Need to Know Microsoft 365 Webinar August 2024

@directorcia

http://about.me/ciaops

Web cast has started

Web cast is being recorded

If you can’t hear anything check your speaker settings

For questions after the event:

Email : director@ciaops.com

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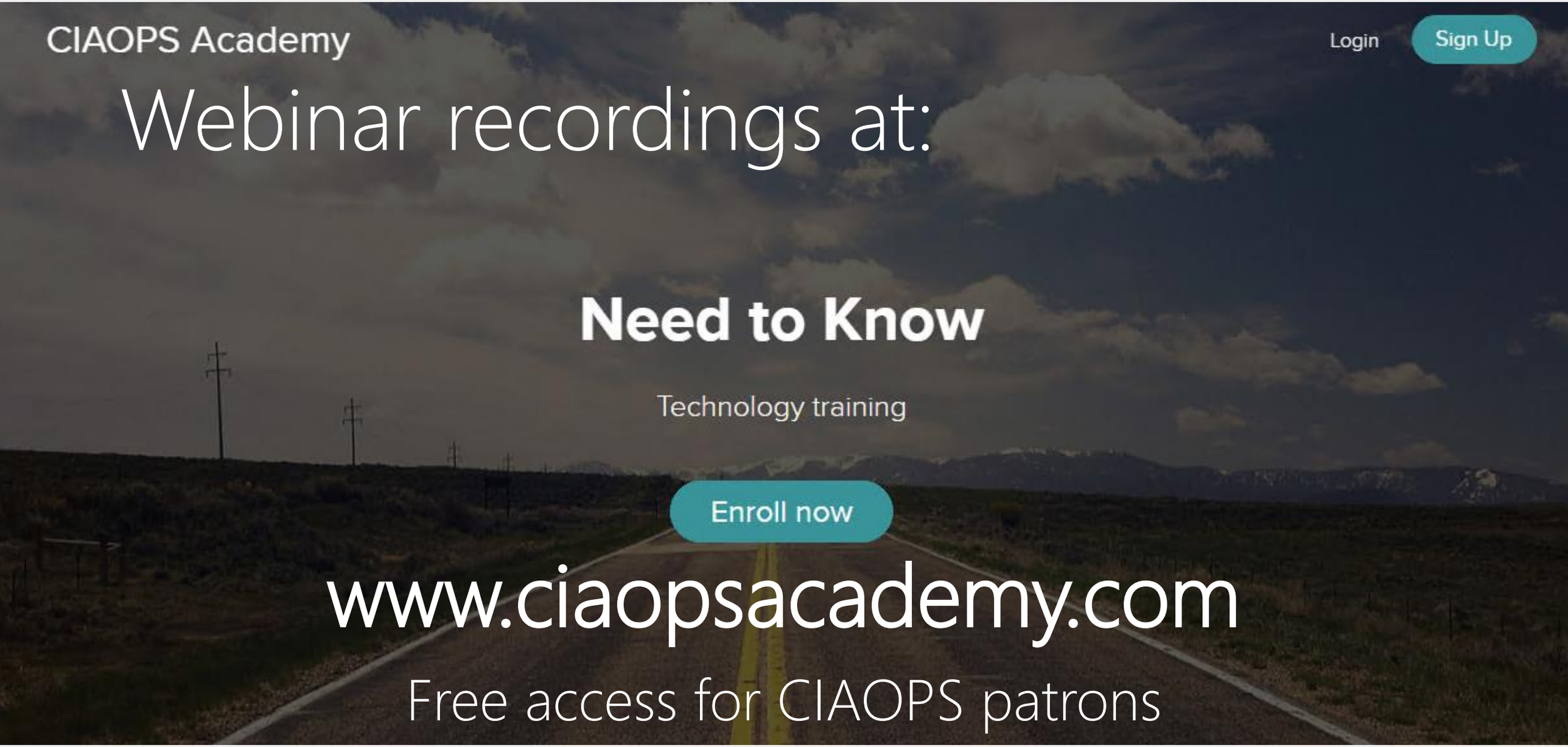


Webinar recordings at:

www.ciaopsacademy.com

Free access for CIAOPS patrons

https://blog.ciaops.com/2022/07/29/join-my-teams-shared-channel/

Join my free shared Channel

Agenda

-Microsoft 365 Update
-Power Automate
-Q & A

Microsoft 365 Update

News

- Level up your project management with Loop
  - https://techcommunity.microsoft.com/t5/microsoft-365-events/level-up-your-project-management-with-loop/ev-p/4202537
- OneNote iOS Widgets
  - https://support.microsoft.com/en-us/office/onenote-ios-widgets-34b31a97-515d-4a6f-bcf4-9472aae43adb
- Support Tip: Enforcement of multifactor authentication for Intune admin center sign-in coming soon
  - https://techcommunity.microsoft.com/t5/intune-customer-success/support-tip-enforcement-of-multifactor-authentication-for-intune/ba-p/4220014
- Microsoft Defender for Endpoint's Safe Deployment Practices
  - https://techcommunity.microsoft.com/t5/microsoft-defender-for-endpoint/microsoft-defender-for-endpoint-s-safe-deployment-practices/ba-p/4220342
- Give a custom name to the General channel in Microsoft Teams
  - https://insider.microsoft365.com/en-us/blog/give-a-custom-name-to-the-general-channel-in-microsoft-teams

Power Automate

Consider this

Microsoft Power Platform

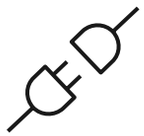
The low-code platform that spans Office 365, Azure, Dynamics 365, and standalone applications

Power BI
Business analytics

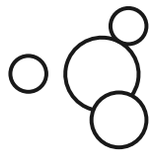
Power Apps
Application development

Power Automate
Process automation

Power Virtual Agents
Intelligent virtual agents



Data connectors



AI Builder

Dataverse

Microsoft Power Automate helps you **work smarter** by automating workflows across your apps and services

Get notifications

Synchronize files

Collect data

Automate approvals

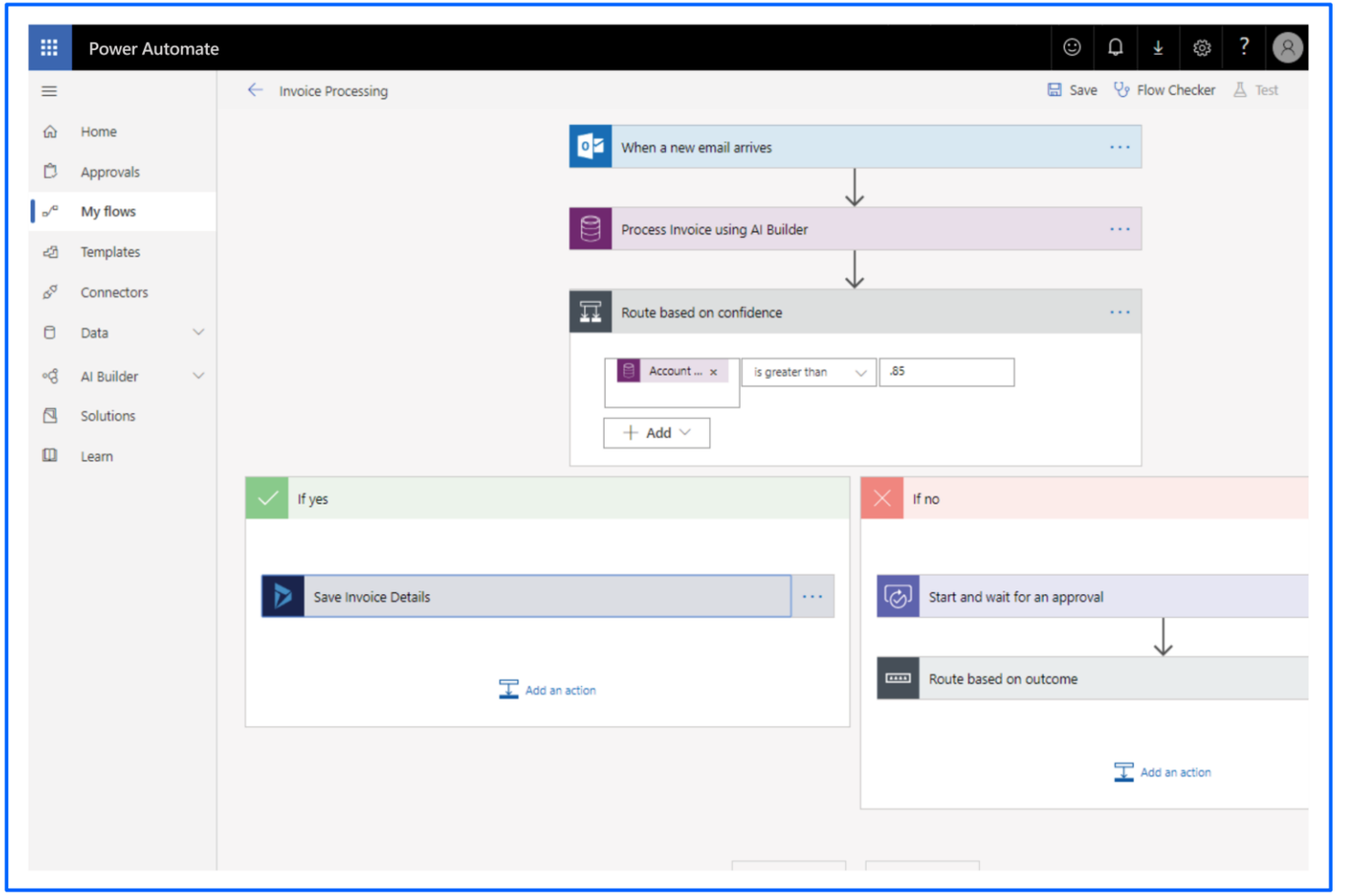
Automate and integrate business processes with Power Automate

Automate and model business processes across your apps and services

From simple automations to advanced scenarios with branches, loops, and more

Trigger actions, grant approvals, and get notifications right where you work

Automate legacy, on-prem and cloud-based applications and services



The value Power Automate brings

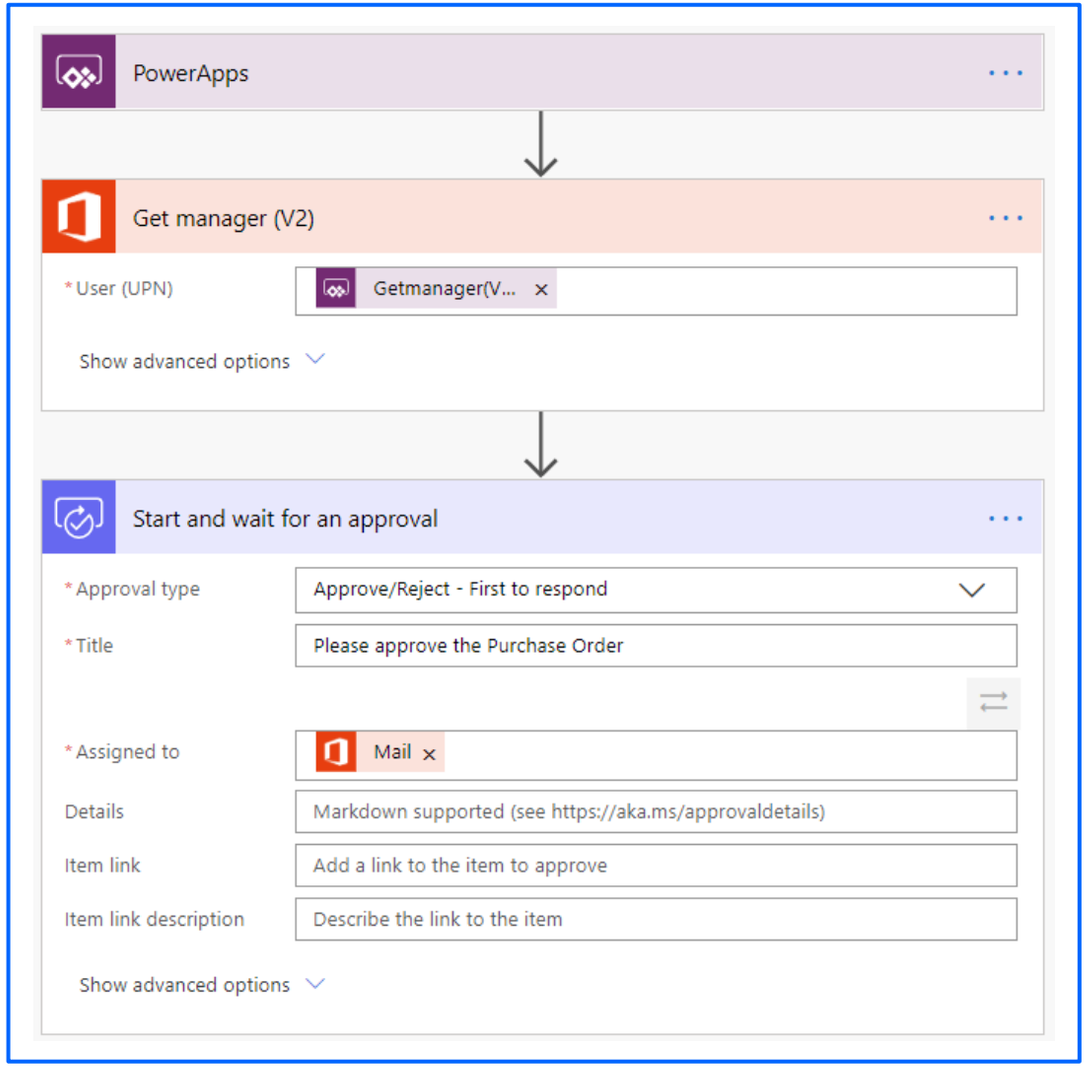
Common scenarios and capabilities:

Automating repetitive tasks

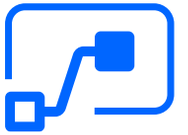
Guiding a user through a process

Connecting to external data sources

Automating desktop-based processes



Scale automation efficiently



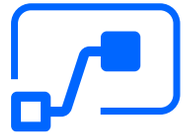
Pre-built templates:
Build automated workflows using prebuilt templates and tailored automations

Automate across your favorite apps and services (300+ connectors):
Scale to automate across your favorite apps and services

Integrates with the Microsoft ecosystem:
Integrate with Azure, Microsoft 365, and Dynamics 365

On-premises and in the cloud:
Access and integrate data across on-premises software and cloud services

Add artificial intelligence to your flow without writing code



To take advantage of these AI capabilities you must first build a model. From make.PowerApps.com a wizard guides you through building and training the model. Currently, there are four available AI models available to build:

Form processor:

This model extracts text from an uploaded image or taken photo

Object detector:

This model identifies objects from an uploaded image or taken photo and then provides a count of the number objects present

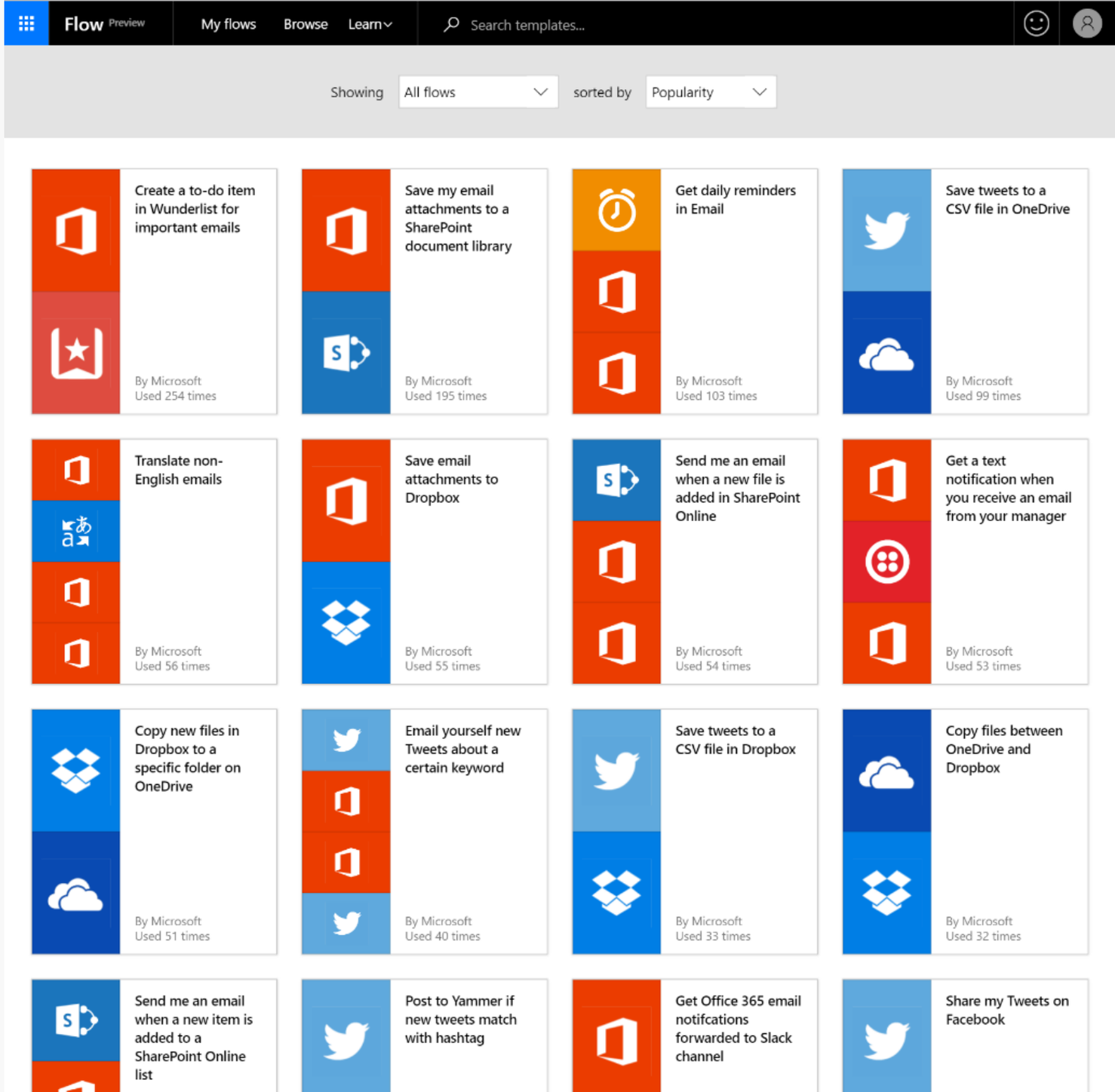
Prediction:

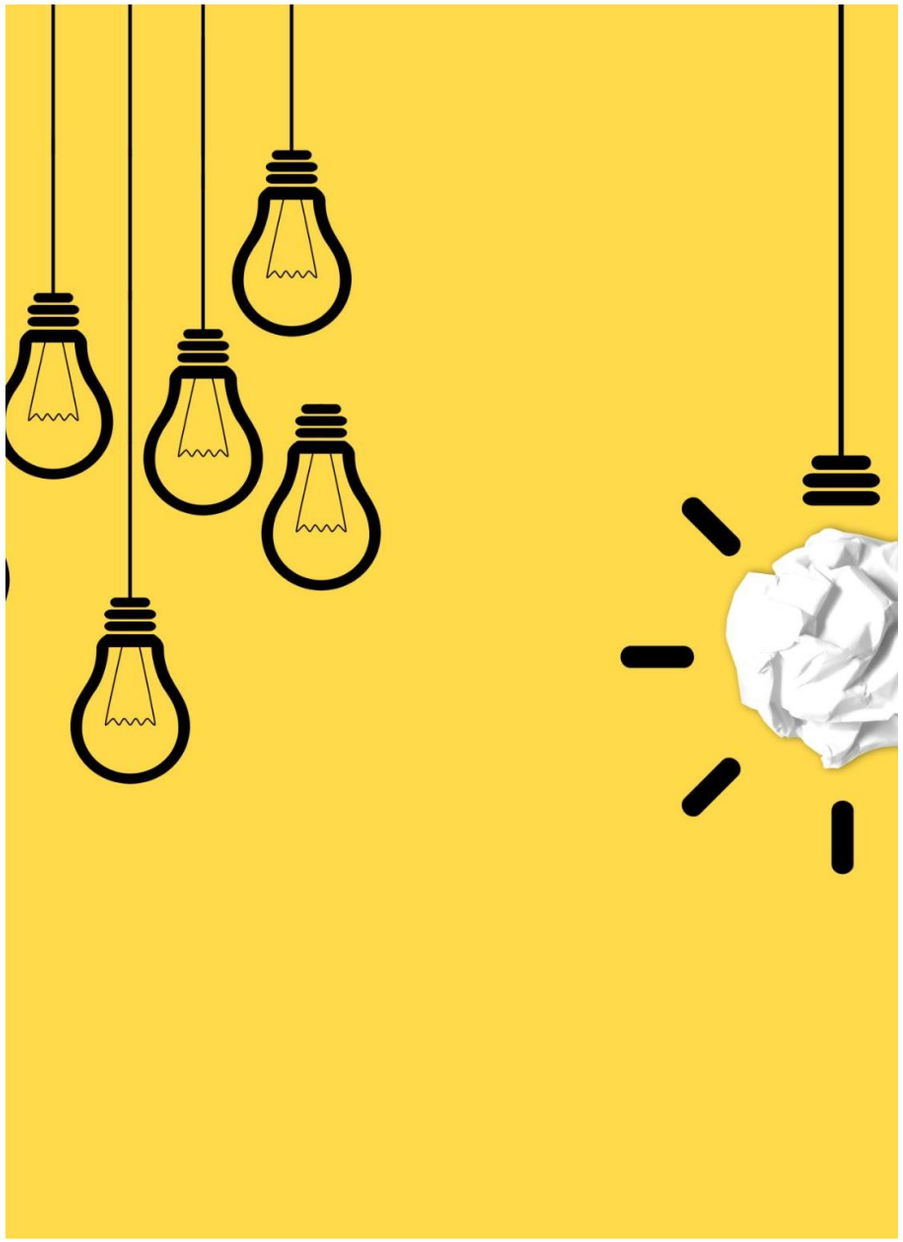
This model predicts whether something will happen or not based on previous data history. More details in the following section

Text classification:

This model categorizes text by its meaning, making it is easier to analyze

Get started quickly with over a hundred useful templates





Key Components of Power Automate

Triggers

Triggers start the workflow in Power Automate when a specific event occurs, such as a new file being added to OneDrive. They allow you to automate tasks and workflows without manual intervention.

Actions

Actions perform a specific task, such as sending an email or creating a task. They allow you to automate repetitive tasks and reduce manual effort.

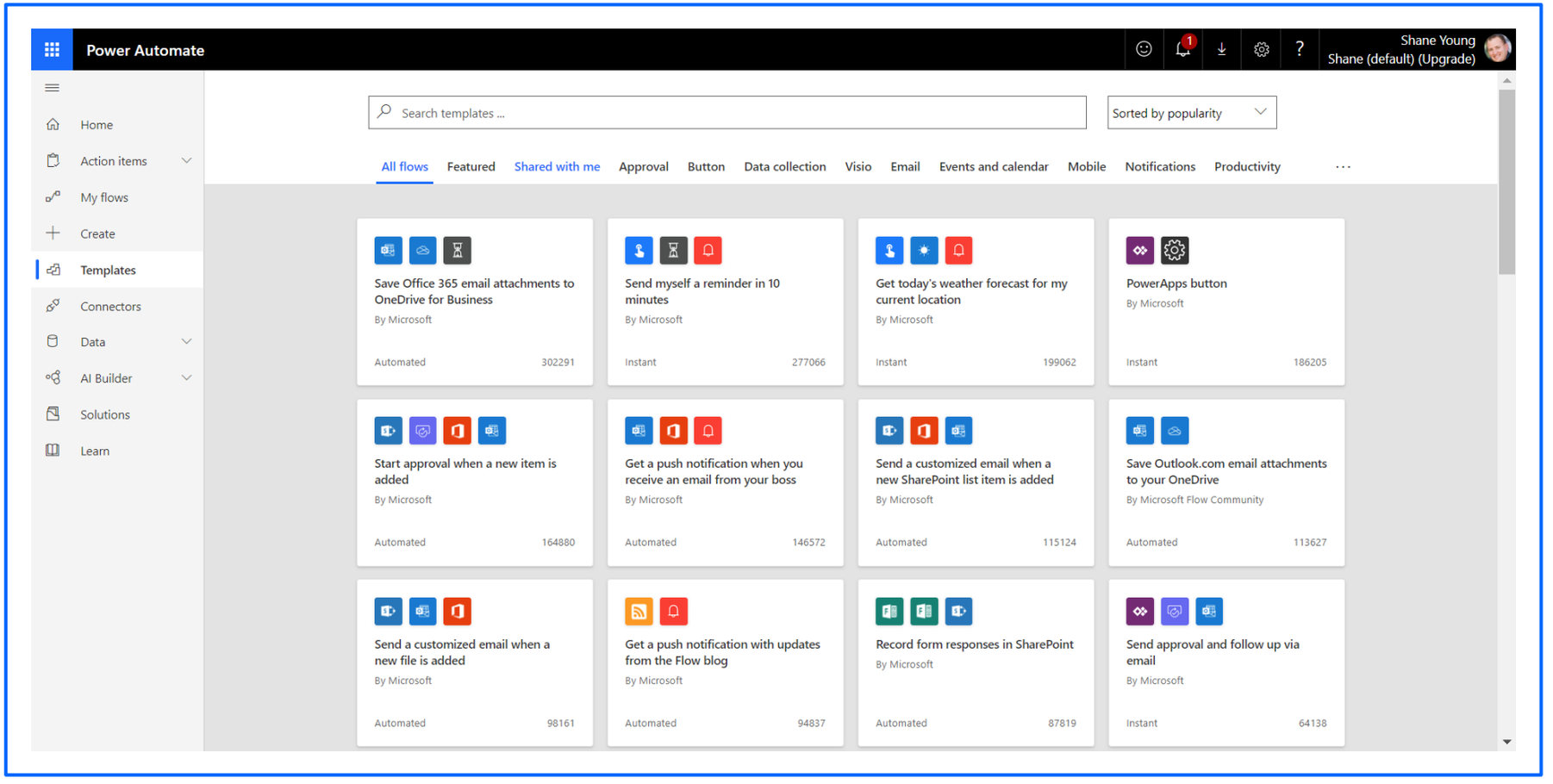
Connectors

Connectors allow Power Automate to interact with other services and apps, such as Twitter, Salesforce, and Trello. They help you to streamline your workflows and automate your business processes.

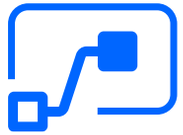
Create a flow from a template

Search using keywords for relevant templates

Example template: Create a flow to save email attachments to OneDrive for Business



Important concepts in Microsoft Power Automate



Keep these concepts in mind when building flows:

Every flow has two main parts:

- a trigger
- one or more actions

Think of the trigger as the starting action for the flow

Actions are what you want to happen when a trigger is invoked.

Some examples of types of actions you can have in a flow include:

Loops

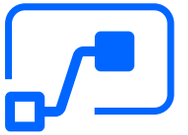
Switch

Do Until

Apply to each

Expressions

Trigger or run the flow



With Power Automate, you don’t think of running a flow the same way as you do with Power Apps. Instead, you perform the activity that triggers the flow to run.

When defining triggers, there are a few different types:

When something changes:

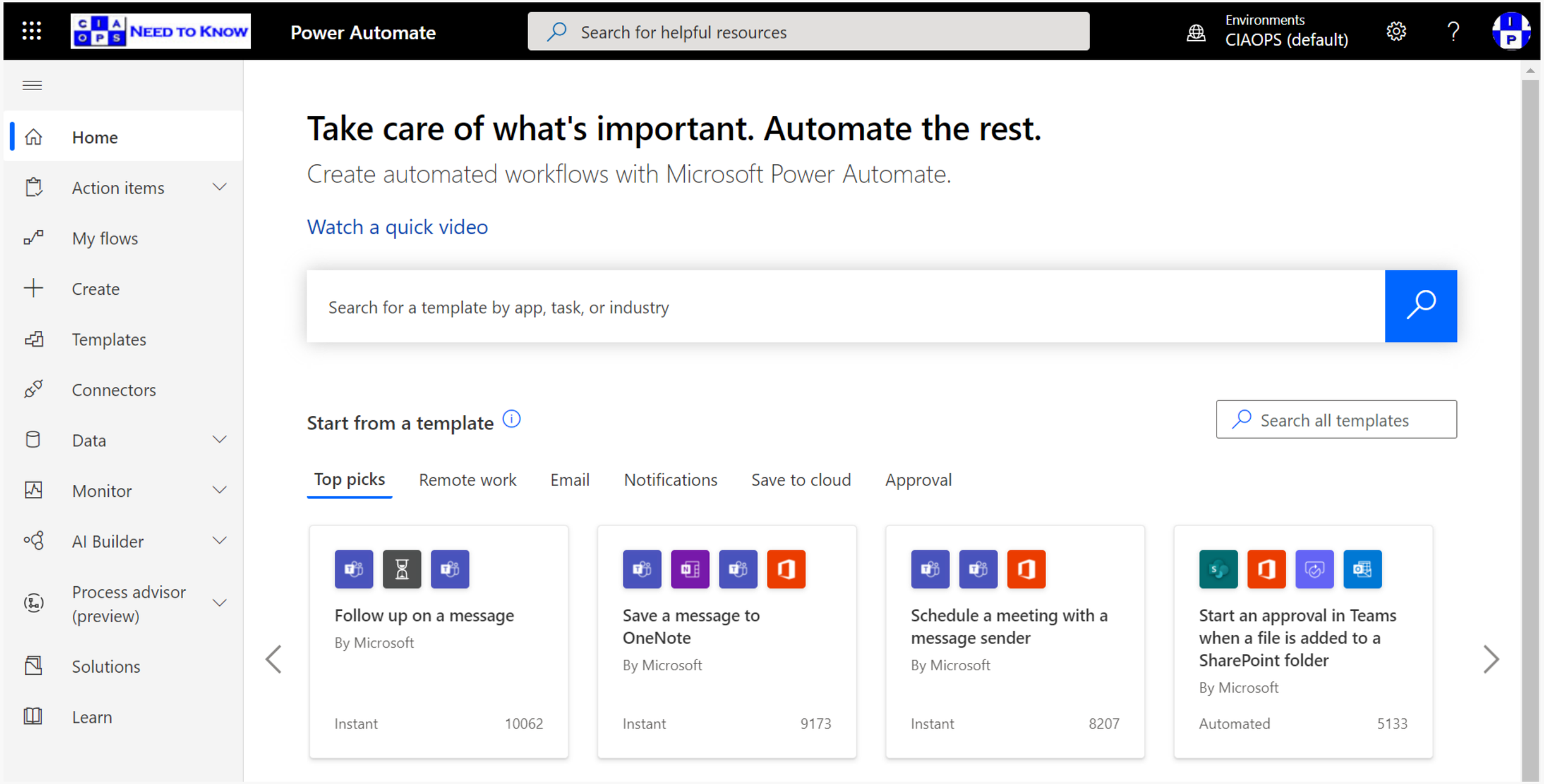
These are triggers that run when data is changed. It could be a new item created in SharePoint, a lead is updated in Dynamics, or when an event has been deleted from Outlook for example

On a schedule:

You can set up a flow to be triggered at a certain time of a day and with a recurrence. This allows for workflows such as checking every day at 8 AM if there are account renewals pending and if so, sending an email to the necessary people

On a button press:

This trigger takes shape in many different ways. This can be when a flow virtual button is run through the mobile app, or a physical button is clicked with 3rd party options, or even when a button is pressed inside of Power Apps. This gives you that control to “run” a flow on-demand


CIAOPS NEED TO KNOW
Power Automate
Search for helpful resources
Environments
CIAOPS (default)
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor (preview)
Solutions
Learn
Take care of what's important. Automate the rest.
Create automated workflows with Microsoft Power Automate.
Watch a quick video
Search for a template by app, task, or industry
Start from a template
Search all templates
Top picks
Remote work
Email
Notifications
Save to cloud
Approval
Follow up on a message
By Microsoft
Instant
10062
Save a message to OneNote
By Microsoft
Instant
9173
Schedule a meeting with a message sender
By Microsoft
Instant
8207
Start an approval in Teams when a file is added to a SharePoint folder
By Microsoft
Automated
5133

DEMO

Build your own flows in an easy to use visual designer

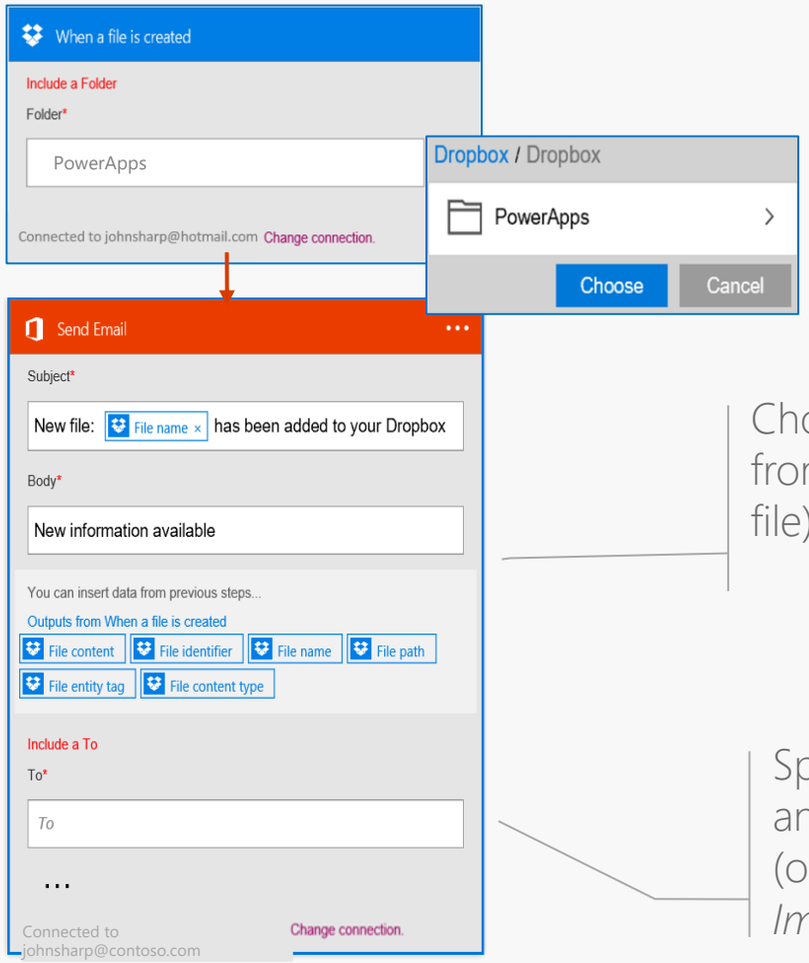
Sending an Exchange email when a new file is added in Dropbox

Authenticate to your Dropbox account.

Select folder to monitor

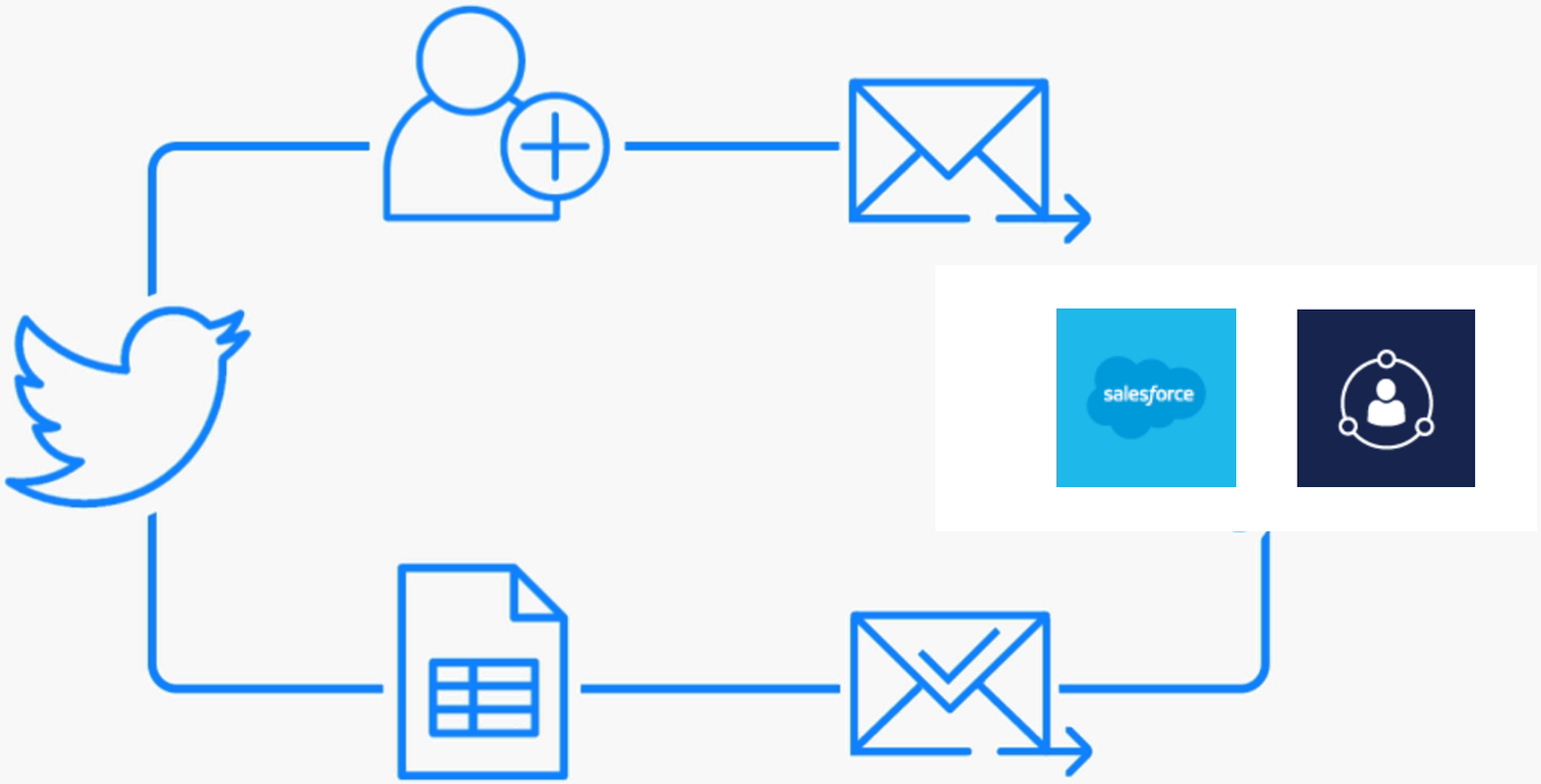
Authenticate to your O365 account.

Build email *Subject* and *Body*



Choose to include properties from previous step (Dropbox file) to improve relevance

Specify *Send To* email address and additional properties (optional): *From*, *CC*, *BCC* and *Importance*



Automate advanced scenarios with multiple steps, branching conditions, and more

Integrate the systems you're already using… even custom APIs.

Business application platform innovation

Build modern business apps fast

Compose analytics, user experiences, and automation using an integrated set of services from Microsoft

Empowered power users

People who understand their business needs best can now build apps quickly without writing code

Power BI

PowerApps

Microsoft Flow

More efficient developers

Seamlessly extend capabilities for power users and leverage powerful Azure platform services

SQL Server BI
Data analytics
Internet of Things (IoT)
...

App Services
Service Fabric
Azure Functions
...

Logic Apps
API Management
BizTalk
...

Connected data across apps

Whether built on the Common Data Model or integrated with existing systems, get more value from your data

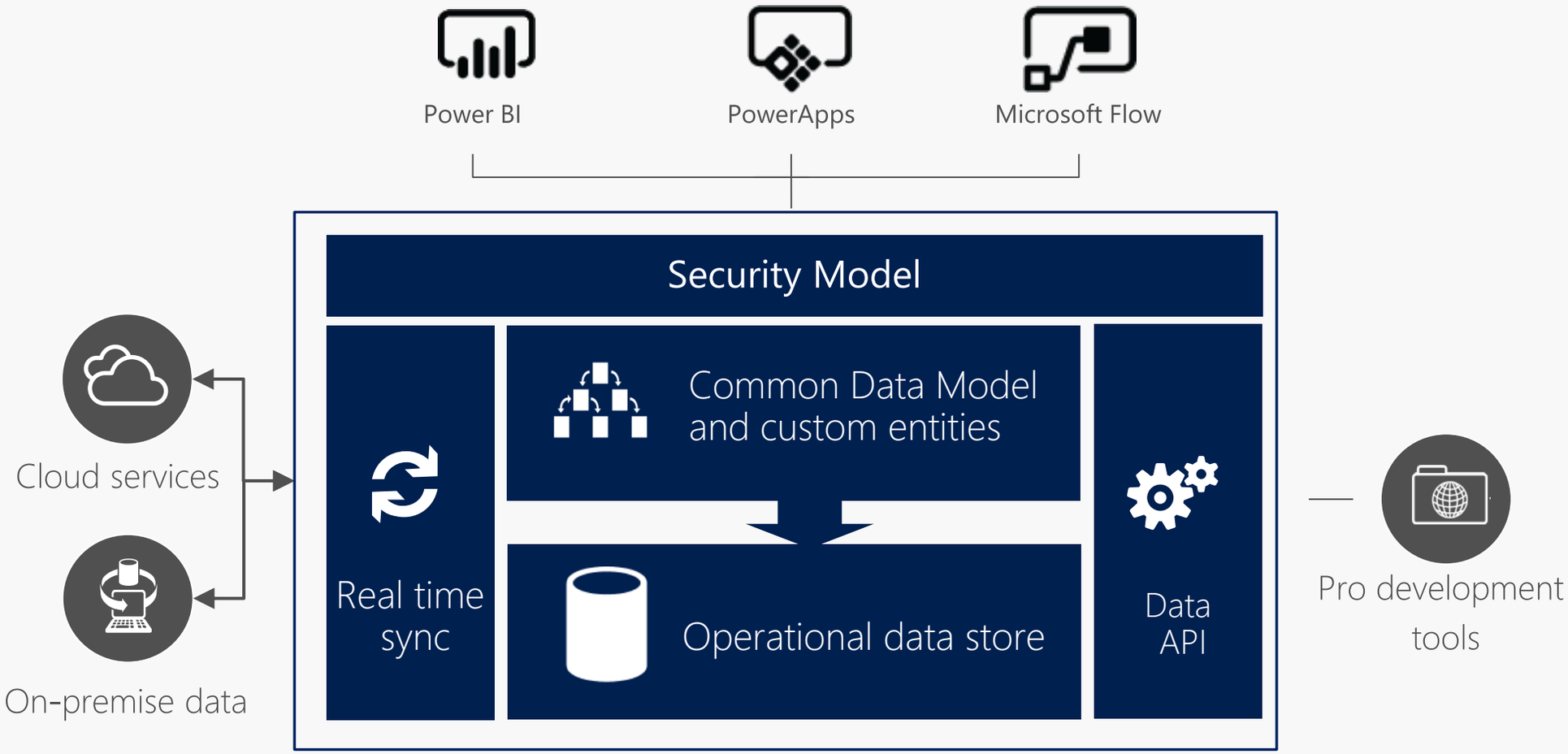
Common Data Model

Connectors & Gateways

Extensibility

The Common Data Platform

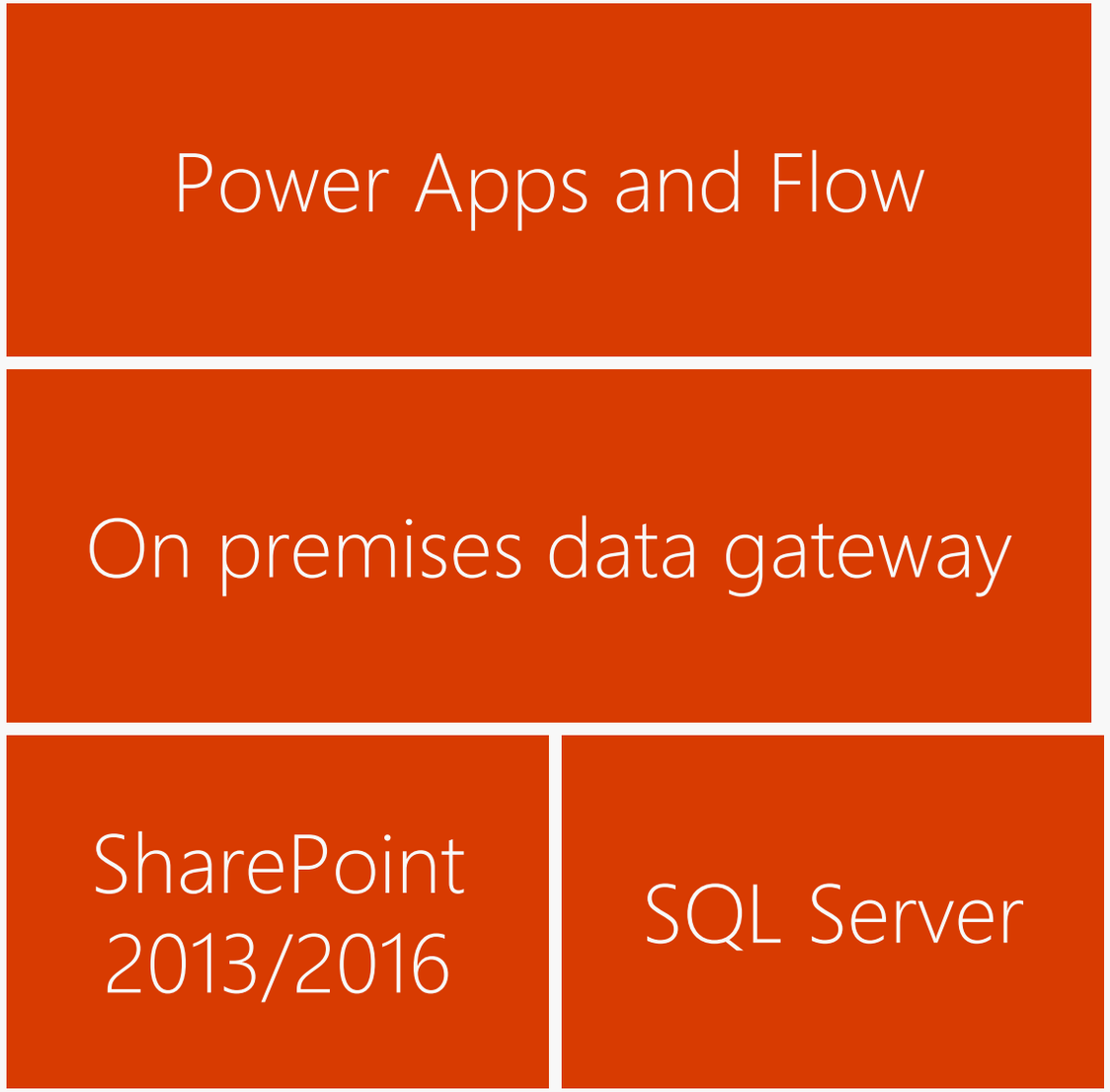
Built-in platform for extending your existing Dynamics 365 & Office 365 data



DEMO

On premises data gateway

- Install from PowerApps Portal
- Manage **on the gateway**
- Upgrades and replaces PowerBI gateway (if present)
- Sign in to register
- Build connections
- Consume from your business apps



Microsoft Flow Sharing and Collaboration

Co-authoring

Many authors can edit a flow, not just a single owner

If the original author leaves the company the flow continues to function

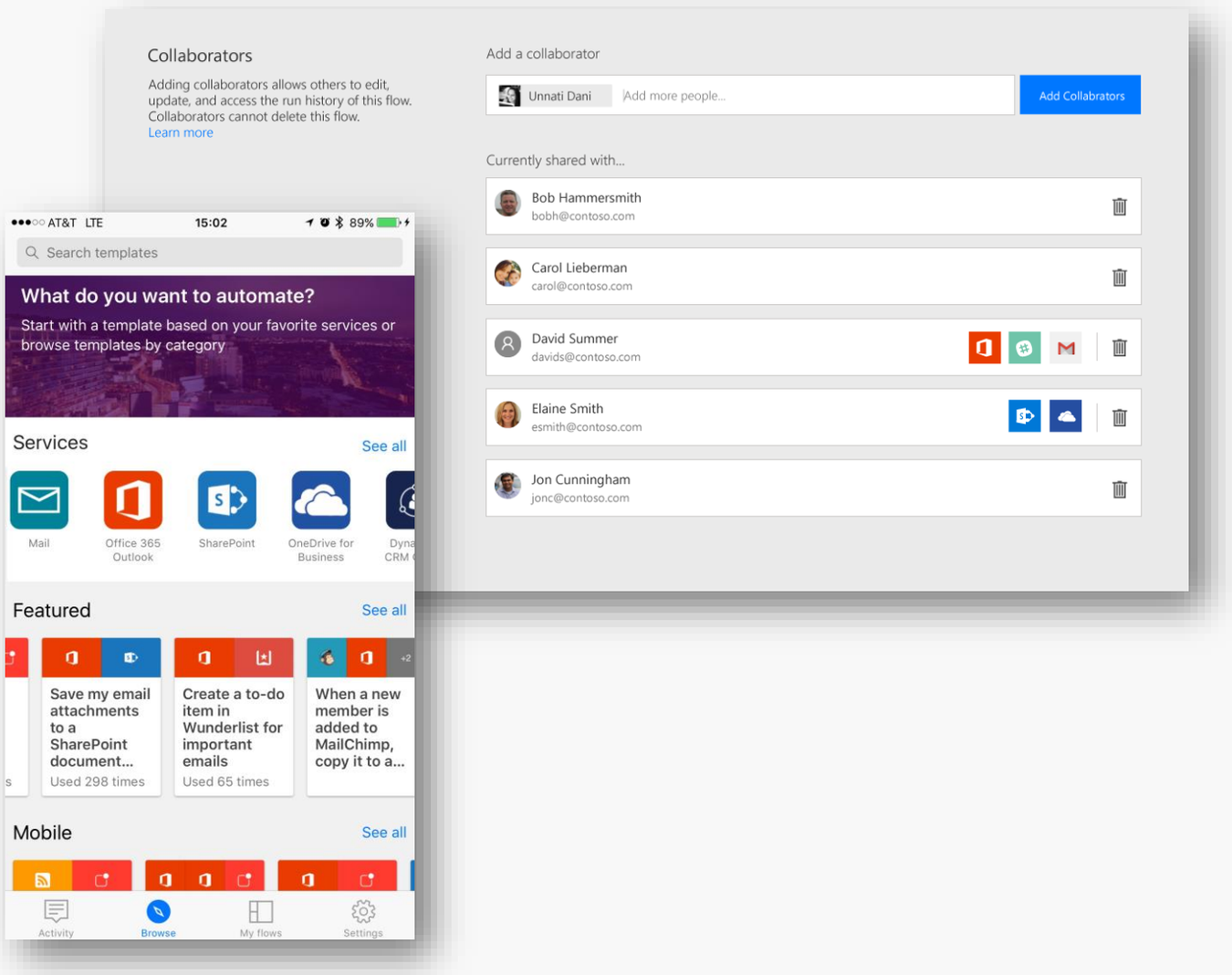
Publish to AppSource

Make flows available to others inside of an organization for consumption

Creation from Mobile

Develop and co-author on flows right from the Microsoft Flow app for iOS or Android

Enhanced Flow mobile integration



Create your automation with Copilot

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

File Edit Debug Tools View Help

Create invoice | Power Automate

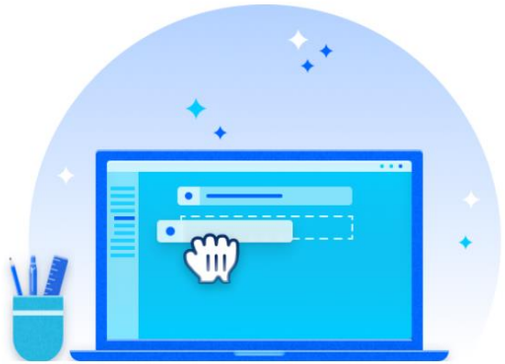
Actions

Search actions

- Variables
- Conditionals
- Loops
- Flow control
- Run flow
- System
- Workstation
- Scripting
- File
- Folder
- Compression
- UI automation
- HTTP
- Browser automation
- Excel
- Database
- Email
- Exchange
- Outlook
- Message boxes
- Mouse and keyboard
- Clipboard
- Text

Save | Run | Stop | Run next action | Recorder

Subflows | Main



You don't have any actions here yet

To get started, drag and drop actions to this pane
or use the recorder to capture the actions

Status: Ready | 0 Selected actions | 0 Actions | 1 Subflow | Run delay 100 ms

Take aways

- Power Automate allows you to easy connect many data sources
- Power Automate allows you to easy automate business processes
- Combine power Automate with Power Apps to deliver quick solutions
- Power Automate can be utilised with on premises resources
- Power Automate is continually improving
- Power Automate enables ‘citizen developers’

Resources

- Microsoft Power Apps and Power Automate Licensing Guide - https://go.microsoft.com/fwlink/?linkid=2085130
- Azure logic apps - https://azure.microsoft.com/en-us/services/logic-apps/
- Power Apps and Power Automate licensing FAQ - https://docs.microsoft.com/en-us/power-platform/admin/powerapps-flow-licensing-faq
- Automate a business process using Power Automate - https://docs.microsoft.com/en-us/learn/paths/automate-process-power-automate/
- Templates - https://make.powerautomate.com/templates/
- Get started with Power Automate - https://docs.microsoft.com/en-us/learn/modules/get-started-flows/
- On premises gateway - https://go.microsoft.com/fwlink/?LinkID=820931

Final thought

CIAOPS Resources

- Blog – http://blog.ciaops.com
- Free Office 365, Azure video tutorials – http://www.youtube.com/directorciaops
- Free documents, presentations, eBooks – http://slideshare.net/directorcia
- Office 365, Azure, Cloud podcast – http://ciaops.podbean.com
- Office 365, Azure online training courses – http://www.ciaopsacademy.com
- Office 365 and Azure community – http://www.ciaopspatron.com
- CIAOPS Github – https://github.com/directorcia
- CIAOPS Best Practices Github – https://github.com/directorcia/bp

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Email
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Teams
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Get access to the latest information by becoming a Patron

http://www.ciaopspatron.com

Questions

That’s all folks!

Thanks for attending