

Table of Contents

| | |
|----------------|------------|
| Preface | xix |
|----------------|------------|

| | |
|-------------------------------------|-------------|
| Free Benefits with Your Book | xxiv |
|-------------------------------------|-------------|

| | |
|-----------------------------|----------|
| Part 1: Introduction | 1 |
|-----------------------------|----------|

| | |
|---|----------|
| Introduction to Power Platform Solution Architecture | 3 |
|---|----------|

| | | | |
|---|----------|--|-----------|
| Laying the foundations for great solution architecture | 4 | Conclusion – embracing your role as a solutions architect | 10 |
|---|----------|--|-----------|

| | | | |
|----------|---|---|-----------|
| Security | 4 | Power Platform architecture overview | 10 |
|----------|---|---|-----------|

| | | | |
|--------------------------------------|---|--|--|
| Makers (formerly citizen developers) | 5 | Dataverse – the backbone of Power Platform | |
|--------------------------------------|---|--|--|

| | | | |
|------------|---|-------------------------|----|
| Compliance | 5 | data-based applications | 11 |
|------------|---|-------------------------|----|

| | | | |
|-----------------|---|--|----|
| Maintainability | 5 | The four key Power Platform components | 12 |
|-----------------|---|--|----|

| | | | |
|--------------|---|------------|----|
| Availability | 5 | Power Apps | 12 |
|--------------|---|------------|----|

| | | | |
|-----------------------------|---|----------------|----|
| Performance and scalability | 6 | Power Automate | 16 |
|-----------------------------|---|----------------|----|

| | | | |
|-------------------------------------|---|----------|----|
| Monitoring and operation efficiency | 6 | Power BI | 20 |
|-------------------------------------|---|----------|----|

| | | | |
|------------------|---|----------------|----|
| Cloud enablement | 6 | Copilot Studio | 21 |
|------------------|---|----------------|----|

| | | | |
|----------------------|---|-------------------------------------|----|
| Cost-benefit balance | 7 | Other key Power Platform components | 23 |
|----------------------|---|-------------------------------------|----|

| | | | |
|--|----------|--------------------------|----|
| Understanding your role as a Power Platform solutions architect | 7 | Environments and tenants | 24 |
|--|----------|--------------------------|----|

| | | | |
|---------------------------------------|---|----------|----|
| Manage expectations and project scope | 8 | Security | 25 |
|---------------------------------------|---|----------|----|

| | | | |
|---------------------------------------|---|--|----|
| Help people reach the same conclusion | 8 | Power Platform application life cycle management | 26 |
|---------------------------------------|---|--|----|

| | | | |
|--|---|--|-----------|
| Define standards and implementation guidelines | 9 | Microsoft’s cloud-based ecosystem | 27 |
|--|---|--|-----------|

| | | | |
|---------------------------------------|---|--------------|----|
| Break down work into actionable tasks | 9 | Dynamics 365 | 28 |
|---------------------------------------|---|--------------|----|

| | | | |
|---------------------------------|----|---------------|----|
| Give the good news and bad news | 10 | Microsoft 365 | 29 |
|---------------------------------|----|---------------|----|

| | | | |
|-----------------|----|-----------|----|
| Lead by example | 10 | AppSource | 29 |
|-----------------|----|-----------|----|

| | | | |
|--|--|-------|----|
| | | Azure | 30 |
|--|--|-------|----|

| | | | |
|--|----|-----------------|----|
| A hands-on approach to Power Platform solution architecture | 30 | Lessons learned | 34 |
| A day in the life of a solutions architect – a success story | 33 | Summary | 34 |
| | | Further reading | 35 |

2

The Digital Transformation Case Study 37

| | | | |
|--|----|----------|----|
| Introducing Skyline Harbor | 37 | The goal | 40 |
| Understanding the current architecture | 38 | Summary | 42 |

Part 2: Requirements Analysis, Solution Envisioning, and the Implementation Roadmap 43

3

Discovery and Initial Solution Planning 45

| | | | |
|--|----|--|----|
| Discovering the business and its needs | 45 | with Microsoft solutions | 60 |
| Pre-discovery research | 46 | Leveraging AppSource apps, third-party applications, and other solutions | 63 |
| Company website | 46 | Case study scenario – matching requirements to AppSource components | 64 |
| Preparing effective discovery questions | 52 | An early view of the migration effort | 65 |
| Orchestrating the discovery phase | 56 | Case study scenario – sizing the migration effort at Skyline Harbor | 65 |
| Defining the success criteria | 57 | Summary | 70 |
| Identifying solutions within Power Platform and other Microsoft cloud services | 60 | | |
| Case study scenario – aligning Skyline Harbor’s requirements | | | |

4

Identifying Business Processes, Risk Factors, and Success Criteria 71

| | | | |
|---|----|---|----|
| Conducting high-level discovery workshops | 72 | The post-discovery session wrap-up | 74 |
| Preparing discovery sessions | 72 | Understanding the organization’s key success criteria | 74 |
| Delivering discovery sessions | 73 | | |

Case study – reviewing the key success criteria at Skyline Harbor 75

Facilitating understanding through high-level processes and data modeling 77

Benefits of a high-level process and data models 77

Modeling the high-level business processes 77

Case study – modeling existing and proposed business processes 78

Case study – a high-level model of the existing data structure 80

5

Understanding the Existing Architectural Landscape 89

Evaluating the current architectural landscape 89

Identifying Power Platform data sources, their usage, and their quality standards 90

Case study – current data sources at Skyline Harbor 91

6

Requirements Analysis and Engineering for Solution Architecture 103

Effective requirements analysis and engineering overview 103

Preparing the requirements capture sessions 105

Defining the purpose and desired outcomes for the session 105

Reviewing previously defined requirements 105

Defining a clear agenda 105

Identifying attendees and stakeholders 106

Scheduling the workshops 106

Identifying automation opportunities and process optimization 81

Case study – identifying optimization opportunities at Skyline Harbor 83

Balancing digital transformation risk factors through planning and mitigation 84

Case study – the SWOT analysis 85

Case study – initial project risk analysis 87

Summary 88

Documenting the organization's architecture 94

Case study – assessing the existing architecture at Skyline Harbor 95

Anticipating future challenges 100

Concluding the architecture assessment 102

Summary 102

Preparing facilities, equipment, and demonstration platforms 106

Preparing baseline documentation 107

Sharing the session prerequisites with the attendees 107

Arranging for any support required during the workshop sessions 107

Case study – Preparing the requirements capture sessions 107

| | | | |
|---|------------|---|------------|
| Define the purpose and desired outcomes for the session | 107 | Identifying functional requirements | 112 |
| Review previously defined requirements | 108 | Identifying non-functional requirements | 115 |
| Define a clear agenda | 108 | Assessing requirement feasibility | 117 |
| Identify attendees and stakeholders | 109 | Managing conflicting requirements | 117 |
| Schedule the workshops | 109 | Managing exceptions | 118 |
| Prepare facilities, equipment, and demonstration platforms | 109 | Managing scope creep | 119 |
| Prepare baseline documentation | 110 | Leveraging requirements capture methodologies and templates | 120 |
| Share the session prerequisites with the attendees | 111 | Helping stakeholders share your vision | 121 |
| Arrange for any support required during the workshop sessions | 111 | Post-requirement capture review and sign-off | 121 |
| Delivering the requirements capture sessions | 111 | Reviewing the requirements capture workshop sessions | 122 |
| Start with the desired outcome | 111 | Confirming and re-aligning requirements to the overall transformation goals | 122 |
| Drive the agenda | 111 | Using a requirements traceability matrix | 122 |
| Refining high-level requirements | 112 | Summary | 123 |

7

Conducting Effective Fit Gap Analysis in Power Platform 125

| | | | |
|--|------------|--|------------|
| Introduction to fit gap analysis | 126 | Evaluating AppSource, third-party, and custom solutions to fill functional gaps | 143 |
| Power Platform fit gap analysis essentials | 126 | Case study – matching Skyline Harbor requirements to AppSource components | 144 |
| In-depth feasibility analysis | 134 | Licensing and API limit considerations in fit gap analysis | 146 |
| Best fit analysis – aligning Microsoft product capabilities | 136 | Licensing considerations | 146 |
| Matching requirements to Power Platform components | 137 | Power Automate API limit considerations | 148 |
| Matching requirements to Dynamics 365 | 137 | Keeping up with licensing changes | 150 |
| Matching requirements to Microsoft 365 and Azure Services | 139 | Validating solutions through POC implementations | 151 |
| Matching requirements to industry accelerators | 143 | Summary | 151 |

8

Designing a Power Platform Solution 155

| | | | |
|--|------------|--|------------|
| Defining a Power Platform solution architecture topology | 156 | Configuration versus custom development in Power Pages and model-driven apps | 179 |
| Understanding the current state | 156 | Power Automate design | 181 |
| Understanding the to-be state | 158 | Facilitating understanding through descriptive visual designs | 190 |
| Architecture that fits short- and long-term objectives | 158 | Designing UX prototypes for customer-facing and internal applications | 191 |
| Linking the architectural building blocks | 159 | Benefits of UX prototypes | 191 |
| Presenting multiple architecture options to facilitate the selection | 160 | Designing data migration strategies | 192 |
| Considering any project's constraints | 163 | Defining an ALM process | 193 |
| Product roadmap | 165 | Planning an environment strategy | 194 |
| Power Platform detailed design | 166 | Setting up an Azure DevOps project | 194 |
| Power Apps design patterns | 166 | Creating a Power Platform solution and publisher | 195 |
| Business process designs | 166 | Creating a development export pipeline | 195 |
| State machine designs | 167 | Building the Power Platform solution | 195 |
| Dataverse design | 168 | Creating a deployment pipeline | 195 |
| Model-driven apps design | 170 | Granting access to users | 195 |
| Canvas apps design | 174 | Summary | 196 |
| Designing Power Pages | 175 | | |

9

Effective Power Platform Data Modeling 197

| | | | |
|--|------------|---|------------|
| Translating complex business requirements into visual data models | 198 | Dataverse | 209 |
| Creating logical data models | 198 | Copying data to Dataverse | 209 |
| Creating physical data models that support the implementation | 202 | Copying data to Azure Data Lake | 210 |
| Deciding factors for integrating or importing external data sources | 208 | Direct access to external data | 210 |
| | | Defining extensible Power Platform data models | 211 |
| | | Dataverse table types | 211 |

| | | | |
|---|------------|--|------------|
| Selecting column data types | 214 | Relationship behaviors | 223 |
| Optimal reference and configuration data modeling strategies | 220 | Power Platform data modeling best practices | 224 |
| Modeling reference data | 221 | Deciding whether to use built-in or custom tables | 226 |
| Modeling configuration data | 221 | Deciding whether to use the Account and Contact tables | 228 |
| Establishing table relationships and cascade behaviors | 222 | Summary | 229 |
| Types of Dataverse relationships | 222 | References | 230 |

10

Power Platform Integration Strategies 231

| | | | |
|--|------------|---|------------|
| Introduction to Power Platform integrations | 232 | Designing integrations with on-premise and cloud-based systems | 259 |
| Your role during the implementation of Power Platform integrations | 232 | Options for connecting on-premise systems and Power Platform | 259 |
| Benefits of Power Platform integrations | 232 | Integrating Power Platform applications with cloud-based services | 267 |
| Power Platform integration challenges | 234 | Defining inbound and outbound authentication strategies | 271 |
| Steps for a successful Power Platform integration | 237 | Designing Power Platform inbound authentication strategies | 272 |
| Identifying the need | 237 | Designing Power Platform outbound authentication strategies | 273 |
| Evaluating options | 238 | Designing a business continuity strategy for Power Platform integrations | 277 |
| Designing Power Platform integrations | 238 | Monitoring and alerts | 277 |
| Building the integration | 241 | Recovery | 281 |
| Releasing the integration into production | 242 | Exception handling | 281 |
| Case study: Skyline Harbor's address search integration | 243 | Summary | 282 |
| Designing integrations between Power Platform and Microsoft 365 | 248 | | |
| Designing for Exchange integration | 249 | | |
| Designing Power Platform integrations with Outlook | 250 | | |
| Designing Power Platform SharePoint integrations | 254 | | |

Defining Power Platform Security Concepts 285

| | | | |
|---|------------|---|------------|
| Designing the Power Platform core security model | 285 | Securing Dataverse-based applications | 296 |
| Understanding an organization's security requirements | 286 | Common usage patterns for security design | 296 |
| Securing Power Platform environments | 288 | Best practices | 297 |
| Providing Dataverse API access to external applications | 291 | Leveraging Dataverse security features | 298 |
| Defining DLP policies for Power Platform solutions | 292 | Defining a Dataverse permissions matrix | 316 |
| | | Defining access routes for external Power Platform users | 318 |
| | | Summary | 319 |

Part 4: Harnessing the Power of Artificial Intelligence 321

Power Platform and AI 323

| | | | |
|--|------------|--|------------|
| AI Builder – an architect's overview | 323 | Case study – automated invoice processing at Skyline Harbor | 340 |
| AI Builder capabilities | 324 | Step 1 – Define the project goals | 340 |
| Choosing between prebuilt and custom AI models | 327 | Step 2 – Implement a PoC | 340 |
| AI Builder in Power Automate | 329 | Step 3 – License and capacity planning | 341 |
| AI Builder in Power Apps | 331 | Step 4 – Design the AI-powered solution | 341 |
| AI Builder – planning the solution | 331 | Step 5 – Incorporate human oversight | 344 |
| Identify business needs and AI opportunities | 331 | Step 6 – Deployment, monitoring, and ongoing optimization | 345 |
| Choose the right AI model | 332 | AI Builder case study conclusion | 346 |
| Design the end-to-end workflow | 332 | Integrating Power Platform and Azure OpenAI GPT models | 346 |
| Integrate AI Builder into the solution | 333 | AI Builder versus Azure | |
| Test and refine the model and workflow | 334 | OpenAI Service (GPT) | 347 |
| Deploy, monitor, and improve | 335 | | |
| AI Builder licensing | 337 | | |

| | | | |
|--|------------|---|------------|
| Use cases for GPT in Power Platform | 347 | Monitoring AI consumption by design | 358 |
| Integrating Azure OpenAI with Power Platform | 349 | Case study – Advanced customer feedback analysis at Skyline Harbor | 360 |
| Integrating alternative AI services | 353 | Step 1 – Define the project goals | 360 |
| Security and data governance considerations | 353 | Step 2 – Review compliance and policies | 360 |
| Power Platform Power Platform LLM design patterns | 355 | Step 3 – Implement a PoC | 361 |
| Retrieval-Augmented Generation overview | 355 | Step 4 – Design the solution architecture | 361 |
| Power Platform as the low-code RAG orchestration layer | 356 | Step 5 – Build the solution | 363 |
| Data augmentation sources for RAG | 357 | Step 6 – Test and deploy the solution | 365 |
| Leveraging custom models (fine-tuning) | 357 | Step 7 – Monitor performance and continuously improve | 365 |
| | | Summary | 366 |

13

Copilot **367**

| | | | |
|---|------------|--|------------|
| Overview of Copilots in Power Platform | 368 | Architectural and configuration considerations | 388 |
| Power Apps Copilot | 371 | Planning Power Platform Copilots | 393 |
| Copilot for makers: | | Evaluating regional availability, data residency, and language support | 393 |
| Conversational authoring | 372 | Estimating demand | 397 |
| Copilot for end users: In-app conversational chat | 376 | Selecting a funding model | 397 |
| Power Automate Copilot | 379 | Case study: Power Platform Copilots at Skyline Harbor | 399 |
| Copilot in cloud flows | 380 | Analysis of Copilot requirements | 399 |
| Copilot in other areas | 382 | Planning the Copilot implementation | 400 |
| Power Pages Copilot | 383 | Build and implementation | 402 |
| Power Pages Copilot capabilities | 383 | Testing | 404 |
| Architectural considerations | 385 | Go-live and post-go-live monitoring | 404 |
| Copilot Studio | 386 | Summary | 405 |
| Core Copilot Studio capabilities | 387 | | |

14

Validating the Solution's Design and Implementation 409**A continuous review of detailed designs and their resulting implementation 410**

Validating the Power Platform detailed designs 410

Validating and reviewing the Power Platform implementation 412

Case study – digital transformation at Skyline Harbor – updated with development guidelines 416

Validating compliance with the defined security requirements 423

Validating Dataverse security for compliance with best practices and guidelines 423

Validating authentication strategies 423

Validating storage and processing secrets 424

Monitoring for security compliance 424

Implementing solutions that work within Power Platform API limits 425

User API limits 425

Resolving business automation conflicts 426**Resolving integration conflicts 428**

Identifying integration conflicts 428

Systematically solving integration conflicts 429

Summary 430

15

Power Platform Implementation Strategies 431**Power Platform environment and tenant configurations 431**

Selecting geographical locations for the environments 432

Deciding on a Power Platform environment strategy 434

Optimizing the output of cross-functional Power Platform development teams 440

Understanding the team's capabilities 440

Implementing effective test strategies for Power Platform solutions 441

Manual testing 441

Automated tests 441

Load tests 442

Security and penetration tests 442

Summary 443

Power Platform ALM

445

| | |
|--|-----|
| Selecting the right Power Platform ALM solution for your project | 445 |
| Using Power Platform pipelines for ALM | 447 |
| Using Azure DevOps for ALM | 448 |

| | |
|---|-----|
| Part 1: Configuring automated Power Platform source control | 448 |
| Part 2: Configuring automated Power Platform deployments | 479 |
| Summary | 497 |

17

Go-Live Strategies and Support

499

| | |
|---|-----|
| Selecting a go-live strategy | 499 |
| Selecting a phased go-live strategy | 500 |
| Selecting a big-bang go-live strategy | 501 |
| Migration go-live strategies | 502 |
| Preparing for go-live | 503 |
| Identifying the resources required to go live | 504 |
| Training users and maximizing adoption | 505 |
| Defining the post-go-live capacity management and monitoring plan | 506 |
| Planning the go-live cutover (who will do what and when) | 512 |
| Ramping up the operational support activities | 514 |
| Preparing a communication plan | 514 |

| | |
|---|-----|
| Common go-live issues and how to preempt them | 515 |
| Validating the solution before rolling it out to production | 516 |
| Taking into account the Power Platform product release schedule | 517 |
| Running through the go-live checklist | 518 |
| The go/no-go decision | 518 |

Rolling out the production environment

519

| | |
|---------------------------------------|-----|
| The cutover | 519 |
| Deciding when to roll back | 520 |
| Troubleshooting data migration issues | 520 |
| Handing over operational support | 521 |

Summary

521

18

Setting Up a Power Platform Center of Excellence

523

| | |
|-------------------------------|-----|
| What is a Power Platform CoE? | 523 |
| The two drivers of a CoE | 524 |
| Aims of a CoE | 524 |
| Benefits of a CoE | 525 |
| The CoE's core features | 527 |

| | |
|---|-----|
| Establishing your CoE: From vision to reality | 530 |
| Introducing the CoE Starter Kit: A tool to support your CoE | 531 |
| Setting up the CoE Starter Kit | 532 |

| | | | |
|---|------------|---|------------|
| Core setup steps | 533 | Scaling, optimization, and maturity stages | 539 |
| Optional components and process setup steps | 534 | Case study: Skyline Harbor implements a Power Platform CoE | 540 |
| Best practices and considerations | 536 | Business challenges | 540 |
| When and how to leverage the CoE's capabilities | 537 | CoE implementation and strategy | 540 |
| Scenarios for a CoE-led strategy | 537 | Solution highlights | 541 |
| Practical use cases for the CoE Starter Kit | 538 | Outcomes and impact | 542 |
| When a CoE may not be necessary | 539 | Summary | 542 |
| Part 6: Power Platform Solution Architect Certification Prep | | | 543 |

19

Microsoft Certified: Power Platform Solution Architect Expert Certification Prep **545**

| | | | |
|---|-----|---|-----|
| The benefits of becoming a Microsoft Certified Power Platform Solution Architect Expert | 546 | PL-600 answers | 562 |
| Preparing for the PL-600 certification exam | 546 | Recommended further reading and additional learning materials | 575 |
| Tips for exam day | 547 | Summary | 575 |
| PL-600 example questions | 547 | Final thoughts | 576 |

20

Unlock Your Exclusive Benefits **579**

Index **583**

Other Books You May Enjoy **602**