Learning objectives

In this module, you'll:

- Understand and use action-based connectors
- Integrate user information and user-profile information into a canvas app
- Use Power Automate with Power Apps

How to build the UI in a canvas app in Power Apps

Do you want to build a better UI for app users? This module helps you do that using themes, icons, images, personalization, different form factors, and controls.

This module helps prepare you for Exam PL-100: Microsoft Power Platform App Maker.

Learning objectives

In this module, you will:

- Understand the basics of building the UI through themes, icons, control customization, and images.
- Use personalization in a canvas app
- Understand the differences between the Tablet and Mobile form factors

Manage apps in Power Apps

Manage app versions, app sharing, and environments in Power Apps.

Learning objectives

In this module, you will:

- Learn how to view and restore app versions.
- Explore how to share an app, including permissions and notifications.
- Learn about what environments are, how to create them, and how to manage security.
- Find more information about Power Apps.

Build your first app with Power Apps and Dataverse for Teams

Today's business problems increasingly require modern digital solutions. With a low-code platform, anyone with a great idea can build a digital app. Dataverse for Teams allows you to build modern digital apps and deploy them to help you and your team solve those problems.

This module helps prepare you for Exam PL-100: Microsoft Power Platform App Maker.

Learning objectives

In this module, you will:

- Create an app by using the hero template.
- Customize and publish your app.
- Install templates.

Access Dataverse in Power Pages websites

The ability to show and interact with Dataverse data on a website is a central benefit of implementing a Microsoft Power Pages website. This module focuses on the several techniques and methods for displaying and interacting with Dataverse data on Power Pages websites.

Learning objectives

In this module, you'll:

- Discover Power Pages components that are available to help you display and interact with Dataverse data on a Power Pages website.
- Identify the various features of the Power Pages components.
- Display a list of data and an associated drill-down list for details.
- Set up a form to access individual table rows.
- Trigger classic Dataverse workflows from the website.

Authentication and user management in Power Pages

An external user might have several identities to choose from when registering and accessing a website. You can add website users in many ways, and several options are available to website users for validating their identities and maintaining their profiles. Microsoft Power Pages supports various authentication options and

provides powerful user-management capabilities. Administrators can choose between using local authentication or delegating authentication to a trusted authentication provider. Power Pages supports multiple authentication providers and various industry standards.

Learning objectives

In this module, you'll:

- Explore common authentication tasks in a Power Pages website deployment.
- Learn about portal contact extensions.
- Set up and register contacts as portal users.
- Align portal authentication settings with business requirements.
- Identify authentication provider capabilities and steps that are involved in the registration.
- Select and set up identity providers.

Power Pages maintenance and troubleshooting

When building a Microsoft Power Pages website, administrators should consider various techniques, best practices, and features. This module covers the various troubleshooting tools that are available and explains the importance of using the Site Checker tool.

Learning objectives

In this module, you'll:

- Apply strategies and techniques to troubleshoot Power Pages website issues.
- Learn how the Site Checker tool works and how to resolve potential website issues.
- Complete the website update process.

Define and create business rules in Dataverse

The ability to build business rules that ensure consistent business logic whatever app is accessing that data set is imperative to a successful business operation. This module will show you how you can build business rules that are triggered anytime they're used within Dataverse.

Learning objectives

In this module, you'll learn how to:

- Define business rules in Dataverse.

- Create and manage business rules in Dataverse.

Get started with Power Automate

Power Automate is an online workflow service that automates actions across the most common apps and services.

This module helps prepare you for Exam PL-100: Microsoft Power Platform App Maker.

Learning objectives

In this module, you will:

- Create a flow that automatically saves email attachments
- Learn how to create a button flow to send yourself a reminder

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

Tenant and environment admins use the Power Automate Admin center to manage data policies and environments for Power Automate deployments.

This module helps prepare you for Exam PL-100: Microsoft Power Platform App Maker.

Learning objectives

In this module, you will:

- Learn about the Admin center
- Learn how to import and export flows
- Learn how to share flows

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Use Dataverse triggers and actions in Power Automate

This module introduces the triggers and actions that you can use to build flows in Power Automate with Dataverse.

Learning objectives

In this module, you will:

- Learn about the Dataverse triggers and actions in Power Automate.
- Discover the additional inputs that are available.

Extend Dataverse with Power Automate

This module explains how to create your first flow in Power Automate with triggers and actions from Dataverse.

Learning objectives

In this module, you will:

- Build flows with Dataverse.
- Integrate Dataverse with Microsoft Outlook.
- Integrate Dataverse with Microsoft to Do.

Introduction to expressions in Power Automate

Learning objectives

In this module, you will:

- Use one or more functions to create expressions.
- Use functions to retrieve data, change data, evaluate data, and more.

Build your first Power Automate for desktop flow

Learn the basics of Power Automate for desktop flows. Additionally, learn how to build the first flow to help automate a repetitive task, freeing up time for more important endeavours.

Learning objectives

In this module, you'll:

- Learn how to use Power Automate to create a new desktop flow.
- Record actions that are performed in a desktop-based application.
- Perform a test run of the new desktop flow.

Run a Power Automate for desktop flow in unattended mode

Some business processes require supervision or input that's impossible or risky to automate. However, you can fully automate other processes that don't require human oversight or are inconvenient or impractical to constantly monitor. This module demonstrates the solution for these scenarios by explaining how to run your UI and API flows in unattended mode.

Learning objectives

In this module, you'll:

- Run a basic desktop flow in unattended mode.
- Run a desktop flow and cloud flow scenario in unattended mode.
- Learn about best practices and setup for unattended desktop flows.

Optimize your business process with process advisor

With the process advisor capability in Power Automate, you can record existing business processes and analyze them to increase efficacy by tracking completion times and mapping various actions that are involved. The first step to automating a solution is knowing the process, and process advisor helps simplify that task.

Learning objectives

In this module, you will:

- Create your first recording.
- Edit recordings and group actions.
- Analyze recordings and interpret results.

Get started with Power Virtual Agents bots

Power Virtual Agents allows organizations to quickly create bots based on business scenarios their customers and employees can easily interact with as needed. In this module, you're introduced to key concepts and build a basic Microsoft Power Virtual Agents bot.

Learning objectives

This module explains how to:

- Create Power Virtual Agents bots.
- Test Power Virtual Agents bots.
- Analyze performance.

Enhance Power Virtual Agents bots

Many times, you may need to leverage or integrate other technologies for your bot to provide the experience you want. This module examines some of the methods that you can use to enhance your Power Virtual Agents bots such as leveraging Power Automate flow to add actions and transferring conversations from a bot to Omnichannel for Customer Service.

Learning objectives

In this module, you will:

- Initiate Power Automate flows directly from topics in your bot.
- Configure bots to pass conversations to applications such as Omnichannel for Customer Service.
- Extract content from support pages and configure it into bot topics that you can use in conversations.

Manage topics in Power Virtual Agents

In Microsoft Power Virtual Agents, topics are used to small conversations related to a specific subject. A Power Virtual Agents bot typically includes many topics. This module you're introduced to the basic principles of topics such as trigger phrases and conversation paths and how to create them.

Learning objectives

This module explains how to:

- Use topics to create and manage conversation paths in a bot.
- Work with topic triggers and conversation nodes.
- Add branching to a topic.
- Use system topics and create topics from content.
- Set up fall-back topics to handle unrecognized user input.

Manage Power Virtual Agents

Power Virtual Agents allows organizations to quickly create bots based on business scenarios their customers and employees can easily interact with as needed. This module examines the components available for managing and administering Power Virtual Agent Bots.

Learning objectives

In this module, you will:

- Create and configure a new bot.
- Set permissions and security.
- Use topics and entities.
- Import and export bots.
- Authenticate users.

Get started building with Power BI

Learn what Power BI is, including its building blocks and how they work together.

This module helps prepare you for Exam PL-100: Microsoft Power Platform App Maker.

Learning objectives

In this module, you will:

- Learn how Power BI services and applications work together.
- Explore how Power BI can make your business more efficient.
- Learn how to create compelling visuals and reports.

Get data with Power BI Desktop

How can you find, collect, and clean data from different sources? Power BI is a tool for making sense of your data. You will learn tricks to make data-gathering easier.

This module helps prepare you for Exam PL-100: Microsoft Power Platform App Maker.

Learning objectives

In this module, you will:

- Explore the data-centric features and tools of Power BI.
- Explore ways to find data.

Model data in Power BI

Connect Power BI to multiple data sources to create reports. Define the relationship between your data sources.

Learning objectives

In this module, you will:

- Create relationships between your data sources
- Create a new field with calculated columns

- Optimize data by hiding fields and sorting visualization data
- Create a measure to perform calculations on your data
- Use a calculated table to create a relationship between two tables
- Format time-based data so that you can drill down for more details

Use visuals in Power BI

Create and customize visuals to present data in compelling and insightful ways.

Learning objectives

In this module, you will:

- Explore Power BI visuals
- Create visuals

Explore data in Power BI

Turn your business intelligence data into data insights by creating and configuring Power BI dashboards.

Learning objectives

In this module, you will:

- Upload reports
- Create dashboards
- Ask questions of your data

Explore data in Power BI

Turn your business intelligence data into data insights by creating and configuring Power BI dashboards.

Learning objectives

In this module, you will:

- Upload reports
- Create dashboards
- Ask questions of your data

Publish and share in Power BI

Publish and share your Power BI reports and dashboards to teammates in your organization or to everyone on the web.

Learning objectives

In this module, you will:

- Publish reports
- Print and export reports
- Build apps

- Integrate with OneDrive
- Publish to the web

Manage solutions in Power Apps and Power Automate

Microsoft Power Apps and Power Automate include such package features as apps from Microsoft Power Apps, site maps, flows, entities, customer connectors, and more. In this module, you'll learn how to manage solutions with Power Automate.

Learning objectives

In this module, you will:

- Package existing items into a solution.
- Create solutions.
- Edit existing solution-aware apps, flows in a solution.
- Import and export solutions.
- Deploy complex solutions with many components.
- Learn about component dependency on other components.

Load/export data and create data views in Dataverse

Dataverse lets you load data into or export tables from other tables by using Microsoft Excel. You can also create views to quickly review data that is stored within a table.

Learning objectives

In this module, you will:

- View data within 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 in Maker Portal
- Generate a new dataflow from an Excel Template
- Learn about dataflows and Azure integration

Get started with AI Builder

This self-paced module helps you build an AI model from the beginning and shows how you can use it in your business without writing a single line of code.

This module helps prepare you for Exam PL-100: Microsoft Power Platform App Maker.

Learning objectives

In this module, you will:

- Explore how AI Builder can help improve your business performance.
- Learn how to use different AI technologies to enhance your processes.
- Create your first model.
- Learn how to use your models in Power Apps and Power Automate.

Manage models in AI Builder

Understand your model, model versions, and model sharing in AI Builder.

Learning objectives

In this module, you will:

- Learn about the lifecycle of a model.
- Learn how to manage model versions.
- Explore how to share a model, including permissions.
- Get a better understanding of AI Builder.

Use AI Builder in Power Automate

Learn the basics of AI Builder usage in Power Automate and how it can benefit your organization.

Learning objectives

In this module, you will:

- Explore how using AI Builder in Power Automate can save you time.
- Learn how to use AI Builder actions in Power Automate.
- Discover advanced AI Builder usage in Power Automate.

Functional Consultant skills

Learn about the functional consultant role and the key skills needed to be successful in this role on a Microsoft Power Platform project.

Learning objectives

In this module, you will:

- Learn the key responsibilities and skills of the functional consultant role on a project that involves Microsoft Power Platform.

- Learn about creating entity relationship diagrams, wireframes, and mock-ups for apps, documenting requirements and solution artifacts, and documenting details of data for migration and integration.
- Understand how functional consultants are expected to engage with stakeholders, perform quality assurance, and configure integrations on projects.

Solution Architect series: Plan application lifecycle management for Power Platform

Solution architects for Microsoft Power Platform need to define the environment strategy and application lifecycle management (ALM) for transporting work from development to test to production.

Learning objectives

In this module, you will:

- Learn about Microsoft's vision and the solution architect's role in ALM.
- Review environment strategies.
- Define a solution structure for your deliverables.