

MS-PL200T00: MICROSOFT POWER PLATFORM FUNCTIONAL CONSULTANT (WITH APPLIED WORKSHOP)



| DURATION | LEVEL | TECHNOLOGY | DELIVERY METHOD | TRAINING CREDITS |
|----------|--------------|----------------|-----------------|------------------|
| 5 Days | Intermediate | Power Platform | Instructor-led | NA |

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 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

Learners should start this course already having the following skills:

- Experience as an IT professional or student
- Working knowledge of the Power Platform and its key components
- A knowledge of the Common Data Service and security concepts

COURSE OBJECTIVES

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
- Analyse data using Power BI visualizations and dashboards

COURSE CONTENT

Module 1: 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 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

- 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.

After completing this module, students will be able to:

- 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.

Module 2: 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.

Lessons

- 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.

After completing this module, students will be able to:

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

Module 3: 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.

Lessons

- Create a custom table.
- Enable attachments within a table.
- Licensing requirements for each table type.
- Lab - Create a new custom table and enable attachments.

After completing this module, students will be able to:

- 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.

Module 4: 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.

Lessons

- 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.

After completing this module, students will be able to:

- 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.

Module 5: 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.

- 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.

After completing this module, students will be able to:

- 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.

Module 6: 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.

Lessons

- Define choice column.
- Standard choices column.
- Lab - Create a new choice or modify an existing choice.

After completing this module, students will be able to:

- Learn about choices.
- Explore the standard choices.

- Create a new choice or modify an existing one.

Module 7: 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.

Lessons

- 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.

After completing this module, students will be able to:

- 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.

Module 8: 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.

Lessons

- 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.

After completing this module, students will be able to:

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

Module 9: 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.

Lessons

- Configure role-based security.
- Manage teams and business units.
- Explore settings and customizations.
- Exercise - Create a new security role.

After completing this module, students will be able to:

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

Module 10: 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.

Lessons

- Identify Microsoft Power Platform environments.
- Data Loss Prevention policies.
- Microsoft Power Platform Center of Excellence Starter Kit.
- Exercise - Create a Power Platform environment.

After completing this module, students will be able to:

- 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.

Module 11: 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.

Lessons

- Components of model-driven apps.
- Design model-driven apps.
- Exercise - Control security when sharing model-driven apps.
- Exercise - Create a model-driven app.

After completing this module, students will be able to:

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

Module 12: 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.

Lessons

- 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.

After completing this module, students will be able 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.

Module 13: Get started with Power Apps canvas apps

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

Lessons

- Power Apps building blocks.
- Exercise - Create your first app in Power Apps.
- Ways to build Power Apps.
- Power Apps related technologies.
- Additional Power Apps related technologies.
- Designing a Power Apps app.

After completing this module, students will be able to:

- 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.

Module 14: 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.

Lessons

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

After completing this module, students will be able to:

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

Module 15: Introduction to Power Apps cards

If you have a task that requires minimal input, such as sharing a poll, and you want to use Power Apps to accomplish that task, then consider using Power Apps cards. Moreover, you can share Power Apps cards with others in Microsoft Teams. In this module, you explore how to quickly design and share Power Apps cards.

Lessons

- Introduction.
- Design Power Apps cards.
- Exercise - Create a card to capture employee suggestions.
- Send Power Apps cards.
- Exercise - Share the employee suggestions card in Teams.
- Check your knowledge.
- Summary.

After completing this module, students will be able to:

- Identify different use cases for Power Apps cards.
- Design and create Power Apps cards.
- Share Power Apps cards in Teams.
- Send a card by using a Power Automate cloud flow.

- Use Microsoft Dataverse as a data source for cards.

Module 16: Core components of Power Pages

Use Power Pages to create modern data-driven external-facing business websites. Extend Dataverse data to external and internal audiences such as customers, partners, and employees. Empower anyone inside or outside your organization to interact with the business by using Power Pages sites.

Lessons

- 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.

After completing this module, students will be able to:

- Identify the capabilities of Power Pages.
- Review the Power Pages site provisioning process.
- Learn about Power Pages core components and tools.
- Discover how to control user access to site content and Dataverse data.

Module 17: 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.

Lessons

- 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.

After completing this module, students will be able to:

- Identify the capabilities of Power Pages.
- Review the Power Pages site provisioning process.
- Learn about Power Pages core components and tools.
- Discover how to control user access to site content and Dataverse data.

Module 18: Explore Power Pages design studio

Power Pages makers spend most of their time building sites in Power Pages design studio. It's important that makers have a full understanding of the capabilities and also the limitations of the design studio. This module will focus on understanding and using the design studio to create and customize sites. Power Pages design studio allows makers to add and configure pages, layout components, static content, custom CSS files, lists, and forms connected to Dataverse.

Lessons

- Introduction to Power Pages design studio.
- Work with pages.
- Page components.
- Site styling and templates.
- Exercise - Edit pages.
- Check your knowledge.
- Summary.

After completing this module, students will be able to:

- Learn how to launch and run Power Pages design studio.
- Identify the various workspaces, commands, and tools.
- Discover how to add new pages, how to place them in the site structure, and how to style the site appearance.
- Learn about the process of configuring specific layouts and adding and modifying different types of content to a page.
- Identify where to add or modify custom HTML, CSS, or code to the webpages by using the design studio.

Module 19: Integrate Power Pages websites with Dataverse

The ability to find and interact with Dataverse data on a website is a central benefit of implementing a Power Pages website. Several methods are available for you to display Dataverse data. Learning and knowing about these different options can help you have successful portal implementations. This module focuses on the techniques that you can use to set up lists, forms, and multistep forms to build powerful web applications.

Lessons

- Introduction to Power Pages design studio.
- Introduction.
- Basic form configuration.
- Multistep form processes.
- Set up multistep forms.
- Extend lists and forms.

- Exercise - Extend forms with more actions.
- Check your knowledge.
- Summary.

After completing this module, students will be able to:

- Set up lists to display Dataverse data in different ways and allow website users to interact with the data by using various techniques.
- Implement forms to allow the creating, reading, and updating of Dataverse rows.
- Build a multistep form process to allow for complex and decision-based data entry.
- Trigger classic Dataverse workflows from the website.
- Combine the various Power Pages components to build powerful web applications.

Module 20: Integrate Power Pages with web-based technologies

Occasionally, you'll need to integrate your portal to web-based technologies to extend the scope of your application. This module explains the process and options to integrate a Power Pages website with related technologies, such as SharePoint, Microsoft Power BI, model-driven charts, and others.

Lessons

- Introduction.
- Document management with SharePoint in Power Pages.
- Integration with Power BI in Power Pages.
- Model-driven charts in Power Pages.
- Check your knowledge.
- Summary.

After completing this module, students will be able to:

- Discover how to use the Iframe component to link to

other cloud-based technologies.

- Learn how to set up portal integration to SharePoint document libraries.
- Learn how to embed Power BI reports on a Power Pages page.
- Learn how to enhance a portal page with model-driven charts.

Module 21: Explore Power Pages design studio data and security features

Power Pages makers spend most their time building sites in Power Pages design studio. It's important that makers understand design studio capabilities as well as its limitations. Power Pages design studio includes Data workspace to create and manage business data and Set up workspace to configure site security and behavior. This module will focus on using the design studio to build secure Dataverse data-driven pages.

Lessons

- Introduction into Power Pages design studio data and security features.
- Data workspace in Power Pages design studio.
- Power Pages security features.
- Exercise - secure Dataverse data access.
- Check your knowledge.
- Summary.

After completing this module, students will be able to:

- Discover Data workspace, Dataverse data modelling and table permissions in Power Pages design studio.
- Explore how to extend the Dataverse data model and how to add connected data components to your page.

- Learn about securing access to a page.
- Identify where to add table permissions to secure business data.

Module 22: Set up Power Pages security

The concept of exposing Microsoft Dataverse on a public webpage is appealing for addressing numerous business requirements. However, careful consideration is necessary to avoid exposing private or sensitive data. This module focuses on helping you learn about and set up website security to protect static and dynamic content and limit visibility to specific audiences.

Lessons

- Introduction into Power Pages design studio data and security features.
- Data workspace in Power Pages design studio.
- Power Pages security features.
- Exercise - secure Dataverse data access.
- Check your knowledge.
- Summary.

After completing this module, students will be able to:

- Discover Data workspace, Dataverse data modelling and table permissions in Power Pages design studio.
- Explore how to extend the Dataverse data model and how to add connected data components to your page.
- Learn about securing access to a page.
- Identify where to add table permissions to secure business data.

ASSOCIATED CERTIFICATIONS & EXAM

This course will prepare delegates to write the PL-200: Microsoft Power Platform Functional Consultant exam.