



K2's The ABCs Of Automation With Microsoft's Power Platform

Major Topics



- Overview of the Power Platform and its components
- Review examples of business processes that may benefit the most from using automation
- Discussion and demonstration of its low-code/no-code app development environment

Learning Objectives



- Identify the major steps in automating business processes
- Identify two rudimentary process automation applications in Microsoft 365 and explain how the use cases for these applications differ from those for Power Platform
- List the applications which make up the Power Platform
- From a list, identify significant differences in expected use cases and user bases for Microsoft Forms in Microsoft 365 and Microsoft Power Automate/Power Apps in the Power Platform
- Identify the Power Platform components used to solve common problems when creating process automation solutions

Description



Automation and standardization are two of the many keys to productivity, but most people who are not programmers are unsure where to start. Microsoft's Power Platform is a comprehensive business application platform for creating automated workflows, integrations, and data-driven near real time reports. Components include Power BI (Business Intelligence), Power Apps (multi-form internal apps), Power Automate (data integration and creation of simplified business logic), Power Pages (data driven extranets), and Power Virtual Agents (Ai-driven chatbots). Attend this session to learn about this platform and how everyone can use its low-code, no-code environment to solve process challenges.



AUTOMATING BUSINESS PROCESSES

Automating Business Processes



- Also known as “Digital Transformation”
- With the advent of low code/no code applications, can be done in businesses of all sizes, often with limited IT assistance
- Successful efforts usually require a combination of:
 - Document management
 - Workflow management
 - Change management
- Often tackled as part of a document management initiative, initial efforts frequently fail miserably, and people often give up

Automation Efforts



Some of the challenges of automating business processes include:

- Employee and customer resistance to change
- Integration with existing/legacy systems (RPA may be a workaround)
- Cost and commitment after setbacks
- Complexity of efforts and availability of IT support
- Data security and privacy

Key Steps – Process Automation



1. Process identification and documentation
2. Technology selection
3. Enterprise architecture planning
4. Implementation strategy –change management, user training
5. Monitoring and optimization

Process Identification And Documentation



- What are your business processes?
- How many business processes does your organization have?
- List and define (very high level) the process
 - Name of process
 - Goals and rough description
 - Incumbent system(s) used
 - Inputs, outputs, transformations required
 - How labor intensive/expensive is the process?
 - What works about the current process?
 - What needs improvement?
 - How are others in our industry addressing this challenge?
- Select a few simple processes first for some quick wins and learning

Technology Selection



- Goal: Make the most of existing tech stack, with an eye toward digital transformation
- Identify
 - Needs vs. wants
 - What integrations and processes are mission critical/mandatory vs. optional
 - How often do the applications need to be interfaced to meet your business needs
 - What are the biggest challenges to be addressed/automated and how will you manage the transition
 - Regulatory compliance requirements and challenges
 - Backup procedures for business continuity in a platform failure (e.g. hotels)

Enterprise Architecture Planning



Platforms and tools for automation:

- Office 365/Zoho/Google can handle simple lists, forms, tasks internally
- Project management may require MS 365 Planner, Trello, Asana, Monday.com or other platforms
- No-code forms/survey tools in office suites (MS 365, Zoho Forms, Google) or more sophisticated tools if required (SurveyMonkey, Zoho Forms, MS Power Apps, etc.)
- Workflow platforms are now integrated with cloud ERP solutions
 - Businesses of any size may use MS Power Platform, Zapier, or Zoho One
 - Mid-sized businesses may use Acumatica, EXACT, NetSuite, or others
 - Enterprises will use Oracle Cloud ERP, Workday, SAP S/4HANA
 - Small businesses may use Airtable, Smartsheet, or IFTTT (watch out for privacy)
 - CPA Firms may use Digilence Experience Cloud or Once Accounting

Enterprise Architecture Planning



Platforms and tools (continued):

- Workflow platforms include MS Power Platform, Zoho One, Salesforce, and many others – including industry-specific solutions
- Integration platform as a Service (iPaaS) tools use event triggers, buttons, or timed actions to create “digital plumbing” which automates data transfer from earlier steps into later ones
 - Candidates include Zoho Flow, Zapier, Power Automate, Boomi, Jitterbit, Appian, and many others

Enterprise Architecture Planning



Platforms and tools (continued):

- Robotic Process Automation (RPA) tools can fill in where the tools in your app stack are not supported by your workflow platform
 - Think of RPA as macros (bots either auto-recorded or coded by IT pros)
 - Setup and licensing can require a significant investment of technical talent, time, and money
 - The macros used are finicky, and changes of UI, screen resolution, or even fonts can cause stable bots to fail
- Pick solutions and approaches which you expect to be around and be supported for 10 years or more

Implementation Strategy



- Pilot project/phased approach versus all at once cutover
 - Most will choose a phased approach, but some processes will require an “all at once” implementation
 - Poor implementations and weak communication will cause turnover and make implementations much harder
- Change management
 - Training and documentation of the process
 - Working and communicating with people whose jobs will be affected
 - Gathering and responding to bug reports, feedback, and complaints

Monitoring And Optimization



- Once a process is automated on a platform and has created log files, Process Mining solutions can analyze activity and help you figure out what needs improvement
 - Analysis of team performance and step response times
 - Visual mapping of exception frequency and how resolved
- Business analytics tools like Microsoft Power BI, Zoho Analytics, or Tableau can also report in real time or near real time on activity, identify roadblocks, and help develop new performance measures and KPIs



INTRODUCTION TO THE POWER PLATFORM

Microsoft's Power Platform



Power BI

Power
Automate

Power Apps

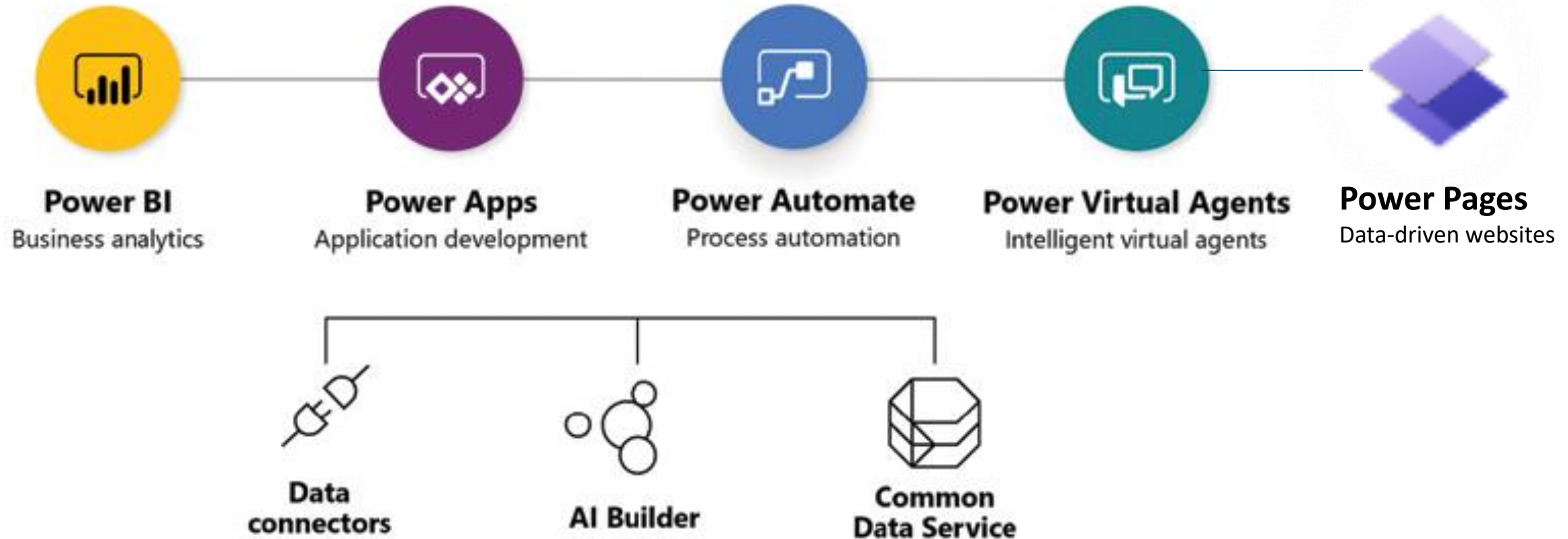
Power Pages

Power Virtual
Agents

Microsoft's Power Platform



The low-code platform that spans Office 365, Azure, Dynamics 365, and standalone applications



Source: Microsoft

The Power Platform



- This is a “low-code/no-code” toolset designed to help business users solve many of their own problems
- Power Platform is also pro-code friendly, so developers can also make the most of it without having to use the simplified low-code/no code tools
- The interfaces in the Power Platform work across all the apps – so if there’s a connector to a solution for Power BI, the same interface/connector should also work with the other Power Platform tools

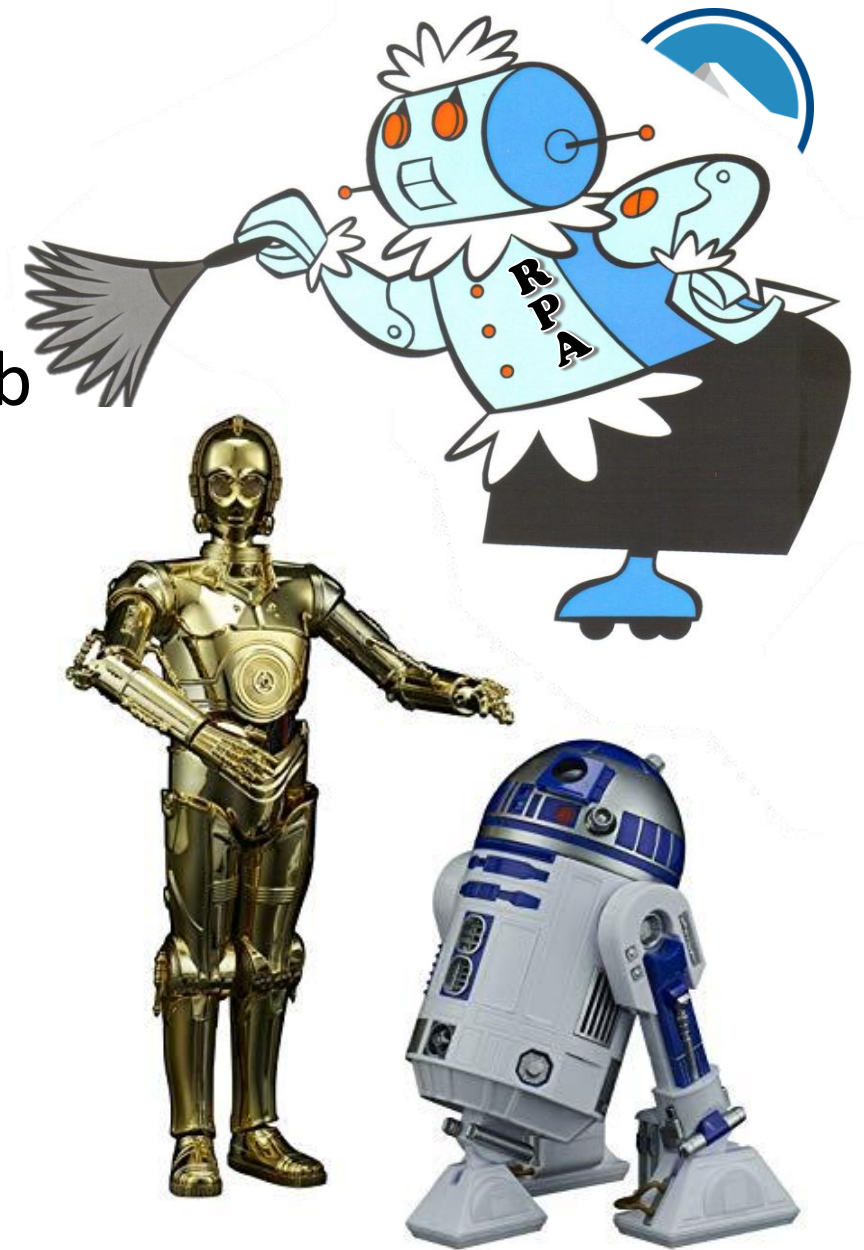
Power Automate



- Tool for creating event-triggered dataflows between hundreds of applications
- Formerly known as Microsoft Flow
- Business logic/rules can be added to a data flow/workflow using a low-code/no-code approach
- Has an integrated robotic process automation (RPA) tool called Power Automate Desktop which uses an action recorder/replay engine similar to Excel/Word/Office macros, but RPA can be run across most any application (or to transfer data between most applications) in Windows

What Can RPA Bots Do?

- Pull data from Excel or CSV & enter in a web page or an application on your PC
- Extract structured data from PDF files
- Enter data into Windows applications
- Watch a folder or a data file for additions and kick off a workflow when new items appear
- Route transactions in accordance with business processes and business logic
- Create e-mails with data from inputs



Power Apps



- Tool for creating custom apps, screens, and tools that work with workflows created in SharePoint or Power Automate
- While it is a low-code/no-code tool, it helps for users to have some prior programming experience
- Pricing is as follows:
 - \$5 per user/per app/per month (includes 250 AI Builder service credits per month - or -
 - \$20 per user/per mo (unlimited apps and portals, 500 AI Builder service credits per month) – or –
 - \$10 per active user/per app/per mo

Power Pages



- Tool for creating custom data-driven websites – with or without prior coding experience
- Low-code/no-code tool is highly integrated into the other Power Platform tools and also can be used with professional coding tools like Visual Studio
- Includes Dataverse storage –
 - Authenticated use model – 16 GB storage, 2 GB database capacity
 - Anonymous use model – 4 GB data storage, 0.5 GB database capacity
- Pricing is as follows:
 - Authenticated use is \$200/mo for 100 users, per site, per month
 - Anonymous use is also available at \$75 for 500 users/site/mo

Power Virtual Agents



- Tool for creating chatbots which complete actions using Power Automate and also integrate with hundreds of other data sources using Power Platform connectors
- Like the other tools, no coding/AI experience is necessary
- Adds 10 GB database capacity and 20 GB file capacity to a user's Microsoft Dataverse storage
- Pricing starts at \$200/mo for 2,000 chatbot sessions per month
 - Additional packs of 1,000 sessions in a month are available for \$100

Power BI

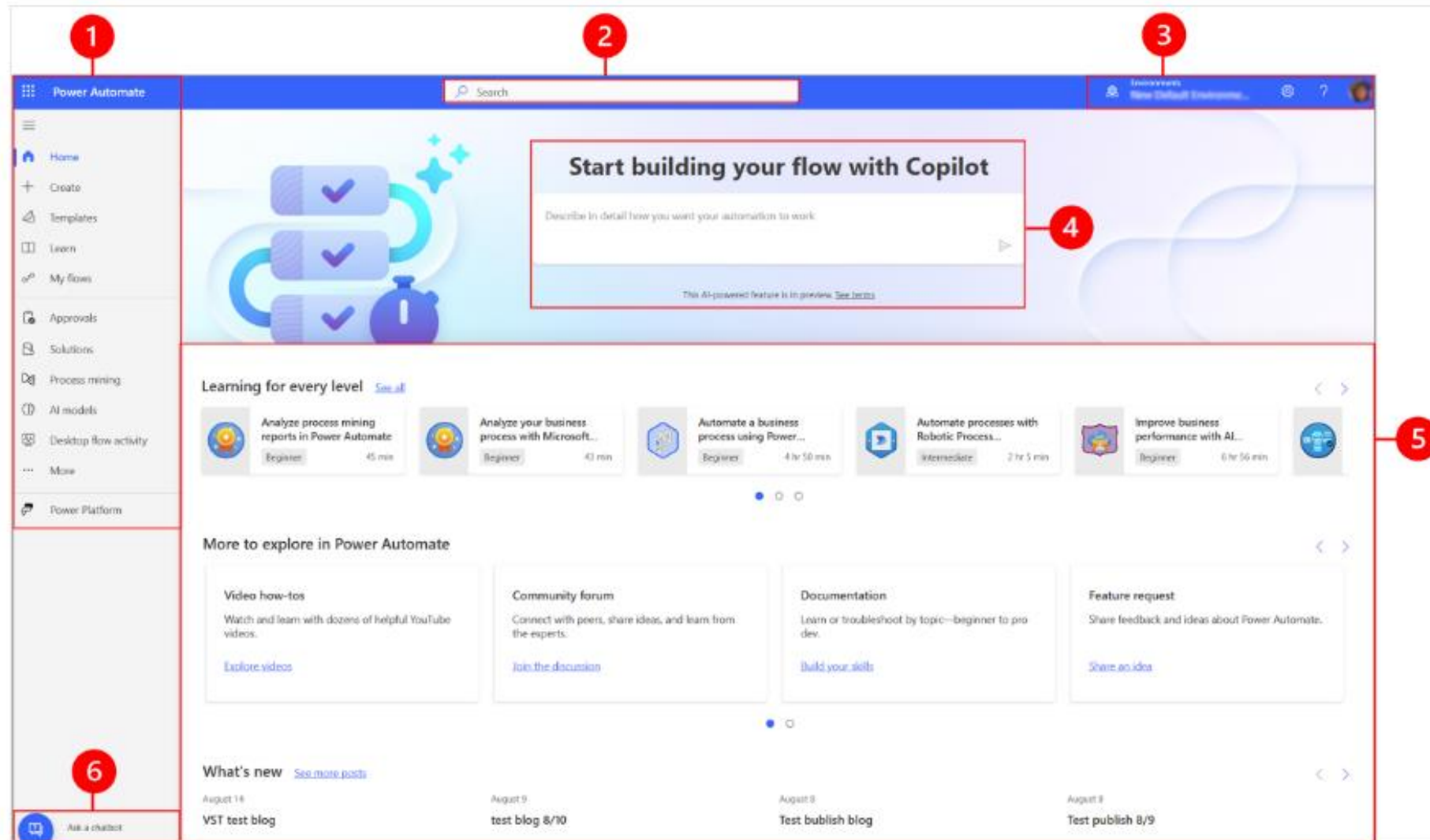


- Microsoft's business analytics platform which is also part of the Power Platform
- It focuses on data analysis, allowing users to explore, transform, and visualize data from various sources
- Users can create interactive reports and dashboards to gain insights
- Like the other Power Platform tools, no coding/AI experience is necessary, and it uses the common data connectors associated with the Power Platform
- There are two basic user plans for Power BI –
 - Power BI Pro is included with MS 365 E5 plans or is \$9.99 USD/user/mo
 - Power BI Premium is \$19.99 USD/user/mo

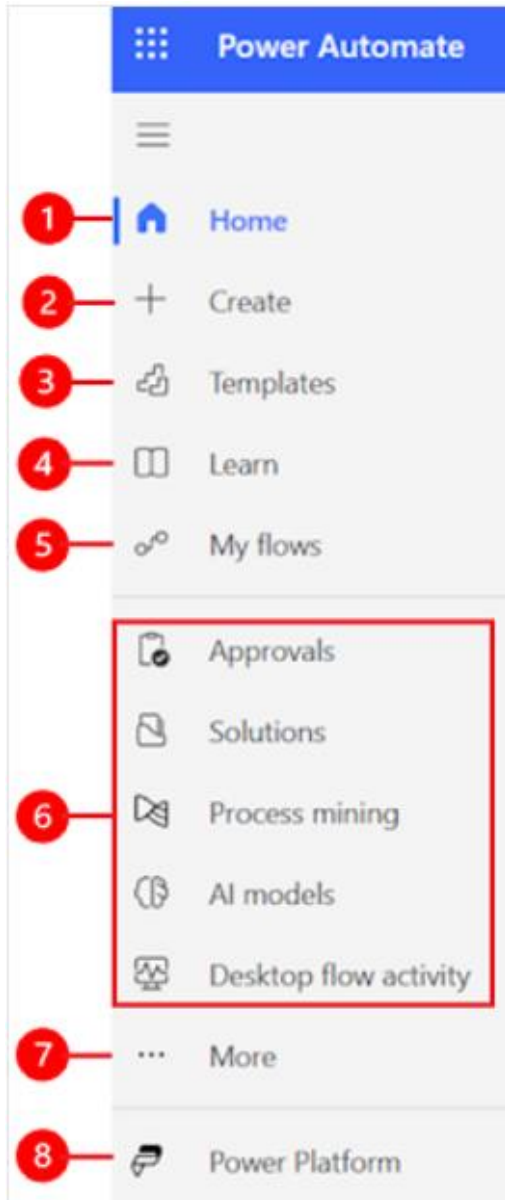


POWER AUTOMATE

Power Automate UI



1. Left nav pane
2. Search
3. Env. info & settings
4. AI Copilot
5. Learning tools
6. Ask a chatbot



1.Home: Takes you to the Power Automate home page.

2.Create: Create flows by using Copilot, templates or build your own.

3.Templates: View and search for templates you can use to create flows.

4.Learn: Learn experience takes you to the Power Automate product documentation.

5.My Flows: If you've created a flow, or someone else has created one and shared it with you, you can view or edit it.

6.Your most used pages: When you first sign in, items such as **Approvals, Solutions, Process mining, AI models,** and **Desktop Flow Activity** appear in the left navigation menu by default. Use the **More** menu item to [unpin](#) any of these items and [pin](#) something else.

7.More: [Pin](#) your most used items to the left navigation pane, such as **Tables, Cloud flow activity, Connections,** and more.

8.Power Platform: Explore other Power Platform products.

Key Terms And Concepts



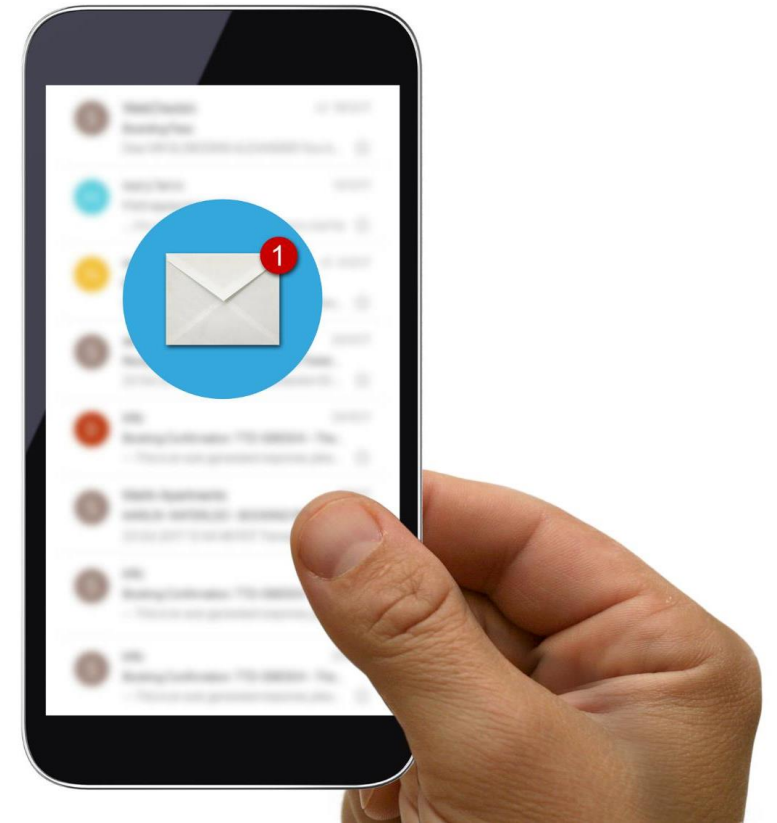
While there are many important concepts to understand about automation

- **Triggers** - Events which are used to start automated processes
- **Connectors** - Software components which retrieve or store data from another application
- **Flows** - Business processes with programmable logic to assist users and their organizations by automating routing and approval of transactions
- **Expressions** - Low-code/no-code functions are libraries which help end users call libraries of code to transform the format in which information is stored within a Flow



Triggers

- Triggers are events used to start a workflow automatically
- Common triggers include:
 - A new item is added to SharePoint list
 - A new e-mail or text message arrives
 - Someone fills out and submits a web form
 - An invoice is created in QuickBooks
 - Someone interacts with one of your posts on social media
 - A specific time is reached each day
- Triggers are the “lightning” that causes Power Automate to execute a workflow



Connectors



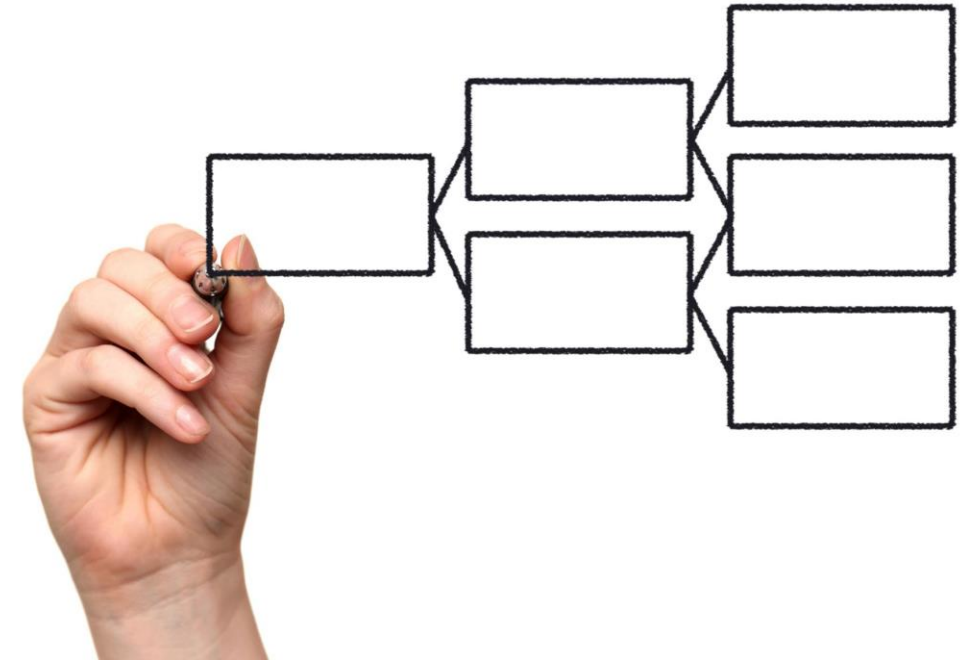
- Connectors make it possible to integrate Power Automate with other apps and services without having to write code – they are a critical part of any low-code/no-code application
- The connectors in Power Automate can also be used with the other Power Platform tools – they represent a common set of pre-built data interfaces
- There are at least 1,000 connectors available to the Power Platform, including Salesforce, Dynamics 365, Mailchimp, Office 365, Acumatica, QuickBooks, and many more
- Users can also write and insert code and functions to accomplish a task into Power Automate if pre-built connector is not available





Flows

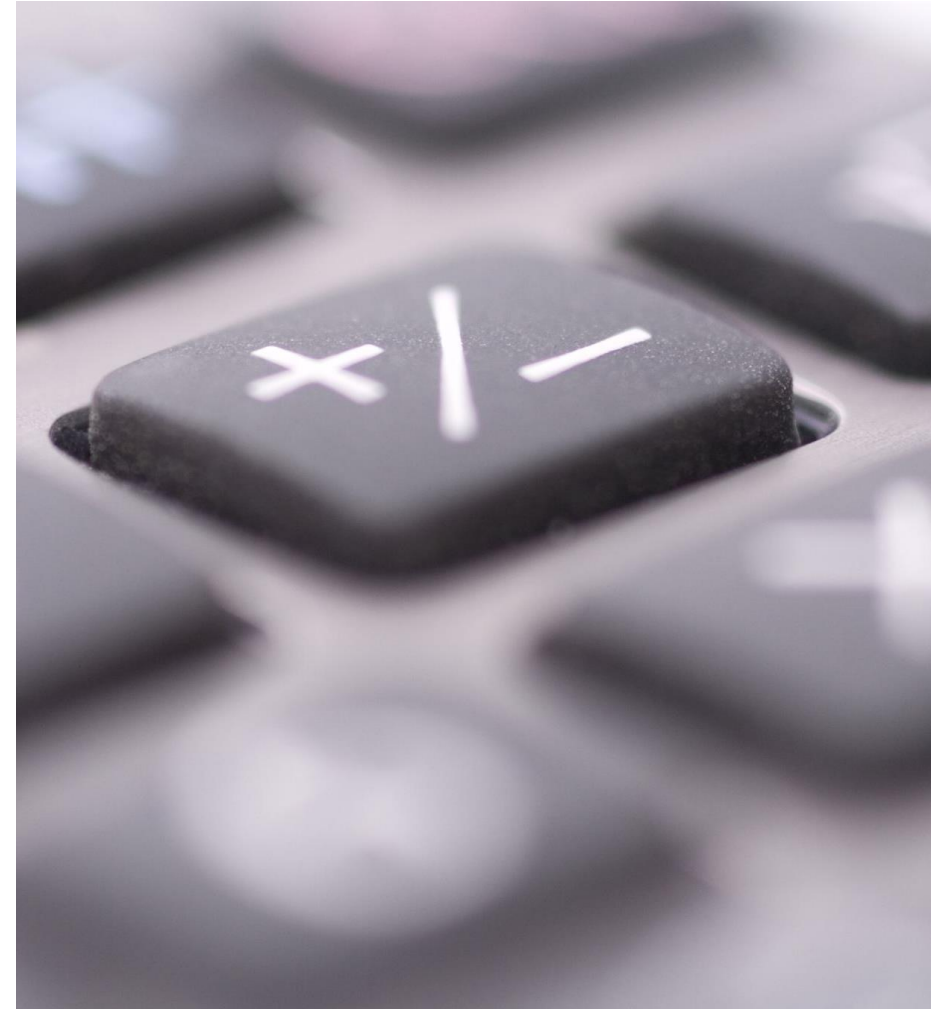
- Flows are a series of interconnected steps that automate a business process
 - Steps in a flow represent the way an organization processes a transaction like a sales opportunity or a bill payment
- Flows can be simple or complex, depending on the needs of the business, and like other applications, they can trigger other flows as needed
- Flows can use branching and looping logic to act upon a series of transactions
- The Power platform lets users create simple approval workflows with Approvals, and more complex workflows with Power Apps and Power Automate





Expressions

- Expressions are used to manipulate data within a workflow
 - Expressions are the “formulas” similar to the @functions in Excel
- Expressions can be used to perform calculations, concatenate text, transform data, or perform other ministerial tasks in Power Automate – just like the functions in Excel
- Command language/syntax reference for expressions is online at <http://cpate.ch/pacmds>



Creating New Flows



- Users can create a flow by:
 - Starting with one of thousands of templates
 - Starting with one of hundreds of connectors
 - Starting with a blank flow
- While Power Automate uses a simplified drag and drop interface, some users may want more help getting started
- An experimental feature called “Describe it to design it” uses generative AI to assemble the required triggers, actions, and connectors based on your plain language description
 - While these custom flows will need to be configured and checked for errors, it represents another low-code/no-code method to generate new flows

Office Scripts vs. Power Automate



- Microsoft is in the process of replacing the Visual Basic (VBA) macros in the Windows desktop version of Excel with a new cloud and Java-based macro language called Office Scripts
- While there are similarities between Office Scripts and Power Automate (especially Power Automate Desktop), these two automation tools are largely separate but complimentary
- There are significant differences in the scope, functionality, and integrations available in each of these tools

Office Scripts vs. Power Automate



	Office Scripts	Power Automate
Purpose	Office Scripts are a feature of Excel Online .	Power Automate is a cloud-based low-code/no-code tool .
	They enable users to record or write scripts that automate tasks within Excel workbooks.	It enables automation across multiple apps and services .
Functionality	Automation within Excel: Office Scripts focus on automating tasks specifically within Excel .	Cross-App Automation: Power Automate connects various Microsoft and third-party applications.
	Recording and Writing Scripts: Users can record actions or manually write scripts to perform repetitive tasks.	Workflow Automation: Users create automated workflows by connecting different actions.
	Workbook-Based: Scripts operate directly on workbook data .	Data Flow: It allows data to flow between apps and services.

Office Scripts vs. Power Automate



	Office Scripts	Power Automate
How Used?	Formatting and Calculations: Automating formatting, calculations, and other Excel operations.	Integration Scenarios: Automating processes involving emails, files, databases, and more.
	Data Manipulation: Transforming and analyzing data within Excel.	Business Process Automation: Streamlining repetitive tasks.
Integration	Within Excel: Office Scripts are tightly integrated with Excel Online.	Across Apps and Services: Power Automate integrates with various tools beyond Excel.
	Limited External Integration: While they can be triggered by external events (e.g., emails), their primary focus is on Excel workbooks.	Dynamic Content: Data can be passed between flow actions using static values, expressions, or dynamic content.



USES OF POWER AUTOMATE

Power Automate



Cloud Flows

- Trigger automation instantly, based on either a “trigger” or a schedule

Desktop Flows

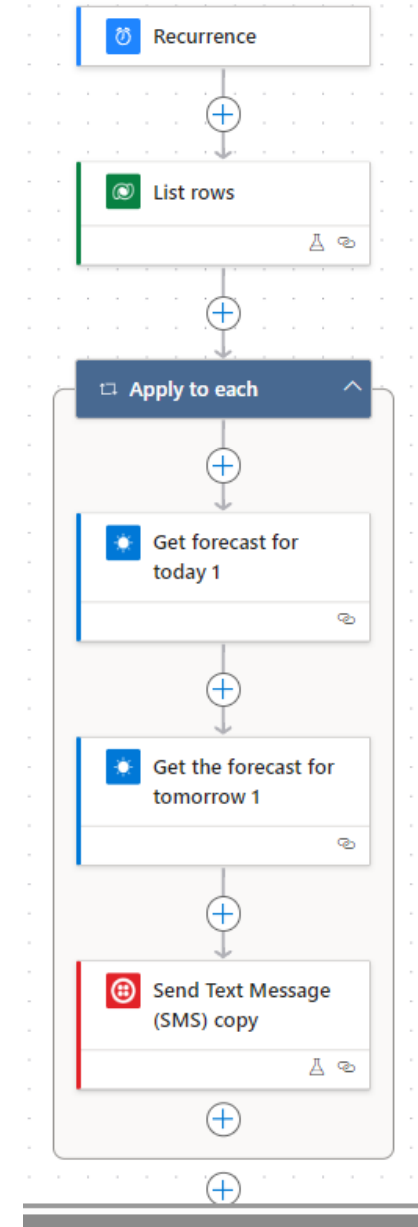
- Use robotic process automation (RPA) to perform repetitive tasks with legacy Windows applications

Business Process Flows

- Provide automation and execution of business logic associated with business processes

Cloud Flows

- Trigger automation instantly, based on either a “trigger” or a schedule
- **Example:** Send the weather for each record in a SharePoint List at 5:15 AM ET every day. Each row in the list contains the name of the recipient, the recipient’s cell phone number, and the zip code for the forecast
 - **Event:** Start when the current time is 5:15 AM ET
 - **Connections:** MSN Weather, SharePoint, Twilio (for SMS messaging), and MS Dataverse



Desktop Flows

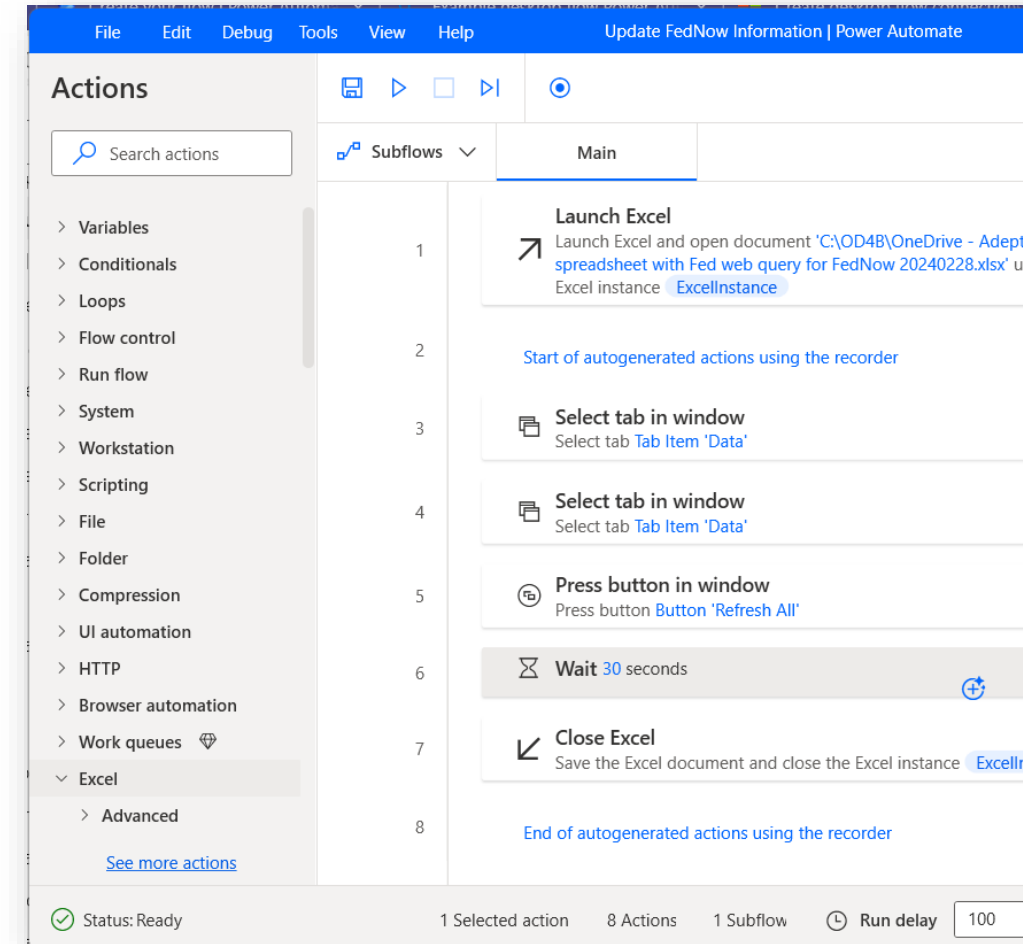


- Are a form of Robotic Process Automation (RPA), which is similar to macros which can access and can move data between most applications in Windows in a manner similar to “macros”
- Make it possible for you to automate processes which run on your local computer - even those which do not have an API
 - If you can interact with it using a keyboard and a mouse, you can most likely configure a desktop flow (bot) to do repetitive tasks with this tool
- Can be used with most applications – including legacy applications - which are accessible by a user on a Windows PC

Desktop Flows



- Desktop flows require the Power Automate Desktop app on a local computer or on a cloud-based virtual machine
- Users can use drag and drop, a “step recorder” or computer code to create and edit the tasks to be automated
- Since these routines require rote memorization of screens, steps must often be adjusted for changes in the menu structure or the user interface of legacy applications



Desktop Flows

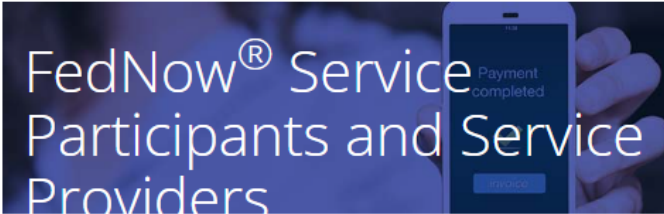


- Power Automate Desktop lets you perform tasks like:
 - Copy data out of a spreadsheet into a web form
 - Update data sets from web queries with power query on an automated basis
- **Example:** Update of web query in Excel which gets the lists of institutions, settlement agents, and service providers for the FedNow instant payment service from the Federal Reserve website



FedNow Service

- FedNow Home
- About the FedNow Service
- Blog Articles (Off-site)
- FedNow Explorer (Off-site)
- Instant Payments Education (Off-site)
- Participants and Service Providers
- 2023 Fees
- 2024 Fees
- Forms
- Resources
- Sign Up for FedNow Emails



The Federal Reserve's FedNow Service is an instant payments infrastructure that allows participating banks and credit unions to send and receive transactions within seconds on behalf of their customers — 24 hours a day, seven days a week.

This page lists **participating financial institutions** that are currently live on the service, as well as financial institutions serving as **settlement and liquidity providers**. Financial institutions that have completed testing and certification will be added to the list once they are live on the service.

Also listed are **certified service providers** that have completed testing certification to support payment processing for participants. More information about the offerings of these organizations — and those of other vendors that support instant payment services such as bill pay, payroll processing, digital wallet and API development — may be found at the FedNow Service Provider Showcase (Off-site).

Table of Contents

- Participating Financial Institutions
- Settlement Agents and Liquidity Providers
- Certified Service Providers

Certified Service Providers

Certified Service Providers

Participation Types				
Organization Name	Receive Only	Send and Receive	Receive RFP*	Liquidity Management Transfer
ACI Worldwide Corp.	•	•	•	•

Settlement Agents and Liquidity Providers

Settlement Agents and Liquidity Providers

Organization Name	City	State
Allova Corporate Federal Credit Union	Naperville	Illinois

Participating Financial Institutions

Participating Financial Institutions

Organization Name	City	State
1st Bank Yuma	Yuma	Arizona
1st Source Bank	South Bend	Indiana
Abbott Laboratories ECU	Gurnee	Illinois
ACCESSbank	Omaha	Nebraska
Addition Financial Credit Union	Lake Mary	Florida
Advantage One Credit Union	Brownstown	Michigan
Adyen	San Francisco	California

Looking for FedNow news, tools and education? Go to:

FedNow Explorer (Off-site)



PQ spreadsheet with Fed web query for FedNow 20240228 No Label • Saved

Brian F. Tankersley

File Home Insert Page Layout Formulas **Data** Review View Automate Developer Add-ins Help Data Stream Inquire Acrobat Power Pivot Script Lab

Get Data Refresh All Organization Stocks Sort Filter Data Tools What-If Analysis Forecast Sheet Outline Solver Flow

Get & Transform Data Queries & Connections Data Types Sort & Filter Forecast Analyze Automation

E3

	A	B	C
1	Organization Name	City	State
2	1st Bank Yuma	Yuma	Arizona
3	1st Source Bank	South Bend	Indiana
4	Abbott Laboratories ECU	Gurnee	Illinois
5	ACCESSbank	Omaha	Nebraska
6	Addition Financial Credit Union	Lake Mary	Florida
7	Advantage One Credit Union	Brownstown	Michigan
8	Adyen	San Francisco	California
9	Affinity Bank, National Association	Covington	Georgia
10	Alliance Bank	Cape Girardeau	Missouri
11	AllNations Bank	Calumet	Oklahoma
12	American Community Bank & Trust	Woodstock	Illinois
13	American National Bank	Omaha	Nebraska
14	Americana Community Bank	Sleepy Eye	Minnesota
15	Anchor State Bank	Anchor	Illinois
16	Apple Federal Credit Union	Fairfax	Virginia

Participating Financial Institutions

Queries & Connections

Queries | Connections

3 queries

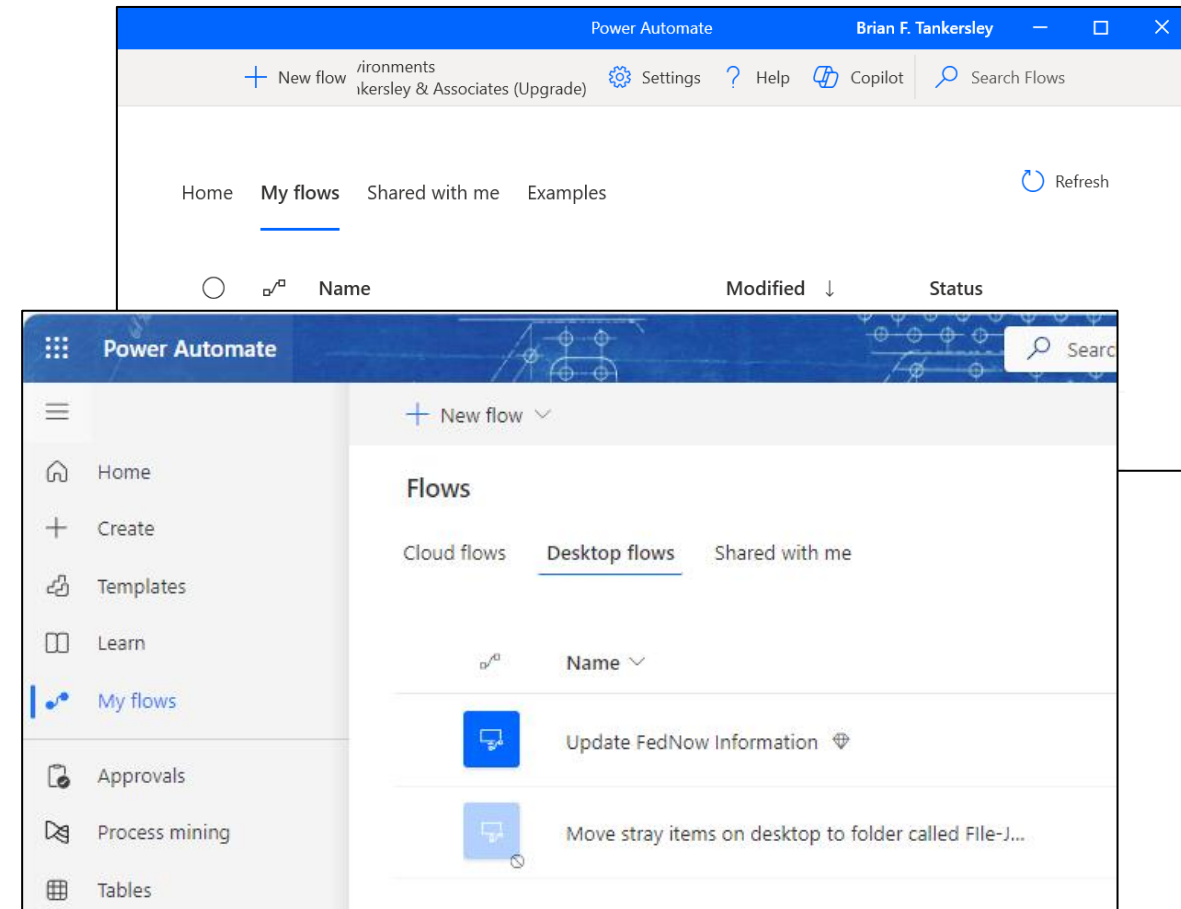
- Participating Financial Institutions
564 rows loaded.
- Certified Service Providers
25 rows loaded.
- Settlement Agents and Liquidity Providers
30 rows loaded.

Ready Accessibility: Investigate Display Settings 100%

Desktop Flows



- To run this demo, you will need to
 1. Add the spreadsheet to a folder in your OneDrive or on SharePoint
 2. Install the Power Automate Desktop app from the Microsoft Store
 3. Import the workflow into Power Automate and connect it to your Microsoft Power Automate account
 4. Configure the flow in Power Automate to point at the sample spreadsheet on your local PC
- Once you have set all of this up, you can then execute the flow from within the Power Automate Desktop application or from the Desktop Flows tab under “My Flows” on the Power Automate website





Business Process Flows In Power Automate

- Power Automate is a tool for creating event-triggered dataflows between hundreds of applications
- Business logic/rules can be added to a data flow/workflow using a low-code/no-code approach
- Provides automation and execution of business logic associated with business processes
- Business process flows are a key component of digital business transformation, which uses automation to complete business workflows

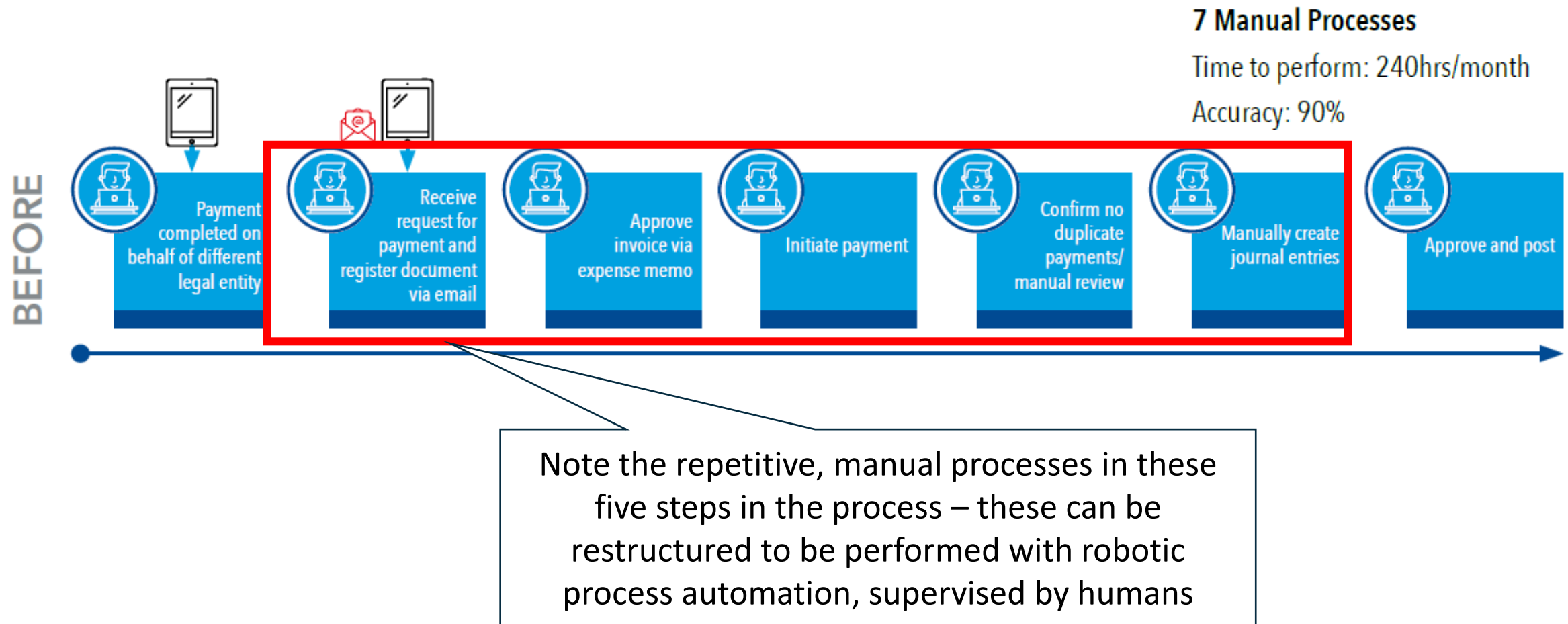


Business Process Flows



- Microsoft made some changes to Power Automate in 2022 which moved much of the functionality associated with Business Process Flows into the Power Apps environment
- While there is a Copilot which can create flows using generative AI within Power Apps, the complexity of managing the user interface, data flows, and actions puts this solution beyond the capabilities of most end users
- Users CAN create simple flows which are event triggered and work together to accomplish many tasks similar to those in business process flows, especially with the RPA capabilities of Power Automate Desktop

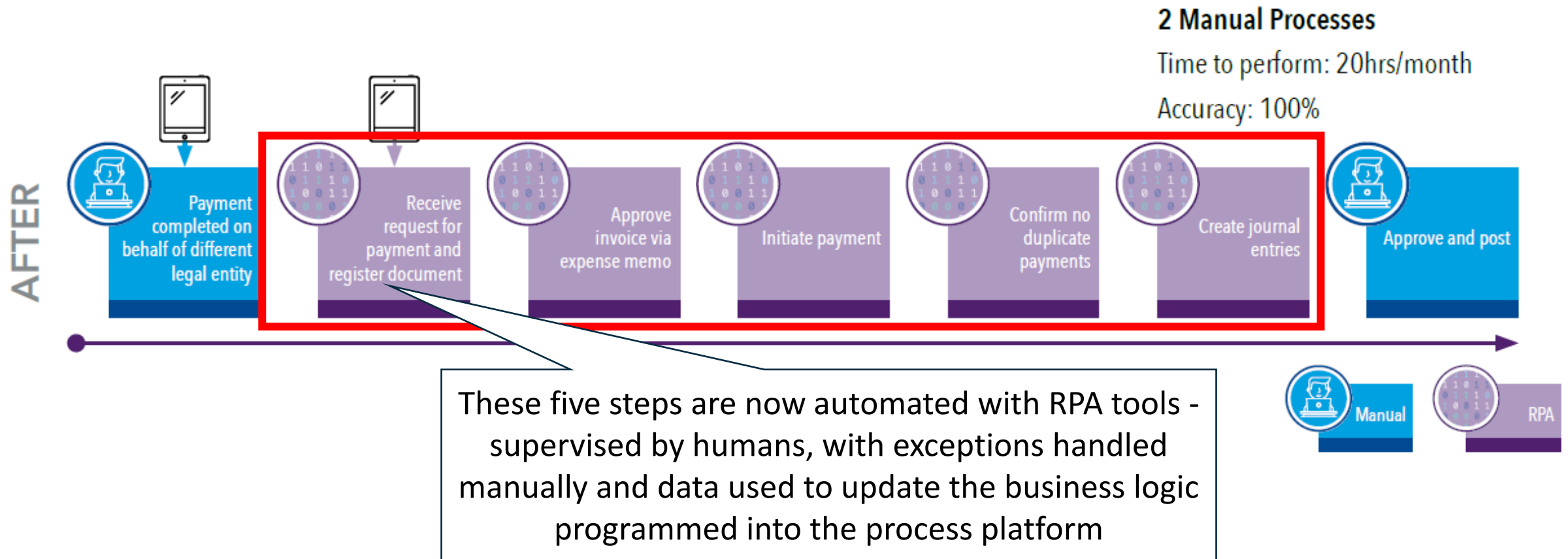
Intercompany Transaction Processing



Source: Embracing Robotic Automation During the Evolution of Finance; ACCA, CAANZ, and KPMG

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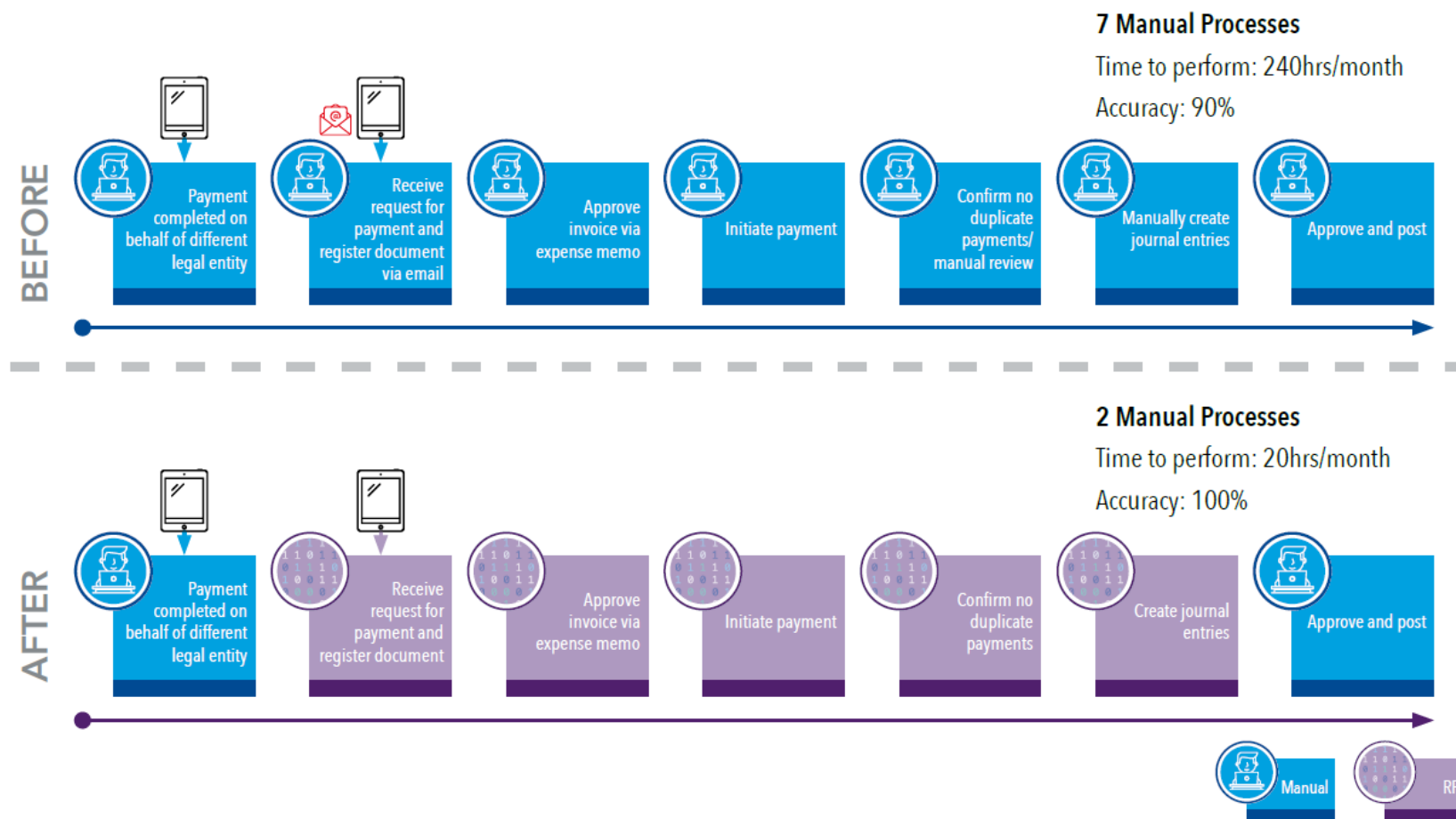
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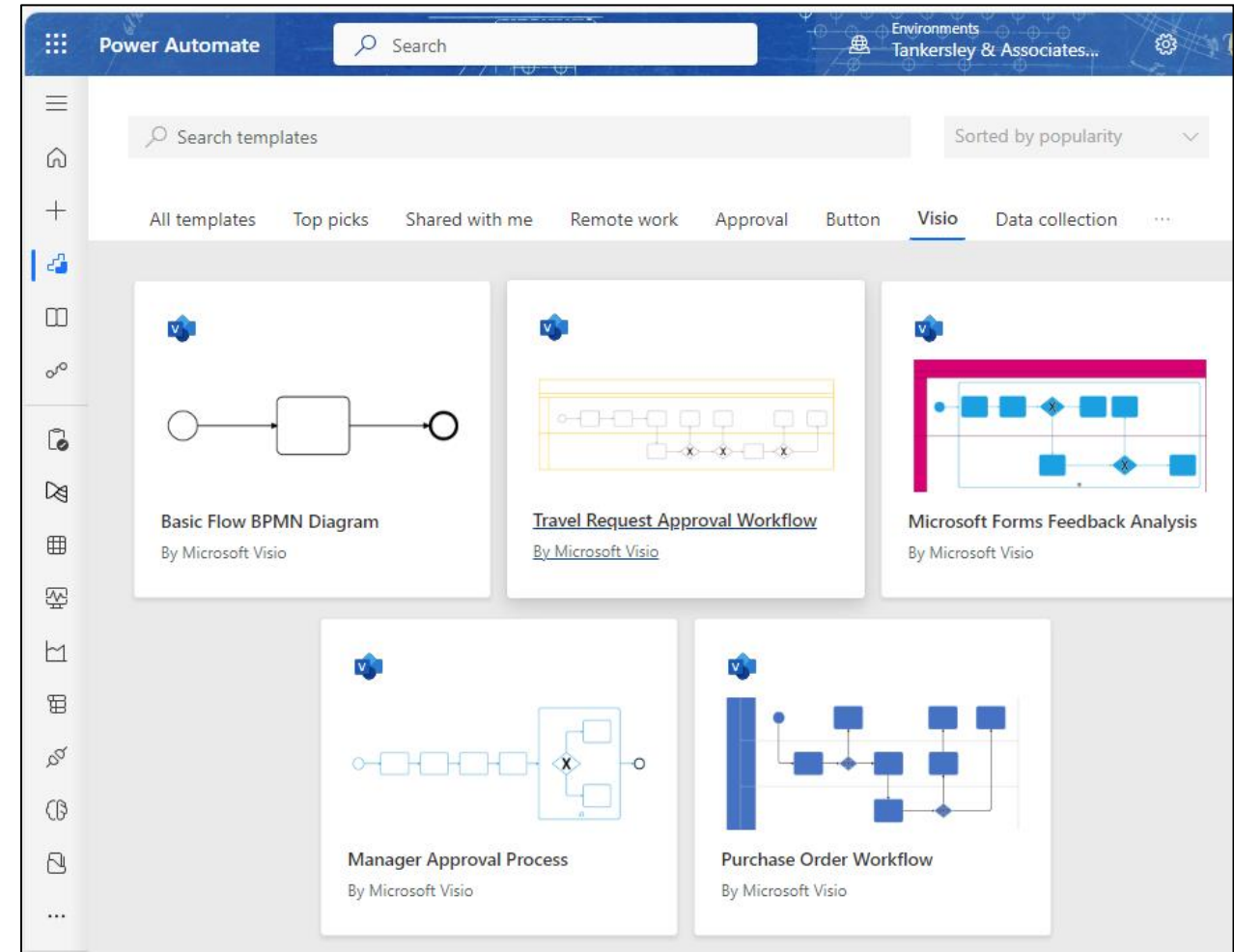


Source: Embracing Robotic Automation During the Evolution of Finance; ACCA, CAANZ, and KPMG

Business Process Flows



- Microsoft Visio Plan 2 users (English only) can use templates to create exportable workflows in Power Automate using BPMN diagrams
- You can learn more about using Visio with Power Automate by visiting <https://cpate.ch/visiopa>



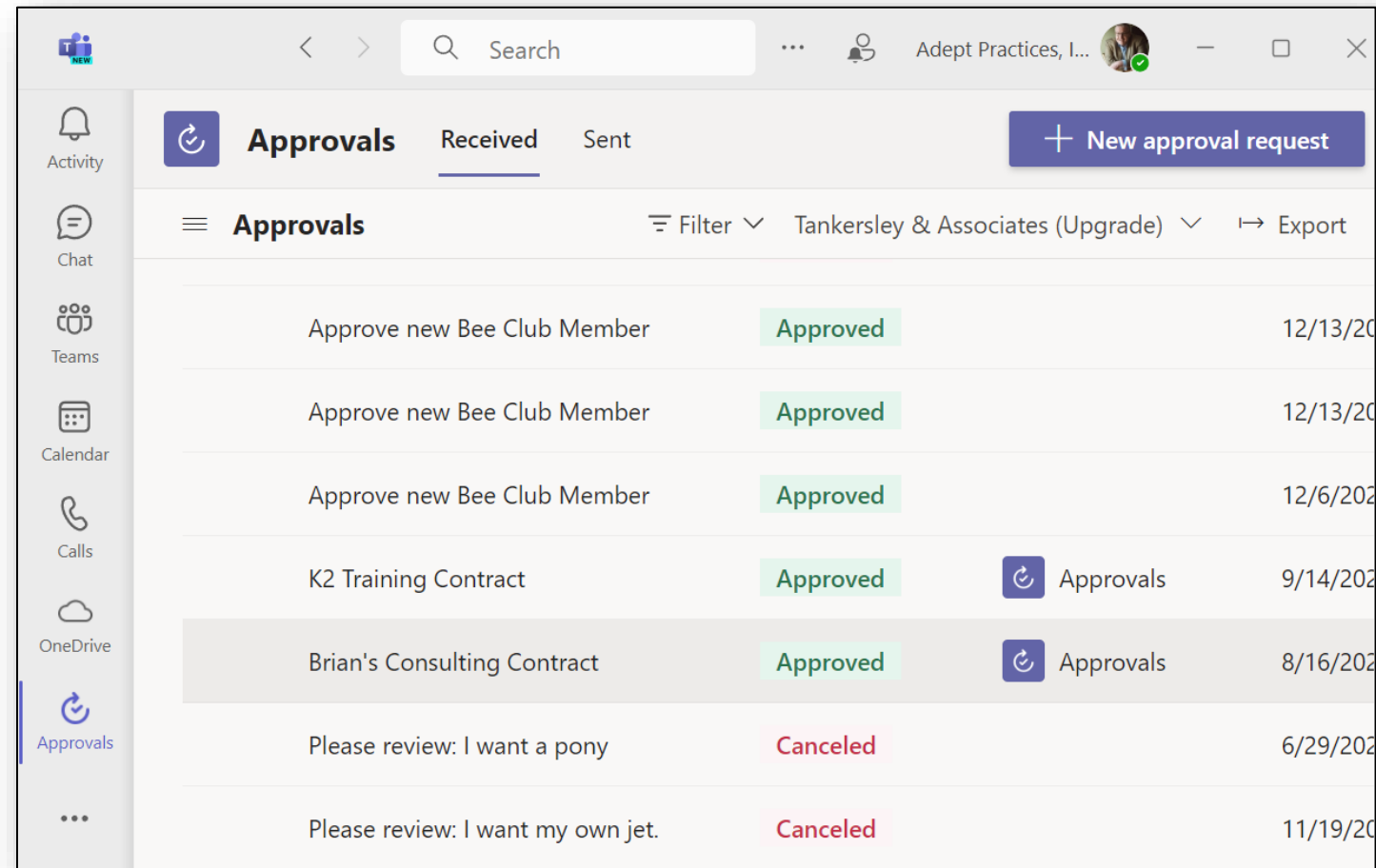
Approvals



- Approvals are a Power Automate feature for business processes that is designed to create lists of requests which can be acted on electronically
- Approvals can be added as an application within Teams so that users can request and give approvals in a familiar interface
- Microsoft provides a number of templates for common simple approval processes such as:
 - Maintenance requests
 - Shift swaps
 - Expense reimbursement
 - Paid time off requests
- Approvals integration with Teams means that users can access their approval requests and required actions from within Teams on computers, tablets, mobile phones, and in a web page – literally anywhere they are online

Approvals

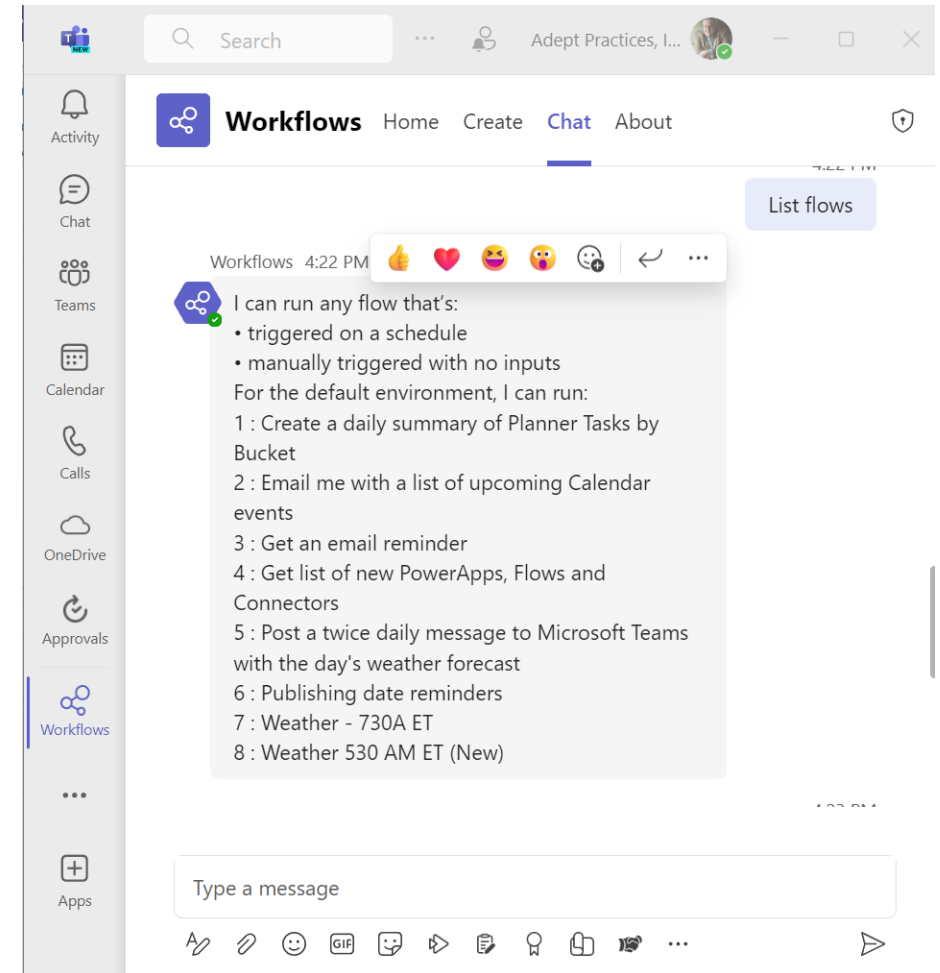
- Approvals in Teams provides an app interface which shows both requests which have been sent as well as received requests
- The app can also work with approvals from other platforms such as Adobe Sign



Workflows In Teams



- The optional Workflows app in Teams allows users to add, edit, execute, and disable Power Automate workflows
- The “Home” tab in this Teams app shows a list of all the flows that are integrated with Teams
- A chatbot in the application can be used to activate flows that are triggered by a schedule or those that are manually triggered





DEMONSTRATION OF PLATFORM USE

Demonstrations - Forms



- **Target Audience:** End users who just need a simple way to collect data
 - Can be used by IT pros, but is somewhat simplified for their needs
 - Can be used to create polls during presentations with real-time status
- **Automation:**
 - Can be used as a trigger to launch a Power Automate workflow and data can be stored in a SharePoint list or other data store
 - Can do light branching logic, but probably not the best tool for those who need very sophisticated rule sets (e.g. large surveys)
- **Location of Tool:** <https://Forms.Microsoft.com>

Forms – Draft With Copilot



Forms

Untitled form - Saved

?

BT

Questions


Responses

Preview

Style

Collect responses


Present

 Draft with Copilot

Design a volunteer sign-up form to know volunteers' available days and times for volunteering, and any relevant skills, preferred volunteer activities and personal contact information.

184 / 2000

Generate


 View prompts

Forms – Draft With Copilot




Forms Untitled form - Saved ? BT

Questions Responses Preview Style Collect responses Present ...


 Remove the questions you don't want ×

Volunteer Sign-Up Form

Thank you for your interest in volunteering with us. Please fill out this form to let us know your availability and preferences. 

1. What days are you available to volunteer?

- ☐ Monday
- ☐ Tuesday
- ☐ Wednesday
- ☐ Thursday
- ☐ Friday
- ☐ Saturday
- ☐ Sunday



Forms – Draft With Copilot



← ↻ <https://forms.microsoft.com/Pages/DesignPageV2.aspx?origin=NeoPortalPage&subpage=design&id=8...> 📄 🔍 A ☆ 9+ ⚙️ | 📄 📄 📄 📄 ...

Send and collect responses


☒ Anyone can respond
Anonymous response, doesn't require sign-in

☐ Only people in Adept Practices, Inc. can respond

☐ Specific people in Adept Practices, Inc. can respond

🔗 👤 📄 </>

Untitled form



Demonstrations – Lists



- **Target Audience:** End users and IT pros who need to store/retrieve data and tasks as part of process automation
 - Lists are easy enough for non-technical users to create and maintain
 - Lists integrates with SharePoint and the Power Platform so enterprise and IT users can access more sophisticated tools for automation and compliance
- **Automation:**
 - Can be used by non-technical users to define columns, set up rules, and create views to organize and manipulate data
 - More technical users can use other Power Platform tools for more integration
 - Power Apps and SharePoint can access data in a form or view
 - Power Automate can read/write/display data in Lists
 - Power BI can report on Lists activity
 - Power Pages and Power Virtual Agents can also access Lists data if needed
- **Location of Tool:** <https://cpate.ch/mslists>

Microsoft 365 Lists - Templates



Microsoft Lists

Search

Create a list

From Microsoft From your organization

Issue tracker
Track issues and bring them to closure in this list.

Employee onboarding
Manage your new employee's onboarding process from day 1...

Event itinerary
Organize all your important event details in one place, so...

Asset manager
Keep track of all devices in your organization, and when they ar...

Recruitment tracker
Keep everyone informed as you recruit, interview, and hire new...

Travel requests
Manage all your travel requests and keep an eye on budgets.

Travel requests with appr...
Manage and approve all your travel requests and keep an eye...

Work progress tracker
Track priorities and progress as you work towards delivering...

Content scheduler
Plan, schedule, and manage your content with this template. Filte...

Content scheduler with a...
Plan, schedule, and approve your content with this template. Filte...

Playlist
Arrange a set of videos for playback in a specific order.

Gift ideas
Easily organize your gift planning for your family & friends in one...

Expense tracker
Record all your expenses in one place.

Recipe tracker
Create your very own virtual recipe book with this template...

Microsoft 365 Lists - Templates



Microsoft Lists								
<div><div>+ Add new item</div><div>Edit in grid view</div><div>Undo</div><div>Share</div><div>Export</div><div>Automate</div><div>Integrate</div><div>...</div><div>Manage access</div></div>								
<div><div>My lists</div><div>Tax Tracking</div><div>Filter</div><div>Sort</div><div>All Items</div><div>+</div></div>								
Prep	Review	Client	Tax Type	ON HOLD	2023 Dat...	2022 Dat...	Work Star...	
<input type="radio"/> LL	BT	Smith, John	1040	Not on Hold	March 14, 2023	February 28, 2022	March 24, 2023	
<input type="radio"/> LL	BT	Adept Practices, Inc.	1120	Not on Hold	January 31, 2023	January 31, 2022	February 09, 2023	
<input type="radio"/> RJ	LL	Andersen News Company, Inc.	1120	Not on Hold				
<input type="radio"/> BT	LL	Plastiline, LLC	1065	Not on Hold				

Microsoft 365 Lists – Create List From Excel



Microsoft Lists


+ Add new item Edit in grid view Undo Share Export Automate Integrate Manage access

My lists
Airlines - Selected Data

Title	Website	Customer...	Frequent ...	Alliance ...	Fly to TYS?	BFT Status	Add column
American Airlines	www.aa.com	1-800-433-7300	AAdvantage	oneworld	Yes	Member	
Delta Air Lines	www.delta.com	1-800-221-1212	SkyMiles	SkyTeam	Yes	Gold Medallion/Million Miler	
United Airlines	www.united.com	1-800-864-8331	MileagePlus	Star Alliance	Yes	Member	
Southwest Airlines	www.southwest.com	1-800-435-9792	Rapid Rewards	N/A	No	Member	
Alaska Airlines	www.alaskaair.com	1-800-252-7522	Mileage Plan	oneworld	No	Member	

Microsoft 365 Lists - SharePoint



 **SharePoint**

Newsfeed

About me

Apps

Recent

personal_wiki

userActivityFeedHiddenListF4387007-BE61-432F-8BDB-85E6B9679E4B

notificationSubscriptionHiddenList6D1E55DA-2564-4A22-A5F9-6C4FCAFF53DE

EDIT LINKS

Airlines - Selected Data ▸ Settings

List Information

Name: Airlines - Selected Data

Web Address: [https://bftcpa2-my.sharepoint.com/personal/brian_tankersley_cpa/Lists/Lists Spreadsheet for Import/AllItems.aspx](https://bftcpa2-my.sharepoint.com/personal/brian_tankersley_cpa/Lists/Lists%20Spreadsheet%20for%20Import/AllItems.aspx)

Description:

General Settings

List name, description and navigation

Versioning settings

Advanced settings

Validation settings

Audience targeting settings

Rating settings

Form settings

Columns

A column stores information about each item in the list. The following columns are currently available in this list:

Column (click to edit)	Type	Required
Airline Name	Single line of text	
Website	Single line of text	

Permissions and Management

Delete this list

Save list as template

Permissions for this list

Apply label to items in this list or library

Enterprise Metadata and Keywords Settings

Communications

RSS settings

Demonstrations – Power Automate



- **Target Audience:** More sophisticated end users and IT pros who need to create process automation
 - Can be used by end users with Copilot, but configuration/ troubleshooting is likely beyond their skills and Copilot solutions often have flaws/bugs
 - Can be used with Power Apps and other more sophisticated tools to create very sophisticated workflows, although the complexity may require stronger programming/database skills than most users possess
- **Automation:**
 - Good as a low-code/no-code tool for most sophisticated users and IT pros
 - Can integrate with hundreds of third-party tools (e.g. Twilio for SMS)
 - IT pros can set up flows and they can be modified by end users if desired
 - Also offers RPA through Power Automate Desktop
- **Location of Tool:** <https://PowerAutomate.com>

Power Automate – Templates



Search templates

Sorted by popularity

All templates Top picks Shared with me Remote work Approval Button Visio Data collection Email Calendar Mobile ...

Post MSN Weather updates to Yammer group everyday

By Microsoft

Scheduled 3262

Save Outlook.com email attachments to your OneDrive

By Microsoft Power Automate Community

Automated 218304

Save email attachments from Outlook.com to Dropbox

By Microsoft

Automated 6548

Complete a custom action for the selected file

By Microsoft Power Automate Community

Instant 46086

Keep my schoolwork in sync with my Google Drive

By Microsoft Power Automate Community

Automated 14525

Save Gmail attachments to a Dropbox folder

By Microsoft

Automated 6900

Get daily reminders from your Outlook.com email

By Microsoft Power Automate Community

Scheduled 18751

Run sentiment analysis on tweets and push results to a Power BI dataset

By Microsoft

Automated 6195

Notify and Email when a new file is uploaded to OneDrive

By Microsoft Power Automate Community

Automated 10020

Create an issue in Azure DevOps when an email is received

By Microsoft Power Automate Community

Automated 10506

Send an email for new Tweets about a certain keyword

By Microsoft

Automated 10191

Trigger a flow with a Power BI data-driven alert

By Microsoft

Automated 156555

Save Office 365 email attachments to specified OneDrive for Business folder

By Microsoft Power Automate Community

Automated 261089

Create a task in Planner based on Office 365 Outlook calendar event

By Microsoft Power Automate Community

Automated 28475

Notify about rows in a SQL DB

By Microsoft Power Automate Community

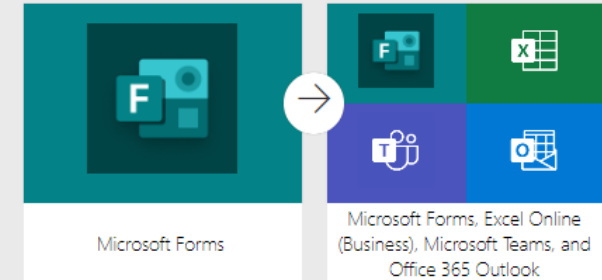
Scheduled 9867

Cross post new items on an RSS feed to Blogger

By Microsoft

Automated 2503

Track Microsoft Forms response in Excel and notify through Teams and email



Track Microsoft Forms responses in an Excel Online (Business) spreadsheet. Send notification through Microsoft Teams and send an Office 365 Outlook email.

This flow will connect to:

Excel Online (Business)	brian@tankersley.cpa	✓ ...
Microsoft Forms	brian@tankersley.cpa	✓ ...
Microsoft Teams	brian@tankersley.cpa	✓ ...
Office 365 Outlook Permissions	brian@tankersley.cpa	✓ ...

Continue

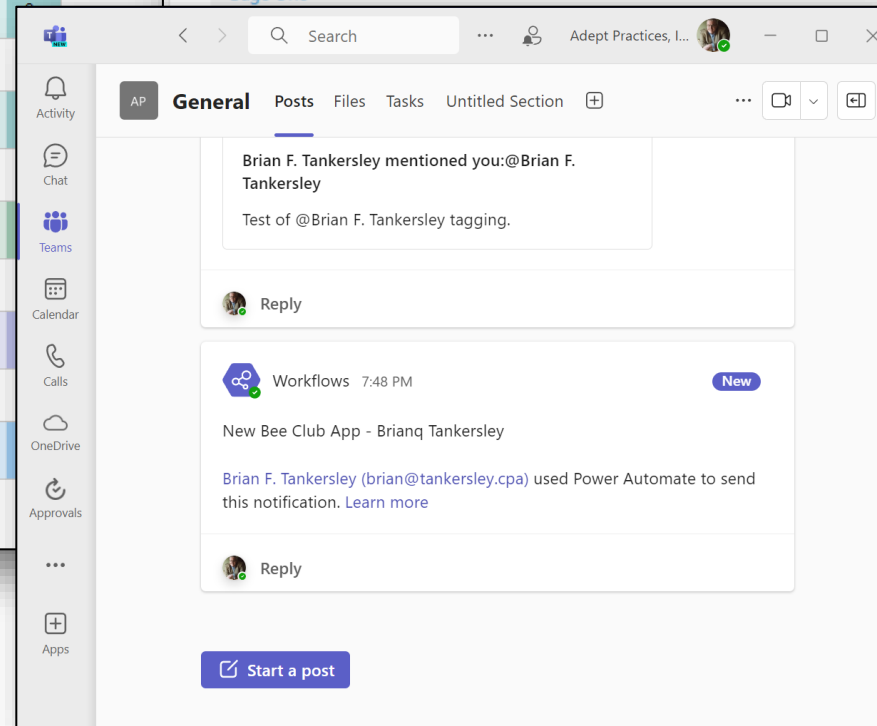
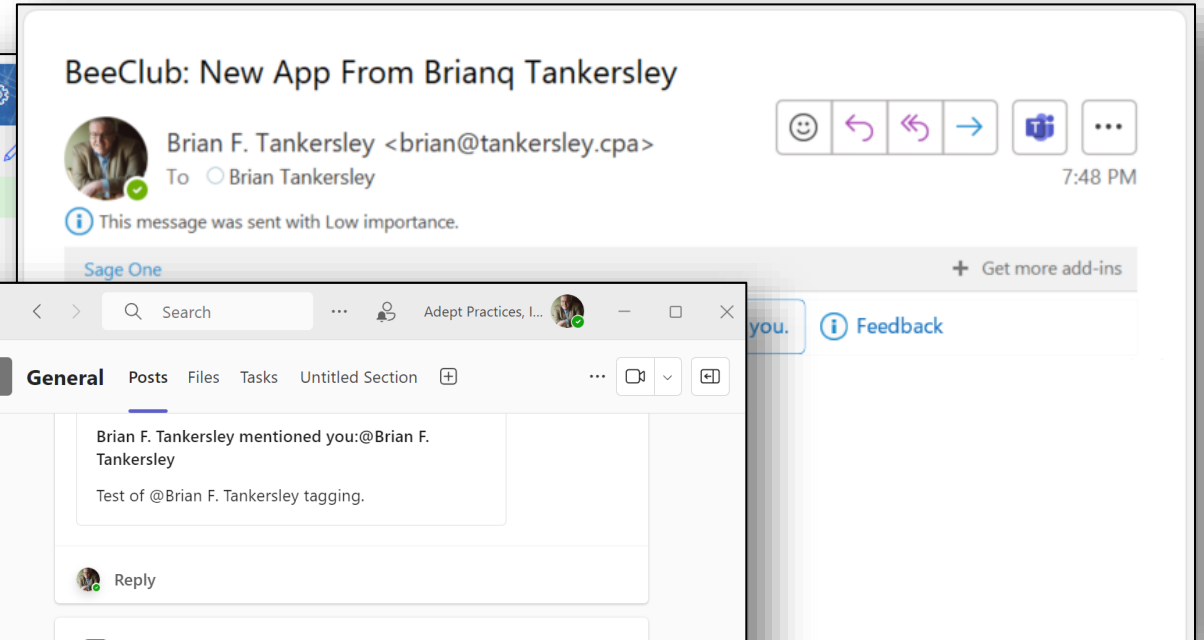
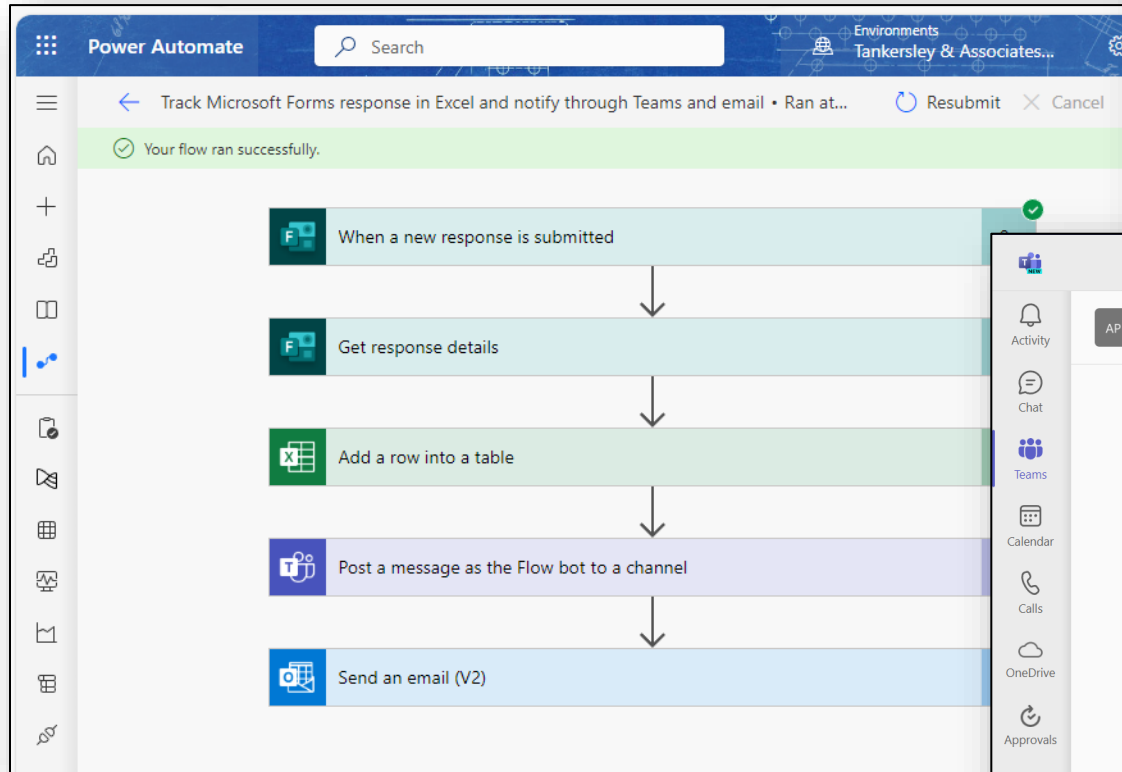
Power Automate – Templates



The image displays a collage of Power Automate interface elements:

- Flow Canvas:** A vertical sequence of five actions: "When a new response is submitted", "Get response details", "Add a row into a table", "Post a message as the Flow bot to a channel", and "Send an email (V2)". Each action has a red "Invalid parameters" warning icon.
- Copilot Sidebar:** Located on the left, it provides AI-generated suggestions and instructions. It lists connected services: Excel Online (Business), Microsoft Forms, Microsoft Teams, and Office 365 Outlook. It also includes a section for "To get this flow ready, finish setting up these actions:" with icons for each step in the flow.
- Action Configuration Panels:** Several panels are shown in the background, including:
 - "When a new response is submitted":** Shows the "Form Id" parameter set to "Farragut Beekeepers ClubMembership Application".
 - "Add a row into a table":** Shows the "Location" as "SharePoint Site - Adept Practices", "Document Library" as "Documents", and "Table" as "Responses".
 - "Send an email (V2)":** Shows the "To" field as "brian@k2e.com" and the "Subject" as "BeeClub: New App From [First Name] [Last Name]".
 - "Post a message as the Flow bot to a channel":** Shows the "Team" as "Adept Practices Watercooler" and the "Channel" as "General".

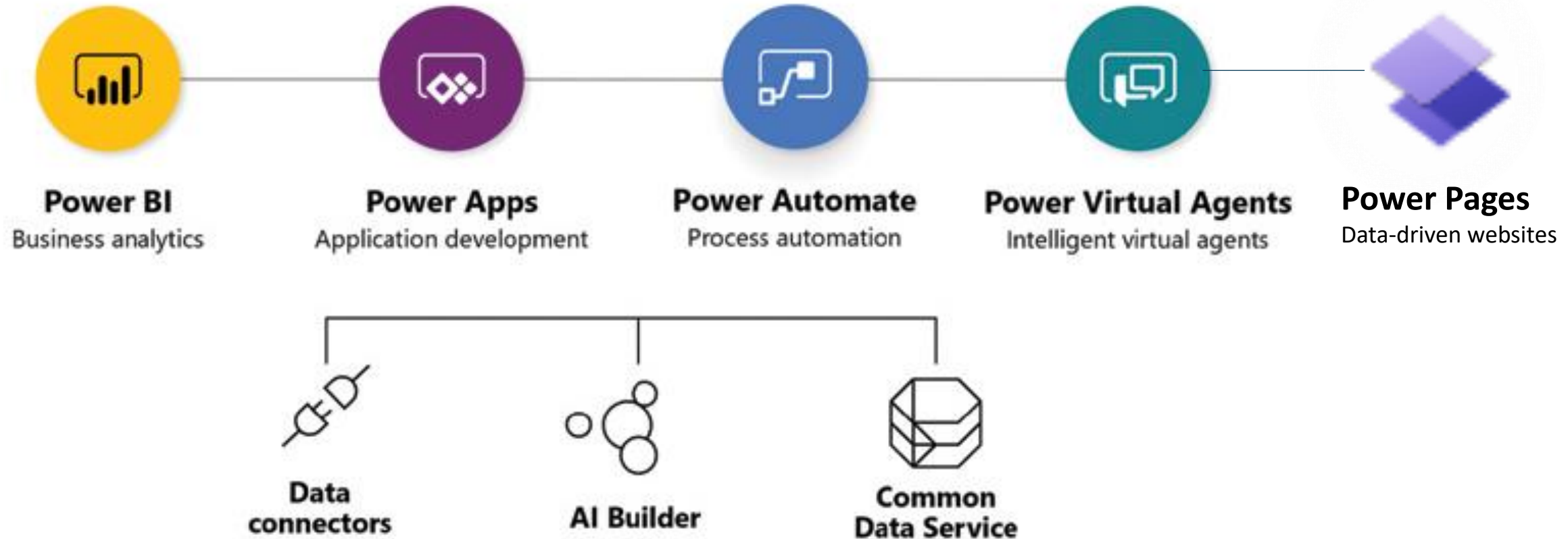
Power Automate - Results



Microsoft's Power Platform



The low-code platform that spans Office 365, Azure, Dynamics 365, and standalone applications



Source: Microsoft



QUESTIONS?



BONUS MATERIAL: COMMON DATA MODEL

Common Data Model (CDM)



- A standardized data schema (layout) used to create business applications
- Embedded in Dynamics 365 applications, the Power Platform, as well as in Azure
- Facilitates cross-platform integrations by allowing data to be transformed to a single standard format (CDM)
- More info at <https://github.com/Microsoft/CDM>

CORE

- Account
- Activity
- Contact
- Currency
- Email
- Goal
- Letter
- Note
- Owner
- Organization
- Position
- Task
- ...

DYNAMICS 365

- Account
- Appointment
- Campaign
- Contact
- Lead
- Marketing List
- Phone Call
- Social Activity
- ...

SALES

- Competitor
- Discount
- Invoice
- Opportunity
- Order
- Order Product
- Quote
- ...

SERVICE

- Case
- Contract
- Entitlement
- Resource
- Service
- Scheduling Group
- Task
- ...

FINANCE

- Main accounts
- General Ledger
- Budget
- Bank
- Fixed assets
- Dimensions
- ...

SUPPLY CHAIN

- Product Information Management
- Procurement
- Trade Agreements
- Sales
- Production
- Warehouse and Transportation Management
- Asset Management
- ...

COMMERCE

- Channel
- Product catalog
- Prices & Discounts
- Sales transaction
- Payment instrument
- Customer loyalty
- Worker
- ...

MARKETING

- Account
- Contact
- Event
- Marketing Email
- Marketing Page
- ...

WEB

- Link Clicks
- Web Interactions
- Web Page
- ...

PROJECT OPERATIONS

- Project Planning
- Project Resourcing
- Project Time and Expense
- Project Invoicing
- Project Accounting
- ...

HUMAN RESOURCES

- Department
- Job Positions
- Worker
- ...

GLOBALIZATION

- Tax determination and calculation
- E-invoicing & real time reporting
- Payment formats
- Tax and audit reports
- Business documents
- Fiscal integrations for Retail
- ...

HEALTHCARE

- Patient
- Practitioner
- Device
- Care Plan
- Risk Assessment
- Medication
- Procedure
- Encounter
- Episode of Care
- ...

Account:

Business that represents a customer or potential customer.

Attributes:

- accountNumber
- accountRatingCode
- createdOn
- creditLimit
- openDeals
- openRevenue
- territoryid
- hotelGroup
- ...

Working with subject matter & industry experts, Common Data Model is expanding to include additional business entities and concepts

DYNAMICS 365

Account

Appointment

Contact

Phone Call

Owner

SALES

Competitor

Discount

Invoice

Opportunity

SERVICE

Case

Contract

Resource

Task

MARKETING

Campaign

Event

Marketing Email

Marketing Page

FINANCE

General Ledger

Budget

Bank

Fixed Assets

Dimensions

SUPPLY CHAIN

Product Information Management

Procurement

Sales

Production

Warehouse Management

Transportation Management

COMMERCE

Product Catalog

Price & Discounts

Sales Transaction

Customer Loyalty



INSIGHTS APPLICATIONS

CUSTOMER INSIGHTS

Customer Activity

Customer Profile

Segment

PRODUCT INSIGHTS

Asset

Signal

Industry Accelerator Models



INDUSTRY ACCELERATORS

AUTOMOTIVE

Deal

Deal Device

Fleet

Service Order

BANKING

Branch

Collateral

Financial Product

Mortgage
Application

MEDICAL RECORDS

Care Plan

Care Team

Encounter

Risk Assessment

HIGHER EDUCATION

Academic Period

Course

Previous Education

Test Score

NON PROFIT

Award

Disbursement

Objective

Planned Giving