VIVAsoft

Technology + Knowledge = Innovation

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Vivasoft

Consulting & Training

Microsoft

Vivasoft is a leading company in the technology sector, specializing in offering innovative solutions based on Microsoft. With years of experience in the market, we are proud to be certified Microsoft partners, committed to supporting the digital transformation of businesses. We provide a comprehensive range of Microsoft products and highly qualified training courses, designed to help companies optimize their processes, enhance productivity, and acquire advanced skills in the world of technology.

Module 1: Introduction to Power Automate
What is Power Automate and What is it Used For?
Definition and overview of Power Automate

Differences between Power Automate, Power Apps, and Power BI

How Power Automate integrates with other Microsoft applications (SharePoint, OneDrive, Outlook, Teams, Dynamics 365) and third-party applications

Introduction to the Power Automate Interface
Overview of the Power Automate web app interface

Types of flows: Automated Flows, Instant Flows, Scheduled Flows, Business Process Flows

Creating a basic flow using a predefined template

Navigating through flows, triggers, actions, and connectors

Installation and Configuration
Accessing Power Automate through Office 365 or Microsoft 365

Configuring credentials for connectors (SharePoint, OneDrive, Outlook, etc.)

Connecting to external data sources (e.g., SQL Server, Salesforce, Google Sheets)

Module 2: Creating Basic Flows
Creating an Automated Flow
What are automated flows and how do they work?

Choosing and configuring a trigger (e.g., when an email arrives, when an item is added to SharePoint)

Adding actions to the flow (sending emails, creating records, updating data, etc.)

Testing and activating the flow

Creating a manual flow (Instant Flow)

What is it and how is it triggered?

Creating flows that are started manually by a user action (e.g. a button click, a request via mobile app)

Adding actions and workflows in response to user input

Creating a Scheduled Flow.

What is it and how is it configured?

Setting up a flow to perform actions at regular intervals (e.g., daily, weekly or monthly)

Adding actions for recurring data processing

Module 3: Using Connectors and Triggers
Power Automate Connectors
What are connectors and how to use them
Exploring Microsoft connectors (Office 365, SharePoint,
OneDrive, Teams, Outlook, etc.)
Third-party connectors (Salesforce, Twitter, Dropbox, Google
Drive, etc.)
Configuring credentials to access external connectors
Trigger and actions
What is a trigger and how to choose the right trigger for a flow
Common trigger examples: when an email is received, when a SharePoint item is modified, when a file is added to OneDrive
How to add and configure actions for each flow
 Introduction to using expressions to manipulate data (e.g., string concatenation, mathematical operations)
Creating Multi-Step Flows
Flows composed of multiple actions
How to add conditions (If/Else), loops (For Each), and parallel actions
Managing complex workflows with multiple branches and conditions

Module 4: Working with Data and Advanced Manipulation
Variables and Data Manipulation
What is a variable and how to use it in a flow
Creating, modifying, and using variables (string, number, boolean)
Advanced data manipulation using expressions (concatenation, formatting, calculations)
Conditions and Branching
Creating flows with conditional branches (If, Else)
Working with combined conditions (AND, OR)
Performing actions based on condition results (e.g., sending a notification, creating a record)
Loops and Operations on Data Sets
Creating "For Each" loops to perform repetitive actions on a list of items
Handling errors and retrying actions in case of failure (Retry Policy)
Using the "Do Until" action to perform tasks until a condition is met

Module 5: Integration with Microsoft Power Platform

Integration with Power Apps
- What is Power Apps and how to integrate Power Automate with Power Apps
- Creating flows triggered by Power Apps (e.g., sending data from a Power Apps application to another system)
- Configuring Power Automate to send responses or updates back to Power Apps

Integration with Power BI
- Creating flows that send data to Power BI for dataset updates
- Using Power Automate to send notifications from Power BI (e.g., when specific thresholds are exceeded)
- Updating Power BI reports using automated flows

Module 6: Approfondimenti e Best Practices

Error Handling and Flow Monitoring
- Monitoring flows in Power Automate: viewing history and executions
- Managing errors: fallback actions in case of failure (e.g., sending notification emails, triggering alternative actions)
- Enabling flow control and tracking action results

Optimization and Performance
- Best practices to improve flow performance (e.g., avoiding redundant actions, reducing the number of connector calls)
- Using parallel flows to enhance efficiency
- Managing large data volumes and optimizing data operations

Security and Access Control
- Managing flow security: defining who can execute, modify, and view flows
- Setting permissions for connectors and processed data
- Implementing data access policies based on business roles

Module 7: Integration with External Tools and Complex Flows

Integration with APIs and Webhooks
- What is an API and how to use it in Power Automate
- Creating flows that call external APIs (using HTTP and REST connectors)
- Handling responses and sending data to external systems via Webhooks

Working with SharePoint and Other Document Management Systems
- Creating flows that automate document management in SharePoint
- Using Power Automate to move, copy, update, and approve documents automatically

Automating Complex Business Processes
- Designing flows for automating complex business processes (e.g., approvals, requests, enterprise workflows)
- Use case examples in HR, finance, and customer support
- Implementing multi-level approvals and validation processes

Module 8: Practical Exercises and Final Project

Final Practical Project: Creating a Complete Flow
- Developing a complex flow to automate a business process (e.g., document approvals, order management, automatic report submission)
- Testing and optimizing the flow
- Sharing the flow with colleagues or the team