

Office 365 - Flow

Learn via: **Classroom / Virtual Classroom**

Duration: **2 Days**

Overview

The goal of this course is to provide you with the knowledge to work with Microsoft Flow. The course will emphasise hands-on experience, with a series of self-guided exercises integrated into the training. You will discover how to open Flow from a browser and use it to automate and manage business processes.

This course will help you meet the following objectives:

- Understand what Flow is and how it works
- Build flows from existing or blank templates
- Understand how to work with the many features Flow offers
- Reuse Flows you have created

Prerequisites

This course requires delegates to meet the following prerequisites:

- A basic understanding of Windows 7 or later versions
- Experience using Internet Explorer or equivalent browser
- A general knowledge of using Office 365
- Some basic programming knowledge is useful but not essential
- General knowledge of HTML and CSS would also be useful but again is not essential.

Please Note: If you attend a course and do not meet the prerequisites you may be asked to leave.

What You Will Learn

Delegates will learn how to

- Understand what Flow is and how it works
- Create new Flows
- Analyse a Flow's success through Run History and Analytics
- Work with Team Flows and Approvals
- Work with Scopes, Switch Case, Variables, Apply To Each and Parallel Branch features
- Use manual and scheduled triggers
- Use Do Until and Reuse Flows

Outline

Module 1 – What is Flow?

- Available Flow Plans
- Data Connectors
- Logging into Flow
- Logging in as a New User
- Logging in as an Existing User
- Accessing Flow from your Office 365 Account

Module 2 – Creating a Flow from a Template

- Flow Templates

- Running the Flow
- Managing your Flows

Module 3 – Creating a Flow from Blank

- Planning a Flow
- Plan which Data Connectors are Needed
- Plan Triggers, Actions and Controls
- Adding Actions
- Adding Conditions
- Adding Multiple Conditions
- Add an Email Action
- Formatting the Email Action
- Creating a Dynamic Hyperlink
- Understanding a SharePoint Document URL
- Understanding Expressions
- Operators
- Functions
- Creating a Hyperlink with Expressions
- Names and Comments

Module 4 – Flow Run History and Analytics

- Viewing Run History
- Analysing an Individual Flow
- Flow Analytics

Module 5 – Approvals

- Setting up a SharePoint Library
- Creating the Approval Flow

Module 6 – Team Flows

- Team Flow Features
- Adding Individual Users as Co-Owners to a Team Flow
- Removing an Individual Co-Owner
- Adding a SharePoint List or Library as an Owner
- Removing a SharePoint List as a Co-Owner

Module 7 – Working with Scopes

Module 8 – Add a Switch Case

- Creating a SharePoint Task List

Module 9 – Using Variables

- Creating Email Variables

Module 10 – Add an Apply to Each

- Creating the SharePoint Lists
- Creating a For Each Flow
- Limitations to Get Items Actions
- Add the Apply to Each Step

Module 11 – Add a Parallel Branch

- Using a Parallel Branch in a Flow

- Setting up the Excel File
- Creating the Parallel Branch Actions
- Working with Data Operations
- Adding Data Operations to Flow

Module 12 – Manually Triggering a Flow in SharePoint

- Creating an Approvals Library
- Creating Flows Directly in SharePoint
- Creating a Custom For Selected Item Flow for a Library
- Editing the Flow to Work Specifically with Document Libraries
- Flow Input Parameters
- Creating Input Parameters
- Completing the Approval Flow
- Adding the Variable and Switch Case Actions
- Add a Future Time Action
- Adding an Approval Action and Outcomes
- Adding a Parallel Branch to Send a Reminder Email
- Testing the Flow

Module 13 – Triggering a Flow from PowerApps Form

- Creating the Relevant Apps in SharePoint
- Creating a PowerApp Flow
- Creating the PowerApp List Form
- Configuring the PowerApp Form
- Adding a Button to Run the Flow
- Saving and Publishing the PowerApp Form

Module 14 – The Flow Mobile App

- Installing the Flow App
- The Flow App Interface
- Creating New Flows
- Modifying an Existing Flow in the Mobile App
- Creating a Button Flow

Module 15 – Scheduled Flows

- Using the Schedule Recurrence Trigger
- Manually Testing a Flow
- Other Scheduling Actions

Module 16 – Using Do Until

- Setting Up a Do Until Loop
- Creating a Flow using Do Loop Actions
- Creating the Onboarding List
- Creating the Do Loop Flow
- Adding Email Actions to the Do Until Controls

Module 17 – Saving and Reusing Flows

- Saving a Flow
- Reusing a Flow
- Creating an Exportable Zip Package
- Importing a Zip Package
- Creating an Exportable JSON Package
- Creating a Flow Template

Appendix A – Flow Settings and Limitations

- Request Limits
- Timeout
- Message Size
- Retry Policy
- Run Duration and Retention
- Looping and Debatching Limits
- Definition Limits

Appendix B – Flow Plans

Appendix C – Functions in Flow