

# COURSE OVERVIEW

**Course Name:**  
(PL-200) Microsoft Power Platform Functional Consultant

**COURSE DURATION: 4 Days**

**Gauteng:**

3rd Floor, 34 Whitely Road  
Melrose Arch  
Johannesburg  
2196

**Gauteng:**

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192 Bram Fischer Drive  
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## 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.

## DELIVERY METHOD

Our courses have flexible delivery options:

- In-person classroom training at the Impactful training facilities
  - Johannesburg, Durban, Cape Town
- Virtual instructor-led training
- Nationally: on-site at the client

## INTENDED 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.

## 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 modelling) and security concepts

## COURSE CONTENT

### Introduction to Microsoft Power Platform

Learn about the components of Microsoft Power Platform, the business value for customers, and security of the technology.

### 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.

### 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.

### 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.

### 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.

### 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.

### 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.

## **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.

## **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.

## **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.

## **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.

## **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.

## **Get started with Power Apps canvas apps**

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

## **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.

## **How to build the UI in a canvas app in Power Apps**

Do you want to build a better UI for app users? This module helps you do that using themes, icons, images, personalization, different form factors, and controls.

## **Manage apps in Power Apps**

Manage app versions, app sharing, and environments in Power Apps.

## **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.

## **Explore Power Pages templates**

Power Pages templates are pre-configured solutions that are available to help accelerate deployment. Site templates provide an environment that is immediately suitable for specific scenarios and audiences.

## **Access Dataverse in Power Apps portals**

The ability to show and interact with Dataverse data on a website is a core benefit of implementing a Microsoft Power Apps portal. This module focuses on the several techniques and methods to display and interact with Dataverse data in Power Apps portals.

## **Authentication and user management in Power Apps portals**

An individual, external user might have several identities from which to choose when registering and accessing a portal. Portal users can be onboarded in many ways, and several options are available to portal users for validating their identity and maintaining their profiles. Microsoft Power Apps portals supports a variety of authentication options and provides powerful user-management capabilities. Administrators can choose between using local authentication or delegating authentication to a trusted authentication provider. Power Apps portals supports multiple authentication providers and various industry standards.

## **Power Apps portals maintenance and troubleshooting**

When building a Microsoft Power Apps portal, administrators should consider various techniques, best practices, and features. This module will cover the various troubleshooting tools that are available and explain the importance of using the Portal Checker tool.

## **Define and create business rules in Dataverse**

The ability to build business rules that ensure consistent business logic whatever app is accessing that data set is imperative to a successful business operation. This module will show you how you can build business rules that are triggered anytime they're used within Dataverse.

## **Get started with Power Automate**

Power Automate is an online workflow service that automates actions across the most common apps and services.

## **Use the Admin center to manage environments and data policies in**

Tenant and environment admins use the Power Automate Admin center to manage data policies and environments for Power Automate deployments.

## **Use Dataverse triggers and actions in Power Automate**

This module introduces the triggers and actions that you can use to build flows in Power Automate with Dataverse.

## **Extend Dataverse with Power Automate**

This module explains how to create your first flow in Power Automate with triggers and actions from Dataverse.

## **Introduction to expressions in Power Automate**

Get the most out of your data using functions to create expressions.

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## **Run a Power Automate for desktop flow in unattended mode**

Some business processes require supervision or input that's impossible or risky to automate. However, you can fully automate other processes that don't require human oversight or are inconvenient or impractical to constantly monitor. This module demonstrates the solution for these scenarios by explaining how to run your UI and API flows in unattended mode.

## **Optimize your business process with process advisor**

With the process advisor capability in Power Automate, you can record existing business processes and analyze them to increase efficacy by tracking completion times and mapping various actions that are involved. The first step to automating a solution is knowing the process, and process advisor helps simplify that task.

## **Get started with Power Virtual Agents**

Power Virtual Agents allows organizations to quickly create bots based on business scenarios their customers and employees can easily interact with as needed. In this module you will be introduced to key concepts and will build a basic Microsoft Power Virtual Agents bot.

## **Enhance Power Virtual Agents bots**

Many times, you may need to leverage or integrate other technologies for your bot to provide the experience you want. This module examines some of the methods that you can use to enhance your Power Virtual Agents bots such as leveraging Power Automate flow to add actions, and transferring conversations from a bot to Omnichannel for Customer Service.

## **Manage topics in Power Virtual Agents**

In Microsoft Power Virtual Agents, topics are used to small conversations related to a specific subject. A Power Virtual Agents bot will typically include many topics. This module you will be introduced to the basic principles of topics such as trigger phrases and conversation paths as well as how to create them.

## **Manage Power Virtual Agents**

Power Virtual Agents allows organizations to quickly create bots based on business scenarios their customers and employees can easily interact with as needed. This module examines the components available for managing and administering Power Virtual Agent Bots.

## **Get started building with Power BI**

Learn what Power BI is, including its building blocks and how they work together.

## **Get data with Power BI Desktop**

How can you find, collect, and clean data from different sources? Power BI is a tool for making sense of your data. You will learn tricks to make data-gathering easier.

## **Model data in Power BI**

Connect Power BI to multiple data sources to create reports. Define the relationship between your data sources.

## **Use visuals in Power BI**

Create and customize visuals to present data in compelling and insightful ways.

## **Explore data in Power BI**

Turn your business intelligence data into data insights by creating and configuring Power BI dashboards.

### **Publish and share in Power BI**

Publish and share your Power BI reports and dashboards to teammates in your organization or to everyone on the web.

### **Manage solutions in Power Apps and Power Automate**

Microsoft Power Apps and Power Automate include such package features as apps from Microsoft Power Apps, site maps, flows, entities, customer connectors, and more. In this module, you'll learn how to manage solutions with Power Automate.

### **Load/export data and create data views in Dataverse**

Dataverse lets you load data into or export tables from other tables by using Microsoft Excel. You can also create views to quickly review data that is stored within a table.

### **Manage models in AI Builder**

Understand your model, model versions, and model sharing in AI Builder.

### **Use AI Builder in Power Automate**

Learn the basics of AI Builder usage in Power Automate and how it can benefit your organization.

### **Functional Consultant skills**

Learn about the functional consultant role and the key skills needed to be successful in this role on a Microsoft Power Platform project.