

Microsoft Power Platform Functional Consultant (PL-200T00)

COURSE OVERVIEW

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.

WHO WILL BENEFIT FROM THIS COURSE?

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PREREQUISITES

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

COURSE OBJECTIVES

Students will learn to:

- Describe the business value of the Microsoft Power Platform
- Get Started with Power Pages
- Create and use analytics reports with Power BI
- Manage workspaces and datasets in Power BI
- Create tables in Dataverse
- Manage tables in Dataverse
- Create and manage columns within a table in Dataverse
- Create a relationship between tables in Dataverse
- Working with choices in Dataverse
- Get started with security roles in Dataverse
- Use administration options for Dataverse



- Manage Dynamics 365 model-driven app settings and security
- Introduction to Microsoft Power Platform security and governance
- Get started with model-driven apps in Power Apps
- Configure forms, charts, and dashboards in model-driven apps
- Get started with Power Apps canvas apps
- Connect to other data in a Power Apps canvas app
- How to build the UI in a canvas app in Power Apps
- Manage apps in Power Apps
- Build your first app with Power Apps and Dataverse for Teams
- Access Dataverse in Power Pages websites
- Authentication and user management in Power Pages
- Power Pages maintenance and troubleshooting
- Define and create business rules in Dataverse
- Get started with Power Automate
- Use the Admin center to manage environments and data policies in Power Automate
- Use Dataverse triggers and actions in Power Automate
- Extend Dataverse with Power Automate
- Introduction to expressions in Power Automate
- Build your first Power Automate for desktop flow
- Run a Power Automate for desktop flow in unattended mode
- Optimize your business process with process advisor
- Get started with Microsoft Copilot Studio bots
- Enhance Microsoft Copilot Studio bots
- Manage topics in Microsoft Copilot Studio
- Manage Power Virtual Agents
- Get started building with Power BI
- Get data with Power BI Desktop
- Model data in Power BI
- Use visuals in Power BI
- Explore data in Power BI
- Publish and share in Power BI
- Manage solutions in Power Apps and Power Automate
- Load/export data and create data views in Dataverse
- Get started with AI Builder
- Manage models in AI Builder
- Use AI Builder in Power Automate
- Functional Consultant skills
- Solution Architect series: Plan application lifecycle management for Power Platform



COURSE OUTLINE

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

- 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: 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.

Module 3: 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.

Module 4: 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.

Module 5: Create tables in Dataverse

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

Module 6: Manage tables in Dataverse

- 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 7: Create and manage columns within a table in Dataverse

- 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 8: Create a relationship between tables in Dataverse

- 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 are building solutions with Dataverse.

Module 9: Working with choices in Dataverse

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

Module 10: Get started with security roles in Dataverse

- 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 11: Use administration options for Dataverse

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

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

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

Module 13: Introduction to Microsoft Power Platform security and governance

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

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

Module 15: Configure forms, charts, and dashboards in model-driven apps

- Learn about 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 16: Get started with Power Apps canvas apps

- 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 17: Connect to other data in a Power Apps canvas app

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

Module 18: How to build the UI in a canvas app in Power Apps

- 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

Module 19: Manage apps in Power Apps

- 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.

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

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

Module 21: Access Dataverse in Power Pages websites

- 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.

Module 22: Authentication and user management in Power Pages

- 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.

Module 23: Power Pages maintenance and troubleshooting

- 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.



Module 24: Define and create business rules in Dataverse

- Define business rules in Dataverse.
- Create and manage business rules in Dataverse.

Module 25: Get started with Power Automate

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

Module 26: Use the Admin center to manage environments and data policies in Power Automate

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

Module 27: Use Dataverse triggers and actions in Power Automate

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

Module 28: Extend Dataverse with Power Automate

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

Module 29: Introduction to expressions in Power Automate

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

Module 30: Build your first Power Automate for desktop flow

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

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

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

Module 32: Optimize your business process with process advisor

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

Module 33: Get started with Microsoft Copilot Studio bots

- Create Microsoft Copilot Studio bots.
- Test Microsoft Copilot Studio bots.
- Analyze performance.

Module 34: Enhance Microsoft Copilot Studio bots

- 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.

Module 35: Manage topics in Microsoft Copilot Studio

- 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.

Module 36: Manage Power Virtual Agents

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

Module 37: Get started building with Power BI

- 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.

Module 38: Get data with Power BI Desktop

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

Module 39: Model data in Power BI

- 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

Module 40: Use visuals in Power BI

- Explore Power BI visuals
- Create visuals

Module 41: Explore data in Power BI

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

Module 42: Publish and share in Power BI

- Publish reports
- Print and export reports
- Build apps
- Integrate with OneDrive
- Publish to the web



Module 43: Manage solutions in Power Apps and Power Automate

- 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.

Module 44: Load/export data and create data views in Dataverse

- 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

Module 45: Get started with AI Builder

- 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.

Module 46: Manage models in AI Builder

- 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.

Module 47: Use AI Builder in Power Automate

- 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.

Module 48: Functional Consultant skills

- 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 mockups 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.

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

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

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