



PL-200T00: Microsoft Power Platform Functional Consultant

Course ID #: 7000-497-ZZ-Z

Hours: 35

Course Content

Course Description:

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.

Course Objectives:

Upon successful completion of this course, students will be able to:

- Describe how Power Platform solutions can consume Azure Services
- Import data into a Dataverse database
- Enabling attachments within a table
- Create a new choice or modify an existing one
- Create a custom security role and assign it to entities and users
- Explore how to share an app, including permissions and notifications
- Create and test Power Virtual Agents bots
- Use a calculated table to create a relationship between two tables
- Create your first model
- Define a solution structure for your deliverables
- And so much more!

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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Target Audience:

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.

Topics:

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

- Introduction
- 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
- Knowledge check
- Summary and resources

Lesson 2: Get Started with Power Pages

- Introduction to Power Pages
- Get started with Power Pages
- Core tools and components of Power Pages
- Overview of Power Pages security
- Overview of Power Pages extensibility
- Check your knowledge
- Summary

Lesson 3: Create and use analytics reports with Power BI

- Introduction
- Use Power BI
- Building blocks of Power BI
- Tour and use the Power BI service
- Knowledge check
- Summary



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Lesson 4: Manage workspaces and datasets in Power BI

- Introduction
- Distribute a report or dashboard
- Monitor usage and performance
- Recommend a development life cycle strategy
- Troubleshoot data by viewing its lineage
- Configure data protection
- Check your knowledge
- Summary

Lesson 5: Create tables in Dataverse

- Introduction to Microsoft Dataverse
- Table characteristics
- Exercise - Create a Microsoft Dataverse table
- Exercise - Import data into your Microsoft Dataverse database
- Table relationships
- Exercise - Create table relationships
- Dataverse logic and security
- Exercise - Create a custom table and import data
- Dataverse auditing
- Dual-write vs. virtual tables
- Check your knowledge
- Summary

Lesson 6: 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
- Summary

Lesson 7: 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
- Exercises
- Check your knowledge
- Summary

Lesson 8: 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
- Exercise - Create two tables and relate them by using a one-to-many relationship
- Check your knowledge
- Summary

Lesson 9: Working with choices in Dataverse

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



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Lesson 10: Get started with security roles in Dataverse

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

Lesson 11: Use administration options for Dataverse

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

Lesson 12: Manage Dynamics 365 model-driven app settings and security

- Introduction
- Configure role-based security
- Manage teams and business units
- Explore settings and customizations
- Knowledge check
- Exercise - Create a new security role
- Summary

Lesson 13: Introduction to Microsoft Power Platform security and governance

- Introduction
- Identify Microsoft Power Platform environments
- Data Loss Prevention policies
- Microsoft Power Platform Center of Excellence Starter Kit
- Exercise - Create a Power Platform environment
- Check your knowledge
- Summary

Lesson 14: Get started with model-driven apps in Power Apps

- Introducing model-driven apps
- Components of model-driven apps
- Design model-driven apps
- Exercise
- Exercise - Control security when sharing model-driven apps
- Exercise - Create a model-driven app
- Check your knowledge
- Summary

Lesson 15: 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
- Create and edit views
- Configure charts overview
- Dashboards overview
- Use interactive streams and tiles
- Check your knowledge
- Summary



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Lesson 16: Get started with Power Apps canvas apps

- Introduction to Power Apps
- Power Apps building blocks
- Exercise - Create your first app in Power Apps
- Exercise - Create an app from Excel using Copilot
- Ways to build Power Apps
- Power Apps related technologies
- Additional Power Apps related technologies
- Designing a Power Apps app
- Check your knowledge
- Summary

Lesson 17: 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
- Summary

Lesson 18: 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
- Exercise - Create UI for a new canvas app
- Check your knowledge
- Summary

Lesson 19: Manage apps in Power Apps

- Exercise - Manage app versions in Power Apps
- Exercise - Share apps in Power Apps
- Exercise - Understand environments in Power Apps
- Power Apps review
- Check your knowledge
- Summary

Lesson 20: Build your first app with Power Apps and Dataverse for Teams

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

Lesson 21: Access Dataverse in Power Pages websites

- Introduction
- Use lists to display multiple Dataverse records
- Use forms to interact with Dataverse data
- Exercise - Use the list and form components
- Check your knowledge
- Summary



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Lesson 22: Authentication and user management in Power Pages

- Introduction
- Power Pages authentication settings
- User registration in Power Pages
- Authentication management for Power Pages users
- Power Pages authentication providers
- Exercise - Use an invitation to register users
- Check your knowledge
- Summary

Lesson 23: Power Pages maintenance and troubleshooting

- Introduction
- Power Pages website maintenance
- Power Pages website troubleshooting
- Exercise - Run the Portal Checker
- Check your knowledge
- Summary

Lesson 24: Define and create business rules in Dataverse

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

Lesson 25: Get started with Power Automate

- Introducing Power Automate
- Exercise - Create your first flow
- Exercise - Create recurring flows
- Exercise - Monitor incoming emails
- Exercise - Share flows
- Troubleshoot flows
- Check your knowledge
- Summary

Lesson 26: 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
- Summary

Lesson 27: Use Dataverse triggers and actions in Power Automate

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

Lesson 28: Extend Dataverse with Power Automate

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



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Lesson 29: Introduction to expressions in Power Automate

- Introduction to expressions
- Get started with expressions
- Notes make things easier
- Types of functions
- Write complex expressions
- Exercise - Creating a manual flow and using expressions
- Check your knowledge
- Summary

Lesson 30: Build your first Power Automate for desktop flow

- Introduction
- 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
- Summary

Lesson 31: Run a Power Automate for desktop flow in unattended mode

- Introduction
- 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
- Summary

Lesson 32: Optimize your business process with process advisor

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

Lesson 33: Get started with Power Virtual Agents bots

- Introduction
- Get started working with environments
- Create bots and work with the Power Virtual Agents interface
- Create topics
- Test bots
- Publish bots and analyze performance
- Exercise - Build your first chatbot
- Check your knowledge
- Summary

Lesson 34: Enhance Power Virtual Agents bots

- Introduction
- 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
- Summary



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Lesson 35: Manage topics in Power Virtual Agents

- Introduction
- 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
- Summary

Lesson 36: Manage Power Virtual Agents

- Introduction
- 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
- Summary

Lesson 37: Get started building with Power BI

- Introduction
- Use Power BI
- Building blocks of Power BI
- Tour and use the Power BI service
- Knowledge check
- Summary

Lesson 38: 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
- Summary

Lesson 39: Model data in Power BI

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

Lesson 40: Use visuals in Power BI

- Introduction to 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
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Lesson 41: Explore data in Power BI

- Introduction to the Power BI service
- 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
- Summary

Lesson 42: Publish and share in Power BI

- Introduction to using workspaces
- 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
- Summary

Lesson 43: Manage solutions in Power Apps and Power Automate

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

Lesson 44: 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
- Summary

Lesson 45: Get started with AI Builder

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

Lesson 46: Manage models in AI Builder

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



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Lesson 47: Use AI Builder in Power Automate

- Introduction to AI Builder usage in Power Automate
- AI Builder in Power Automate saves time
- Exercise - Use AI Builder actions in Power Automate
- Advanced usage of AI Builder in Power Automate
- Check your knowledge
- Summary

Lesson 49: Solution Architect series: Plan application lifecycle management for Power Platform

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

Lesson 48: Functional Consultant skills

- Introduction
- 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
- Knowledge check
- Summary

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