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PL-200: Microsoft Power Platform Functional Consultant

Duration: 5 days

The Power Platform empowers organizations to automate business processes, develop their own rich app experiences, and connect with customers better and faster. In this course, students will learn to perform discovery, capture requirements, engage subject matter experts and stakeholders, translate requirements, and configure Power Platform solutions and apps. They will supplement their learnings with hands-on labs to create application enhancements, custom user experiences, system integrations, data conversions, custom process automation, and custom visualizations. Power Platform is comprised of four key products: Power Apps, Power Automate, Power BI, and Power Virtual Agents. In this course, we will cover these four applications in depth, with additional focus on Microsoft Dataverse (formerly Common Data Service), AI Builder, connectors, and portals.

PREREQUISITES

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

AUDIENCE

A Power Platform Functional Consultant is responsible for performing discovery, capturing requirements, engaging subject matter experts and stakeholders, translating requirements, and configuring Power Platform solutions and apps. The Functional Consultant implements components of a solution that include application enhancements, custom user experiences, system integrations, data conversions, custom process automation, and custom visualizations.

AT COURSE COMPLETION

After completing this course, students will be able to:

- Work with an organization to gather requirements and implement Power Platform solutions
- Build model-driven, canvas, and portal apps
- Create Power Automate flows
- Design a simple chatbot using Power Virtual Agents
- Analyze data using Power BI visualizations and dashboards

COURSE OUTLINE

Module 1: Introduction to the Power Platform

This module will provide the learner with background about the Power Platform and its 4 key components: Power Apps, Power Automate, Power BI, and Power Virtual Agents.

Lessons

- Power Platform overview

Lab: Validate lab environment

After completing this module, students will be able to:

- Identify the key components of the Power Platform
- Describe the role of a functional consultant

Module 2: The Functional Consultant role

In this module, students will learn more about the functional consultant role and the skills required to successfully implement a Power Platform solution for an organization.

Lessons

- Consultant skills overview

- Create and validate documentation
- Engage stakeholders
- Perform quality assurance
- Configure integrations

After completing this module, students will be able to:

- Engage stakeholders with demos
- Create table (entity) relationship diagrams
- Design integrations
- Interact with consultant and customer organization teams

Module 3: Work with Dataverse

In this module, students will learn about creating a data model in Microsoft Dataverse, including importing data, using tabular reporting options, and configuring security. They will also learn about creating easy AI with AI Builder.

Lessons

- Work with the data model
- Create and manage processes
- Work with AI Builder
- Configure Dataverse settings
- Import and export data
- Use tabular reporting options
- Configure security settings

Lab: Create an app

Lab: Create tables and columns

Lab: Create relationships

Lab: Additional table options

After completing this module, students will be able to:

- Understand tables, columns, rows, and relationships
- Configure a data model in Dataverse
- Work in an environment within the Power Platform admin center

Module 4: Make Power Apps

In this module, students will learn the business value of the three types of Power Apps. They will then learn to how to configure and design them, including user experience considerations for each type of application.

Lessons

- Make model-driven apps
- Make canvas apps
- Make portal apps

Lab: App designer

Lab: Modify forms

Lab: Modify views

Lab: Build dashboards

Lab: Canvas app fundamentals

Lab: Work with data and services

Lab: User experience

After completing this module, students will be able to:

- Connect to data in Power Apps
- Build a Power App
- Design an application user experience

Module 5: Build Power Automate flows

In this module, students will learn how to automate business processes using Power Automate flows, business process flows, and UI flows.

Lessons

- Build flows
- Build business process flows
- Build UI flows

Lab: Create users

Lab: Create security role

Lab: Configure a new business rule

Lab: Advanced business rules

Lab: Create a flow

Lab: Build approval flow

Lab: Build a business process flow

Lab: Add branching to business process flow

After completing this module, students will be able to:

- Create flows
- Create business process flows
- Understand UI flows

Module 6: Work with Power Virtual Agents

In this module, students will learn how to automate customer interactions with a chatbot using Power Virtual Agents.

Lessons

- Create a chatbot
- Configure topics
- Automate and integrate
- Configure entities
- Test and publish chatbots

Lab: Create a chatbot

After completing this module, students will be able to:

- Create a chatbot
- Include a flow in a chatbot
- Create topics and entities

Module 7: Analyze data with Power BI

In this module, students will learn how to work with Power BI Desktop and Power BI Service to analyze data and create visualizations.

Lessons

- Get started with Power BI

- Model data in Power BI
- Create visualizations
- Create dashboards
- Publish and share in Power BI

Lab: Build a Word template

Lab: Build an Excel template

Lab: Duplicate detection

Lab: Import data

Lab: Export data

Lab: Bulk delete

After completing this module, students will be able to:

- Create visualizations
- Consume data in Power BI
- Export data visualizations for stakeholders