

## **Table of Contents**

### **PL-7008 Focused – Copilot Studio, Power Automate & Data Standardization**

**Duration: 16 Hours**

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#### **Module 1: Power Platform & Copilot Studio Foundations**

- Power Platform overview and architecture
- Where Copilot Studio fits in the ecosystem
- Dataverse vs SharePoint vs Excel – decision guidelines
- Copilot Studio licensing & environment prerequisites
- PL-7008 exam overview and skill areas

#### **Lab:**

- Environment walkthrough
  - Copilot Studio UI navigation
- 

#### **Module 2: Copilot Studio – Core Bot Design**

- Copilot Studio components
  - Topics
  - Triggers
  - Entities and variables
- Conversation design best practices
- Topic authoring using natural language
- Fallback, escalation, and handoff concepts

#### **Lab:**

- Create a basic copilot with multiple topics
  - Test conversation flows
- 

#### **Module 3: Generative Answers & Knowledge Sources**

- What generative answers are and how they work

- Supported knowledge sources
  - SharePoint
  - Websites
  - Uploaded files
- When to use topics vs generative answers
- Limitations and governance considerations

**Lab:**

- Configure generative answers from SharePoint/Excel sources
  - Compare topic-based vs generative responses
- 

**Module 4: Actions & Agent Flows (Copilot + Power Automate)**

- What actions are in Copilot Studio
- Calling Power Automate flows from copilot
- Input/output parameter handling
- Synchronous vs asynchronous patterns

**Lab:**

- Create an action-backed topic
  - Invoke a Power Automate flow from Copilot Studio
- 

**Module 5: Power Automate – Workflow Design Essentials**

- Cloud flow types
- Triggers and actions overview
- Expressions (basic to intermediate)
- Approvals overview
- Retry policies and timeout handling

**Lab:**

- Build a reusable Power Automate flow
- Use expressions to normalize incoming data

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## **Module 6: Error Handling, Monitoring & Resilience**

- Try–Catch–Finally patterns
- Scope-based error handling
- Run history analysis
- Notifications and logging strategies
- Designing stable, repeatable flows

### **Lab:**

- Implement error handling in an ingestion flow
  - Simulate failures and recovery
- 

## **Module 7: Dataverse Fundamentals for Copilot & Automation**

- Dataverse core concepts
  - Tables, columns, relationships
- Standard vs custom tables
- Dataverse security model
  - Business units
  - Security roles
- When to use Dataverse for standardized data

### **Lab:**

- Create a Dataverse table for standardized data
  - Assign security roles
- 

## **Module 8: Data Standardization Patterns (Key Focus Area)**

- Challenges with multiple Excel/reporting formats
- Common ingestion patterns
  - Template-based ingestion
  - Metadata-driven mapping

- Normalization strategies using Power Automate
- Designing a canonical data model
- Avoiding custom code (TypeScript) where possible

**Lab:**

- Ingest multiple Excel formats
  - Transform and map data into a standardized structure
- 

**Module 9: Integrations**

- SharePoint integration patterns
- Excel Online vs SharePoint lists vs Dataverse
- SQL / API connector overview
- Authentication basics (delegated vs application context)

**Lab:**

- Read Excel files from SharePoint
  - Store standardized data in Dataverse
- 

**Module 10: ALM & Governance**

- Solution concepts
- Solution-aware flows
- Environment strategy (Dev/Test/Prod)
- Deployment basics
- DLP policies
- Governance best practices for bots and flows

**Lab:**

- Package copilot, flows, and tables into a solution
  - Import solution into another environment
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**Module 11: Mini Project – End-to-End Use Case**

**Scenario:**

*Multiple Excel / reporting files → standardized dataset → bot/report output*

**Activities:**

- Design data model
- Build ingestion and standardization flow
- Store data in Dataverse
- Expose data via Copilot Studio
- Test end-to-end scenario