



YOU'VE GOT THE POWER - AN INTRODUCTION TO MICROSOFT POWER AUTOMATE

23rd February 2021

Thank you for joining – we'll be starting soon



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



STRUCTURE OF TODAY

- **Intro**
- **Individual/Personal Power Automate Use**
 - What and Why
 - Demonstration
- **Forms**
 - What is possible?
 - Demonstration



STRUCTURE OF TODAY

Organisational Flows

- What are they?
- Example & How to build

Attendee Examples

- Examples we received
- Our attempts

Final Q/A



WHAT DO WE HOPE YOU TAKE AWAY?

- Understand what Power Automate can do
- View and understand the example templates we put up
- Consider how they could work for your organisation
- Learn how to do some building
- Ask questions, questions, questions!



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. teamTM

Maintaining the health of your I.T. system

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
- Cloud, Mobile, Desktop

WHY CONSIDER AUTOMATION/PAPERLESS?

- Environmental factors
- Improve and accelerate processes
- Implementing processes easily
- Allow your organisation to function (in a lockdown scenario!)
- Keep tight records (digitally) of all activity



PROCESSES THAT ARE COMMONLY PAPER BASED

- Time Sheets
- Purchase requests
- Expense Claims
- Credit Card requests
- H&S Incidents
- Travel Requests
- New Client/Contact Forms
- Staff Induction



Individual Flows

Individual Flows

- Often buttons, can be scheduled/triggered
- Can often be achieved by other means, but keeps things in one place to manage
- Create on mobile, or web
- Great way to learn
- Can be shared with others

Individual Flow Examples

- Set yourself a reminder
- Get a push notification for emails from your manager
- Get the weather forecast delivered daily
- Create a task in Planner when an email is flagged
- Block out my calendar for the next hour

Demo

- Templates
- Calendar Block flow build

QUESTIONS

FORMS

Forms

- Microsoft tool
- Easy way to gather data input
- Mobile friendly, embed in Teams or Sharepoint
- Quick to build, and easy to use
- Power Automate enables useful access to the data

Form Examples

- Credit Card approval
- Health & Safety notification
- Induction information gathering
- Timesheet logging
- Leave approval
- Collating feedback
- Any time you need to get consistent information, and take action

Demo

- Forms overview
- Form build

QUESTIONS

ORGANISATIONAL FLOWS

Organisational Flows

- Used company-wide
- Often replacing existing paper based processes
- Can involve people external to the organisation
- For us: Approvals and Notifications

Organisational Flows

- Approvals
 - Documents
 - Spending
 - Leave
 - Training
- Health & Safety
- Induction
- Social Media
- CRM
- What else?

Demo

- Internal Purchase approval

QUESTIONS

ATTENDEE EXAMPLES

ATTENDEE EXAMPLES

Annual Leave Management – approval + more

Expense Claim processing - claiming + receipts

Strategic Document Reviews – approval,
feedback, + tracking

Top Tips

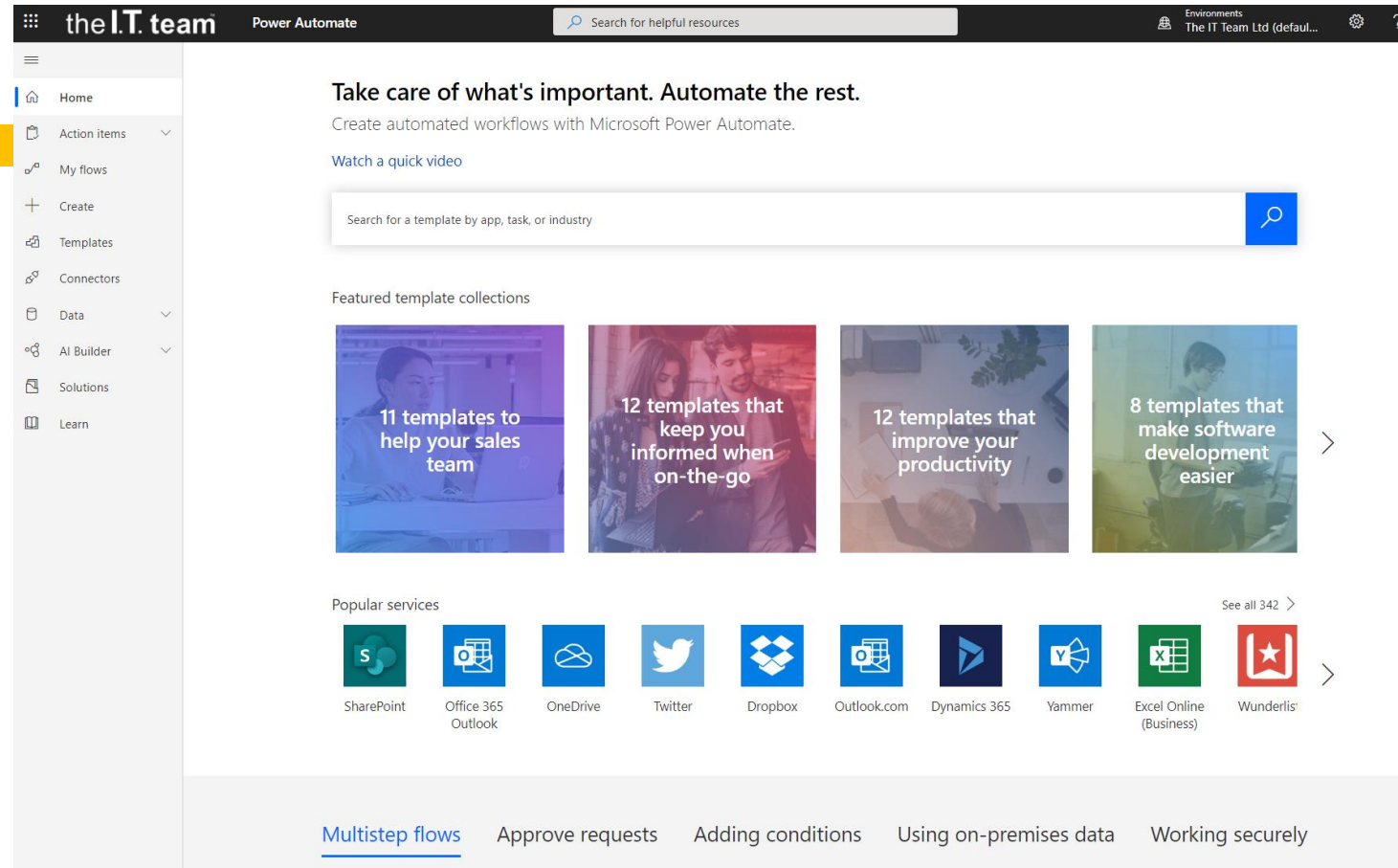
Sometimes it won't work the way you're expecting, remove and try again!

Watch out for password expiry – dedicate an account.

Be mindful of timezones!

HOW TO START?

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





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>



QUESTION TIME

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THANK YOU

the I.T. team has been in business since 2011.

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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