

PL-7002: Create and Manage Automated Processes by using Power Automate

Course Duration: 4 Hours

Course code: PL-702

1. Course Overview

Dive into PL-7002, a hands-on course designed to empower you with the skills to build, manage, and optimize automated workflows using Microsoft Power Automate. Whether you're automating everyday tasks, integrating data between systems, or orchestrating complex business processes—this course arms you with practical knowledge and real-world scenarios to automate with confidence.

2. What you'll learn?

By the end of this course, you will be able to:

- Understand the fundamentals of Power Automate, including cloud flows, desktop flows (Power Automate Desktop), triggers, and actions.
- Create intuitive, reusable automated workflows across various Microsoft services—like SharePoint, Teams, Outlook, Dynamics 365—and other third-party platforms.
- Design processes that respond to events, scheduled intervals, or manual triggers.
- Incorporate conditional logic, loops, and parallel branching to enable advanced workflow behaviors.
- Handle errors gracefully through exception handling, retries, and notifications.
- Monitor, test, and debug flows using built-in tools and analytics dashboards.
- Secure and govern workflows by managing connections, access control, and data loss prevention (DLP) policies.
- Optimize performance and cost through best practices and governance guidelines.

3. Target Audience

This course is ideal for:

- Business Analysts, Process Owners, and Citizen Developers seeking to automate and optimize business workflows.
- IT Professionals and Solution Architects looking to implement robust automation across enterprise environments.
- Operational Managers and Project Leads who want to reduce manual effort and increase efficiency in daily tasks.
- Anyone with a keen interest in streamlining processes using low-code/no-code automation tools.

4. Pre-Requisites

- A foundational understanding of Microsoft 365 or Dynamics 365 ecosystems.
- Basic working knowledge of business processes and logic (e.g., if/then reasoning, loops).
- Familiarity with cloud-based applications (e.g., SharePoint, Teams, Outlook) is beneficial—but not required.
- No prior coding experience is necessary; the course is tailored for low-code/no-code users.

5. Course content

Module 1: Introduction to Power Automate

- Understanding the Power Platform ecosystem
- Overview of Power Automate: Cloud Flows vs. Desktop Flows
- Licensing models and environment setup
- Navigating the Power Automate interface

Module 2: Getting Started with Cloud Flows

- Creating automated, instant, and scheduled flows
- Working with triggers and actions
- Connecting to Microsoft 365 and third-party services
- Building simple workflows

Module 3: Advanced Workflow Logic

- Using conditions, switches, and loops
- Adding parallel branches for multi-path processes
- Managing data with variables and expressions
- Integrating approvals and notifications

Module 4: Desktop Automation (RPA)

- Introduction to Power Automate Desktop
- Recording and editing desktop flows
- Using pre-built actions for UI and system automation
- Integrating desktop flows with cloud flows

Module 5: Data Integration and Management

- Connecting to data sources (SharePoint, Dataverse, SQL, etc.)
- Reading and writing data in flows
- Data transformation with expressions and format functions

Module 6: Error Handling and Flow Optimization

- Implementing error scopes and retry policies
- Monitoring and debugging flows
- Using analytics and run history
- Improving performance and efficiency

Module 7: Security, Compliance, and Governance

- Managing connections and credentials
- Data Loss Prevention (DLP) policies
- Role-based access and sharing flows
- Compliance considerations for automation

Module 8: Best Practices for Automation

- Workflow design guidelines
- Naming conventions and documentation
- Maintaining and scaling automation solutions

Module 9: Real-World Scenarios and Capstone Project

- Automating approval processes
- Data synchronization between systems
- Ticketing system automation
- End-to-end project applying all modules