CDAY SOLUTION

Microsoft 365 & Power Platform Training

Innovate | Build | Empower

Microsoft 365 & Power Platform Development Course

SharePoint • Forms in Microsoft 365 • Power Apps • Power Automate • Power BI

Target Audience: Beginner to intermediate users/developers

Recommended Duration:16–20 weeks

Format: Instructor-led + hands-on labs + real-world project

Module 1 — Microsoft 365 & Power Platform Fundamentals

Module 2 — SharePoint

Module 3 — Forms in Microsoft 365

Module 4 — Power Apps

Module 5 — Power Automate

Module 6 — Power BI

Module 7 — Capstone Project

Module 1 — Microsoft 365 & Power Platform Fundamentals

1.1 Outlook

- Email, calendar, meetings, and contacts.

1.2 OneDrive

- File storage, sharing, synchronization, and shortcuts.

1.3 Microsoft Teams

- Chat, teams, channels, meetings, calls, and collaboration.

1.4 SharePoint Overview

- Sites, lists, document libraries, pages, views, and basic permissions.

1.5 Word, Excel & PowerPoint

- Documents, spreadsheets, presentations, and collaboration.

1.6 Power Platform Overview

- Introduction to Power Apps, Power Automate, Power BI, and how they work together.

Module 2 — SharePoint

2.1 SharePoint Overview

- What is SharePoint?
- SharePoint Online
- Classic vs Modern Site
- Team Sites
- Communication Sites
- Hub Sites

2.2 SharePoint Sites

- Create a SharePoint site, Site navigation, Site settings, Site permissions (Owners, Members, and Visitors)

2.3 SharePoint Lists

- What is a SharePoint List? - Stores structured information in rows and columns, like a table in Excel
- Create a list, List columns, create and manage views, filtering, sorting, grouping, Conditional formatting

2.4 SharePoint Columns

- Single line of text, Multiple lines of text, Choice, Number, Currency, Date and Time, Yes/No, Person, Lookup, Hyperlink

2.5 SharePoint Document Libraries

- What is a document library? - Stores and manages files, such as Word documents, Excel spreadsheets, PDFs, and PowerPoint presentations.
- Upload documents
- Folders
- Metadata
- Sync and Shortcut
- Version history
- Sharing

2.6 SharePoint Permissions

- Site permissions (Owners, Members, Visitors), List permissions, Library permissions, Item-level permissions (List advanced settings or unique permissions), Sharing

2.7 SharePoint Pages

- Create pages, Page layouts, Sections, Columns, Page templates

2.8 SharePoint Web Parts

- Text, Image, Hero, Quick Links, News, Events, List, Document Library, Microsoft Forms, Power BI

2.9 SharePoint Intranet

- Home page
- Department pages – HR, IT, Budget
- Navigation

2.10 Hub Sites

- What is a Hub Site?
- Create a Hub Site
- Associate sites
- Hub navigation
- Hub branding

2.11 SharePoint JSON Formatting

- Column formatting
- View formatting
- Conditional formatting
- Buttons
- Icons
- Cards

Module 3 — Forms in Microsoft 365

3.1 Introduction to Microsoft Forms
- Purpose, Interface, and common uses of forms

3.2 Creating Forms and Quizzes
- Questions, Question Types, Required Fields, and Quiz settings

3.3 Sharing Forms and Collecting Responses
- Response Permissions, sharing links, and collecting submissions

3.4 Viewing and Analyzing Responses
- Response Summaries, Individual responses, and exporting results to Excel

3.5 Microsoft Forms vs. SharePoint Forms
- Key differences, features, and when to use each

3.6 Forms Integration with SharePoint and Power Automate
- Use the form to collect information and a Power Automate flow to save responses to a SharePoint list

Module 4 — Power Apps

4.1 Introduction to Power Apps
- What Power Apps is, why it is used, common business scenarios, and how it fits into the Power Platform.

4.2 Environments and Solutions
- Environment types, solution basics, and organizing apps and components.

4.3 Canvas Apps vs. Model-Driven Apps
- Differences, advantages, use cases, app creation, and an introduction to Dataverse.

4.4 Data Sources and Connections
- SharePoint Lists, Dataverse tables, Excel, connectors, and connecting an app to data.

4.5 Power Apps Interface and Control

- Screen, Galleries, Forms, Labels, Buttons, Text Inputs, Dropdowns, Combo boxes, and Date pickers.

4.6 Power Fx Formulas and Expressions

- Formula basics, operators, conditions, If, Switch, Filter, Lookup, Sort, Search, and error handling.

4.7 Variables and Collection

- Global variables with Set, screen variables with UpdateContext, collections with Collect and ClearCollect, and when to use each.

4.8 Forms and Data Operations

- New, Edit, and View forms; SubmitForm, NewForm, EditForm, ViewForm, Patch, Defaults, validation, and resetting forms.

4.9 Navigation and App Logic

- Screen navigation, Navigate, Back, OnSelect, OnVisible, OnStart, and controlling app behavior.

4.10 Components and Reusability

- Component basics, reusable controls, custom properties, and component libraries.

4.11 Security, Sharing, and Deployment

- App sharing, permissions to data sources, environment basics, publishing, solutions, and application lifecycle management fundamentals.

4.12 Troubleshooting and Best Practices

- Common formula errors, delegation warnings, performance, responsive design, accessibility, and maintainability.

Module 5 — Power Automate

5.1 Introduction to Power Automate

- What Power Automate is, its purpose, and common business uses.

5.2 Types of Flows

- Automated, instant, and scheduled cloud flows.

5.3 Triggers, Actions, and Connectors

- How flows start, perform tasks, and connect to Microsoft 365 services.

5.4 Conditions, Expressions, and Variables

- Dynamic content, conditions, expressions, and variables

5.5 SharePoint, Forms, and Outlook Integration

- Create and update SharePoint items, process Forms responses, and send email notifications.

5.6 Troubleshooting

- Review flow run history, fix common errors

Module 6 — Power BI

6.1 Introduction to Power BI

- Purpose and common business users
- Power BI Desktop and Power BI Service

6.2 Connecting to Data Sources

- Excel, SharePoint, and other data sources

6.3 Data Preparation and Modeling

- Power Query basics, relationships between tables, and importing and refreshing data

6.4 Creating Reports and Visualizations

- Charts, tables, cards, and slicers
- Filters and interactive reports

6.5 DAX Fundamentals

- Measures and calculated columns
- Basic DAX functions and calculations

6.6 Workspace, Apps, permissions, and Publishing

- Creating and managing workspace
- Publishing reports to Power BI Service
- Creating and distributing Power BI apps
- Workspace roles and access permissions
- Sharing reports and dashboards
- Configuring scheduled data refresh

Module 7 — Capstone Project

Project 1 — Project Management Dashboard

Technology Stack - SharePoint · Power Apps (Canvas Apps) · Power Automate · Power BI

Students will learn to:

- Design SharePoint lists, columns, lookup relationships, and data structures.
- Build canvas apps using galleries, nested galleries, forms, and filtering.
- Automate notifications, task assignments, and deadline reminders.
- Create Power BI reports and dashboards to monitor projects and tasks.
- Apply access permissions and test the complete solution.

Project 2 — Business Service Portal

Technology Stack - Dataverse · Power Apps (Model Driven Apps) · Power Automate · Power Pages

Students will learn to:

- Design relational Dataverse tables, columns, and relationships.
- Create model-driven apps with forms, views, charts, and dashboards.
- Configure business rules, security roles, and business processes.
- Automate record-based workflows and notifications.
- Build a Power Pages website for external users to submit service requests and securely view their permitted information.