An intro to:

Power Automate

Part of our Digital
Foundations programme

superhighways
harnessing **technology** for **community** benefit

What we'll be covering today

- ✓ What is Power Automate
- ✓ How does it work
- ✓ Some examples and demos
- ✓ Identifying your automation
- ✓ Mapping the logic
- ✓ Building your Power Automate

What is PowerAutomate?

Power Automate

✓Part of the Microsoft 365 suite

✓Enables creation of automated data sharing & workflows between different applications and services

✓'Connectors' serve as bridges between different systems either within M365 or with external applications

✓There are a range of templates to help you get started

How does an automated workflow work?

Automations have 3 basic steps (which might be repeated if it's a complicated flow):

✓ Step 1: Choose a source & a destination

✓ Step 2: Set up a trigger

✓ Step 3: Define an action

Demo 1

Alerting the team to a new Form response via a shared Outlook inbox

https://youtu.be/CyCKF6C1NRA

Demo 2

Saving email attachments in Sharepoint folders two streamline the invoice payment process
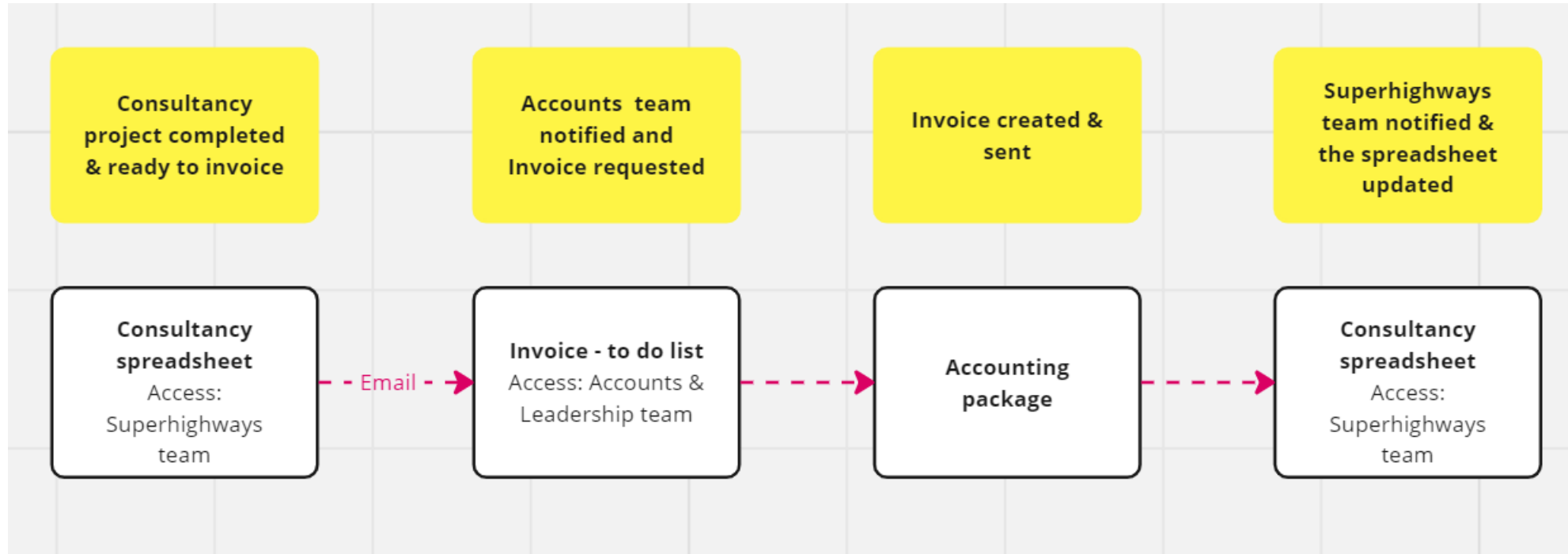
https://youtu.be/q3mzpTX0a70

Demo 3

Automating spreadsheet management and communications between two teams

Mapping the problem

Consultancy project completed & ready to invoice

Accounts team notified and Invoice requested

Invoice created & sent

Superhighways team notified & the spreadsheet updated

Consultancy spreadsheet
Access: Superhighways team

- Email →

Invoice - to do list
Access: Accounts & Leadership team

Accounting package

Consultancy spreadsheet
Access: Superhighways team

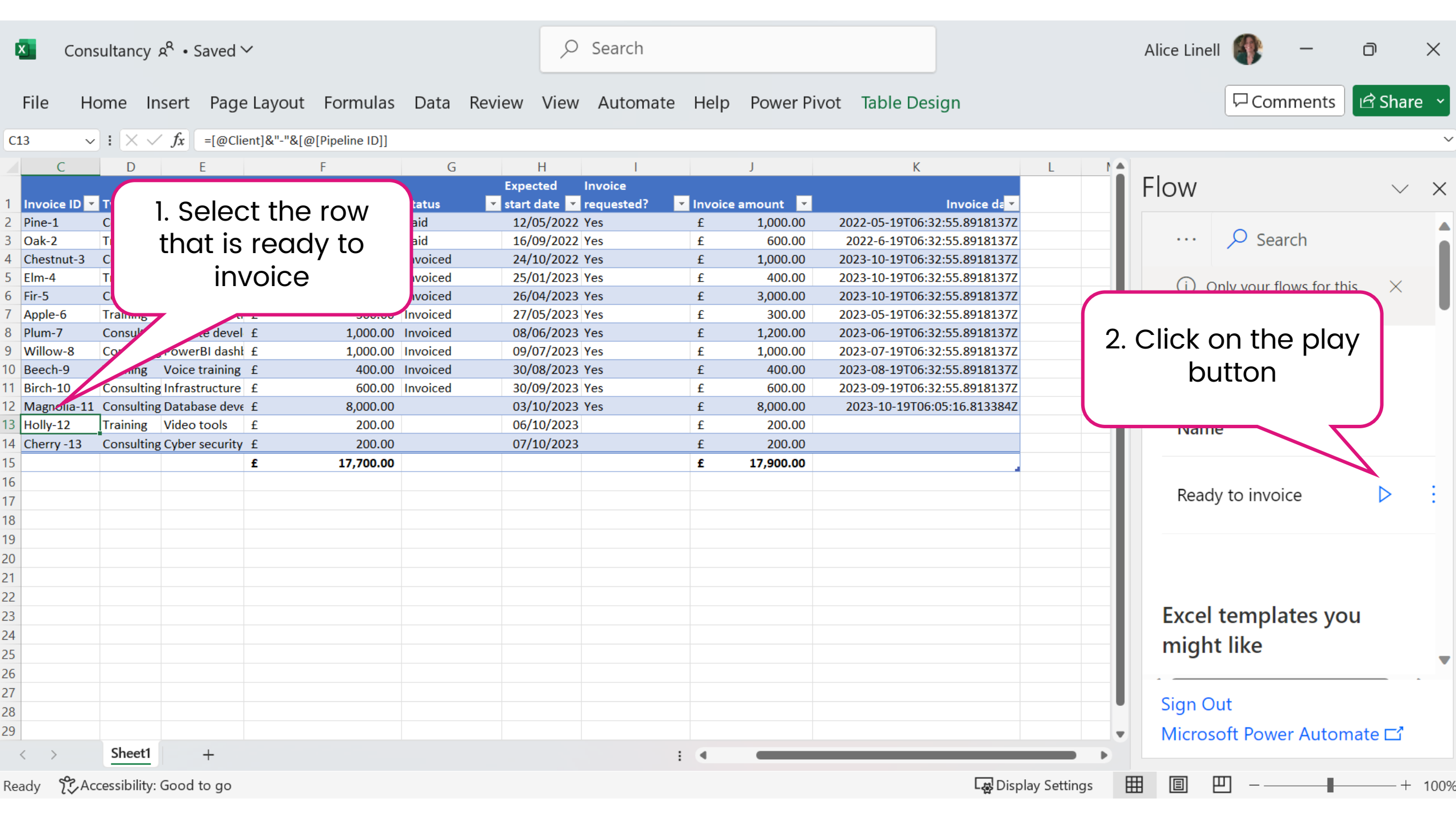# Creating the flows

Flows

Cloud flows   Desktop flows   Shared with me

	Name	Modified	Type
	Ready to invoice	9 sec ago	Instant
	Invoice done	3 min ago	Automated

Consultancy • Saved

Alice Linell

File   Home   Insert   Page Layout   Formulas   Data   Review   View   Automate   Help   Power Pivot   Table Design

C13   =[@Client]&"-"&[@[Pipeline ID]]

	Invoice ID	T		Status	Expected start date	Invoice requested?	Invoice amount		Invoice da
2	Pine-1	C		aid	12/05/2022	Yes	£	1,000.00	2022-05-19T06:32:55.8918137Z
3	Oak-2	T		aid	16/09/2022	Yes	£	600.00	2022-6-19T06:32:55.8918137Z
4	Chestnut-3	C		voiced	24/10/2022	Yes	£	1,000.00	2023-10-19T06:32:55.8918137Z
5	Elm-4	T		voiced	25/01/2023	Yes	£	400.00	2023-10-19T06:32:55.8918137Z
6	Fir-5	C		voiced	26/04/2023	Yes	£	3,000.00	2023-10-19T06:32:55.8918137Z
7	Apple-6	Training		Invoiced	27/05/2023	Yes	£	300.00	2023-05-19T06:32:55.8918137Z
8	Plum-7	Consul	e devel	£	1,000.00	Invoiced	08/06/2023	Yes	£	1,200.00	2023-06-19T06:32:55.8918137Z
9	Willow-8	Co	owerBI dashl	£	1,000.00	Invoiced	09/07/2023	Yes	£	1,000.00	2023-07-19T06:32:55.8918137Z
10	Beech-9	ing	Voice training	£	400.00	Invoiced	30/08/2023	Yes	£	400.00	2023-08-19T06:32:55.8918137Z
11	Birch-10	Consulting	Infrastructure	£	600.00	Invoiced	30/09/2023	Yes	£	600.00	2023-09-19T06:32:55.8918137Z
12	Magnolia-11	Consulting	Database deve	£	8,000.00		03/10/2023	Yes	£	8,000.00	2023-10-19T06:05:16.813384Z
13	Holly-12	Training	Video tools	£	200.00		06/10/2023		£	200.00	
14	Cherry -13	Consulting	Cyber security	£	200.00		07/10/2023		£	200.00	
15				£	17,700.00			£	17,900.00	

1. Select the row that is ready to invoice

2. Click on the play button

Flow

Search

Only your flows for this

Name

Ready to invoice ▷

Excel templates you might like

Sign Out

Microsoft Power Automate

Sheet1

Ready   Accessibility: Good to go   Display Settings   100%

Linking the steps to your data

Notifying the team

When the invoice task is completed

Update the Consultancy spreadsheet

Notify the team the invoice is created
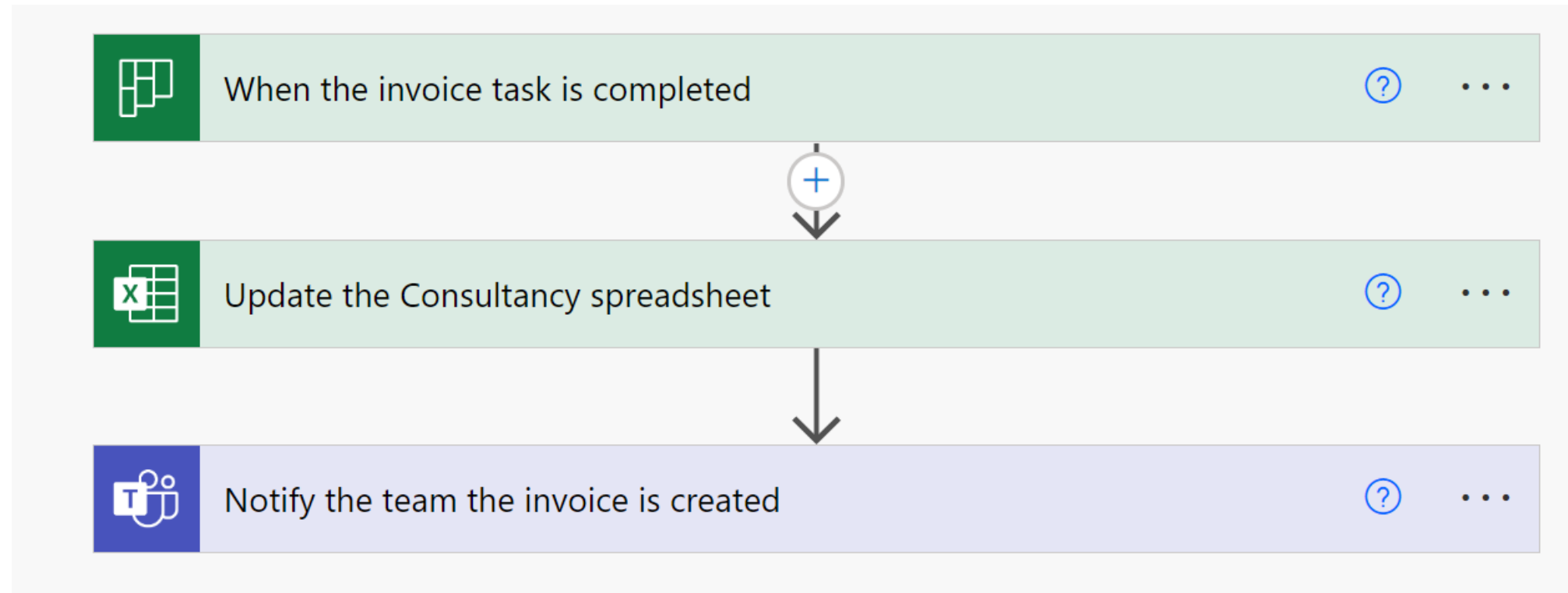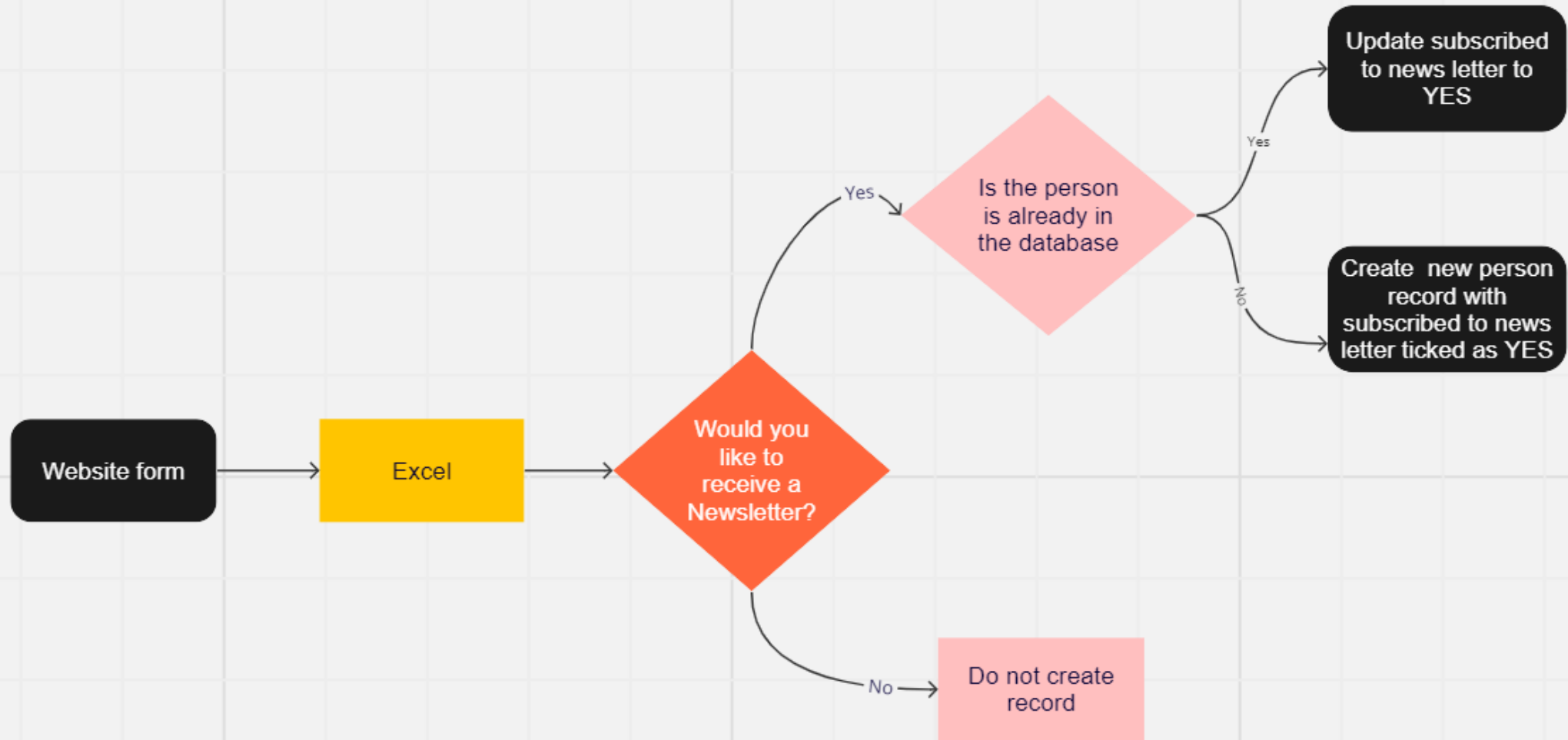
Considerations to take?

✓Identify where your files are – if it's a Teams file the

✓Linking Excel will require you to have your data in Tables.

What automations would you like to set up?

Visualising the problem

Power Automate templates

Automating automations!

Let's automate something. What should it do?

Describe in detail how you want your automation to work

Generate

This AI-powered feature is in preview. See terms

Alternative integration tools

Solution	When to use it	Cost
Power Automate	Brilliant when working within the Microsoft suite of products but harder to link external solutions	Free with MS 365 licence (There is a premium version but everything we looked at today is in the free one)
Zapier	Free for 3 single step automations. Easy to use & allows you to integrate with thousands of products.	£200 for the paid version per year or £170 with a charity discount
Make	Slightly more complex to use, but the plus of this is greater capability to do branching flows & a lower price tag.	£100 per year

For more info check out our Integration & Automation resource on our Datawise London site

Digital Foundations programme

There are many ways we can help small community organisations make sound choices about the digital tools and technology they use.

Communications made easy

Raise your profile using digital tools to engage supporters and fund your future

Read more »

Digital basics

Work and collaborate online using free and affordable digital tools and technology

Read more »

Websites for communities

Put your website at the heart of your charity or community organisation's story

Read more »

Find out more about the Digital Foundations programme

About Superhighways

Providing tech support to small local charities in London for over 20 years

- ✓ Support
- ✓ Training
- ✓ Consultancy
- ✓ Digital inclusion
- ✓ Datawise London
- ✓ See all services

- ✓ E-news sign up

Thank you for listening

KATE WHITE

ALICE LINELL

info@superhighways.org.uk

@SuperhighwaysUK

#DigitalFoundations