



Microsoft Forms, SharePoint and Power Automate Essentials

Duration : 1 day

Microsoft Forms

Discuss the role and purpose of Microsoft Forms

Group Forms

Differentiate between the types of forms available for use

Creating Forms

Create a basic form using Microsoft Forms
Question types and Properties
Explain the purpose of branching and describe when to use it
Explain how to set rules and parameters

Sharing Forms

Explain the different ways to share a form
Customize a Microsoft Form using the "Themes" feature
Collecting Form Data
Explain how to gather, view, and share information collected
Save Form Data into Excel
Process to store Form data in SharePoint

Microsoft SharePoint

Accessing and Navigating SharePoint Team Sites

Access SharePoint Sites
Navigate SharePoint Sites

Working with Documents, Content, and Libraries

Upload Documents
Document Management
Version Control
Document Metadata
Search for Documents and Files

Working with Lists

Create a Custom List to store items
Add List Items
Modify List Items
List Metadata
Configure List Views
Filter and Group with List Views
Exporting List Data

Configuring Your SharePoint Access

Ensuring users can access Site Libraries & Lists
Controlling Site Settings
Site Security Groups

Microsoft Power Automate

Introduction to Power Automate

What is Microsoft Power Automate?
The benefits of automation
How to get to Power Automate

Getting Started with Power Automate

Using Power Automate templates
Navigating in Power Automate
Editing a Flow in Power Automate
Publish and trigger a Flow
Turn off or delete a Flow

Power Automate logic

Adding conditions
Designing switches
Using apply to each
Configuring do until logic
Adding a scope
Approvals Processing

Administration and maintenance

Maintaining a Flow
View history and analytics
Sharing a Flow *
Export and import Flows
Office 365 administration for Power Automate
Environments
Data policies
Data integration

Workshop

Collecting Form submission into SharePoint
Viewing SharePoint Data and Files
Starting Approval process
Email Notifications
Feeds and approvals
Distributing and Testing process

* Additional Licenses may be required