Business Productivity with SharePoint, Power BI and the Power Platform

Duration: 40 Hours

Course Overview

This course equips learners to organize, analyze, and act on business information using Microsoft 365 and the Power Platform. Participants manage SharePoint sites and Microsoft Lists, follow the PL-300 path to build interactive Power BI reports and dashboards, and create business applications with Power Apps, Dataverse, and Power Automate. By the end, learners will be able to design collaborative workspaces, deliver data-driven insights, and build custom apps that streamline business processes.

Audience Profile

This course is designed for business users and professionals who want to improve collaboration, productivity, data analytics, and app building skills using available Microsoft tools. It suits business analysts, project managers, IT professionals, product managers, business stakeholders, aspiring Power BI data analysts, and beginner app creators, with no coding experience required.

Course Prerequisites

- No formal prerequisites and no coding experience required.
- Prior familiarity with the SharePoint, Power BI, and Power Apps user interfaces is beneficial.
- Basic comfort with Microsoft 365 and working with tabular data (for example, in Excel) is helpful.

Course Syllabus

Day 1: SharePoint and Microsoft Lists

Module 1: SharePoint Site Management

- Introduction to SharePoint sites, pages, document libraries, and lists
- Creating team sites and communication sites for business scenarios
- Managing site navigation, pages, sections, and web parts
- Organizing documents using libraries, folders, metadata, and version history
- Managing site permissions, members, owners, and sharing settings

Module 2: Microsoft Lists Management

- Introduction to Microsoft Lists and common business uses
- Key differences between Microsoft Lists and Excel
- Creating lists from templates, blank lists, and existing data
- Navigating the Lists interface and working with list items
- Understanding column types and managing new and existing columns
- Creating and customizing views for different audiences and scenarios
- Sorting, grouping, and filtering data in Lists
- Collaborating on Lists in Microsoft Teams
- Sharing lists, managing permissions, adding comments, and tracking updates

Day 2: Power BI Data Analyst (PL-300), Part 1

Get started with Microsoft data analytics

Module 3: Discover data analysis

- Different types of Analysis
- Data analyst tasks

Module 4: Get started building with Power BI

- Power BI services and applications work
- The Flow of Power BI
- Building Blocks of Power BI

Prepare data in Power BI Desktop

Module 5: Get data in Power BI

- Identify and connect to a data source
- Select storage mode
- Fix performance issues
- Resolve import errors

Module 6: Clean, transform, and load data in Power BI

- Resolve inconsistencies and data quality issues
- Apply user friendly naming conventions
- Apply data shape transformations using Power Query Editor

Model data with Power BI Desktop

Module 7: Design a data model in Power BI

- Data table types

- Star schema
- Create relationships
- Edit relationships
- Create hierarchies

Day 3: Power BI Data Analyst (PL-300), Part 2

Model data with Power BI Desktop (continued)

Module 8: Add measures to semantic models

- DAX concept and syntax
- Calculated measures, columns, and tables

Module 9: Use DAX functions

- Filter context
- Understand and manipulate filter context
- Use DAX functions to extend semantic models
- Semi-additive measures
- Create custom date table for Time intelligence functions

Module 10: Create Visual Calculations

- Understand visual calculations and how they differ from measures
- Create visual calculations in Power BI Desktop
- Use parameters in visual calculations
- Lab: Create visual calculations in Power BI Desktop

Build Power BI visuals and reports

Module 11: Design Power BI reports

- Understand Power BI report structure and report objects
- Choose effective visuals
- Format and configure visuals
- Explore interactive features of visuals

Module 12: Enhance reports for user experience

- Design report navigation and filtering
- Add report elements and bookmarks
- Drill through to other visuals
- Choose when to use paginated reports

Day 4: Power BI Data Analyst (PL-300), Part 3

Perform Advanced Analytics with Power BI Desktop

Module 13: Perform Advanced Analytics

- Use the Analyze feature
- Working with Advanced visuals such as KPI, Decomposition tree etc.
- Group, Bin and Cluster data
- Identify patterns and trends
- Report design best practices and storytelling

Manage workspaces and datasets in Power BI

Module 14: Create and manage workspaces

- Create workspaces and manage permissions
- Explore different workspace items
- Share and distribute reports

Module 15: Manage semantic models

- Use a Power BI gateway to connect to on-premises data sources.
- Configure data refresh for a semantic model
- Manage and promote semantic models

Module 16: Create Dashboards

- Create a Power BI dashboard
- Pin a live report page to a dashboard
- Add a theme to the visuals in your dashboard
- Set a mobile view

Module 17: Implement row-level security

- Configure row-level security by using a static method
- Configure row-level security by using a dynamic method row-level security

Module 18: Explore Copilot for Power BI

- Understand semantic model requirements
- Create visuals and reports using Copilot for Power BI
- Create summaries using Copilot for Power BI

Day 5: Getting started with Power Apps

Module 21: Introduction

- Setting the stage
- Power Platform Overview

Module 22: Business Applications and Power Apps Canvas Apps

- Power Platform Core Components
- Starting with Power Apps
- Key Maker Concepts
- Power Apps Studio experience
- Designing a canvas app

Module 23: Microsoft Dataverse

- Introduction to Dataverse
- Common Data model
- Working with Dataverse

Module 24: Power Apps Model Driven Apps

- Introduction to Model Driven apps
- Canvas vs. Model driven apps
- Business Process Flows
- Model driven app components
- Business Rules
- Compose your Model driven app