

MICROSOFT POWER PLATFORM ORGANIZATIONAL ADOPTION AND GOVERNANCE

Safeguard your business's use of Power Apps, Power Automate, and Power BI with a governance and compliance security framework.

A tailored multi-course education offering from Dynamics 365 University at PowerObjects



OFFERING OVERVIEW

The Microsoft Power Platform has business application creation capabilities that allow anyone with a business need in your organization to be part of building a software solution. You want to empower your employees to innovate and create, but you understand the risks associated with an unstructured and untethered strategic commitment to free use of these tools.

Through our Microsoft Power Platform Organizational Adoption and Governance suite of courses, PowerObjects provides our customers the concepts, skills, and tools to enable and support organizational excellence in implementing the Power Platform within a governance structure that empowers system administrators to balance business productivity with risk management and security.

AUDIENCE FOR THE OFFERING

- Global Admins for Tenant
- Power Platform Admins
- Risk & Compliance Team
- Information Security Team
- Data Loss Prevention Team
- Product Owner

LEARNING OBJECTIVES FOR THE OFFERING

Upon completion of the full offering, you will be able to:

- Appraise the utility of each Power Platform application (Power Apps, Power Automate, Power BI) in your organization
- Identify the data and process risks of the application(s)
- Describe the components of effective organizational adoption and governance
- Use administrative tools provided by Microsoft
- Recommend policies that encourage innovation and support oversight

THE SUITE OF COURSES

Microsoft Power Platform Organizational Adoption and Governance is comprised of four required baseline courses to learn core Power Platform concepts and skills, as well as three additional electives, culminating in a capstone Power Platform Governance workshop.

Required Baseline Courses (all 4 are required)	Elective Courses (recommended but optional)	Capstone Workshop
<ul style="list-style-type: none">• Power Automate Functional Overview• D365 / CDS Schema & Security• Power Apps Canvas Apps Functional Overview• Power BI Functional Overview	<ul style="list-style-type: none">• D365 Sales Functional Overview• D365 Customer Service Functional Overview• D365 Field Service Functional Overview	<ul style="list-style-type: none">• Power Platform Governance

LEARNING OBJECTIVES FOR EACH COURSE MODULE:

Power Automate Functional Overview	D365 / CDS Schema & Security	Power Apps Canvas Apps Functional Overview	Power BI Functional Overview
<ul style="list-style-type: none">• Identify three required components of a flow• Create automated and scheduled flows from templates and from scratch• Design a flow that uses the CDS connector and interacts with email and document sharing• Relate Power Automate capabilities to the needs of your organization	<ul style="list-style-type: none">• Explain where and how to access and modify environment settings• Modify the Common Data Service schema including entities and entity relationships from either a default or custom solution• Assess the privileges of a user given their licenses, security roles, business unit, teams, and field level security, with consideration for hierarchy security	<ul style="list-style-type: none">• Create a canvas app from data• Use the Canvas Studio to modify the visual elements of the app, including screens, galleries, forms, icons, and text boxes• Compose interactive canvas app components that are connected to data• Practice using canvas apps in conjunction with flows• Understand how canvas apps can connect with model-driven apps, reports, and dashboards	<ul style="list-style-type: none">• Define Power BI components and licensing• Use Power BI Desktop to connect to data• Manipulate and transform data with Power Query• Generate and format data visualizations in a Power BI Desktop report• Publish reports to the Power BI Service• Create dashboards in the Power BI Service• Apply Power BI row level security concepts

OBJECTIVES OF ELECTIVE COURSES (none required but one or more recommended)

D365 Sales Functional Overview	D365 Customer Service Functional Overview	D365 Field Service Functional Overview
<ul style="list-style-type: none">• Understand the default record types and built-in processes for:• Lead, campaign, and sales opportunity management• Quotes, orders, and invoices• Understand and create marketing lists and campaigns• Understand configuration options for the product catalog• Understand the goal tracking capabilities• Understand playbook configuration and use	<ul style="list-style-type: none">• Understand the default record types and built-in processes and process flows for case management and knowledge article management• Understand how and when to create queues and assign records to queues• Understand the capabilities and configuration of service level agreements and entitlements• Gain familiarity with automation specific to customer service, including case routing rules, record creation and update rules, and the email to case process	<ul style="list-style-type: none">• Review Dynamics 365 Customer Service• Understand Field Service entities and feature set• Understand how to approach Field Service implementations• Understand the Field Service flow of work and core functionality• Understand resource scheduling and common scenarios• Understand Work Order creation scenarios and considerations

OBJECTIVES OF CAPSTONE WORKSHOP (required)

- Define access control and authorization in the context of Power Platform
- Describe the capabilities of Power Platform environments
- Create and modify Data Loss Prevention (DLP) policies
- Summarize application lifecycle management best practices
- Practice solution segmentation and managed solution deployment
- Use Power Automate to pull actionable information on your processes
- Evaluate Microsoft-provided Power Platform monitoring apps and reports

Learn More at

<https://www.powerobjects.com/microsoft-dynamics-education/training-for-dynamics-365/adoption-and-governance/>

Other courses available from Dynamics 365 University at PowerObjects

- Boot Camp for Dynamics 365 and Model-driven Apps
- Advanced Power BI
- Advanced Power Automate
- Extending D365 / Model-driven Apps
- Extending Power Apps Canvas Apps