Webinar: How To Harness Microsoft Power Automate To Digitise Your Paper Processes

7th May 2020

Thank you for joining – we'll be starting soon

the I.T. team™
Maintaining the health of your I.T. system

IN PARTNERSHIP WITH
techsoup

WHAT WE WILL COVER TODAY?

- Why should you consider Automating and going Paperless?

- Outline of Power Automate and how it works

- Process that you can automate

- Several Power Automate Examples that we use

- Other tools to consider that can assist automation or going paperless

WHAT DO WE HOPE YOU TAKE AWAY?

- Understand Power Automate (and be able to explain it to a colleague)

- Take useful/practical examples away to your organisations

- Be confident that you can implement or make progress yourself.

- Start using Power Automate soon!

About the I.T. team

- Formed in 2011

- Office 365 since its inception

- Managed Services/IT support

- A wide range of IT services

- Major NFP base of customers

- Providing IT services to NZ & Australian organisations

the I.T. team™

Maintaining the health of your I.T. system

WHY CONSIDER AUTOMATION/PAPERLESS?

- Obviously, the environmental side

- Improve and accelerate processes

- Implementing processes easily

- Allow your organisation to function (in a lockdown scenario!)

- Keep tight records (digitally) of all activity

GO PAPERLESS

PROCESSES THAT ARE COMMONLY PAPER BASED

- Time Sheets
- Purchase requests
- Expense Claims
- Credit Card requests
- H&S Incidents
- Travel Requests
- New Client Forms
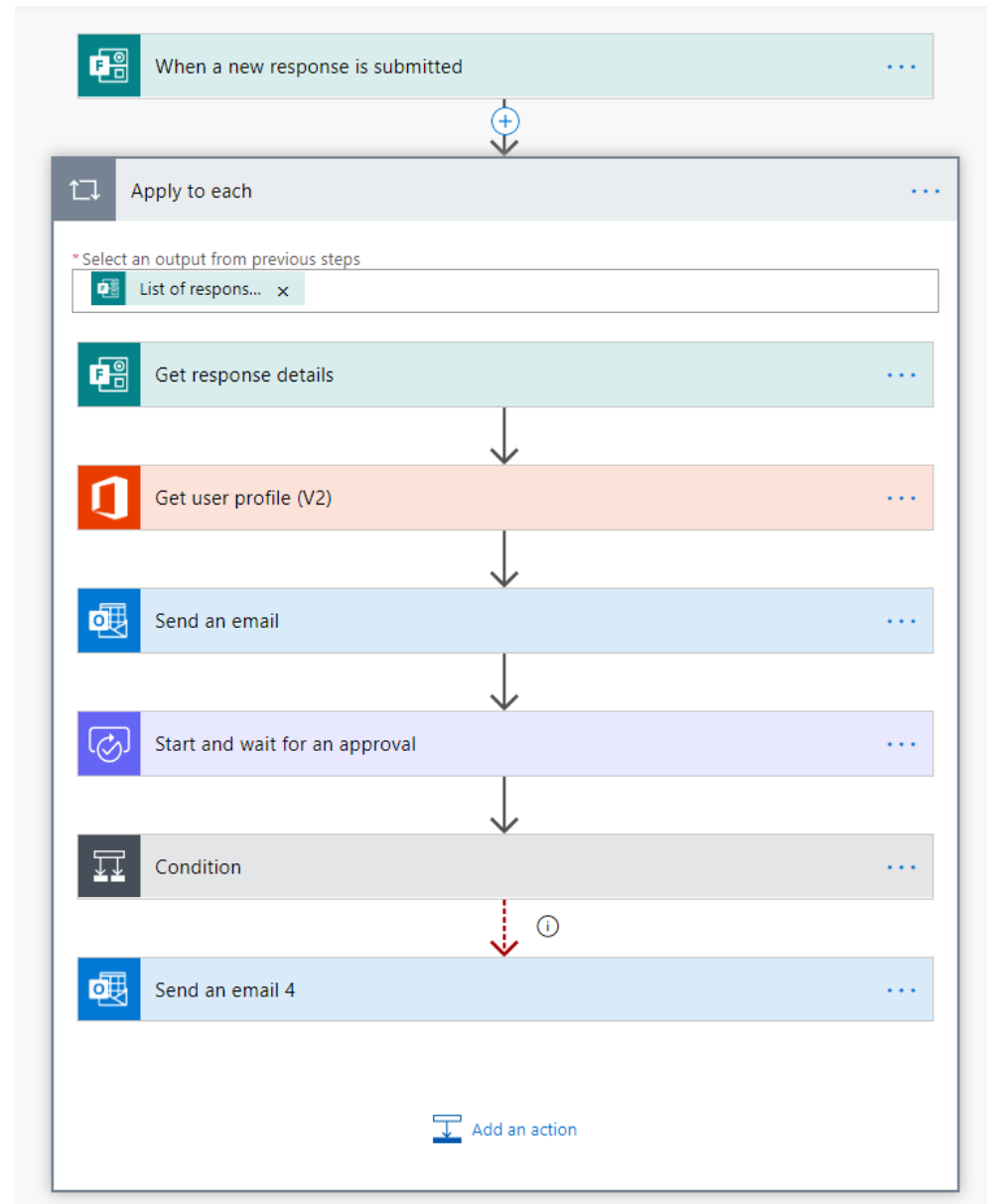- Staff Induction
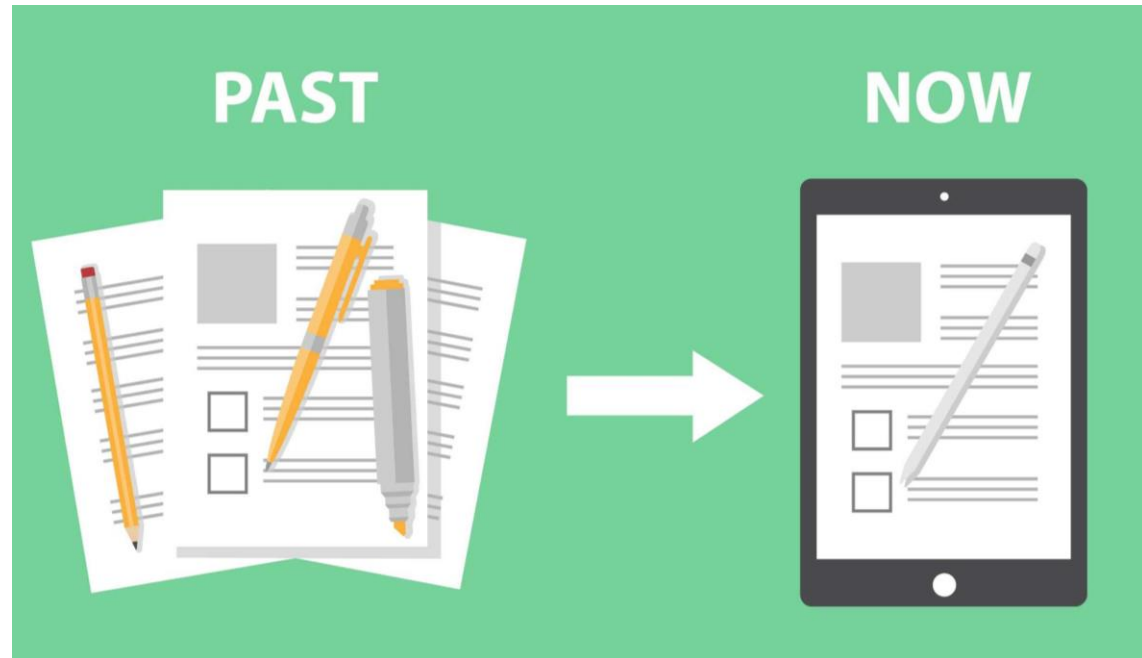
WHAT IS POWER AUTOMATE?

POWER AUTOMATE INTRO

WHAT IS POWER AUTOMATE?

- Microsoft Product/Service (part of Office 365)
- Part of the Microsoft Power Platform
- Formerly called Microsoft Flow
- For organisations and individuals
- Low or no code
- Many templates available

WHAT DOES A FLOW LOOK LIKE?

HOW DOES A FLOW START?

- Triggers
  - Email received
  - Form filled out
  - Document uploaded
  - Tweet mention
- Buttons
- Schedules

MICROSOFT FORMS

DEMOS

INTERNAL PURCHASES - OVERVIEW

What is it?

- A process to request approval for purchasing something for internal use, and/or on a company credit card

How does it work?

- Details gathered in a Microsoft form
- Approval sent to nominated person
- Details sent to Accounts Team on approval

INTERNAL PURCHASES - OVERVIEW

What did we previously do?

- Paper forms, filled out by hand and then put on manager's desk
- Often got lost, buried, or forgotten!
- Not easy for queries to be shared
- Staff would circumvent the process
- Forms weren't always filed, defeating the validity of the approval

Search

Change View ▾ | View Settings | Reset View

Current View

☑ Show as Conversations
🔲 Conversation Settings ▾

Messages

Show Focused Inbox

Focused Inbox

Message Preview ▾

Date (Conversations) | From | To
Categories | Flag Status | Flag: Start Date

↑↓ Reverse Sort
Add Columns
+ Expand/Collapse ▾

Arrangement

Use Tighter Spacing | Folder Pane ▾ | Reading Pane ▾ | To-Do Bar ▾ | People Pane ▾

Layout

People Pane

Reminders Window | Open in New Window | Close All Items

Window

Favorites

Inbox - Lucy@theitteam.co.nz	2
Inbox - IT Team - Company Forms	95
Admin	11
Enquiries	9
Inbox - 365	132
Inbox - Techsupport Voicemail	[4]
Job Applications	
Customer Thermometer	74
Brightgauge Reporting	64
Techsupport	57
Technotify	11
Drafts	[69]

Lucy@theitteam.co.nz

COVID-19	
SBA	
Service Delivery	1
Stomp Group	
Blis	
Leading Edge	7
Feldspar	
FSM	1
Onboardings	2
RCD	
To Sort	
Archive	165
Inbox	2
Tom	
> Resourcing	
Christmas Leave	
Smash Sessions	
Ticket Analysis	
Webinar Recordings	

All | Unread | By Date ▾

Today

IT Team - Company Fo...
Internal Purchase Request Dec... — 7:42 AM

Microsoft Flow
Internal Purchase Requiring A... — 7:42 AM

IT Team - Company Fo...
Purchase Order/Credit Card R... — 7:41 AM

[Draft] Connon Daly
Polls? — 12:30 AM

Yesterday

MSPRP Surveys
Microsoft Partner Research Pa... — Wed 11:33 PM

Lucy Rees
Webinar notes — Wed 9:40 PM

Sue Wilkinson
end of day catch up before C... — Wed 4:03 PM

Sue Wilkinson
Ops Daily Stand Up — Wed 4:03 PM

Rae Wakefield-Jones
Meeting follow up — Wed 3:38 PM

Kieran Gämperle
Kieran Gämperle shared "ha... — Wed 3:20 PM

Lucy Rees
Egor and Andy notes — Wed 2:25 PM

Ben Hewitt
Item from Engineers - Backup... — Wed 11:28 AM

Annal Chandra (PCTro...
Update on AT accounts — Wed 11:14 AM

Mark Taylor; Ben Hewi...
Stalled email migration - next ... — Wed 8:27 AM

Monday

Microsoft Partner Research Panel – Office 365 Partner Landscape

Reply | Reply All | Forward | ...

MS — **MSPRP Surveys** <msprp@msprp.com>
To ⬤ Lucy Rees
Wed 22/04/2020 11:33 PM

Microsoft Partner Network

Dear Partner,

We have an interesting new study to help Microsoft gain a greater understanding of the current landscape for partners who sell Office 365. We would love to include input from your organization.

Follow this link to the Survey:
Take the Survey

The questions within the survey will be customized to be relevant to your responses. For most, it will take about **11 minutes** to complete, though time may be shorter or longer depending on your unique responses.

We appreciate your continuing involvement in the Microsoft Partner Research Panel (MSPRP). Your time and thoughtful feedback are very much appreciated!

Sincerely,

Microsoft Partner Research Panel Team

MDC Research and the Microsoft Partner Research Panel recognize the widespread disruptions COVID-19 (Coronavirus) is creating for individuals and businesses; we have adapted many of our practices to protect the health of research participants, employees, and community. Fortunately, online research is a safe and effective way for people to continue to help shape decisions made by a wide range of companies, as well as maintain stability in business practices wherever possible. If this invitation is unwanted due to current circumstances, you may opt out of this specific study by clicking here. We wish you and everyone in your organization all the best.

If you experience any problems accessing the above website, please email msprp@msprp.com.

Unsubscribe | Privacy Statement
Microsoft Corporation
One Microsoft Way
Redmond, WA 98052

◀ April 2020 ▶

SU	MO	TU	WE	TH	FR	SA
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

Today

7:38 AM	Calendar blocked from Microsoft Flow
9:00 AM	Procurement Standup Workshop
9:15 AM	Service Desk Standup
9:30 AM	Weekly Level 2 Check in — The Cool Row
9:45 AM	Ops Daily Stand Up — Microsoft Teams Meeting
11:00 AM	Fortnightly Check Ins — Victoria
1:00 PM	Power Automate Webinar
3:00 PM	Alex Weekly Projects Catch up — Microsoft Teams Meeting
3:00 PM	end of day catch up before Connon/Su...
3:30 PM	Eraj Projects Catch up — Desk

Tomorrow

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3:00 PM	Friday Catch up + Bake Off! — Microsoft Teams Meeting

Monday

All day	Matt's Anniversary

File   Home   Send / Receive   Folder   View   Help

Change View | View Settings | Reset View | ☑ Show as Conversations | ⚙ Conversation Settings ⌄ | Show Focused Inbox | Message Preview ⌄ | 📅 Date (Conversations) | 🔲 Categories | 📧 From | 👤 To | 🚩 Flag Status | 🚩 Flag: Start Date | ↑↓ Reverse Sort | 📋 Add Columns | +− Expand/Collapse ⌄ | Use Tighter Spacing | Folder Pane ⌄ | Reading Pane ⌄ | To-Do Bar ⌄ | People Pane ⌄ | Reminders Window | Open in New Window | Close All Items

Current View | Messages | Focused Inbox | Arrangement | Layout | People Pane | Window

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SBA
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Ben Hewitt   🚩
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Annal Chandra (PCTro...   🚩

Internal Purchase Requiring Approval

MF   **Microsoft Flow <maccount@microsoft.com>**
To ⊙ Lucy Rees

↩ Reply | ↩ Reply All | → Forward | ⋯

Thu 23/04/2020 7:49 AM

ⓘ Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

⟳ **Approvals** | Powered by Microsoft Flow

Rejected

Date Submitted: Wednesday, April 22, 2020 7:49 PM GMT

Comments: We already have some on order. They should arrive tomorrow.

Get the Flow app to receive push notifications and grant approvals from anywhere.
Learn more
This message was created by an automated workflow in Microsoft Flow. Do not reply.
Microsoft Corporation 2020.

◄ | April 2020 | ►

SU MO TU WE TH FR SA
29 30 31 1   2   3   4
5   6   7   8   9   10 11
12 13 14 15 16 17 18
19 20 21 22 23 24 25
26 27 28 29 30 1   2
3   4   5   6   7   8   9

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Monday

All day   Matt's Anniversary

INTERNAL PURCHASES - WE USE THIS FOR

- Internal Purchases
- Credit Card Approvals
- Credit Approvals
- *Time off requests*

INTERNAL PURCHASES – SO FAR…

18 MONTHS

240 HOURS SAVED!!

IMPORTANT NOTIFICATIONS – OVERVIEW

What is it?

- Notifying our Health & Safety team when incidents, near misses, or potentially hazardous onsite work is taking place

How does it work?

- Details collected via a Microsoft form
- H&S Committee notified directly in Teams, alerted immediately

IMPORTANT NOTIFICATIONS – OVERVIEW

What did we used to do?

- Email
- Phone call
- Paper form
- No central record
- Items not consistently reported

https://theitteamnz.sharepoint.com/sites/HealthSafetyandWellness

the I.T. team   SharePoint

Search this site

People Hub   The Hub   COVID-19 Resources   Health, Safety, and Wellness   Level Up   Staff Profiles   Social Club

HS   **Health, Safety, and Wellness**
Public group

★ Following

👤 32 members

Home

+ New ⌄   ⚙ Page details

Published 3/29/2020   ✏ Edit

Conversations

Documents

Notebook

Pages

Site contents

Recycle bin

Edit

Welcome to the Health, Safety, and Wellness hub!

Here you'll find all sorts of information about how we manage this in the workplace, and also how to let us know if you have any Health, Safety, or Wellness related incidents.

Please see our COVID-19 Page for resources and information on how to stay healthy and safe!

I'd like to report an Incident

I've noticed a Hazard

I'd like to check our onsite guidelines

Vehicle Accident Insurance Form

Monthly Office Checklist
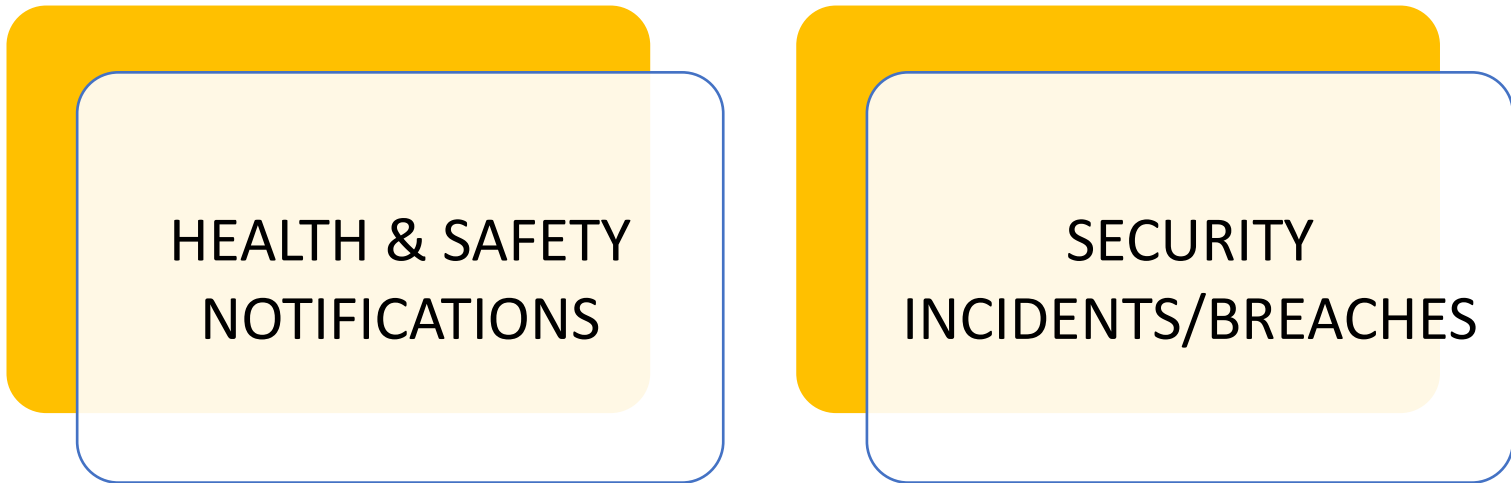
I need to complete an Onsite Work form

a Significant
Hazard ?

No ────→ look at ways to 'control' the hazard

Yes

Elimination

Get the mobile app

Teams

	Budget	...
	Monitoring	...
FS	Family Success Matters	...
PP	Project Power	...
LE	Leading Edge Project	...
T	Teams Adoption Project	...
OA	OCHT Azure Migration	...
CS	Child Steps Implementation	...
AC	Age Concern Auckland Projects	...
	Service Desk	...
	Health, Safety and Wellness Committee	...
	General	
	Onsite Work Notifications	
	Project Highway	...
	CCT Autopilot Project	...
	[External] Freshpork RDP 2019 Upgrade	...
HS	Health, Safety, and Wellness	...
	General	
	Recipes	

Join or create a team

Onsite Work Notifications

Posts   Files   Wiki   Onsite Work Notificati...

Org

IT Team - Company Forms   3/11 12:28 PM

A new Onsite Work checklist has been completed by forms@theitteam.co.nz.

Please review the details, and get in touch with them.

Lucy Rees   3/11 12:28 PM

FYI team, testing out the notification 🙂

↩ Reply

Lucy Rees   3/11 12:33 PM

Added a new tab at the top of this channel. Here's a link.

x	Excel

↩ Reply

IT Team - Company Forms   3/11 12:33 PM

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IT Team - Company Forms   3/11 12:39 PM

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Please review the details, and get in touch with them.

↩ Reply

IT Team - Company Forms   3/11 12:41 PM

A new Onsite Work checklist has been completed by Lucy@theitteam.co.nz.

Please review the details, and get in touch with them.

↩ Reply

Start a new conversation. Type @ to mention someone.

IMPORTANT NOTIFICATIONS - WE USE THIS FOR...

HEALTH & SAFETY NOTIFICATIONS

SECURITY INCIDENTS/BREACHES

DAILY STANDUP - OVERVIEW

What is it?

- Tool to gather information from our engineering team, on how their workload is looking for the day

How does it work?

- PowerApp on mobile

- Teams bot chat

- Information collated into a spreadsheet, with a daily report

Welcome to standup!

Are you ready to submit your entry for today?

Yes   Not yet

the I.T. team™

Maintaining the health of your I.T. system

Please enter your standup data below.

How busy are you for project work today?

3 - Some project work planned today ▼

How busy are you with BAU work today?

2 - A small amount of BAU ▼

Do you have any availability notes for the team today?

I'm booked onsite between 1pm-3pm, and will not be contactable during this time.

Submit

Search or type a command

Chat   Recent   Contacts

Flow   Chat   Flows   Approvals   About

Pinned

Child Steps Team — 2/20
User added

Leading Edge Team — 4/1
Gnana: I've spoken to Connon about escalating W...

Team FSM — 3/25
Pankaj: thnx

Age Con Akl Team — 4/1
Kieran: Was her phone working before, cause one...

HOBANZ Team — 12/6
Pankaj: sure - will send all the info on monday 😊

Helpdesk's Kitchen — 3/4
Chris: Sent an image

Gatekeepers Ltd. — 4/20
Shey: wrong chanel

Connon, Mark, and Sue — 4/9
You: sounds like it is not critical if it's a no, he can ...

Ops Daily Stand Up — 10:04 AM
Mark: %AppData%\Microsoft\Teams\Backgrou...

On Phones — 5:06 PM
Allan: NOTE FOR TOMORROW: i'll start at 9...

Recent

Flow — 5:40 PM
Sent a card

Allan Barclay — 5:07 PM
Forgot to say, but i'll start at 9 tomorrow/fr...

Nick Jongens — 4:42 PM
Can't say myself 😋

Connon Daly — 4:06 PM
one min call?

Chris Winter — 3:37 PM
lol good luck with that ive not had fun with thei...

Kieran Gämperle — 3:28 PM
You: hope it's a good break!

Ben Hewitt — 3:25 PM
You did - wasn't too bad through

Security - Mastermind Session — 3:13 PM
Nick: https://theitteamnz.sharepoint.com/:x:/s/...

Mastermind session - Monitoring! — 2:54 PM
Kieran: Sent an image

By using Flow, you agree to the Terms of use and Privacy statement.

8/27/18 5:08 PM
Learn more

Flow 8/27/18 5:08 PM
Here's what I can do:
• List flows for the default environment, command: *List flows*
• Run flows that don't have any inputs, or that run on a schedule, command: *Run flow index*
• Describe flows that don't have any inputs, or that run on a schedule, command: *Describe flow index*
By continuing, you agree to the Microsoft Privacy Statement and Microsoft Services Agreement.

8/27/18 5:08 PM
List flows

Flow 8/27/18 5:08 PM
I can run any flow that's:
• triggered on a schedule
• manually triggered with no inputs
Currently there are no Flows available. Please go to Flow Portal to create your flows or learn more from our Flow Blog

Yesterday

Flow Yesterday 5:40 PM Updated

Adaptive Cards │ Power Automate

{ "$schema": "http://adaptivecards.io/schemas/a...

Responded by   You

Lucy Rees (Lucy@theitteam.co.nz) used Power Automate to send this notification. Learn more

Type your questions here

Activity
Chat
Teams
Calendar
Calls
Files
Planner
OneNote
Apps
Help

File | Home | Insert | Formulas | Data | Review | View | Help | Open in Desktop App

	A	B	C	D	E
1	Standup Information	4/23/2020			
2					
3	Who?	Status	Projects	Support	Availability
4	Alex Vernel	Checked In	3 - Some project work planned today	1 - No BAU items planned	This morning I am on back to back Teams calls, available from 11am.
5	AJ Jackson	Not Checked In			
6	Egor Laptev	Not Checked In			
7	Eraj Sirisena	Checked In	3 - Some project work planned today	2 - A small amount of BAU	I'm booked on-site this afternoon.
8	Joe Fourie	Not Checked In			
9	Andy Davis	Checked In	2 - Some I could work on, but not much	3 - There are some BAU items I need to work on	I'm heading onsite at 2pm, so if you need anything please see me before then. Thanks!
10	Lucy Rees	Checked In	3 - Some project work planned today	2 - A small amount of BAU	I'm booked onsite between 1pm-3pm, and will not be contactable during this time.
11	Connon Daly	Not Checked In			

Summary | Sheet1 | Sheet2

Calculating...

Help Improve Office

DOCUMENT APPROVAL - OVERVIEW

What is it?

- Process to send documents for approval to those who need to sign off

- Useful for Boards, Sales proposals

How does it work?

- Built in to Sharepoint

- Specified item gets sent for approval

- Sign-off status column to track

https://m365b862811.sharepoint.com/sites/Marketing/Shared%20Documents/Forms/AllItems.aspx

InPrivate

SharePoint

Search this library

M

Marketing
Public group

⭐ Not following

👤 10 members

Home
Conversations
Documents
Shared with us
Notebook
Pages
Site contents
Recycle bin

Edit

+ New ⌄ ⬆ Upload ⌄ ✏ Quick edit 🔄 Sync Export to Excel PowerApps ⌄ Automate ⌄ ···

🔄 ☰ All Documents ⌄ 🔽 ⓘ ⛶

Documents

	Name ⌄	Modified ⌄	Modified By ⌄	Sign-off status ⌄	+ Add column ⌄
📄	Cross Cultural Marketing Campaigns.pptx	February 22	Megan Bowen		
📄	DG-1000 Product Overview.pptx	February 22	Alex Wilber		
📄	DG-2000 Product Overview.docx	February 22	Alex Wilber		
📄	DG-2000 Product Pitch.pptx	February 22	Alex Wilber		
📄	International Marketing Campaigns.docx	February 22	Megan Bowen		
📄	Marketing To Your Audience.docx	February 22	Alex Wilber		
📄	Q2 Web Marketing Plan.pptx	February 22	Megan Bowen		
📄	Q4 Marketing Analysis.xlsx	February 22	Lynne Robbins		

Return to classic SharePoint

BUTTONS – OVERVIEW

What are buttons?

- Part of the mobile app
- Click to start a flow
- Big focus on personal productivity

MAKING A SIMPLE BUTTON
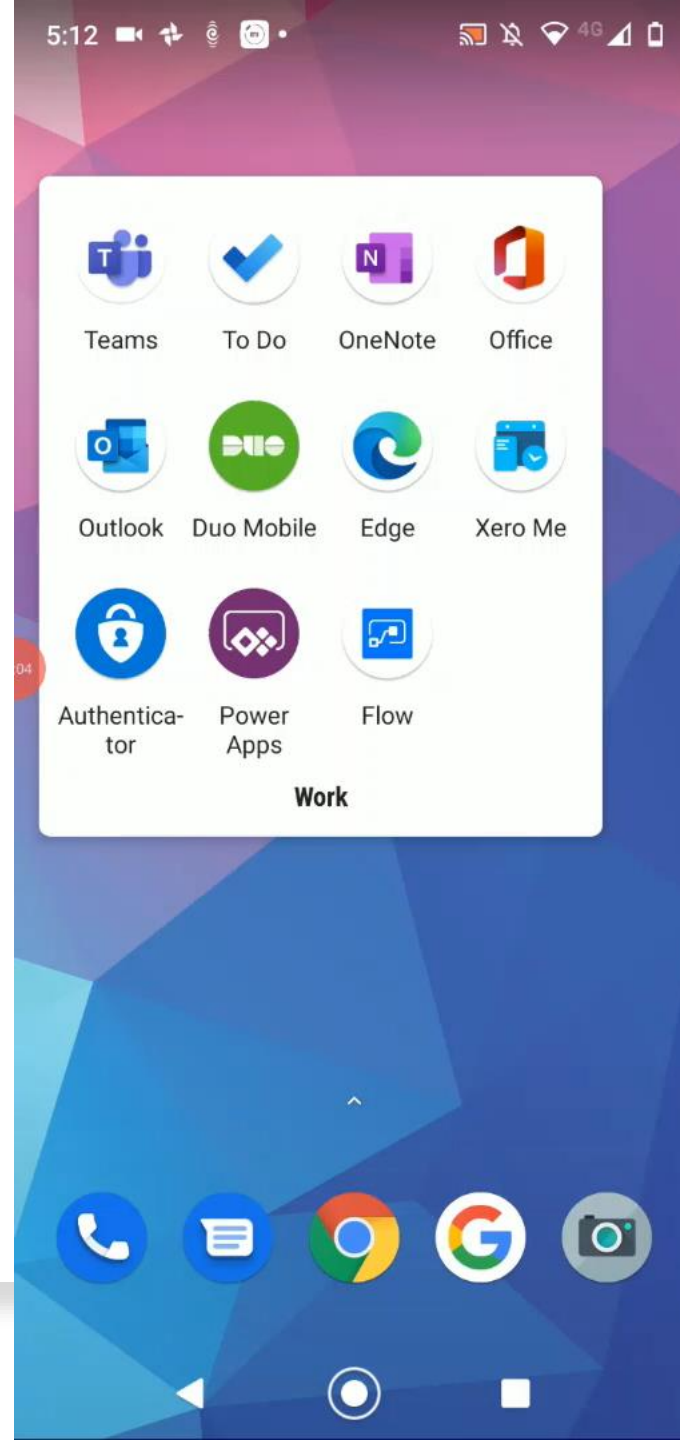
MAKING A SIMPLE BUTTON
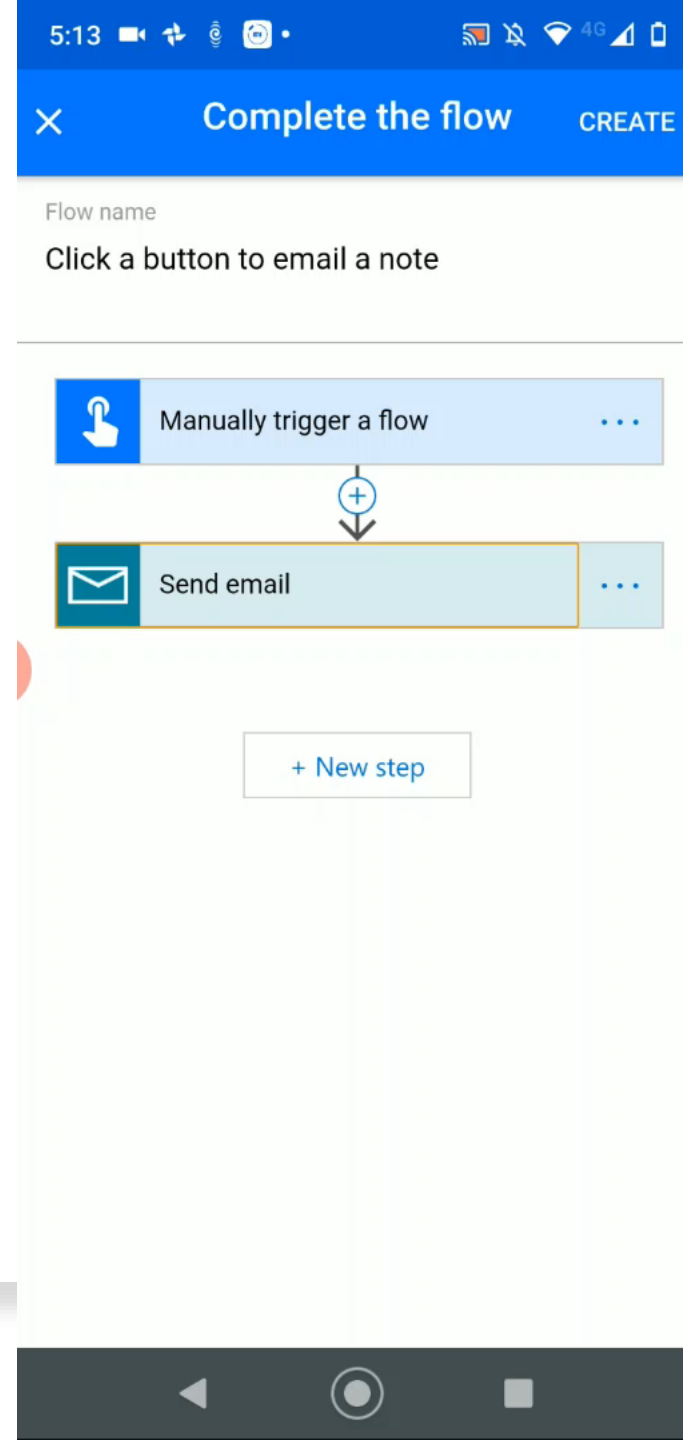
MAKING A SIMPLE BUTTON
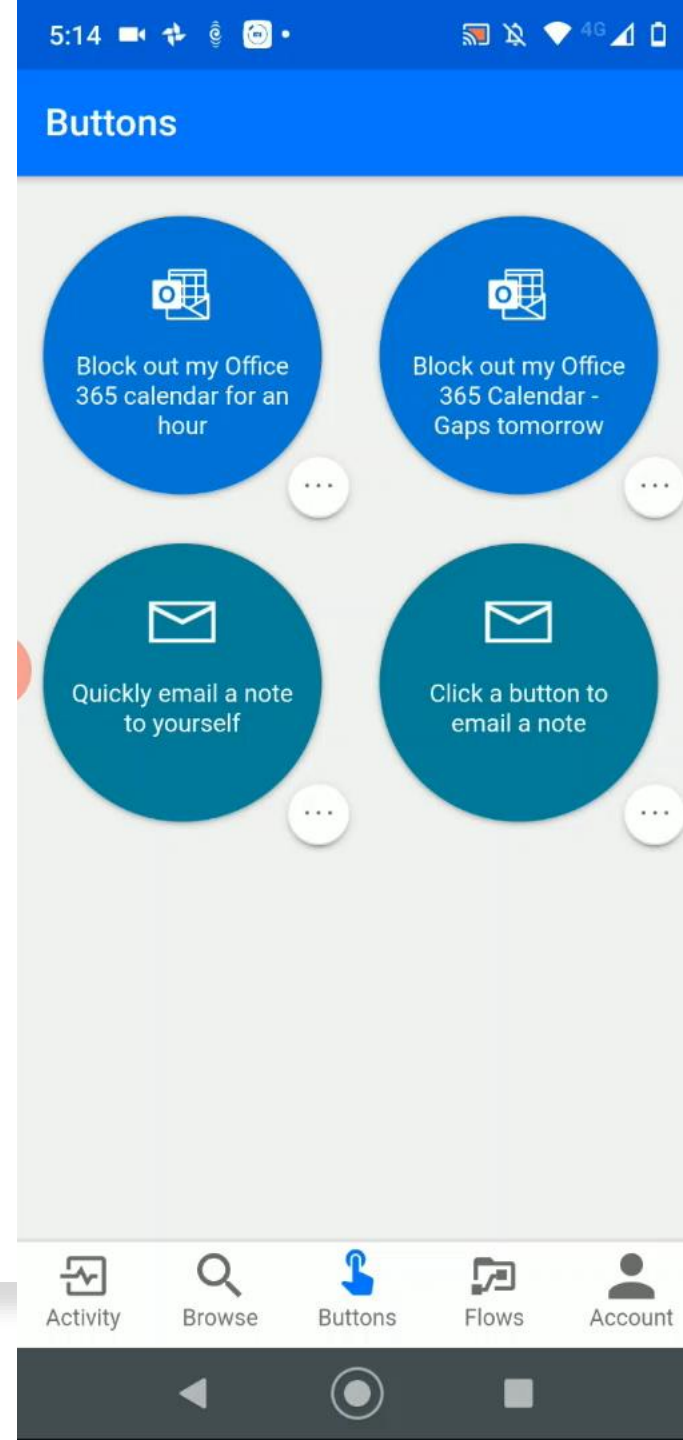
MAKING A SIMPLE BUTTON
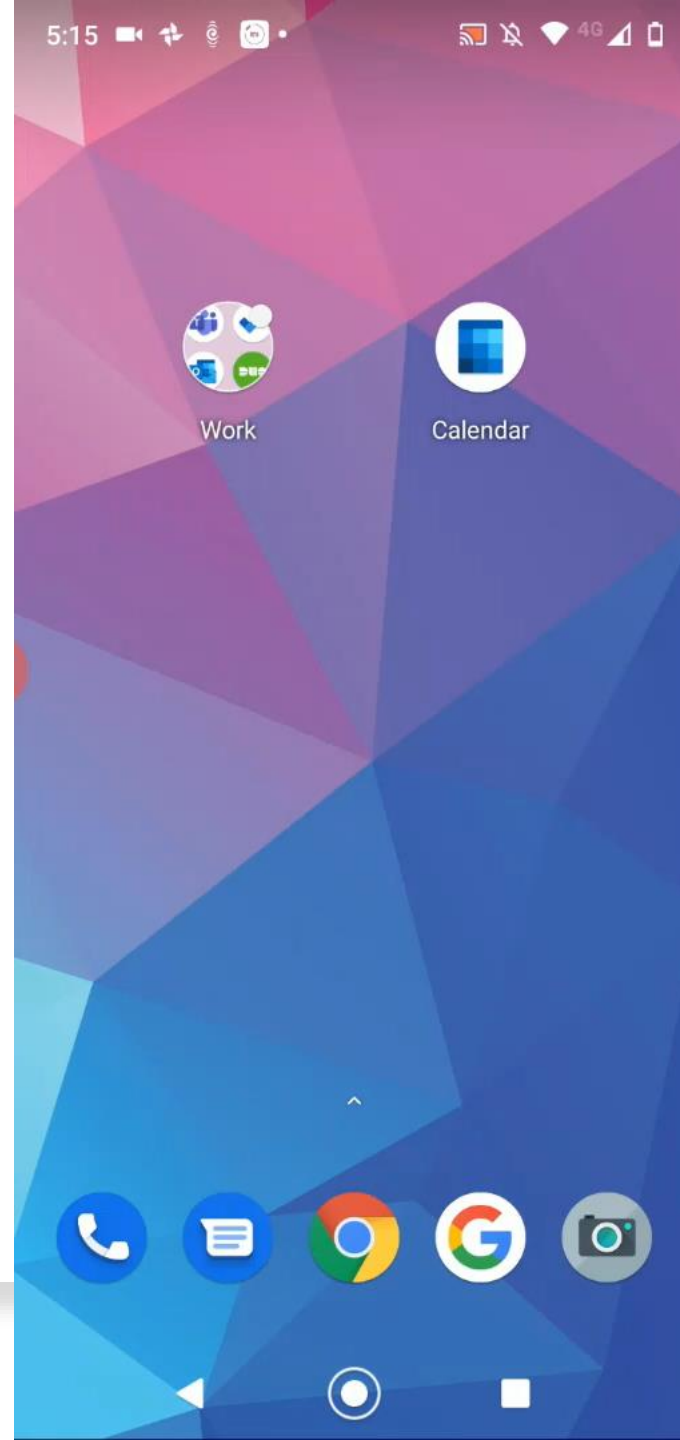
ADVANCED BUTTONS
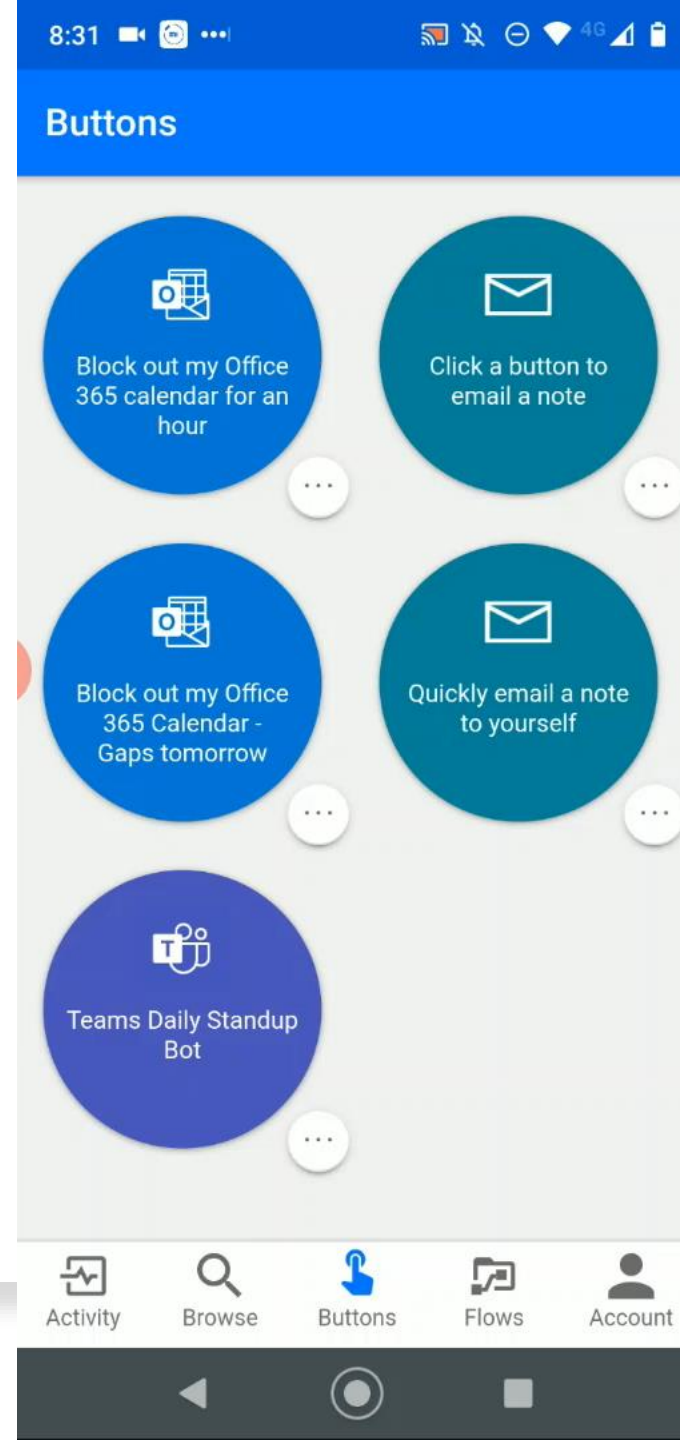
ADVANCED BUTTONS
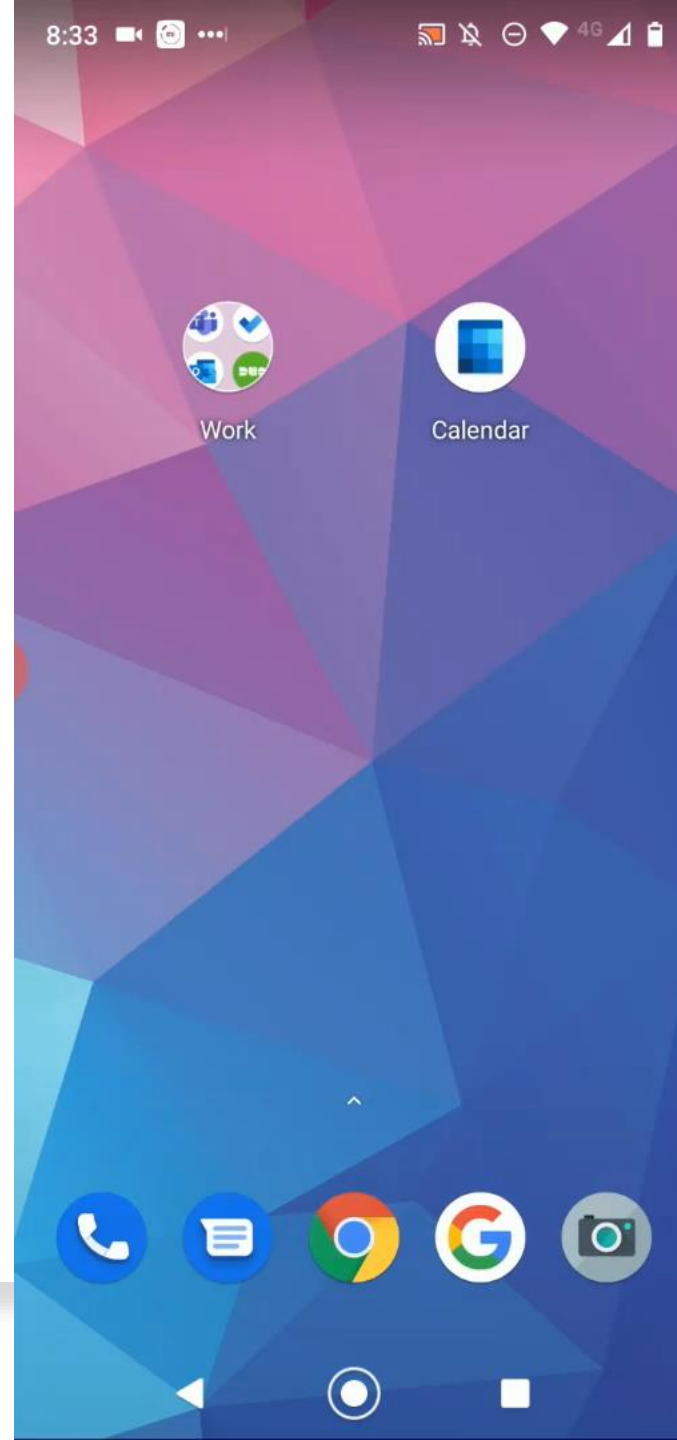
HOW TO START?

- Start with templates
- Get used to the backend
- Think of one process you're struggling with, and give it a go

- Keep track of your social media updates

- Automate some Social media activity

- Team quiz scoring

- Induction processes

- CRM integrations

WHAT ELSE?

PANDADOCS

- Proposed based system (used by us)
- Short and long quotes/proposals
- Allows to track activity
- Obtains sign off by customers

Send a new document

0
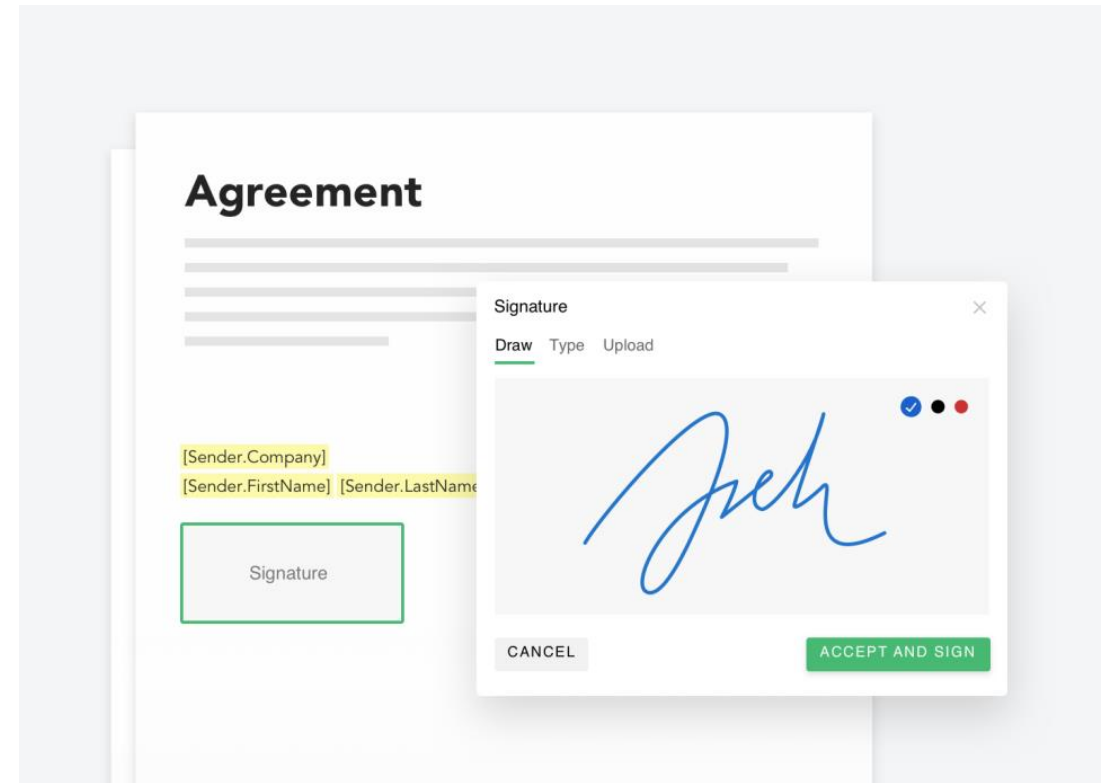
Dashboard

Inbox

Documents

Templates

Contacts

Settings

Regulations

and

Conditions of Employment

SAMPLE EMPLOYEE CONTRACT

2 simple steps to complete this document

FILL

Default

Recent updates

Post comments to this document...

POST

👁 **Eugene Nevgen** viewed this document in a few seconds

✈ **Eugene Nevgen** sent this document in a few seconds

✏ **Eugene Nevgen** edited this document in a few seconds

➕ **Eugene Nevgen** created this document a few seconds ago

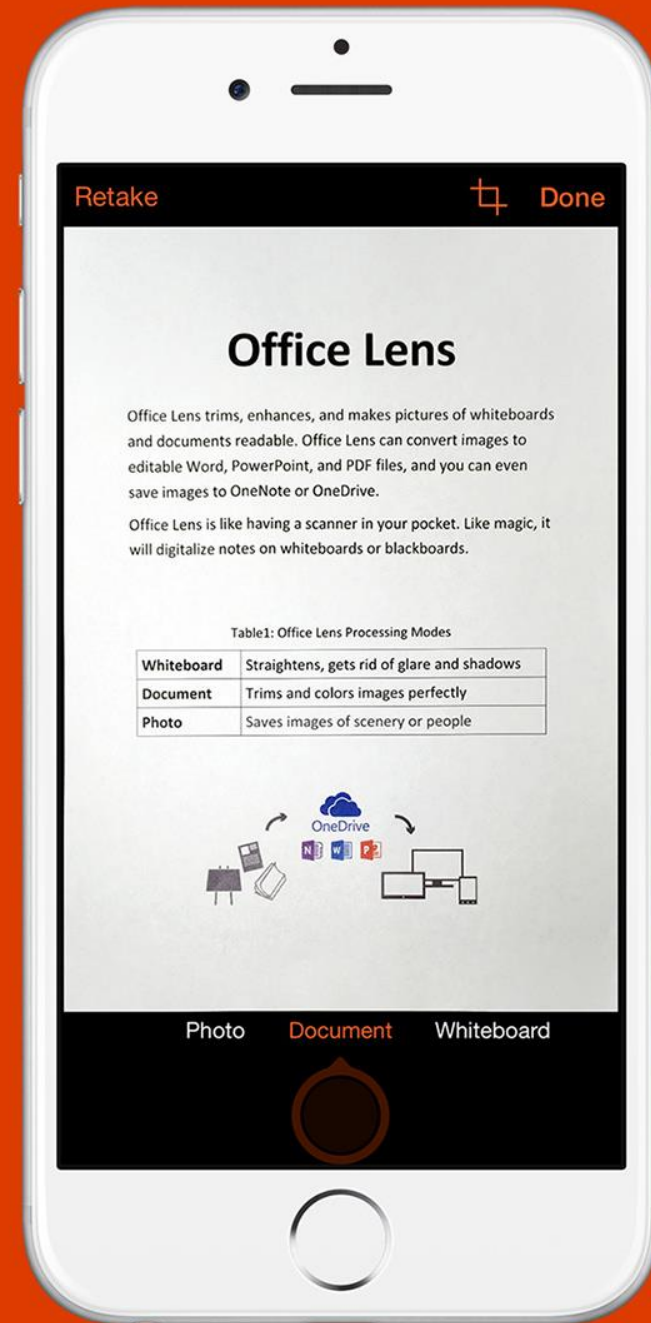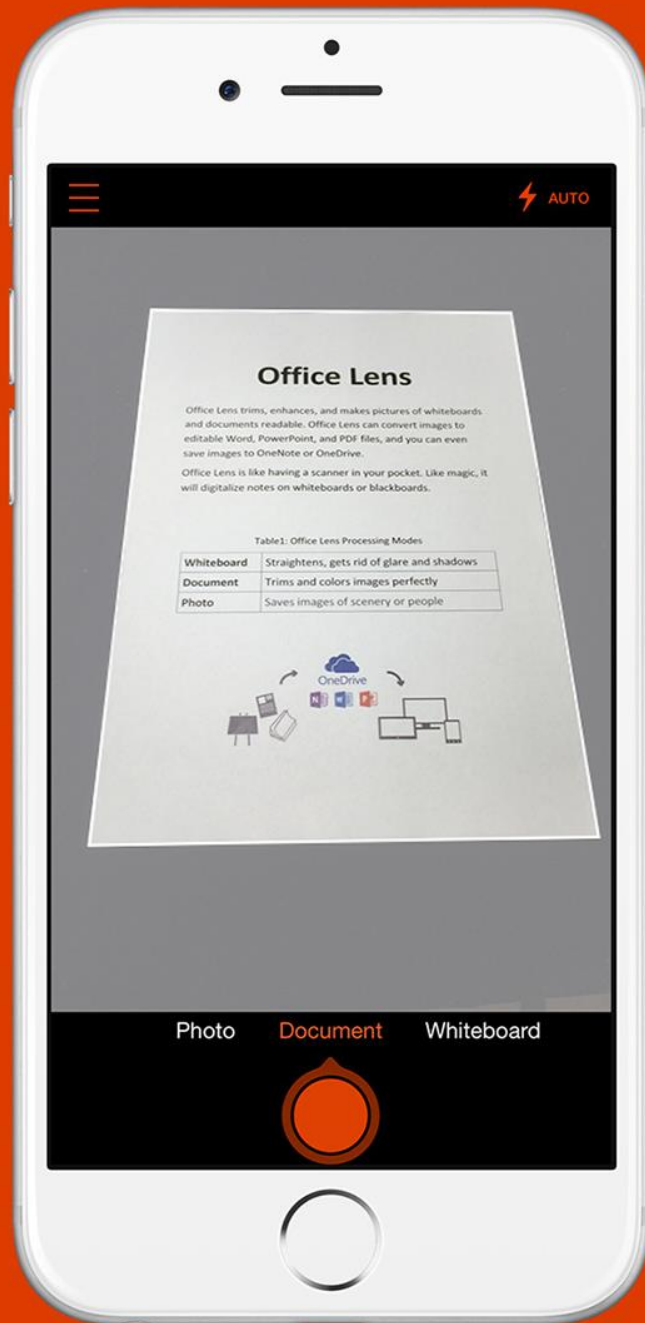Timeline

Recipients

Edit

Download

OFFICE LENS

- Alternative to a Scanner

- Microsoft Product/Service

- Effective at capturing text on scanned document.

- Feature rich

- Very useful in a lockdown scenario if you don't have access to a scanner!

the I.T. team™
Maintaining the health of your I.T. system

WHERE TO FROM HERE?

- Start thinking your processes that could be automated. Consider your time savings.

- Get started yourself. See how you get on. Find templates and try to get one of them going.

- If you struggle or would like someone else to get started, we can help.

- Download the Mobile App for a play.

- Read our Blog on Power Automate, has a bit more on our journey. https://www.theitteam.co.nz/microsoft-power-automate-18-months-on/

- Go here for the pages: http://flow.microsoft.com

COMMON QUESTIONS

- How shall I get started?

- Which licenses are required for Power Automate?

- Can we get hold of the example templates?

- Does you need Office 365?

- If we don't have Paper Processes, is this valuable?

- Are we too small to use this?

- Do I need to be a developer/techie to do this?

QUESTION TIME

webinar@theitteam.co.nz

THANK YOU

the I.T. team has been in business since 2004 .

Our focus has always been on offering a fresh range of I.T. related services and support designed to help client organisations maximise productivity and protect themselves from all kinds of data related risks.

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