

# Rock Your World with Power Automate



POWERED BY  DUG

# DYNAMICS CON

# LIVE

MAY 2024

The central graphic is a large, multi-colored starburst shape. Inside the starburst, the text "POWERED BY" is in yellow, followed by a small logo consisting of three colored squares (purple, green, blue) and the word "DUG" in yellow. Below this, "DYNAMICS CON" is written in large, bold, yellow 3D block letters with a rainbow gradient. Underneath that, "LIVE" is written in the same style. At the bottom of the starburst, "MAY 2024" is written in yellow. The background of the entire image is a colorful sunset with rays of light, silhouettes of mountains, and a line of evergreen trees at the bottom.

# Introduction

## Herb

- Blue Summit Technologies
- Power Automate Geek
- CRM 4.0
- USMC Programmer
- Minnesooooota
- 5 Marathons, Many halves
- Vintage Mopar Fan
- Lego Fan

hjohnson@

bluesummingtech.com



POWERED BY DUG  
**DYNAMICS CON**  
**LIVE**  
MAY 2024

Rock your world with Power Automate.



Herb Johnson   Chad Althaus

## Chad

- Stoneridge Software
- Power Platform
- Mechanical Engineer
- Houston, Texas
- End User/Operations Background
- Parent of 4-year-old

Chad.Althaus@

stoneridgesoftware.com



# Agenda

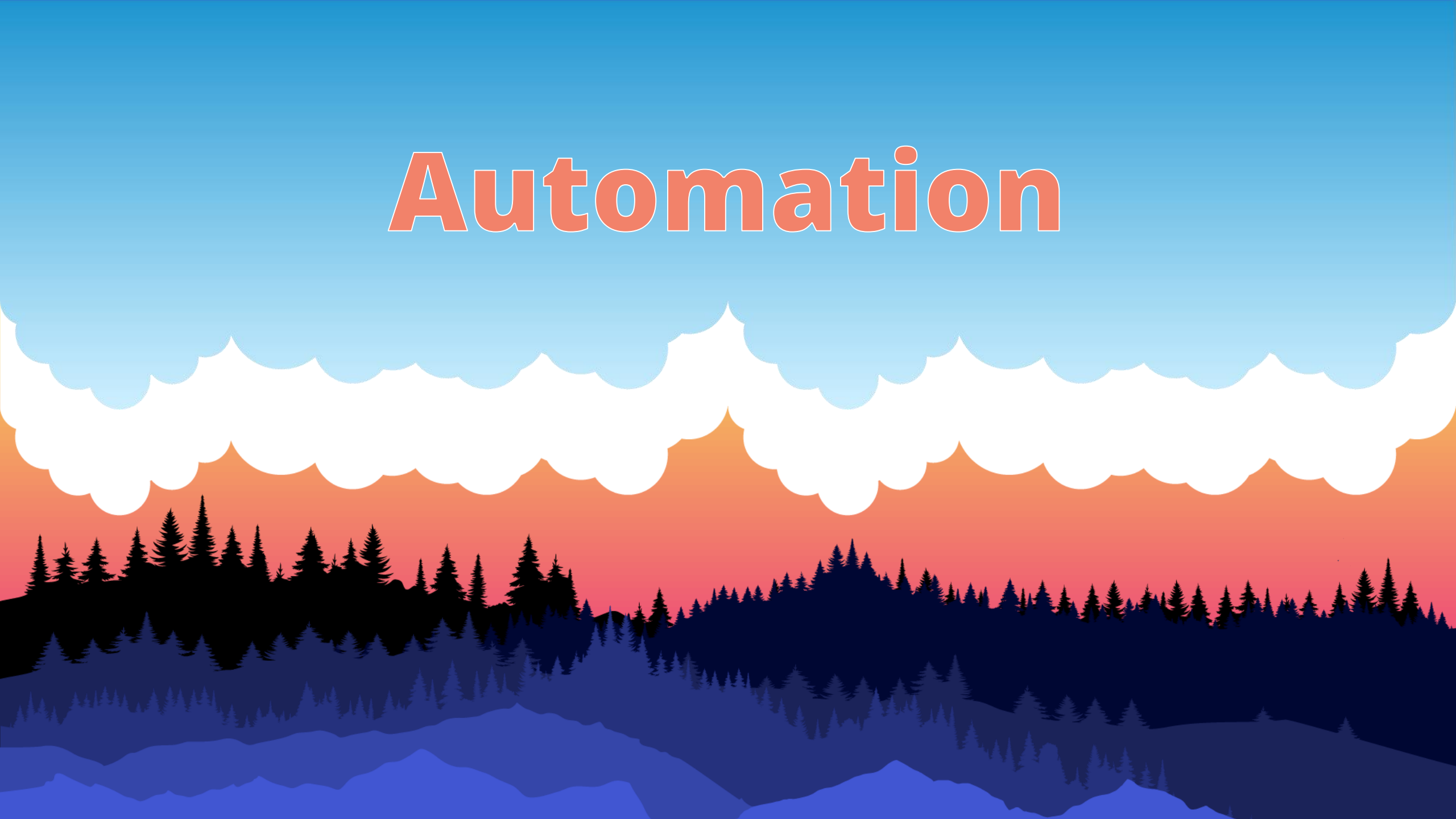
## Rock your world with Power Automate

See how Power Automate cloud and desktop flows can make your workday more efficient. From eliminating repetitive tasks to reducing errors, you'll find many ideas to bring you more joy in your workday! This session is intended for anyone who is a User of Dynamics 365.

- Introduction
- Let's hear from you!
- My Flows, Cloud Flows, Desktop Flows
- Demos + Examples
- Blurb on licensing\*
- Resources

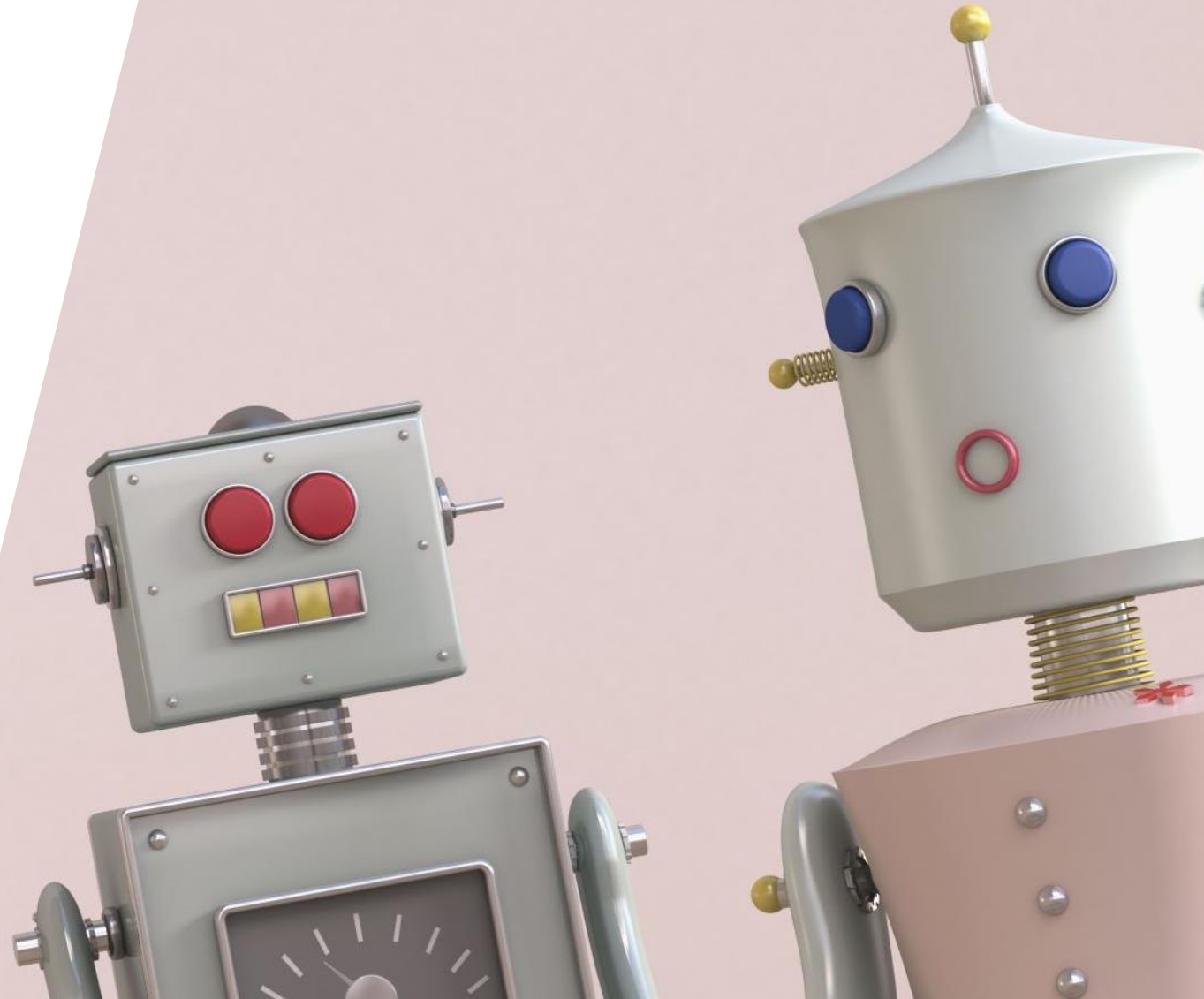


# Automation



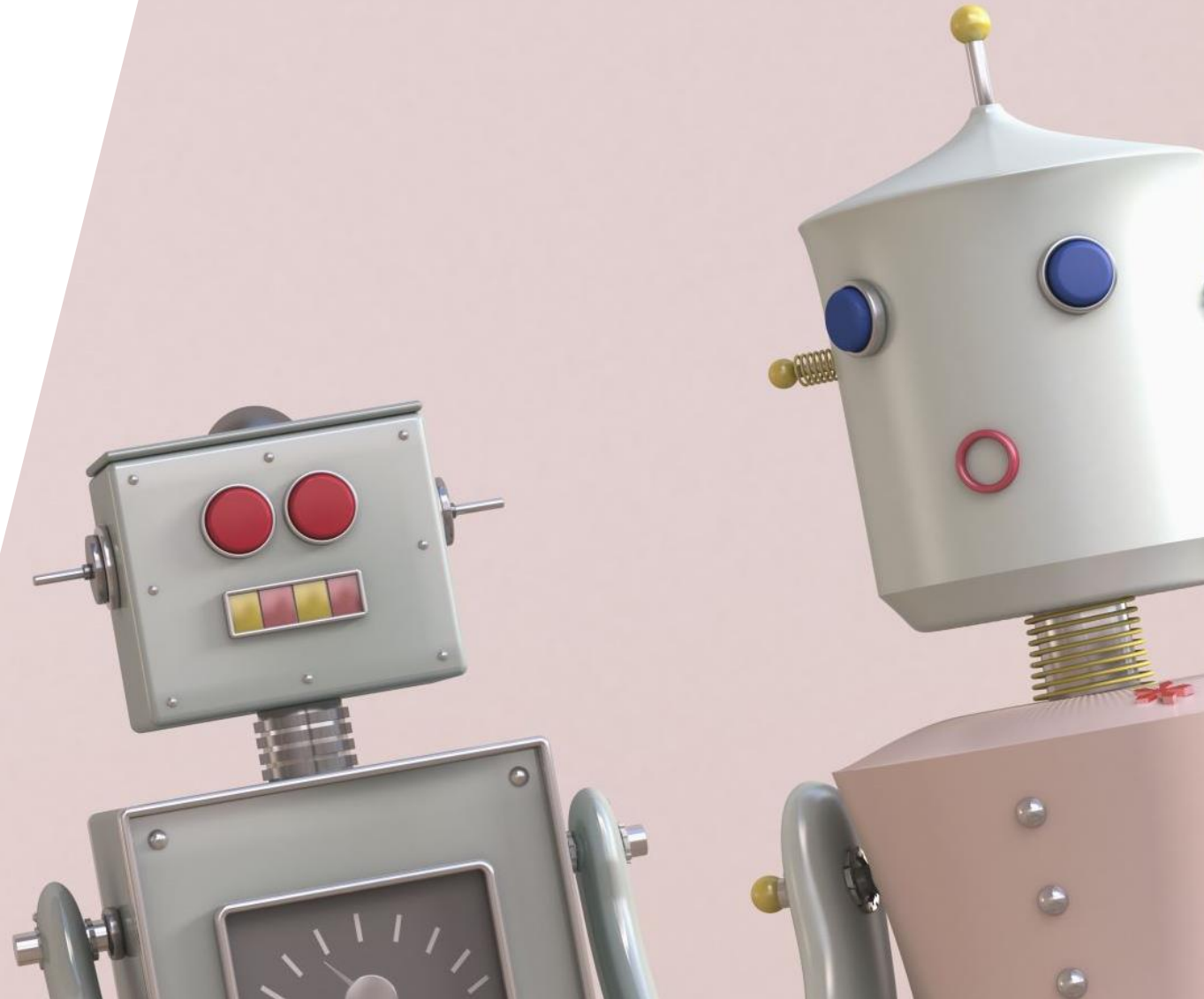
# What is Automation?

- “The technique, method, or system of operating or controlling a process by highly automatic means... reducing human intervention to a minimum.”  
([Dictionary.com](https://www.dictionary.com))



# Why Automate?

- Eliminate mundane/repetitive tasks
- Make life easier for yourself
- Increase user adoption
- Reduce stress and errors
- Standardize processes
- Enforce business logic
- Improve data quality
- Access external data sources
- Improve communication
- Free you up to enjoy your day!



# Let's hear from you!

💡 **Where might automation help you in your day?**

💡 **How have you automated something for yourself in the past?**

- Scan the QR code to submit your idea.
- Something that will reduce redundancy in your day, week, or month.
- We will discuss responses together and might choose one to walk through the automation.



---

# Where We've Come From

- Historically clunky and highly dependent on developers
- Out of reach of the common folk
- Microsoft working to democratize this sort of thing







# Microsoft Power Platform

The low code platform that spans Microsoft 365, Azure, Dynamics 365, and standalone apps.



## Power BI

Business analytics



## Power Apps

App development



## Power Automate

Process automation



## Power Virtual Agents

Intelligent virtual agents



## Power Pages

External-facing websites



Data  
connectors



AI Builder



Dataverse

# Power Automate



- Microsoft's low-code automation tool
- Cloud flows = automation through API connections
- Leverages data connectors for easy access
- Uses:
  - On-demand flows
  - Automated flows
  - Scheduled flows
- Power Automate Desktop
  - Make D365 talk with desktop applications, local file storage, or web applications



# Data Connectors



- Pre-built API connections
- Enables you to connect to hundreds of other data sources
  - First party and independent
  - Salesforce, SAP, SQL Server, Excel, WordPress...
- Build your own custom connectors

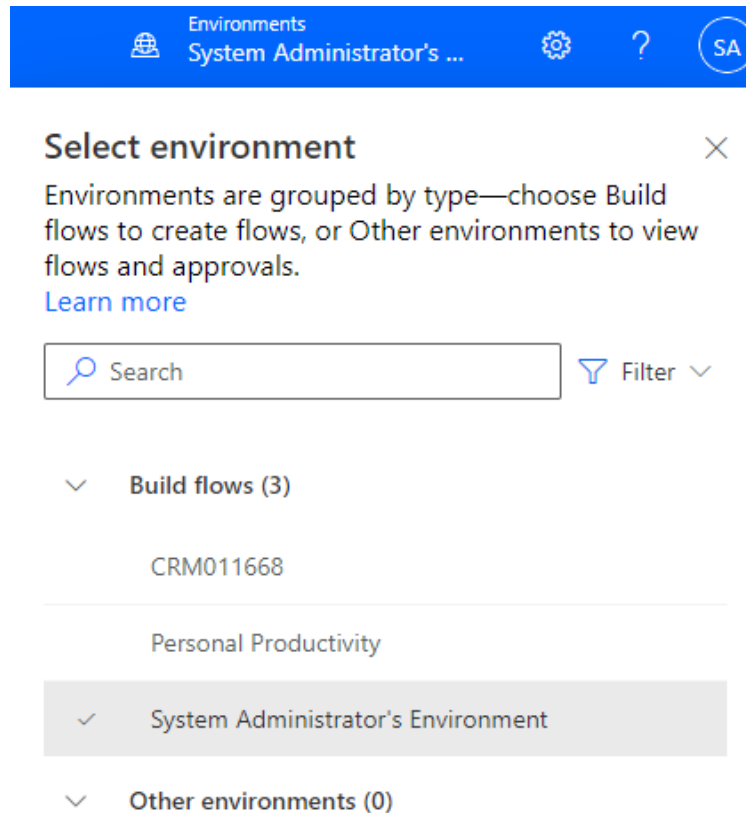
Filter by tag:

- Budget
- Business Central
- Business Forecast
- Business Process Managem...
- Business Strategy
- Calendar Scheduling
- Call Management
- Certification
- Charitable Contributions
- Chart Generator
- Chat
- Chatbots
- ChatGPT
- Chuck Norris
- Click Tracking
- Climate Change

Azure Data Lake	Azure Database for MySQL	Azure DevOps	Azure Digital Twins	Azure Event Grid	Azure Event Grid Publish	Azure File Storage
 Azure IoT Central V2	 Azure IoT Central V3	 Azure Key Vault	 Azure Log Analytics [DEPRECATED]	 Azure Log Analytics Data Collector	 Azure Monitor Logs	 Azure Queues
 Azure Resource Manager	 Azure Speech Pronunciation Assessment	 Azure SQL Data Warehouse	 Azure Table Storage	 Azure Text to speech	 Azure VM	 Badgr (Independent Publisher)
 Basecamp 2	 Basecamp 3	 Benchmark Email	 BillsPLS	 BIN Checker (Independent Publisher)	 Binance.us (Independent Publisher)	 Bing Maps
 Bing Search	 Bitbucket	 Bitly	 BitlyIP (Independent Publisher)	 Bitskout	 Bitvore Cellenus	 BizTalkServer

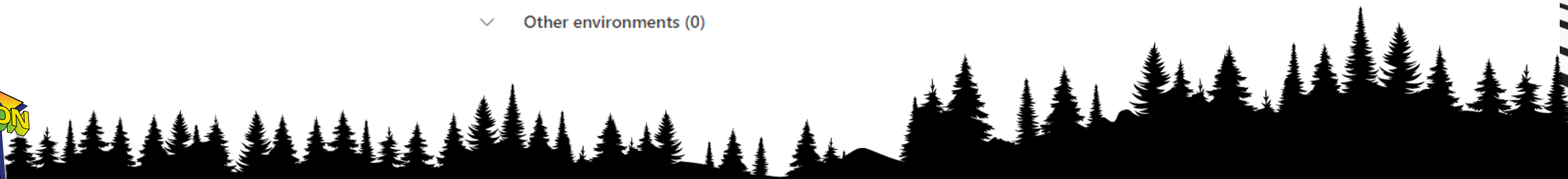
# Power Platform Environments

- Default = "Personal Productivity"
- Dataverse (Dynamics 365)
- Teams environments
- Developer environment



The screenshot shows the 'Environments' selection interface in the Power Platform. At the top, there is a blue header bar with the text 'Environments System Administrator's ...' and icons for settings, help, and a user profile labeled 'SA'. Below the header, the main content area is titled 'Select environment' with a close button (X). A subtitle reads: 'Environments are grouped by type—choose Build flows to create flows, or Other environments to view flows and approvals.' There is a link for 'Learn more'. A search bar with a magnifying glass icon and the text 'Search' is present, along with a 'Filter' dropdown menu. The environment list is organized into four sections: 'Build flows (3)' (expanded), 'Other environments (0)', 'System Administrator's Environment' (highlighted), and 'Personal Productivity'. Under 'Build flows (3)', the environment 'CRM011668' is listed. Under 'System Administrator's Environment', the environment 'Personal Productivity' is listed.

- Flows are built within an environment
- Select environment before building
- Align to the flow's purpose/data



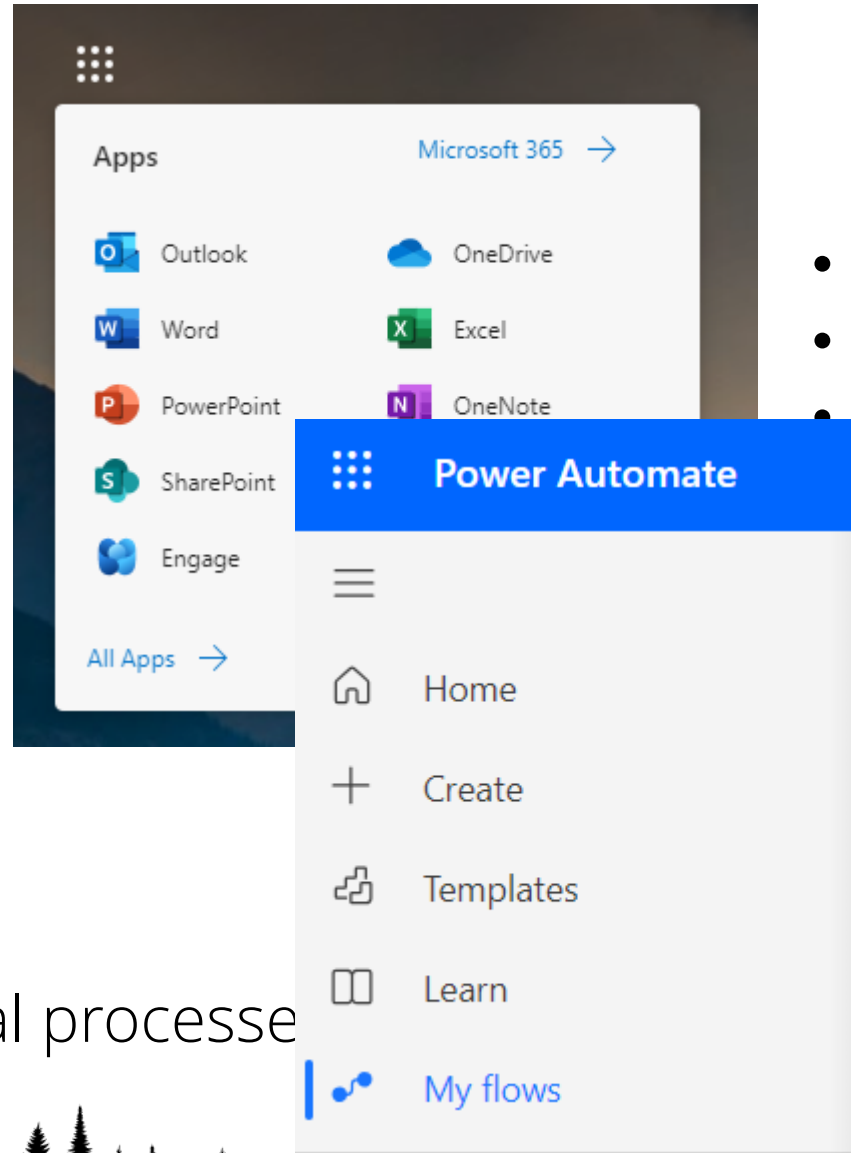
# My Flows

## Dos

- Personal functionality only
- Practice and learning flows
- Start with a template
- Naming convention
- Use notes
- Error Handling

## Don'ts

- Incorporate Organizational processes



- Requires sharing
  - Not solution aware
  - Environment specific
    - Know your data
    - Know your access
- User leaves, flow stops running

# Solution Flows

## Dos

- Built in a solution
- Connection references
- Part of the application life cycle
- Organizational processes
- Keep in mind the environment and Specific records.
- Use Environment Variables and configuration tables
- Expressions is your friend
- Consider including the flow's name on the creation and update of records

## Don'ts

- Begin with My Flows



# Desktop Flows

The screenshot displays the Power Automate Desktop interface. The main window title is "Add text file to country folder | Power Automate Desktop". The interface is divided into several sections:

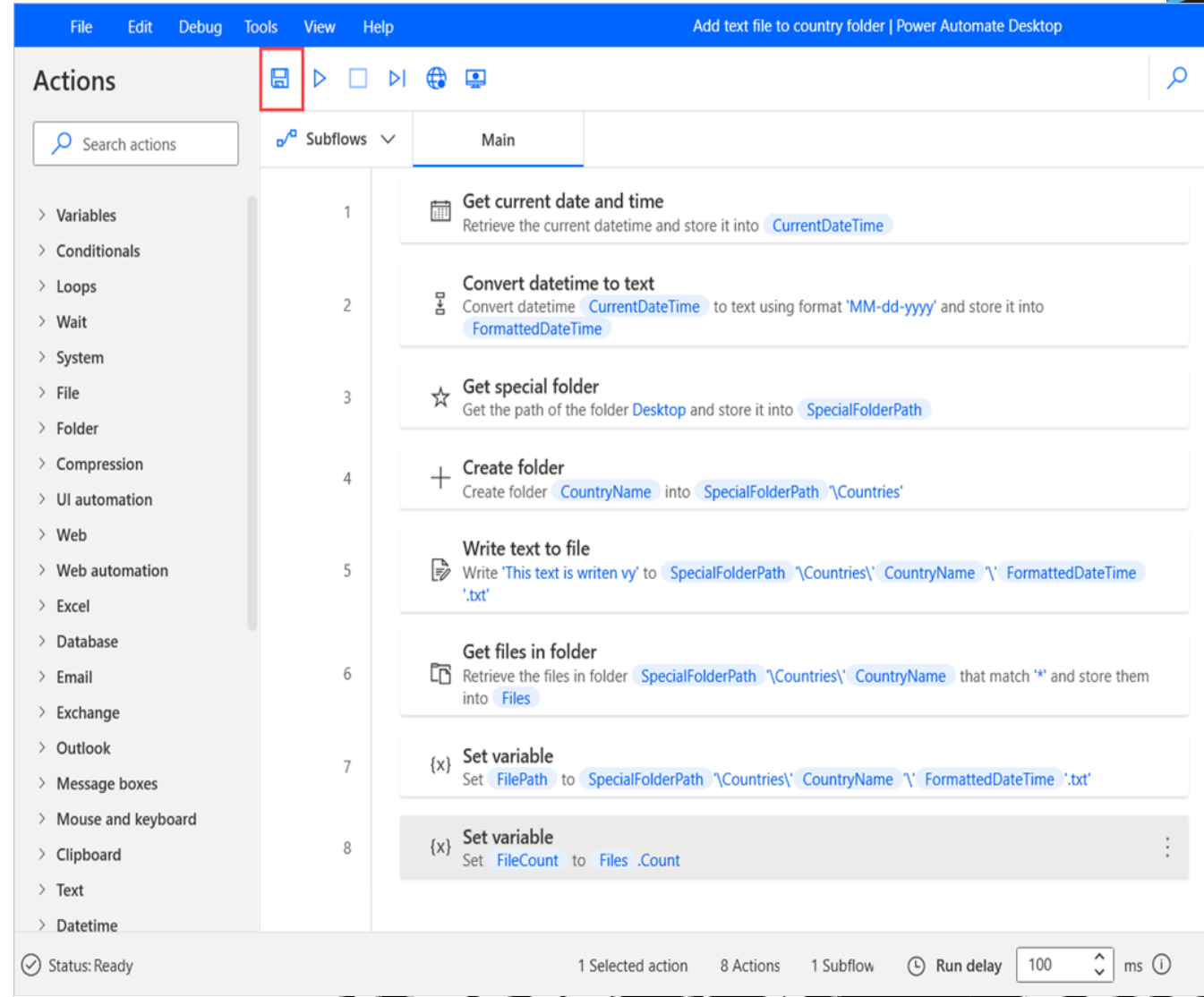
- Actions:** A list of actions is shown on the left, including Variables, Conditionals, Loops, Wait, System, File, Folder, Compression, UI automation, Web, Web automation, Excel, Database, Email, Exchange, Outlook, Message boxes, Mouse and keyboard, Clipboard, Text, and Datetime. The "File" category is selected.
- Main Flow:** A sequence of 8 actions is displayed in the center:
  1. **Get current date and time**: Retrieve the current datetime and store it into `CurrentDateTime`.
  2. **Convert datetime to text**: Convert datetime `CurrentDateTime` to text using format 'MM-dd-yyyy' and store it into `FormattedDateTime`.
  3. **Get special folder**: Get the path of the folder `Desktop` and store it into `SpecialFolderPath`.
  4. **Create folder**: Create folder `CountryName` into `SpecialFolderPath \Countries`.
  5. **Write text to file**: Write 'This text is written by' to `SpecialFolderPath \Countries\ CountryName \ FormattedDateTime .txt`.
  6. **Get files in folder**: Retrieve the files in folder `SpecialFolderPath \Countries\ CountryName` that match "\*" and store them into `Files`.
  7. **Set variable**: Set `FilePath` to `SpecialFolderPath \Countries\ CountryName \ FormattedDateTime .txt`.
  8. **Set variable**: Set `FileCount` to `Files .Count`.
- Variables:** A pane on the right shows the variables used in the flow, categorized into "Input / output variables" and "Flow variables".
  - Input / output variables (3):** `CountryName` (France), `FileCount`, and `FilePath`.
  - Flow variables (5):** `CurrentDateTime`, `Files`, `FormattedDateT...`, `NewFolder`, and `SpecialFolderPath`.
- Status Bar:** At the bottom, it shows "Status: Ready", "1 Selected action", "8 Actions", "1 Subflow", and "Run delay 100 ms".





# Desktop Flows

- "Robotic process automation"
- Repeat clicks of your mouse – kind of like macros
- Built into Windows 11
- Can access desktop applications and also scrape websites
- Runs real-time on your computer – or someone else's
- Be diligent in design



The screenshot displays the Power Automate Desktop interface for a Desktop Flow titled "Add text file to country folder". The flow consists of 8 actions:

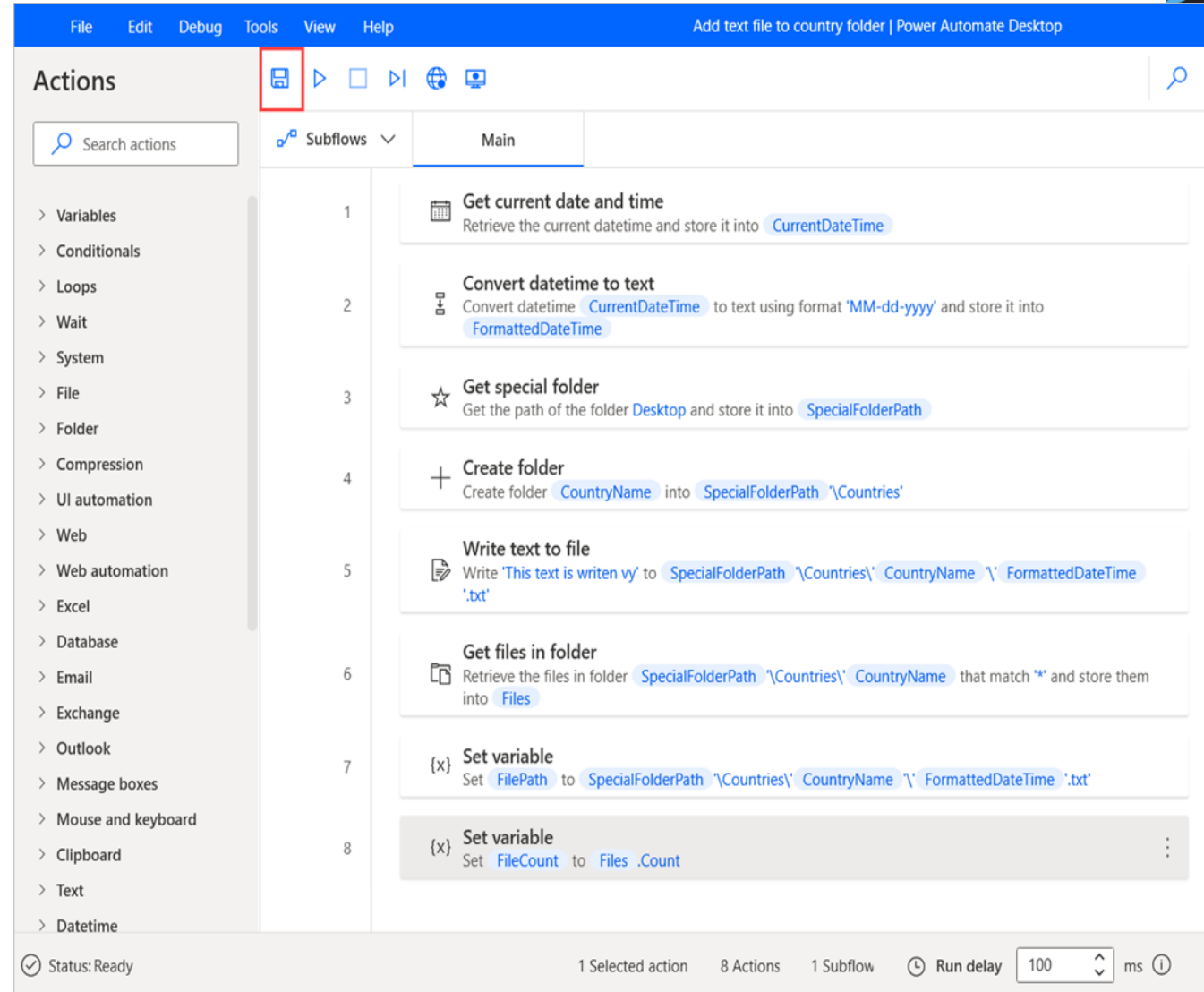
1. **Get current date and time**: Retrieve the current datetime and store it into `CurrentDateTime`.
2. **Convert datetime to text**: Convert datetime `CurrentDateTime` to text using format 'MM-dd-yyyy' and store it into `FormattedDateTime`.
3. **Get special folder**: Get the path of the folder `Desktop` and store it into `SpecialFolderPath`.
4. **Create folder**: Create folder `CountryName` into `SpecialFolderPath \Countries`.
5. **Write text to file**: Write 'This text is written by' to `SpecialFolderPath \Countries\ CountryName \ FormattedDateTime .txt`.
6. **Get files in folder**: Retrieve the files in folder `SpecialFolderPath \Countries\ CountryName` that match '\*' and store them into `Files`.
7. **Set variable**: Set `FilePath` to `SpecialFolderPath \Countries\ CountryName \ FormattedDateTime .txt`.
8. **Set variable**: Set `FileCount` to `Files .Count`.

The interface includes a menu bar (File, Edit, Debug, Tools, View, Help), a search bar for actions, and a status bar at the bottom showing "Status: Ready", "1 Selected action", "8 Actions", "1 Subflow", and a "Run delay" of 100 ms.

# Desktop Flows

## Versus Cloud Flows?

- Fundamentally different than cloud flows
- Access apps without APIs
- Can scrape the web to repeat what a user might do
- Definitions also stored in the cloud
- Can integrate with cloud flows



The screenshot displays the Power Automate Desktop interface for a desktop flow titled "Add text file to country folder". The interface includes a menu bar (File, Edit, Debug, Tools, View, Help) and a toolbar with icons for saving, running, and pausing. A red box highlights the save icon. The left sidebar shows a list of action categories: Variables, Conditionals, Loops, Wait, System, File, Folder, Compression, UI automation, Web, Web automation, Excel, Database, Email, Exchange, Outlook, Message boxes, Mouse and keyboard, Clipboard, Text, and Datetime. The main workspace shows a sequence of 8 actions:

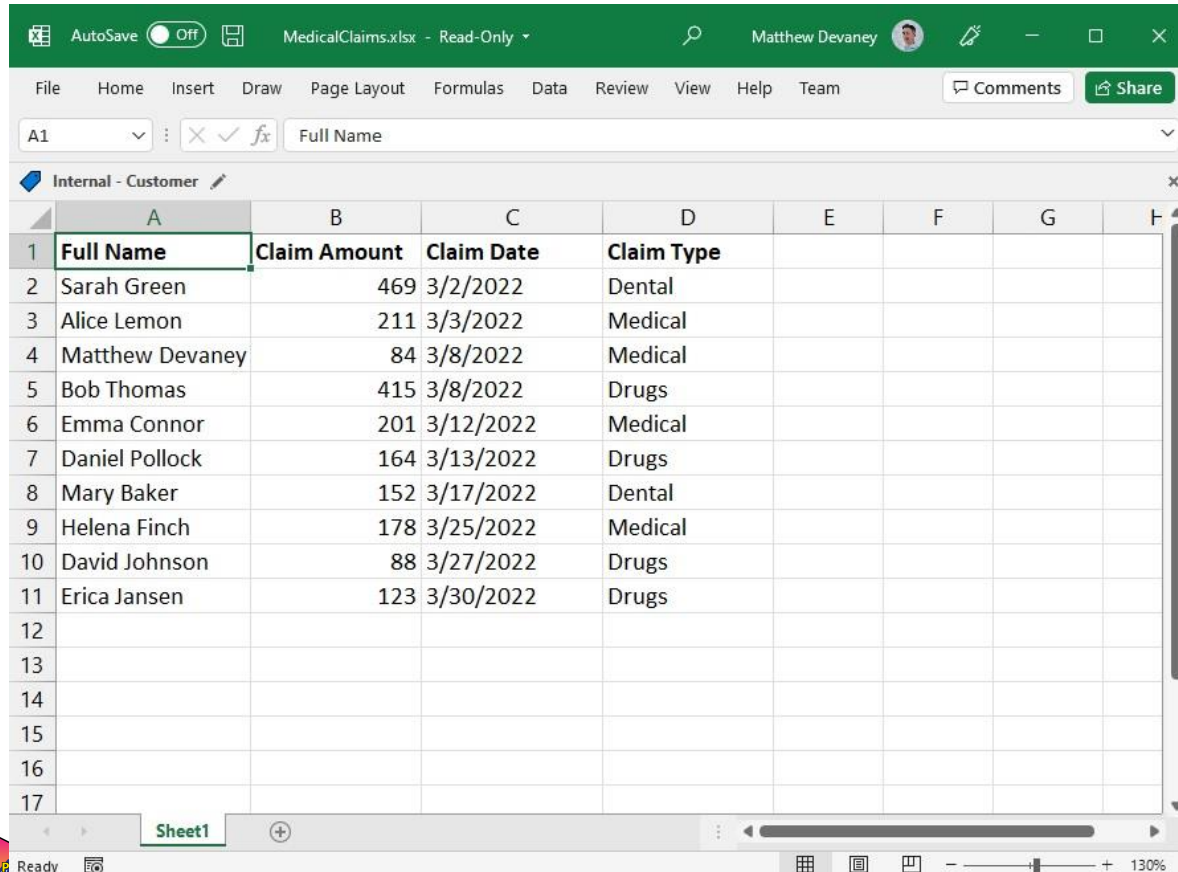
1. **Get current date and time**: Retrieve the current datetime and store it into `CurrentDateTime`.
2. **Convert datetime to text**: Convert datetime `CurrentDateTime` to text using format 'MM-dd-yyyy' and store it into `FormattedDateTime`.
3. **Get special folder**: Get the path of the folder `Desktop` and store it into `SpecialFolderPath`.
4. **Create folder**: Create folder `CountryName` into `SpecialFolderPath \Countries'`.
5. **Write text to file**: Write 'This text is written by' to `SpecialFolderPath \Countries' CountryName \FormattedDateTime.txt`.
6. **Get files in folder**: Retrieve the files in folder `SpecialFolderPath \Countries' CountryName` that match '\*' and store them into `Files`.
7. **Set variable**: Set `FilePath` to `SpecialFolderPath \Countries' CountryName \FormattedDateTime.txt`.
8. **Set variable**: Set `FileCount` to `Files.Count`.

The status bar at the bottom indicates "Status: Ready", "1 Selected action", "8 Actions", "1 Subflow", and "Run delay 100 ms".

# Fill Forms from Excel

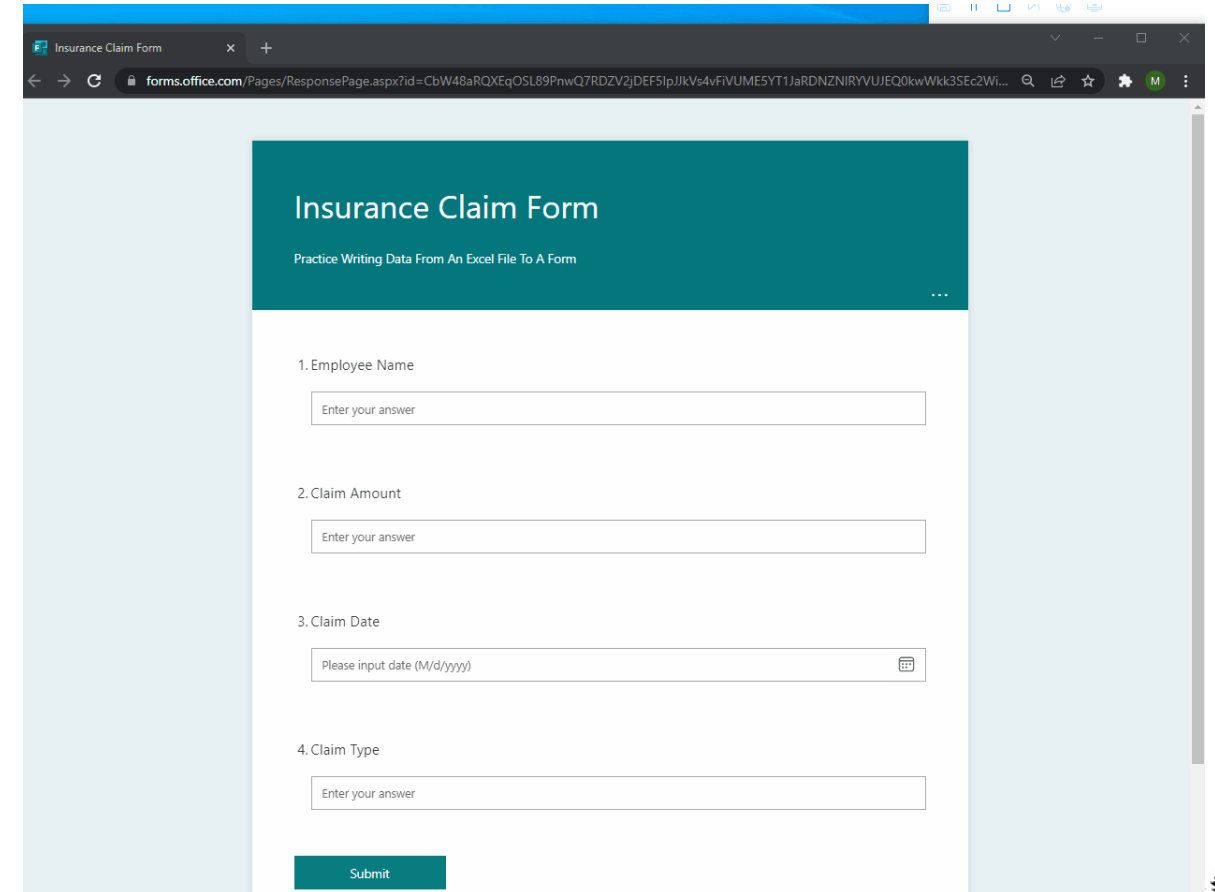
\* All credit to Matthew Devaney

[Power Automate Desktop: Data Entry From Excel To Website \(matthewdevaney.com\)](https://matthewdevaney.com)



The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D	E	F	G
1	<b>Full Name</b>	<b>Claim Amount</b>	<b>Claim Date</b>	<b>Claim Type</b>			
2	Sarah Green	469	3/2/2022	Dental			
3	Alice Lemon	211	3/3/2022	Medical			
4	Matthew Devaney	84	3/8/2022	Medical			
5	Bob Thomas	415	3/8/2022	Drugs			
6	Emma Connor	201	3/12/2022	Medical			
7	Daniel Pollock	164	3/13/2022	Drugs			
8	Mary Baker	152	3/17/2022	Dental			
9	Helena Finch	178	3/25/2022	Medical			
10	David Johnson	88	3/27/2022	Drugs			
11	Erica Jansen	123	3/30/2022	Drugs			
12							
13							
14							
15							
16							
17							



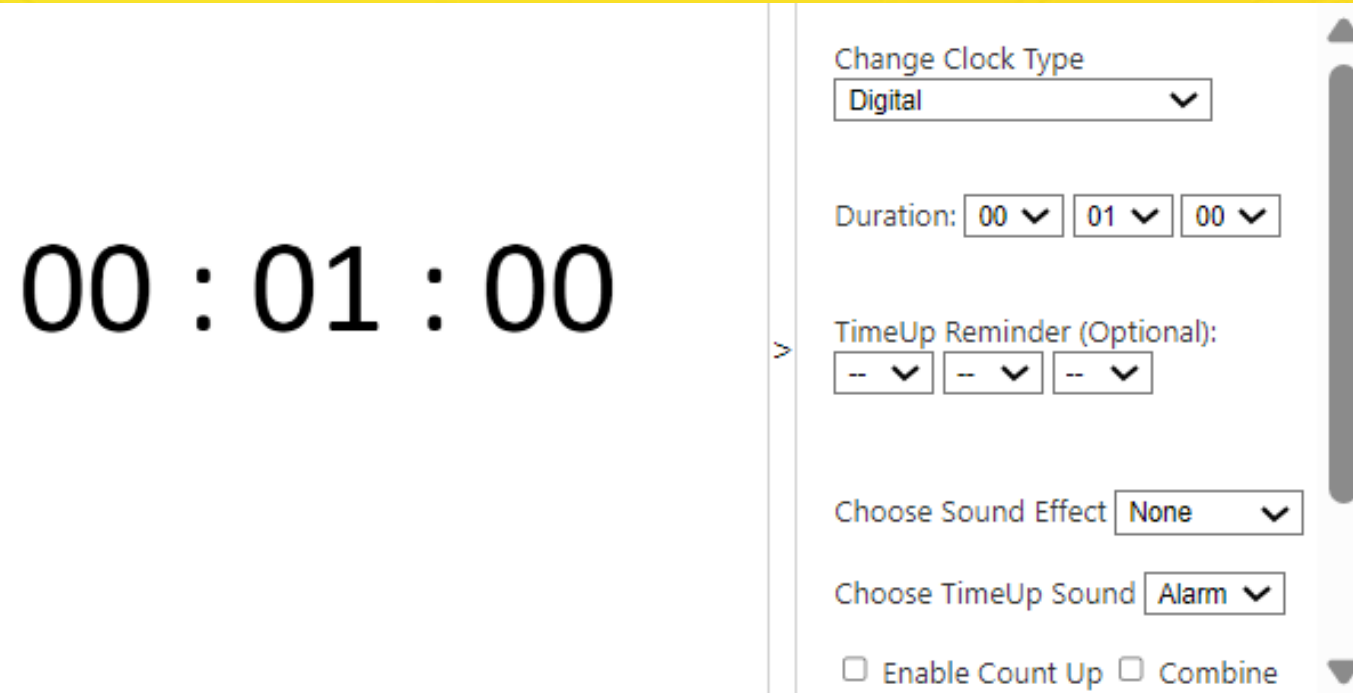
The screenshot shows a web browser displaying an "Insurance Claim Form". The form has the following fields:

- 1. Employee Name:
- 2. Claim Amount:
- 3. Claim Date:
- 4. Claim Type:

A "Submit" button is located at the bottom of the form.



# 7<sup>th</sup> Slide Stretch



00 : 01 : 00

Change Clock Type  
Digital

Duration: 00 01 00

TimeUp Reminder (Optional):  
-- -- --

Choose Sound Effect None

Choose TimeUp Sound Alarm

Enable Count Up  Combine

The image shows a digital timer interface. On the left, the timer displays '00 : 01 : 00'. On the right, there is a control panel with several settings: 'Change Clock Type' set to 'Digital', 'Duration' set to '00 : 01 : 00', 'TimeUp Reminder (Optional)' set to '-- : -- : --', 'Choose Sound Effect' set to 'None', 'Choose TimeUp Sound' set to 'Alarm', and two checkboxes for 'Enable Count Up' and 'Combine' which are currently unchecked. The interface is set against a background of a sunset over a landscape with rolling hills and trees.

# Getting Started

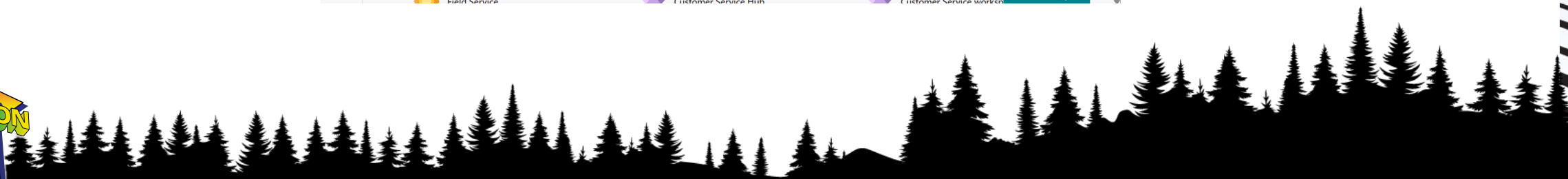
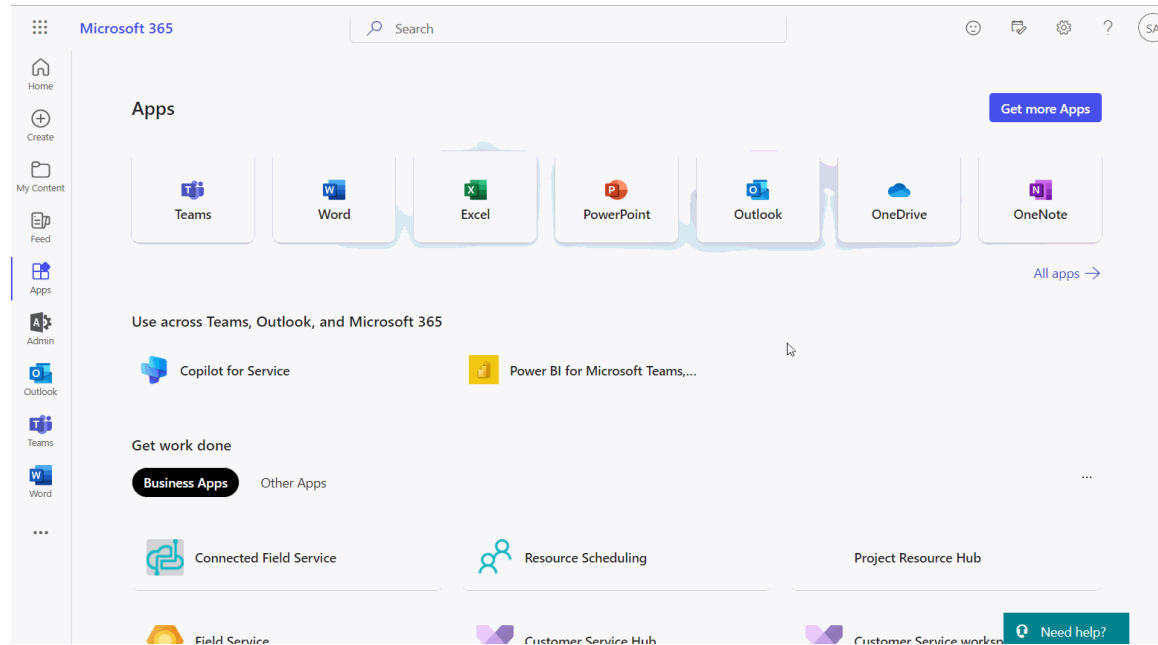


# How can I get started?

- Copilot!
  - Describe it to design it.
- Templates
  - [make.powerautomate.com](https://make.powerautomate.com)
  - Teams
  - SharePoint
- Power Automate Desktop templates
- Import a flow from someone else.



# Copilot – Describe it to design it!





Home



Create



My Content



Feed



Apps



Admin



Outlook



Teams




Word




# Apps


Get more Apps




Teams




Word




Excel




PowerPoint



Outlook




OneDrive




OneNote

All apps →

## Use across Teams, Outlook, and Microsoft 365



Copilot for Service



Power BI for Microsoft Teams,...

## Get work done

Business Apps

Other Apps



Connected Field Service



Resource Scheduling

Project Resource Hub



Field Service



Customer Service Hub



Customer Service worksp

Need help?



# Templates



- Home
- Create
- Templates
- Learn
- My flows
- Approvals
- Solutions
- Process mining
- AI hub
- Desktop flow activity
- Connections
- Tables
- More

This is a developer environment and not meant for production use. [Learn more](#)

# Let's automate something. What should it do?

Get started by selecting an example or describing your own automation idea.

Every month, copy all files from OneDrive folder to another OneDrive folder

Copy all rows from an Excel file to another excel file with a click of a button

When a new item is created in SharePoint, send me an email

Describe in detail how you want your automation to work

**Generate**

## Learning for every level [See all](#)

- Analyze process mining reports in Power Automate
- Analyze your business process with Microsoft...
- Register for free 1-day automation workshop
- Aut Rol

Power Platform  
Ask a chatbot

# Teams Templates

## "Workflows"

The screenshot displays the Microsoft Teams Workflows interface. At the top, there is a search bar and a notification to turn on desktop notifications. The main navigation bar includes 'Workflows', 'Home', 'Create', 'Chat', and 'About'. A sidebar on the left lists various categories: Activity, Chat, Teams, Calendar, Calls, OneDrive, Workflows, Apps, and Notifications. The main content area is titled 'Start with a popular Teams template' and features six template cards. Each card includes icons representing the services involved, a title, the creator, and the number of users who have used the template.

Template Title	Creator	Frequency	User Count
Send me an email when a new message is added in Microsoft Teams channel	By Microsoft Power Automate Community	Automated	89786
Create a task in Planner from Microsoft Forms and post message in Teams	By Microsoft Power Automate Community	Automated	180448
Follow up on a message	By Microsoft	Instant	582893
Schedule a reply	By Microsoft	Instant	363866
Save a message to OneNote	By Microsoft	Instant	194098
Start an approval when a file is added to SharePoint	By Microsoft	Automated	144886

At the bottom of the template grid, there is a button labeled 'See more templates'.



# SharePoint Flows

The screenshot shows a SharePoint interface for a list named "Denver Help Desk". The top navigation bar includes the "SharePoint" logo, a search box for the list, and user profile information (SA). The list is categorized as a "Public group" with "Not following" status and "2 members".

Below the navigation bar, there are action buttons: "+ New", "Exit grid view", "Undo", "Share", "Export", "Automate", "Integrate", "All Items", and a filter icon. The list is titled "Tickets" and has a star icon for favorites.

The list columns are: Issue, Issue description, Priority, Status, Assigned to, Date reported, and Follow. A single item is displayed:

Issue	Issue description	Priority	Status	Assigned to	Date reported	Follow
Damaged La...	Screen has a crack and shows blu...	High	New		5/15/2024	Thursd

Below the list item, there is a "+ Add new item" button.





# Denver Help Desk

Home Devices FAQs Tickets ... Edit

Public group Not following 2 members

+ New

Exit grid view Undo Share Export Automate Integrate All Items

## Tickets ☆

Issue	Issue description	Priority	Status	Assigned to	Date reported	For
○ Damaged La...	Screen has a crack and shows blu...	↑ High	New		5/15/2024	Thu

+ Add new item

# Desktop Flow Templates

Go talk Andrew + Kylie Kiser at 10:30 to learn more!

The screenshot displays the Power Automate web interface. At the top, the title bar reads "Power Automate" and "System Administrator". Below the title bar, there are navigation options: "New flow", "Go premium", "Environments" (System Administrator's Environment), "Settings", "Help", "Copilot", and "Search Flows". The main content area is titled "Examples" and features a grid of "Example categories".

Category	Description	Number of Examples
Excel Automation	Automate repetitive Excel tasks, extract and store data into Excel files, read and manipulate cells, and manage spreadsheets.	5 examples
Web Automation	Automate web applications, populate forms, extract structured data from web pages, and create reports using web data.	3 examples
Desktop Automation	Automate your daily desktop routine, launch applications, interact with Windows, and extract data for further processing in your flows.	11 examples
Datetime Handling	Handle date and time data, perform calculations using datetime values, and make conversions between datetime and text values.	6 examples
PDF Automation	Automate PDF workflows, extract data from PDF pages, manipulate PDF files, and generate new files by splitting existing ones.	9 examples
Text Manipulation	Manipulate text values, extract text entities in natural language, search for subtexts, and handle text files.	5 examples
Scripting	Simplify administrative procedures, avoid interacting with complex user interfaces, and implement custom behavior in your desktop flows using scripting.	7 examples
Flow control	Create maintainable desktop flows using subflows, transfer the running point using labels, implement advanced logic using conditionals and logical operators, and make your desktop flows robust using error handling.	5 examples





## PDF Automation ▾



Name



Create PDF from selected PDF page(s)



Get images from PDF



Merge two PDFs



Extract table(s) from PDF



Get number of pages in a PDF



# Welcome to Power Automate, System Administrator

With Power Automate, you can automate all mundane tasks and focus your attention where it's needed most. Learn how to build automations that will free up your valuable time.

 [Watch a 1 minute video](#)

## Begin your automation journey

Get familiar with Power Automate and begin your automation journey.



### Get started tour

Get a tour on Power Automate for desktop and access all features available to elevate your ex...

[Start tour](#)



### Build desktop flows

Drag and drop actions to perform the steps of your automation and form a flow.

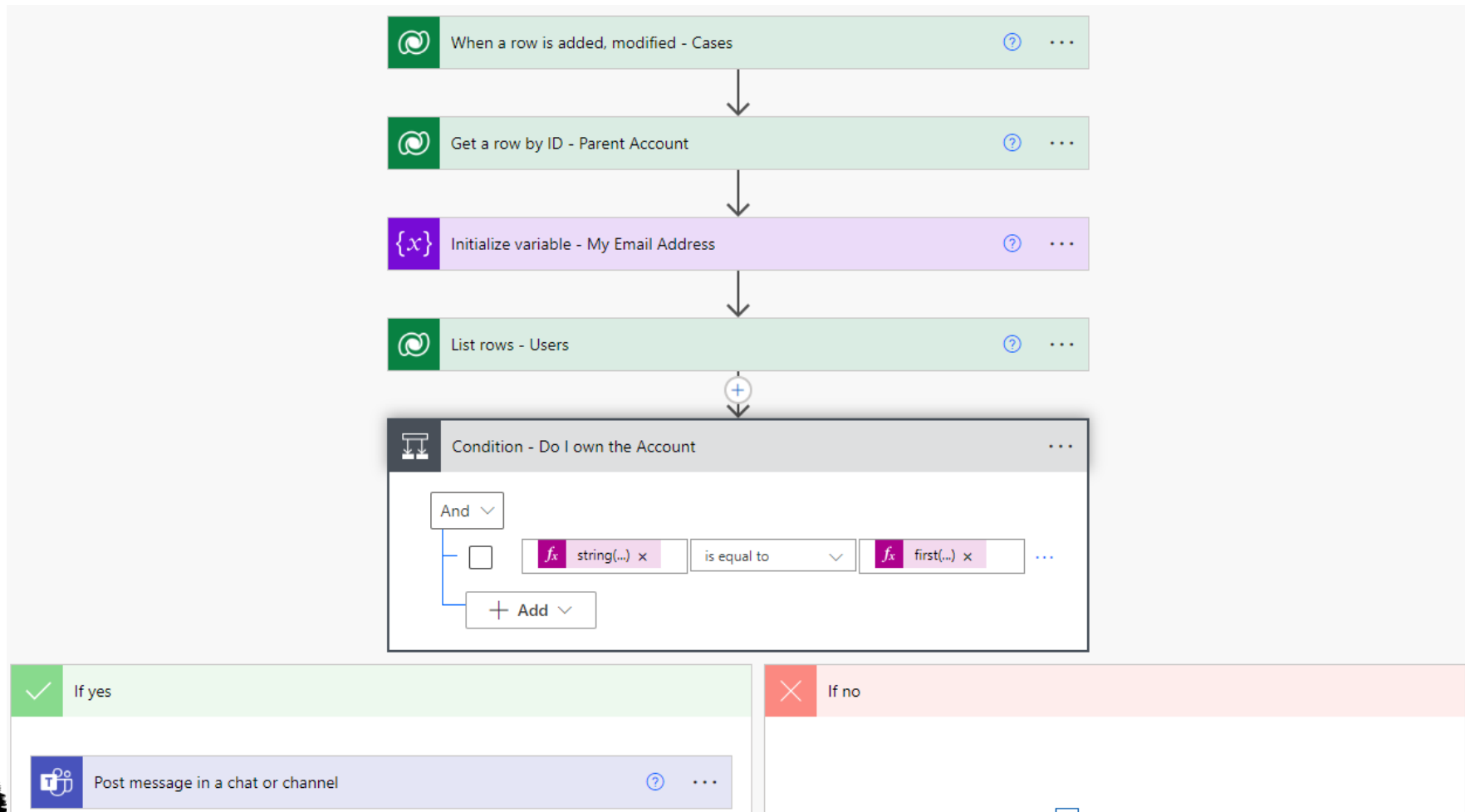
[+ New flow](#)



# Cloud Flows in Action!



# Case - When my accounts get a case



# Case – When my accounts get a case

Dynamics 365 | Sales Hub

My Active Accounts

Account Name ↑	Main Phone	Address 1:...	Primary Contact	Email (Primary Con...
<a href="#">A Datum Corporation</a>	425-555-01...	Moorhead		
<a href="#">City Power &amp; Light (sample)</a>	555-0155	Redmond	<a href="#">Scott Konersmann (s...</a>	<a href="#">someone_f@exampl...</a>

1 - 2 of 2

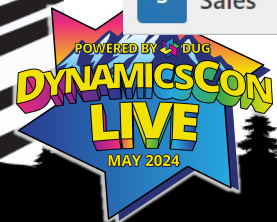
Page 1

Navigation icons: Focused view, Show Chart, New, Delete, Refresh, Collaborate, Visualize this view, Share

Filter by keyword

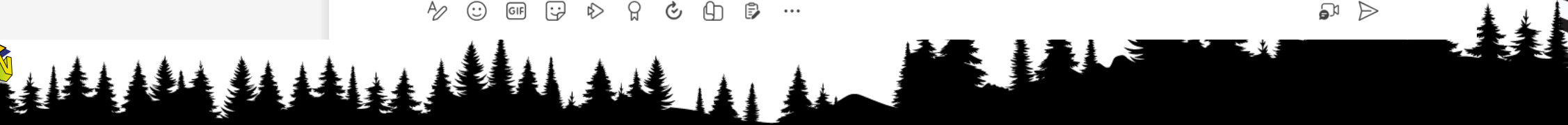
Left sidebar: Sales accelerator, Activities, Dashboards, Customers, Accounts, Contacts, Sales, Leads, Opportunities, Competitors, Collateral

Right sidebar: Edit columns, Edit filters



# Case - When my accounts get a case

The screenshot shows a Microsoft Teams chat interface. On the left is a navigation pane with icons for Activity, Chat, Teams, Calendar, Calls, OneDrive, and Apps. The main chat area shows a conversation with 'Workflows'. A message from 'Workflows' at 6:25 PM is highlighted with a red box. The message text is: 'A case had been added or modified for account, City Power & Light (sample): https://orgb769a7d6.crm.dynamics.com/main.aspx?pagetype=entityrecord&etn=account&id=784faeb1-86e0-ee11-904d-00224805c590'. Below this, it says 'Case: Dynamics Con Wifi Issues' and provides another URL: 'https://orgb769a7d6.crm.dynamics.com/main.aspx?pagetype=entityrecord&etn=incident&id=b437ef1b-5b0c-4a19-90e0-cdd7436b4296'. The chat input area at the bottom contains icons for text, emojis, GIFs, attachments, and other actions.

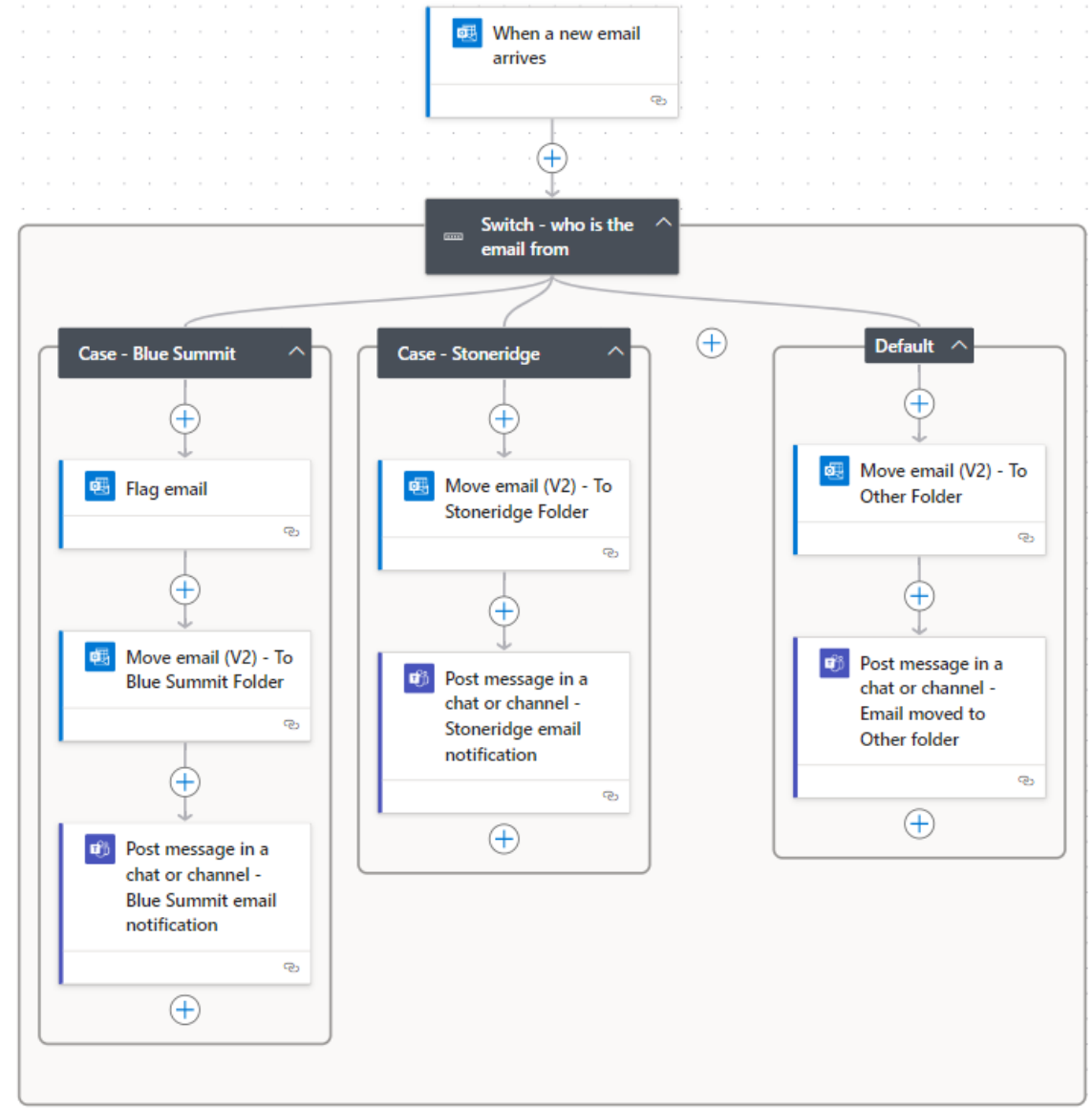


# Case - When my accounts get a case

The screenshot displays the Microsoft Power Automate interface. At the top, the header includes the 'Power Automate' logo, a search bar, and environment information: 'Environments CRM011668'. The left sidebar contains navigation options: Home, Create, Templates, Learn, My flows (highlighted), Approvals, Solutions, Process mining, AI hub, Desktop flow activity, and Cloud flow activity. The main workspace shows a flow titled 'Cases - When my accounts get a case'. The flow steps are: 1. 'When a row is added, modified - Cases' (green step), 2. 'Get a row by ID - Parent Account' (green step), 3. 'Initialize variable - My Email Address' (purple step), 4. 'List rows - Users' (green step), and 5. 'Condition - Do I own the Account' (grey step). The flow is connected by downward arrows. At the bottom of the workspace, there are buttons for '+ New step' and 'Save'. A chatbot icon is visible in the bottom left corner of the workspace.

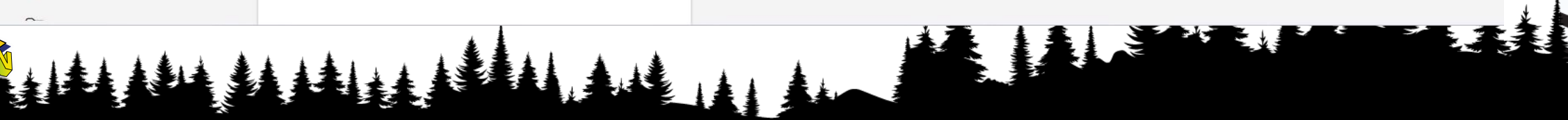
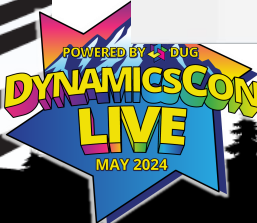


When I get an email – process it



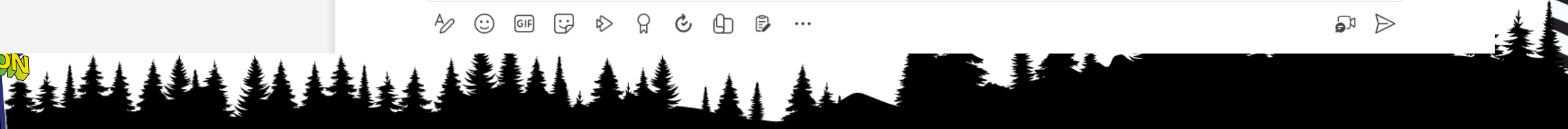
# When I get an email – process it

The screenshot shows the Microsoft Outlook web interface. At the top, there is a blue header bar with the Outlook logo, a search bar, and several utility icons (calendar, mail, notifications, settings, help) along with a user profile picture. Below the header, the main interface is divided into three sections. On the left is a navigation pane with a 'Folders' list including 'Inbox', 'Blue Summit', 'Other', 'Stoneridge' (with a '1' next to it), 'Drafts', 'Sent Items', 'Deleted Items', 'Junk Email', 'Archive', and 'Notes'. The 'Inbox' folder is selected. The central pane shows the 'Focused' tab active, displaying a large graphic of an empty envelope with the text 'All done for the day' and 'Enjoy your empty inbox.' The right pane is currently empty. At the top right of the main interface, there is a notification for a 'Daily Touch Point Meeting' scheduled for 'Tomorrow 11:00 AM'.



# When I get an email – process it

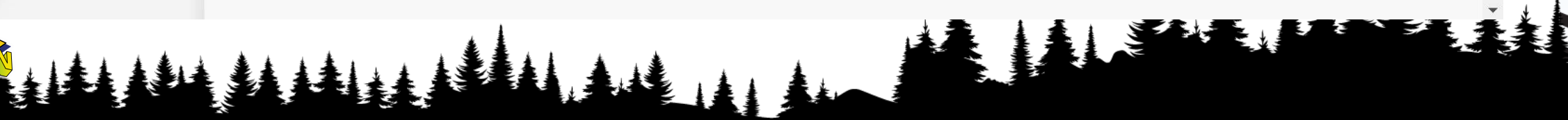
The screenshot shows a Microsoft Teams chat interface. On the left is a navigation pane with icons for Activity, Chat, Teams, Calendar, Calls, OneDrive, and Apps. The main chat area is titled 'Workflows' and shows a message from 'Alan Steiner via Workflows' at 2:34 PM. The message content is: 'Low: An incoming email from, thejohnsonshy@gmail.com was moved to the Other folder at 05/14/2024 07:34 Subject: Denver'. Below this is another message from 'Alan Steiner via Workflows' at 2:55 PM with the content: 'Low: An incoming email from, thejohnsonshy@gmail.com was moved to the Other folder at 05/14/2024 07:55 Subject: Denver' and 'High: An incoming email from, hjohnson@bluesummittech.com was moved to the Blue Summit folder at 05/14/2024 07:55 Subject: Dynamics Con Denver'. At the bottom is a text input field with the placeholder 'Type a message' and a row of icons for emojis, GIFs, and other chat features.



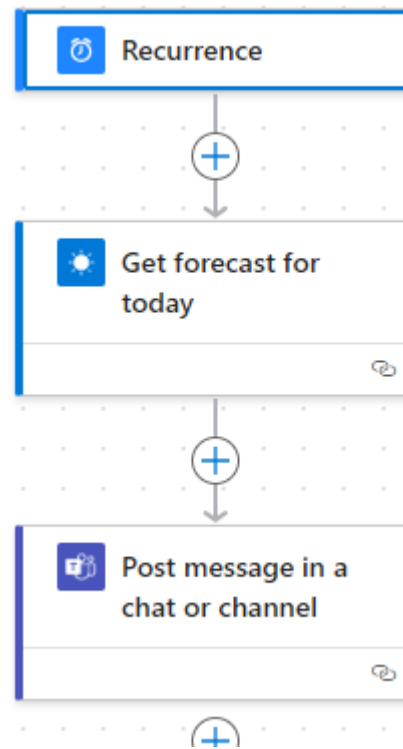


# When I get an email – process it

The screenshot shows the Microsoft Power Automate interface. At the top, there is a blue header with the 'Power Automate' logo, a search bar, and the environment 'Personal Productivity'. Below the header is a navigation pane on the left with options like Home, Create, Templates, Learn, My flows, Approvals, Solutions, Process mining, AI hub, Desktop flow activity, and a chatbot icon. The main workspace displays a flow titled 'When I get an email move to correct folder'. The flow has two steps: 'When a new email arrives' (trigger) and 'Switch - who is the email from' (action). Below the steps are buttons for '+ New step' and 'Save'. The top of the workspace has a toolbar with 'Undo', 'Redo', 'Comments', 'Save', 'Flow checker', 'Test', and 'New designer'.

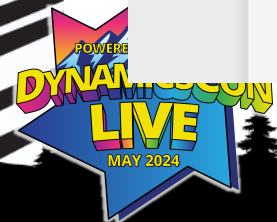


# Post daily weather

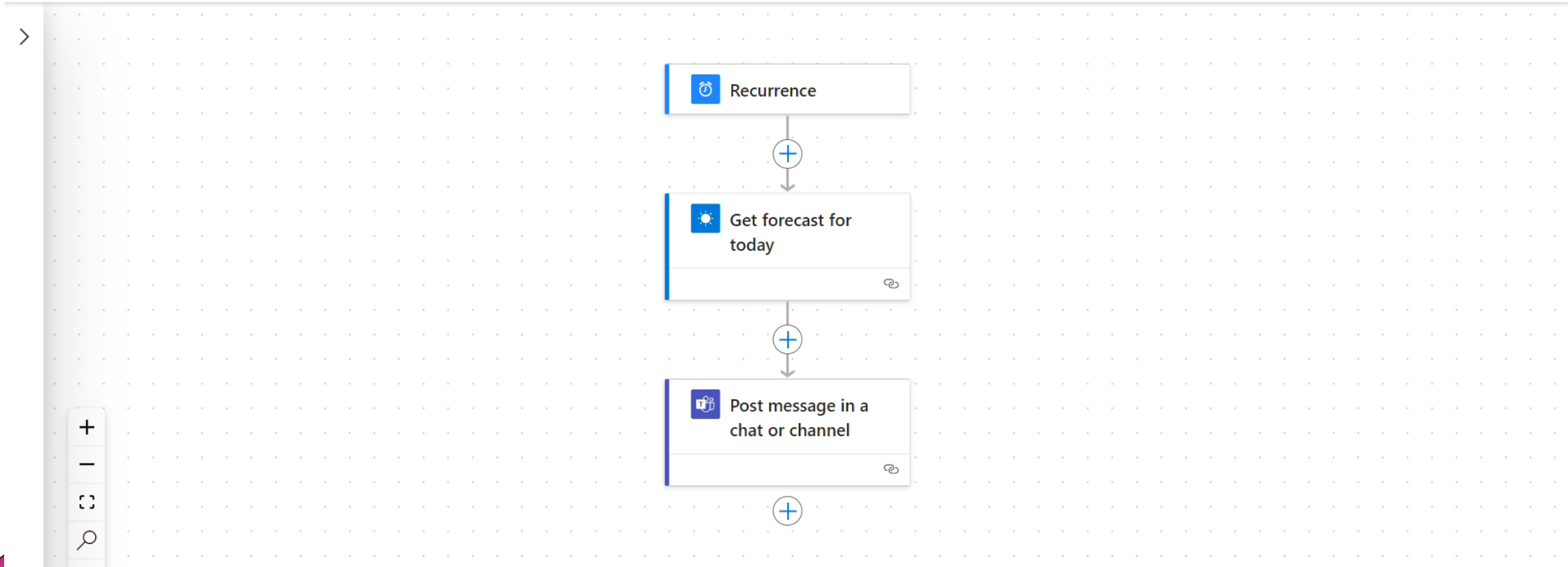


# Post daily weather

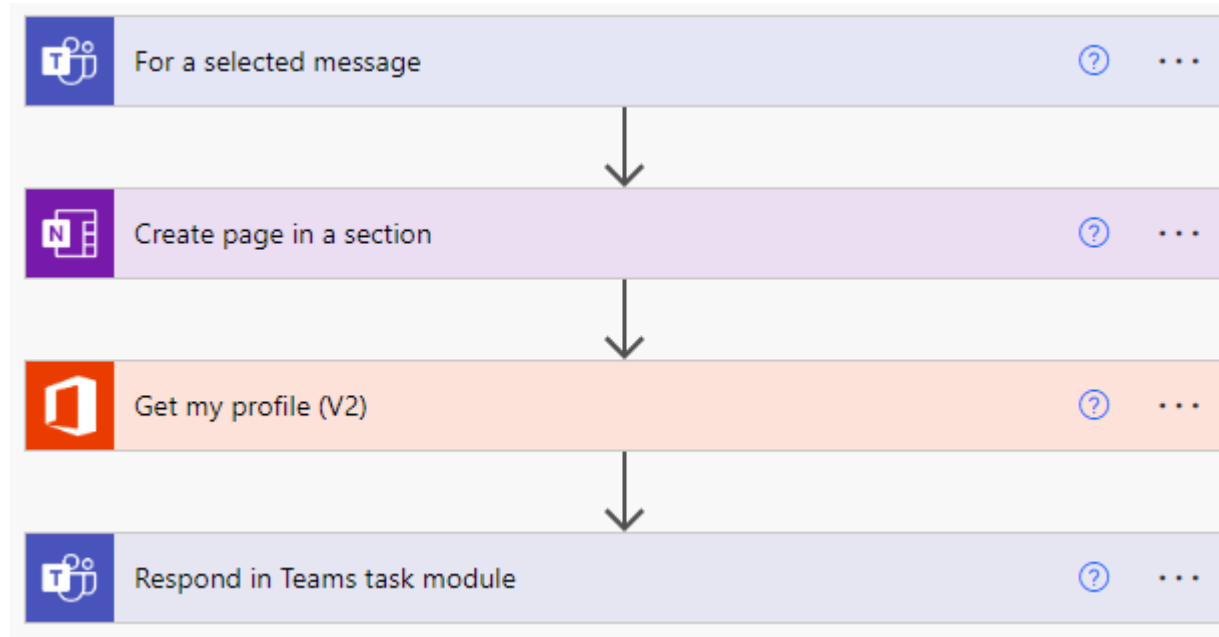
The screenshot shows the Microsoft Teams interface. On the left is a navigation pane with icons for Activity, Chat, Teams, Calendar, Calls, OneDrive, and Apps. The main area is a chat window titled 'Workflows' with tabs for Chat, Home, Create, and About. The chat history shows a pinned message from Alan Steiner (You) at 3:43 PM stating 'This message was deleted', and a recent message from Herb Johnson (HJ) at 5/9 External. A 'Workflows Draft' is also visible. A 'Suggestions' dropdown menu is open over the draft, listing options: 'Learn more' (Find out what I can do), 'List flows' (See which flows I can run for you in the default environment), 'Run flow' (Choose the flow you'd like me to run), and 'Describe' (Choose the flow you'd like me to describe). A yellow hand cursor is pointing at the 'Describe' option. The chat input area at the bottom contains icons for emojis, GIFs, and other actions.



# Post daily weather



# Save to OneNote



# Save to OneNote

Microsoft Power A | Manage your flows | Mail - Alan Steiner | Case: Case: Defecti | Chat | Herb Johnsc | Alan @ Work

crm011668-my.sharepoint.com/personal/alans\_crm011668\_onmicrosoft\_com/\_layouts/15/Doc.aspx?sourcedoc={5c142c03-fae4-4393-...

Alan @ Work

Alan @ Work

From Teams

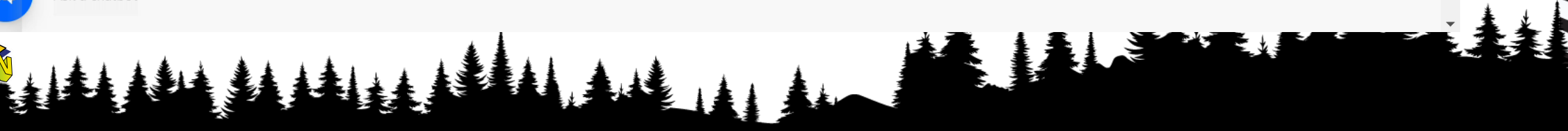
**i** This section is empty.  
Click here or press ENTER to create a new page.

Add section Add page



# Save to OneNote

The screenshot displays the Microsoft Power Automate interface. At the top, the header bar includes the 'Power Automate' logo, a search bar, and navigation options for 'Environments' and 'Personal Productivity'. The main workspace shows a flowchart titled 'Save to OneNote' with four sequential steps: 'For a selected message', 'Create page in a section', 'Get my profile (V2)', and 'Respond in Teams task module'. Each step is represented by a colored bar with a corresponding icon and a help/question mark. Below the flowchart are buttons for '+ New step' and 'Save'. A yellow mouse cursor is positioned over the 'Comments' button in the top toolbar. On the left side, there is a vertical navigation pane with various icons, and at the bottom, a chatbot icon labeled 'Ask a chatbot'.



# Weekly Digest of Power App Blog Posts in Teams

The screenshot shows a Microsoft Teams chat window with a tab labeled 'General'. The chat history includes two messages from a user with the initials 'SA':

- Message 1:** productivity, enhancing collaboration, and reducing errors when building apps. Microsoft Power Apps named a No-Code/Low-Code Market Leader by Omdia. Posted on April 25. We're excited to announce that Microsoft has been named a Leader in the Omdia Universe: No-Code, Low-Code. [see more](#). A 'Reply' button is visible below.
- Message 2:** System Administrator via Workflows (Monday 12:58 PM). A 'New' badge is present. The message contains a link: 'Check out the latest news on Microsoft Power Apps' with sub-links for 'What's new: Power Apps April 2024 Feature Update', 'Announcing General Availability of Customer Managed Keys for Power Apps', and another 'What's new' link. It also includes dates 'Posted on May 1' and a 'see more' link. A 'Reply' button is visible below.

At the bottom of the chat window, there is a 'Start a post' button.



Download Template





- Home
- Create
- Templates
- Learn
- My flows
- Approvals
- Solutions
- Process mining
- AI hub
- Desktop flow activity
- Connections
- Tables
- More

# Let's automate something. What should it do?

Get started by selecting an example or describing your own automation idea.

Every month, copy all files from OneDrive folder to another OneDrive folder

Copy all rows from an Excel file to another excel file with a click of a button

When a new item is created in SharePoint, send me an email

Describe in detail how you want your automation to work

I

**Generate**

## Learning for every level [See all](#)

Analyze process mining reports in Power Automate

Beginner 45 min

Analyze your business process with Microsoft...

Beginner 43 min

Register for free 1-day automation workshop

Beginner 8 hr

Au Rol

Int

Flows > **Get a weekly digest of the new Power Automate and Power App blog posts**

**Details** [Edit](#)

---

<p><b>Flow</b> Get a weekly digest of the new Power Automate and Power App blog posts</p> <p><b>Description</b> Each week, get a Teams post with a list of all of the Power App + Power Automate blog posts in that week.</p> <p><b>Primary owner</b> System Administrator</p>	<p><b>Status</b> On</p> <p><b>Created</b> Apr 29, 01:57 PM</p> <p><b>Modified</b> Apr 29, 01:58 PM</p> <p><b>Type</b> Scheduled</p> <p><b>Plan</b> This flow runs on owner's plan</p>
--	---

**Connections** [Edit](#)

---

- RSS RSS
- Microsoft Teams admin@CRM011668.on

**Co-owners** [Edit](#)

---

- System Administrator

**Process mining (preview)** [Improve your flow](#)

---

Average run duration

00:00:06

**28-day run history** [Edit columns](#) [All runs](#)

Start	Duration	Status
Ask a chatbot May 14, 10:52 PM (2 min ago)	00:00:03	Succeeded

**Associated apps and flows** [Edit](#)

---



productivity, enhancing collaboration, and reducing errors when building apps.

[Microsoft Power Apps named a No-Code/Low-Code Market Leader by Omdia](#)

Posted on April 25

We're excited to announce that Microsoft has been named a Leader in the Omdia Universe: No-Code, Low-Code  
[see more](#)

SA Reply

Last read



System Administrator via Workflows Monday 12:58 PM

New

### Check out the latest news on Microsoft Power Apps

[What's new: Power Apps April 2024 Feature Update](#)

Posted on May 1

Welcome to the Power Apps monthly feature update! We will use this blog to share a summary of product, community, and learning updates from throughout the month so you can access it in one easy place. This month we've got a great set of updates for Makers, Admins, and users across Power Apps, Dataverse and Copilot.

[Announcing General Availability of Customer Managed Keys for Power Apps](#)

Posted on May 1

[see more](#)

SA Reply

Start a post



# Download this template here!



# What are you thinking?

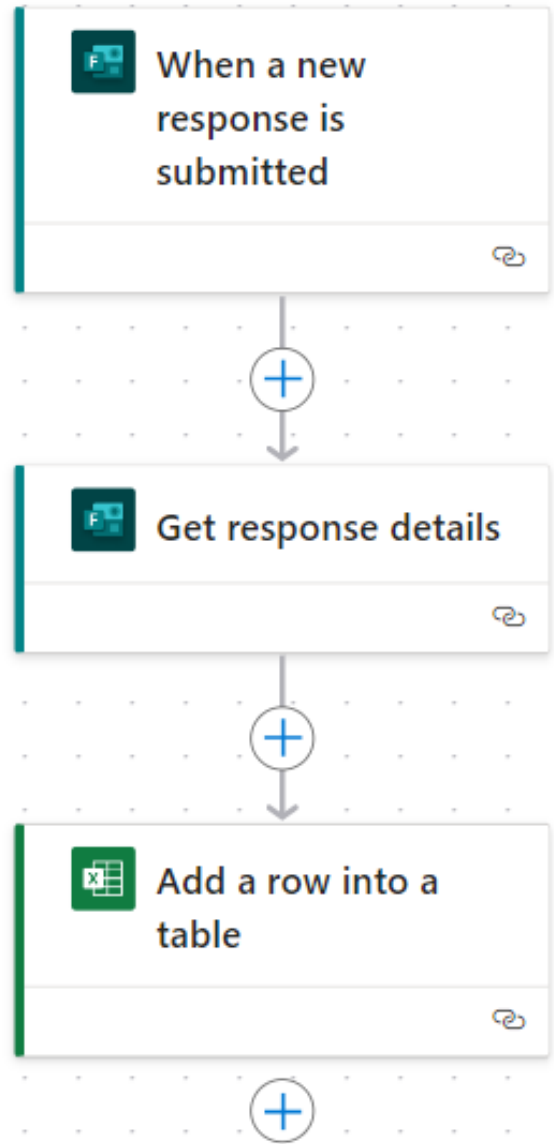
💡 **Where might automation help you in your day?**

💡 **How have you automated something for yourself in the past?**

- Scan the QR code to submit your idea.
- Something that will reduce redundancy in your day, week, or month.
- We will discuss responses together and might choose one to walk through the automation.



# Add MS Forms Result to Excel



# Add MS Forms Result to Excel

## Automate your idea

Submit an idea for automating your work day and if chosen, we'll work to build it out during the session.

1. Tell us your name, so we can give you credit.

Enter your answer

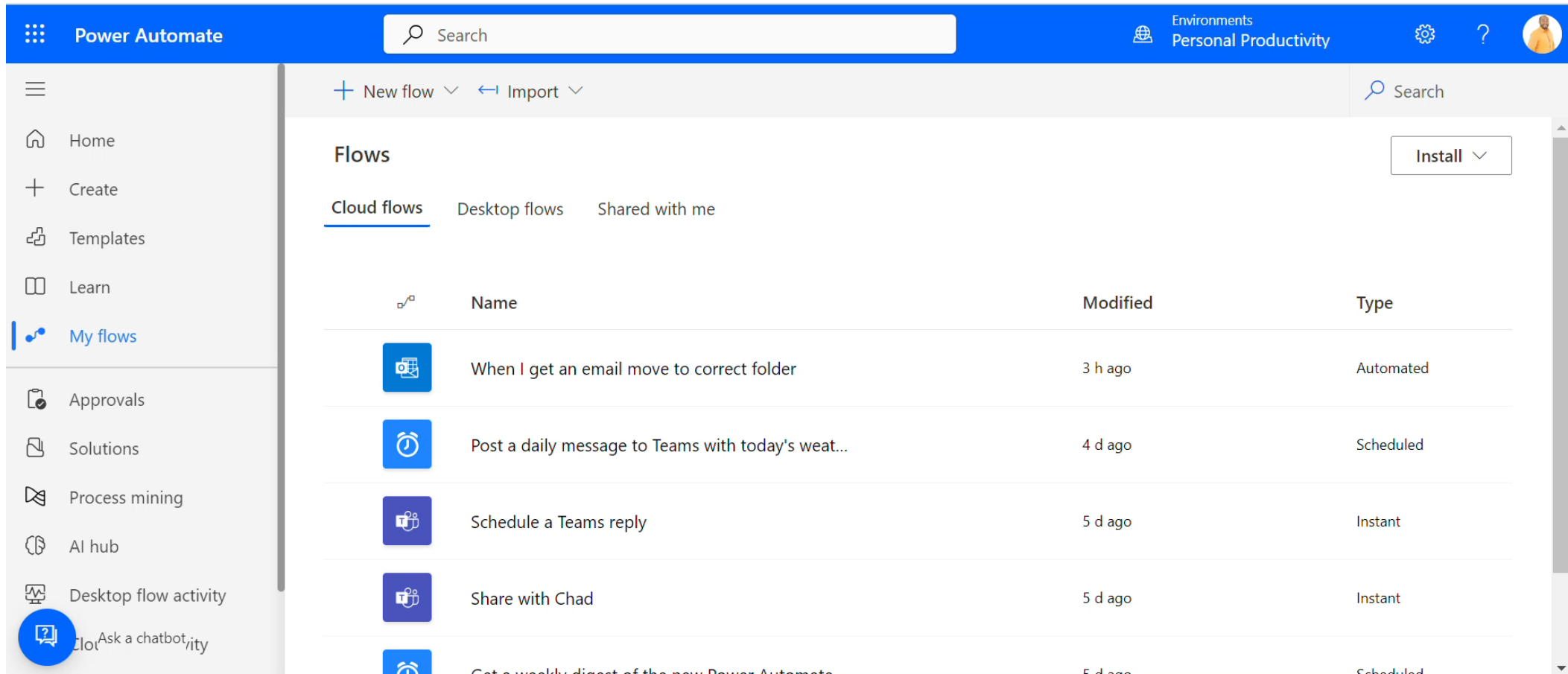


2. Tell us about your idea for automation.

Enter your answer



# Add MS Forms Result to Excel



The screenshot shows the Power Automate web interface. At the top, there is a blue header with the 'Power Automate' logo, a search bar, and user information including 'Environments Personal Productivity'. Below the header is a left-hand navigation menu with options like Home, Create, Templates, Learn, My flows, Approvals, Solutions, Process mining, AI hub, Desktop flow activity, and Ask a chatbot. The main area displays a list of flows under the 'Cloud flows' tab. The list has columns for Name, Modified, and Type. An 'Install' button is visible in the top right of the flow list area.

Name	Modified	Type
When I get an email move to correct folder	3 h ago	Automated
Post a daily message to Teams with today's weat...	4 d ago	Scheduled
Schedule a Teams reply	5 d ago	Instant
Share with Chad	5 d ago	Instant
Get a weekly digest of the new Power Automate	5 d ago	Scheduled



# Best Practices & Bonus Tips

- Name consistently
- Anticipate errors
- Document via notes on actions
- Description – let Copilot give that to you
- Monitor flows
- Work with IT if you can. Solutions are preferred.
- Learn from others



2023 Power Automate  
Coding Standards

MATTHEW DEVANEY

LAST UPDATED: 2023-09-09





# What's it cost me?

- Included with Microsoft 365
- Included with Dynamics 365
- Windows 11 for Power Automate Desktop
- Licensing needed for connecting desktop flows to cloud flows
  - Attended vs. Unattended

 Microsoft Power Platform

## Power Platform Licensing Guide

*\*See Power Platform Licensing Guide*





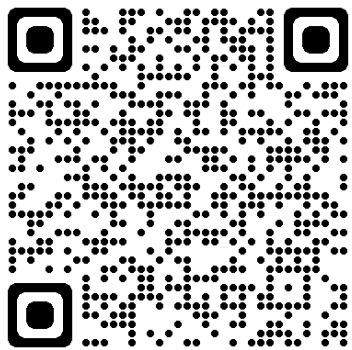
**Now Get Started!**



# Thank You for attending

## Herb

- Blue Summit Technologies
- [hjohnson@bluesummingtech.com](mailto:hjohnson@bluesummingtech.com)
- <https://www.linkedin.com/in/herb-johnson-d365/>



## Chad

- Stoneridge Software
- [Chad.Althaus@stoneridgesoftware.com](mailto:Chad.Althaus@stoneridgesoftware.com)
- <https://www.linkedin.com/in/chadalhaus/>

