

Project Management Transformation with Microsoft Power Platform

Purpose & audience: This 5-day program helps project and PMO teams modernize project intake, execution tracking, reporting, and collaboration using Microsoft Power Platform. It is intended for project managers, PMO leads, business analysts, and Power Platform makers/administrators who will design, build, and govern a Dataverse-backed project management solution.

Day	Focus	Modules
Day 1	Power Platform & Dataverse foundations	1–3
Day 2	Forms, Views & Model-driven apps	4–6
Day 3	Data migration & Power Automate	7–8
Day 4	Power BI (Analytics & Reporting)	9
Day 5	Integration, Copilot Studio & SharePoint	10–12

Logistics

- **Duration:** 5 days (recommended 6–7 hours/day including breaks), with 60–70% hands-on exercises.
- **Prerequisites:** Basic understanding of project management concepts; familiarity with Microsoft 365 (Teams/SharePoint/Excel) is helpful.
- **Access required:** A Power Platform environment with Dataverse enabled; ability to create tables, apps, flows; Power BI Pro (or equivalent) for sharing content; and permission to use Planner/Project for the Web (if included in scope).
- **Hands-on setup:** Sample project dataset (Excel/CSV), at least two test users/roles (e.g., Division Manager and Viewer), and a target site in SharePoint for the landing page exercise.

Day 1: Modules 1–3 (Power Platform & Dataverse Foundations)

Day 1 outcomes (what participants will be able to do)

- Describe core Power Platform components, environments, and solution concepts.
- Design Dataverse tables, columns, and relationships aligned to a project management data model.

- Implement a practical security approach using roles, business units/teams, and column-level security.

Module 1: Basics of Power Platform

- Components of Power Platform and supporting elements
- Environments and solutions

Module 2: Understanding Dataverse (tables, columns, data types, relationships & formulas)

- Dataverse fundamentals
- Types of tables and table creation
- Column types and data types
- Table relationships (1:N, N:1 via lookup columns, N:N)
- Lookup columns & related data on forms: subgrids, quick view forms, and how related records display (Division projects, Project tasks, etc.)
- Formula/calculated columns: actual finish date patterns, auto-calculated duration, and rollups (what to use when)

Module 3: Security in Dataverse

- Explore the Power Platform Admin Center
- Security roles and business units
- Row-level access patterns for the use case: division managers can see only their divisions' projects (business units vs. teams, ownership, and access rules)
- Column-level security: hide sensitive columns (e.g., budget) for specific users/roles and how it behaves in forms, views, and exports
- Auditing and column profiling

Day 2: Modules 4–6 (Forms, Views & Model-Driven Apps)

Day 2 outcomes (what participants will be able to do)

- Build usable Dataverse forms and views for project intake and tracking.
- Create and configure a model-driven app with business rules and dashboards.
- Design an integration approach with Planner/Project for the Web and implement a basic sync pattern.

Module 4: Forms and views in Dataverse

- Types of forms
- Types of views
- Create and configure forms and views

Module 5: Model-driven apps (build & configure)

- Create model-driven apps
- Understand the hierarchy of model-driven apps
- Configure business rules
- Intro to Power Fx in model-driven apps: calculated fields, validations, and reusable formula patterns
- Scoring & KPI logic using Power Fx
- Add pages, reports, and dashboards

Module 6: Microsoft Planner / Project for the Web integration + model-driven app commands

- Create commands and buttons
- Planner/Project for the Web overview: how plans, buckets, tasks, assignments, and progress are represented
- Link tasks to Dataverse records: connect Planner/Project tasks to SOK/Division/Project records (design options and recommended approach)
- Progress rollups: how task completion rolls up to project-level % complete and how to mirror/compute this in Dataverse
- Read/write Planner/Project data using connectors (Power Automate), triggers, and common synchronization patterns
- Hands-on exercise / mini project: create a Project record in the model-driven app and automatically create/sync a plan + tasks

Day 3: Modules 7–8 (Data Migration & Power Automate)

Day 3 outcomes (what participants will be able to do)

- Import and export data reliably between Excel and Dataverse using appropriate tools.
- Create cloud flows for notifications, approvals, and orchestration around project processes.

- Apply AI Builder and business process flows where they add value (and understand limitations).

Module 7: Migrate data into and out of Dataverse

- Import/migrate data from Excel into Dataverse using different tools
- Export Dataverse data to Excel

Module 8: Power Automate (Cloud flows)

- Types of cloud flows
- Create different types of cloud flows
- Create approval flows
- Use AI Builder
- Create business process flows

Day 4: Module 9 (Power BI)

Day 4 outcomes (what participants will be able to do)

- Build a Power BI data model and report for project status and portfolio views.
- Define core visuals (timeline, budget vs. actual, risks/issues) and drill-down patterns.
- Publish and share reports using Power BI Service with appropriate access controls.

Module 9: Power BI (Analytics & Reporting)

- Prepare data
- Model the data
- Visualize data
- Analyze data
- Share and manage using Power BI Service

Day 5: Modules 10–12 (Integration, Copilot Studio & SharePoint)

Day 5 outcomes (what participants will be able to do)

- Embed analytics into the model-driven app experience securely
- Build a basic Copilot Studio agent that can answer questions and trigger actions

- Publish the solution through a single SharePoint landing page (and understand governance implications)

Module 10: Embed Power BI in a model-driven app

- Embed a report or dashboard in the app (forms, dashboards, or dedicated pages)
- Filter contextually (e.g., by Division/Project) and discuss design options
- Security: row-level security concepts, workspace/app permissions, and what users should/shouldn't see

Module 11: Build a custom agent using Microsoft Copilot Studio

- Define scope and success criteria (FAQs, status queries, guided actions)
- Create topics, triggers, and entities/variables
- Connect to data/actions using Power Automate (e.g., create/update a Project, fetch a project status summary)
- Test, iterate, and handle fallbacks

Module 12: SharePoint integration (single portal for the app + Copilot)

- Design a simple landing page: navigation, key links, and embedded experiences
- Embed the model-driven app (or app views) and provide a launch pattern (SharePoint/Teams)
- Surface the Copilot agent (Teams and web) on the same landing page
- Governance checklist: access management, least privilege, environment strategy, and change control

Hands-on wrap-up: Build a SharePoint landing page that links/embeds the model-driven app and includes the Copilot agent; validate access for two roles (e.g., Division Manager vs. Viewer).

5-DAY TRAINING JOURNEY

Modern Project Management with Microsoft Power Platform



Track Projects



Automate Workflows



Visualize Insights



Enable AI-Driven Decisions

