

**Planet** | YouAlreadyOwnIt.

# Microsoft Power Platform

Session 1: Fundamentals



# Session Topics

## Session 1: Fundamentals

- Business Value of Microsoft Power Platform
- Power Platform Products
- Dataverse
- Connectors

# Business Value - Challenges

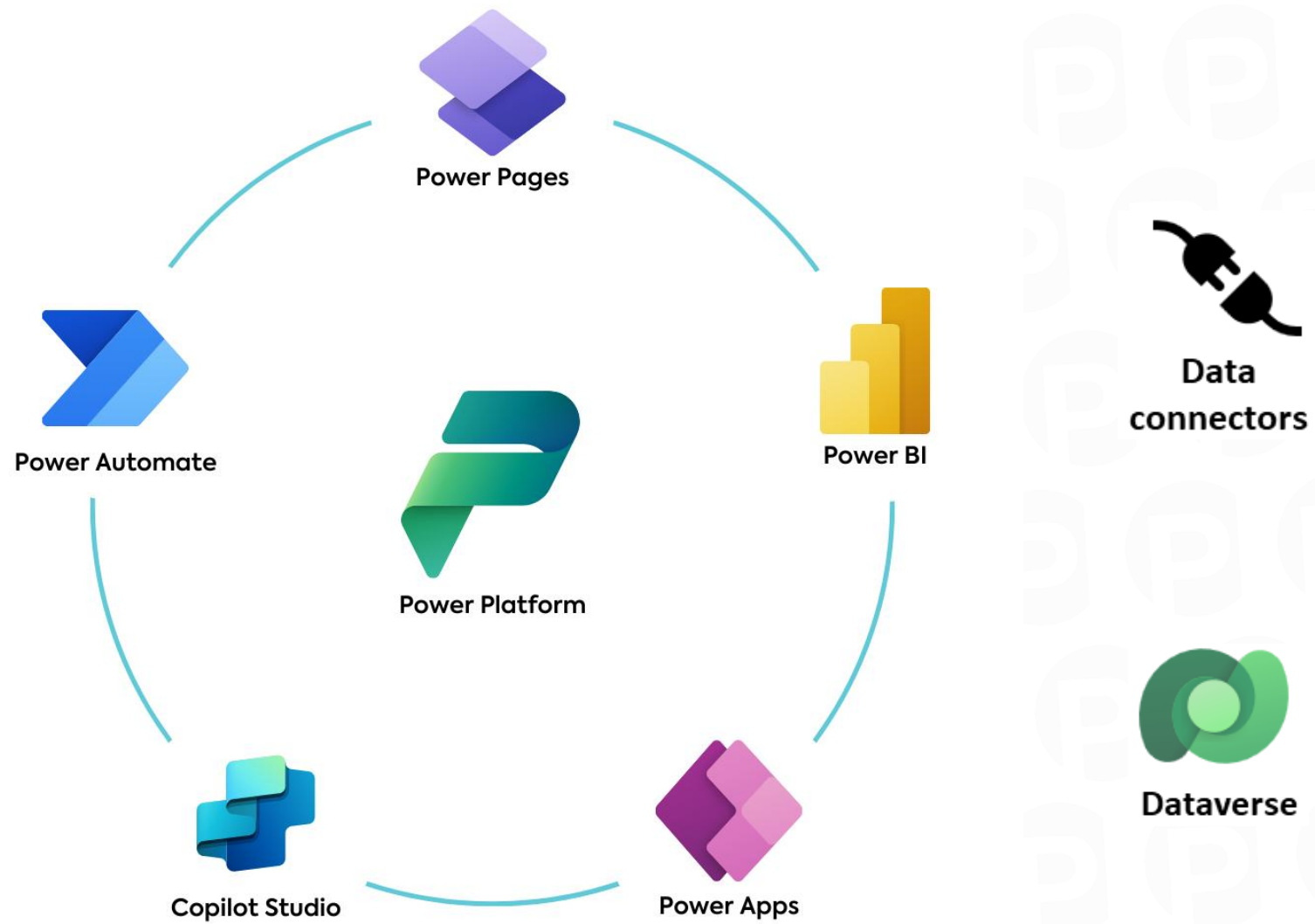
Many organizations struggle with building solutions that help their users be successful. Not only do they struggle trying to modernize their systems, but they simply do not have the resources required to meet the ever-changing needs of businesses today. With demands for targeted applications at an all-time high and labor shortages, it is common to see application demand exponentially higher than what departments can realistically deliver.



- **Changing workforce expectations** – Organizations need to adapt to the modern workforce who expect custom, streamlined, and collaborative digital experiences.
- **Application/License sprawl** – Proliferation of multiple point-solutions, and associated costs for maintenance, licensing, and support.
- **Increased costs for custom application development** – Traditional development is time consuming and costly and can require considerable resources to maintain.
- **Need to become more agile** – Traditional solutions took months to years to build and deploy. Business strategies change rapidly, and organizations need the ability to build quickly based on changing needs.
- **Need to scale development efficiently** – Organizations need to be able to change the way they develop solutions, including empowering the entire organization through hybrid development teams.

# Business Value – Benefits/ROI

- Using a low/no-code approach minimizes the amount of time that development resources spend working on items like screens, automations, and more.
  - This efficiency frees them up to focus on the more advanced portions of the solution where their skills are more appropriately used.
- 
- **Quickly build applications** in hours/days/months as opposed to weeks/months/years.
  - Build applications and solutions that **meet your business initiatives and goals**.
  - **Replace paper and manual processes** to streamline business process and reduce data errors.
  - **Increase performance and efficiency**.
  - **Manage, monitor, and secure** your low-code investments with enterprise-grade compliance and governance.
  - **Licensing/Training ROI**: Standardize & consolidate.
- 
- **Hybrid/Fusion Development**: IT Developers and Citizen Developers
  - **Configure approvals** to automatically route items to the appropriate person or group.
  - Ensure that by the time the solution is completed, **it still provides value**.
  - **Speed of development** also allows organizations to build a library of applications to facilitate day-to-day operations.
  - Over 1,000 prebuilt **Connectors facilitate simplification of integrations** with internal and external systems to create unified solutions.



# Power Apps & Power Pages

- **Rapid low/no-code development environment** for building custom apps.
- **Suite of app development services** with scalable data platform (Dataverse).
- **Model Driven Apps & Dynamics 365** for enterprise-level apps, **Canvas apps** for task-based interactions or surfacing an App on existing data, and **Power Pages** for external-facing presence.
- **Cross-browser and Cross-device support** (computer, laptop, tablet, and phone).

## Use Cases:

- Model Driven Apps to manage Fleet Vehicles, Job Postings/Applications/Interviews.
- Canvas Apps for Time-Off Requests, Expense Tracking, and Vehicle Fueling/Maintenance, or surfacing various data sources through a standardized App experience.
- Power Pages for Vehicle Reservations, Application for Employment, and Customer Feedback.

# Power Automate

- Create **workflows between applications and services**.
- Cloud flows and desktop flows.
- Can be **automated** via schedule or trigger or **manually** triggered.
- **Automate repetitive business processes** such as communication, data collection, and decision approvals.

## Use Cases:

- Send an email alert to the Human Resources Manager when a new job application has been submitted through the Power Pages portal.
- Initiate an approval workflow to management for time-off request.
- Send an email to a customer regarding an abandoned shopping cart, or birthday greeting.

# Power BI

- **Business analytics service** that delivers insights for analyzing data.
- Share insights through **data visualizations consisting of reports and dashboards**.
- **Scales across an organization** and has build-in governance and security. Focus on using your data more than managing it.
- Planet offers a separate Power BI presentation through the *Your Already Own It* program. Thus, it is covered very lightly in this presentation.

## Use Cases:

- Create reports and analytics that can consume data from multiple data sources and surface as a single dashboard
- Empower end-users to create their own dashboards & reports.

# Copilot Studio (formerly Power Virtual Agents)

- Create **powerful agents/chatbots** using a guided, no-code graphical interface.
- **Minimize IT effort** required to deploy and maintain custom chat solutions.
- **Empower Subject Matter Experts** to build and maintain their own conversation solutions.
- **Integrates** with Microsoft and third-party systems.
- Pair with Power Automate to **trigger workflows and perform actions**.
- **Modernize** existing Power Apps with agentic interface.

## Use Cases:

- Provide automated assistance to employees, customers, and constituents, such as customer support, appointment scheduling, event registration, training, and onboarding.
- Facilitate lead generation, product recommendations, and order processing.

# Microsoft Power Platform

- **Additional Tools**

- **AI Builder** allows users and developers to add AI capabilities to the workflows and Power Apps they create and use. AI Builder is a turnkey solution that allows you to easily add intelligence to your workflows or apps and predict outcomes to help improve business performance without writing code.
- **Microsoft Dataverse** is a scalable data service and app platform which lets users securely store and manage data from multiple sources and integrate that data in business applications using a common data model to ensure ease and consistency to users. Microsoft Dataverse is the common currency that enables the components of Power Platform to work together. It is the foundation that enables the consolidation, display, and manipulation of data.
- **Connectors** enable you to connect apps, data, and devices in the cloud. Consider connectors as the bridge across which information and commands travel. Connectors can be used by Power Apps, Power Automate flow, and logic apps. There are more than 1,000 pre-built connectors for Power Platform, enabling all your data and actions to connect cohesively. Examples of popular connectors include Salesforce, Office 365, Twitter, Dropbox, Google services, and more.

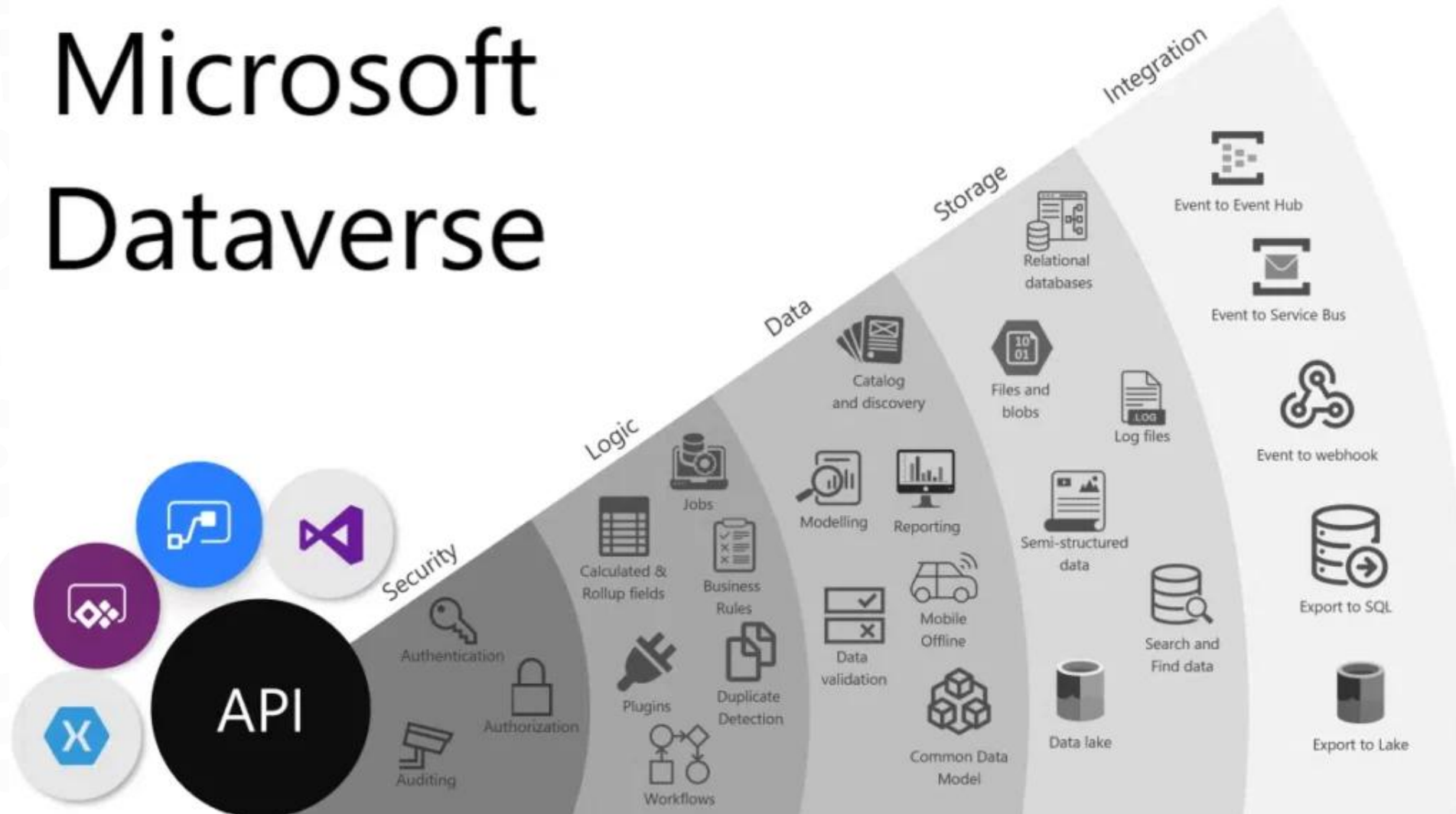
# Dataverse

Microsoft Dataverse allows organizations to securely store and manage data used by their business applications. Each Dataverse instance includes a base set of standard tables (Common Data Model) that cover typical business scenarios such as accounts, contacts, and activities. This base set of tables reduces the amount of time that it takes for organizations to start building solutions since there are already standard business tables available. Additionally, organizations can also create custom tables specific to their needs and populate them with data.

- **Easy to manage:** Both the metadata and data are stored in the cloud.
- **Easy to secure:** Data is securely stored so users can only access what they need to. Role-based security allows you to control access to tables for different users within your organization.
- **Rich metadata:** Data types and relationships are used directly within Power Apps.
- **Logic and validation:** Define calculated columns, business rules, workflows, and business process flows to ensure data quality and drive business processes.
- **Productivity tools:** Tables are available within the add-ins for Microsoft Excel to increase productivity and ensure data accessibility.

# Dataverse (Continued)

## Microsoft Dataverse



# Connectors

Data connectors make it easier to work with various data sources. They act as the bridge between data sources and your app or workflow. Power Platform has more than 1,000 connectors available to various data sources. Connectors also include a series of actions that simplify the process of working with those data sources.

## Examples:

- The Office 365 Outlook connector has prebuilt actions for working with mailboxes, such as downloading attachments, sending emails, managing events, and more.
- A company might create an order fulfillment application for their employees who work in the field. Data connectors would be used to connect the app to data sources like a SQL database or Microsoft Dataverse.
- In Power Automate, data connectors can be used to connect to data sources that are used as either triggers or actions.

# Recommended Actions

## Level of Effort

Low – Customer can complete on their own

Medium – Some guidance suggested

High – Subject Matter Expert / Professional Services Recommended

| Recommendation                                                                                   | Impact                                                                                | General Level of Effort                                                 |
|--------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|-------------------------------------------------------------------------|
| Assess opportunities to replace paper processes, spreadsheets, and outdated/legacy technologies. | Gain understanding of current systems that are in place, usage, and associated costs. | Low – Can be completed by your organization.                            |
| Familiarize yourself with the core components of the Power Platform.                             | Gain deeper understanding of the Power Platform.                                      | Low – Can be completed by your organization.                            |
| Explore Learning Resources.                                                                      | Gain deeper understanding of the Power Platform.                                      | Low – Can be completed by your organization.                            |
| Schedule the YAOI: Power Platform Session 2 with Planet.                                         | Gain deeper understanding of the Power Platform and associated topics.                | Medium – To be provided collaboratively by Planet to your organization. |

# Suggested Resources to Review

| Resource                                       | Type             | Resource links                                                                                                                                                  |
|------------------------------------------------|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Microsoft Power Platform                       | Website          | <a href="https://www.microsoft.com/en-us/power-platform">https://www.microsoft.com/en-us/power-platform</a>                                                     |
| Microsoft Power Apps                           | Website          | <a href="https://www.microsoft.com/en-us/power-platform/products/power-apps">https://www.microsoft.com/en-us/power-platform/products/power-apps</a>             |
| Microsoft Power Pages                          | Website          | <a href="https://www.microsoft.com/en-us/power-platform/products/power-pages">https://www.microsoft.com/en-us/power-platform/products/power-pages</a>           |
| Microsoft Power Automate                       | Website          | <a href="https://www.microsoft.com/en-us/power-platform/products/power-automate">https://www.microsoft.com/en-us/power-platform/products/power-automate</a>     |
| Microsoft Power Platform Fundamentals (PL-900) | Website/Training | <a href="https://learn.microsoft.com/en-us/training/paths/power-plat-fundamentals">https://learn.microsoft.com/en-us/training/paths/power-plat-fundamentals</a> |
| You Already Own It                             | Website          | <a href="https://www.youalreadyownit.com">https://www.youalreadyownit.com</a>                                                                                   |
| Power Platform Licensing Guide                 | PDF              | <a href="https://go.microsoft.com/fwlink/?LinkId=2085130&amp;clcid=0x409">https://go.microsoft.com/fwlink/?LinkId=2085130&amp;clcid=0x409</a>                   |
| Power Platform US GOV Feature Parity & Roadmap | PDF              | <a href="https://aka.ms/bapfunctionalparity">https://aka.ms/bapfunctionalparity</a>                                                                             |
| Power Platform Connectors                      | Website          | <a href="https://learn.microsoft.com/en-us/connectors">https://learn.microsoft.com/en-us/connectors</a>                                                         |

**| Thank You!**  
**| End of Session 1**

