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Workplace Training - Power Automate (Flow)

Course Overview - 1-day course

The work horse of Office 365

This course focuses on Microsoft Power Automate as the automation and integration tool within Microsoft's Office 365 suite of products and solutions. Organisations looking to make use of more end user and enterprise levels of automation, increase end use productivity and reduce errors and repetition will benefit from this one-day course.

The objectives of the course are to introduce Power Automate in order to reduce manual workload for everyday tasks. It then explores more intermediate and advanced concepts to help users design and manage more complex flows.

The course makes use of several integrated products in Office 365 that Power Automate works natively with. As an alternative, our series of Office 365 public and workplace courses explore more of these associated products so the benefits of Office 365 can be better realized.

Detailed Content

Introduction
- Course Objectives
- How this manual is organised

About Office 365
- What is Office 365
- Suite of Apps
- Office 365 Subscriptions
- Power Platform
- Office 365 in the workplace

Microsoft Power Automate
- Introduction to Power Automate
- Purpose of Power Automate
- Why use Microsoft Power Automate?
- What kind of tasks can Power Automate perform?
- How should you use Microsoft Power Automate?
- Accessing Power Automate

Power Automate interface
- Suite Bar
- My Flows
- Team Flows
- How to view Team Flows Approvals
- How to view approval requests Templates & Connectors

Designing a Flow
- What's in the gallery of templates?

Flow 1: save email attachments
- Creating a flow from the gallery
- Editing a flow
- Building blocks of the flow
- Testing the flow

Flow 2: regular reminders
- Create the flow
- Run now feature
- Disabling a flow

Flow 3: sync calendars
- Add a condition to a flow

Flow 4: send a newsletter
- Fixing failed flows
- Deleting Flows

Approvals in Power Automate
- Introduction to Flow Approvals
- Approval Templates
- Create an Approval Flow Manually
- Test and Run the Approval Flow from Flow
- Add a conditional action after approval
- Power Automate integration with Teams

Sharing Flows
- Introduction to sharing of Flows
- Allow other users to run
- The Dynamics 365 interface
- Allow other users to run with your credentials
- Sharing a Flow with other Owners

Administration of Flows
- Copy (save as) a Flow
- Enable and Disable Flows
- Export a Flow to file
- Configuring Connections
- Delete a Flow
- Optional Integration Project Exercise

Power Automate - Error Handling
- Introduction to Error Handling
- Error Handling in Power Automate
- Error Types in Power Automate
- Create an error free Flow in Power Automate
- Cause the Flow to error
- View successful actions & triggers
- View failed actions & triggers
- Error handling techniques

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Configuring Run Conditions
Handle the error with a parallel branch
Add an action after the parallel branches
Handle the outcome of all branches
Use Terminate to successfully end a Flow
More complex but efficient alternative error handling

Power Automate - Debugging

Debugging in Power Automate
View the output of an action
Using Compose to see data
Variables for debugging
Using a variable to capture debug information
Variables versus Compose
View a complex output from an action
Debugging with Static Results
Causing an error with Static Results
Advice for Debugging and Error Handling

Power Automate - Data and JSON

Basic data Types in Power Automate
Object and Array data types
What is JSON
JSON examples
How to handle JSON
How a Flow is defined (JSON)
A string of JSON in a Flow
An Object of JSON in a Flow
Handling data in JSON format
Parse JSON data
Extended Topic – JSON Schemas
More complex JSON data
Accessing an array of JSON data

Power Automate - Expressions

What is the Workflow Definition Language
The Workflow Definition Language Schema
The functions reference for Workflow Definition Language
Writing Expressions in Power Automate
The expression pane

Power Automate - String Expressions

A Basic String function
Combining String functions together

Power Automate - Variables in expressions

Variable naming conventions
The variables() function
Referencing a variable in another function

Power Automate - Arrays & Collections

What is an array
What is a collection
Defining an array
Looping through an array
Filtering an array
The length of an array
Find if an element exists in an array
Accessing an array element by index

Power Automate - Data & Math Expressions

Arithmetic Functions
Conversion functions

Power Automate - Date/Time types and expressions

The Date and Time data type
Date and Time functions
Time Zone functions
Formatting Dates and Times

Power Automate - Advanced Functions

The workflow() function
Data from the trigger
The dot (.) operator
Data from an action
Operators to access data fields
Avoiding errors with NULL or missing fields
The ? operator
Have a default if value is null
Other function groups

Power Automate - Configuration

Introduction to limits
Trigger Conditions
Tracked Properties
Create a Tracked Property
Accessing Tracked Properties
A calculation from a Tracked Property
Extended Exercise – Using a calculated output for Tracked Property
Other Power Automate settings
Secure Inputs and Outputs
Concurrency Control
Timeouts and Retries
Other settings

SharePoint Automation

Power Automate and SharePoint
SharePoint Triggers
SharePoint Actions
SharePoint caution with actions and triggers
Perform an action on an item using Power Automate
Share a SharePoint Flow
Select file and initiate the Flow
Use SharePoint metadata to advise user
Expand the SharePoint Flow functionality
Content Approval in SharePoint
SharePoint Approval Process
SharePoint Workflows
Using Power Automate to manage SharePoint Approvals
Create a Flow to Approve SharePoint files
Add an approval action to the SharePoint Flow
The approval response handling
Testing the approval Flow