
Power Automate Examples for the New SharePoint System:

1. **Advanced Document Approval & Review Management:**
    - **How it Works:** This isn't just one flow, but a potential system. When a document (identified by its Content Type, e.g., "Contract" or "SOP") has its Status metadata updated to "Pending Approval", a Power Automate flow triggers.
        - **Routing:** It identifies the required approver(s) based on metadata (e.g., Department, Document Type, a specific Approver field). It can handle simple single approvals, sequential approvals (Manager then Director), or parallel approvals (multiple people approve simultaneously).
        - **Notifications:** Sends customized notifications via Teams and/or Email to approvers with document links and context. Approvers can often approve/reject directly from the notification.
        - **Reminders & Escalation:** If an approver doesn't respond within a defined timeframe (e.g., 3 days), the flow can send reminders. If there's still no response after another period, it can escalate the request automatically to an alternate approver or manager.
        - **Status Updates:** Upon final approval or rejection, the flow automatically updates the document's Status metadata in SharePoint (e.g., to "Approved" or "Rejected"). It can also update SharePoint's built-in Content Approval status to control document visibility if needed.
        - **History Logging:** Records key details of the approval process (who approved/rejected, dates, comments provided) back into specific metadata fields on the document or into a central audit log list for traceability.
    - **Benefit:** Streamlines and standardizes the entire review and approval lifecycle, improves accountability, creates audit trails, and reduces manual chasing. Relies heavily on well-defined Status, Approver, and potentially Department metadata fields within relevant Content Types.
2. **Policy/SOP/Contract Expiration & Review Reminders:**
    - **How it Works:** A scheduled Power Automate flow runs regularly (e.g., daily or weekly). It scans relevant document libraries (like "Policies" or "Contracts") for items where a specific Review Date or Expiration Date metadata field is approaching (e.g., within the next 90, 60, or 30 days).
    - **Action:** When it finds such documents, it sends an automated reminder notification (Email/Teams) to the person listed in the Document Owner or Contract Manager metadata field, prompting them to initiate the review or renewal process.
    - **Benefit:** Proactively manages document lifecycles, helps ensure timely reviews or renewals, and reduces the risk of using outdated information or letting contracts lapse unintentionally. Depends on accurate Review Date/Expiration Date and Owner/Manager metadata.
3. **Metadata-Based Document Routing & Archiving:**
    - **How it Works:** A flow triggers when a document's Status metadata field is changed (e.g., to "Archived", "Superseded", "Obsolete", or perhaps "Final Approved").
    - **Action:** Based on the new status, the flow automatically moves or copies the document from its current working library to a designated Archive library or site. It can also potentially update permissions on the archived item (e.g., make it read-only).
    - **Benefit:** Keeps active document libraries clean and focused, ensures proper disposition of documents according to retention policies, and simplifies applying different rules or permissions to archived content. Relies on a clear Status metadata field and predefined

archive locations.

4. **Notification of New High-Importance Documents:**
    - **How it Works:** A flow triggers when a new document is added to a specific library (e.g., the central "Company Policies" library). It checks the document's Content Type (e.g., "Company Policy") or specific metadata (like Audience: All Staff or Importance: High).
    - **Action:** If it matches the criteria, the flow automatically posts a notification message (e.g., in a company-wide Teams channel or via email digest) alerting employees to the new document, often including a brief description (from metadata) and a direct link.
    - **Benefit:** Ensures timely communication of critical information, improves awareness, and reduces the chance of employees missing important updates. Depends on consistent use of Content Types and relevant metadata during upload.
5. **Task Creation for Document-Related Actions:**
    - **How it Works:** When a document is uploaded or its metadata is updated to indicate an action is needed (e.g., populating an Action Required By person field and a Follow-up Date field), a flow triggers.
    - **Action:** The flow automatically creates a task in Microsoft Planner (in a specific plan/bucket) or Microsoft To Do, assigning it to the specified person and including details from the document's metadata along with a direct link back to the SharePoint document.
    - **Benefit:** Integrates document management with task management systems, ensures accountability for follow-up actions, and provides easy access to the relevant document from the task interface. Relies on having relevant 'action' metadata fields.
6. **Automated Feedback Collection Requests:**
    - **How it Works:** When a document's Status metadata is set to "Draft for Review" or similar, a flow triggers. It might look up reviewers listed in a Reviewers metadata field (a Person field allowing multiple selections).
    - **Action:** The flow sends individual notifications (Email/Teams) to each reviewer requesting feedback by a certain deadline (perhaps calculated or stored in metadata). It could potentially link to a Microsoft Form for structured feedback, with responses perhaps logged back to the document or a related list.
    - **Benefit:** Standardizes the feedback request process, ensures reviewers are notified promptly, and can help structure the feedback received. Depends on Status and Reviewers metadata.
7. **Request Metadata Completion:**
    - **How it Works:** A flow triggers when a document is uploaded or potentially on a schedule. It checks if certain *required* metadata fields (defined in the Content Type or library settings) are blank.
    - **Action:** If required metadata is missing, the flow sends a notification (Email/Teams) back to the person who last modified the document ("Modified By"), reminding them to fill in the missing information and providing a link to the document properties form.
    - **Benefit:** Helps enforce metadata policies, improves data quality and consistency, and makes the overall system more reliable for searching and other automations. Relies on correctly configured required fields.
8. **Generate Unique Document ID:**
    - **How it Works:** When a document of a specific Content Type (e.g., "Contract", "Controlled Document") is first created or possibly moved to a 'final' state.
    - **Action:** The flow constructs a unique ID based on other metadata (e.g., Department Abbreviation, Document Type Code, Year, and a sequential number fetched from a central counter list) and writes this unique ID into a dedicated Document ID metadata field on the document.

    - **Benefit:** Provides a consistent, organization-specific identifier for critical documents, useful for referencing and tracking outside of just the filename. Depends on having the component metadata fields and potentially a separate list to manage sequence numbers.
9. **Convert to PDF on Finalization:**
    - **How it Works:** Triggers when a document's Status metadata is set to "Approved" or "Final". It checks if the source file is compatible (e.g., a Word document).
    - **Action:** Uses a built-in Power Automate action to convert the document content to PDF format. The resulting PDF can then be saved (e.g., replacing the original, adding alongside with a "-Final.pdf" suffix, or saving to a separate 'Published Records' library).
    - **Benefit:** Creates standardized, non-editable versions of final documents suitable for distribution or archival. Relies on Status metadata and source file format.
10. **Sync SharePoint List Data for Reporting/Integration:**
    - **How it Works:** Triggers when an item is created or modified in a key SharePoint list (e.g., a project status tracking list, an issue log).
    - **Action:** The flow takes data from the list item's columns (metadata) and updates or creates a corresponding row in an external source, such as an Excel spreadsheet (for simple dashboards), a Power BI dataset, or even another business system via available connectors (if applicable).
    - **Benefit:** Enables data from SharePoint lists to be used for broader reporting, dashboards, or integration without manual data export/import. Depends on the structure of the list and the target system.
11. **Post Adaptive Cards in Teams for Quick Actions:**
    - **How it Works:** Similar to notification flows (like approvals or feedback requests), but instead of just sending text, it posts an interactive 'Adaptive Card' in a Teams chat or channel.
    - **Action:** The card displays key information from the SharePoint item/document and provides buttons directly within Teams (e.g., "Approve", "Reject", "Update Status", "Assign Task"). User interaction with the card triggers the flow to update the corresponding data back in SharePoint.
    - **Benefit:** Allows users to perform common actions directly within their Teams workflow without needing to switch context back to SharePoint, increasing efficiency. Requires designing the Adaptive Card JSON.
12. **Scheduled Summary Reports from Metadata:**
    - **How it Works:** A scheduled flow runs periodically (e.g., every Monday morning). It uses SharePoint actions to query a specific list or library based on metadata criteria (e.g., get all items where Status = Open and Priority = High, or where DueDate is within the next 7 days).
    - **Action:** Formats the retrieved data (e.g., into an HTML table or bulleted list) and sends it as a summary report via email or posts it to a Teams channel for stakeholder review.
    - **Benefit:** Provides automated, regular summaries of key information without requiring users to manually filter and compile data. Depends on the metadata used for filtering.
13. **Request Electronic Signatures:**
    - **How it Works:** Triggers when a document's Status metadata is set to "Ready for Signature". It likely identifies signatories from metadata fields (Signatory1, Signatory2, etc.).
    - **Action:** Uses a connector for an e-signature service (like Adobe Sign, DocuSign - **Note:** These are typically premium connectors requiring separate licenses) to initiate the signature process, sending the document to the required signatories via that service. The flow might wait for completion and update the SharePoint Status accordingly.
    - **Benefit:** Integrates formal document signing processes directly into the SharePoint workflow. Relies on Status and signatory metadata, plus the necessary e-signature service subscription

and Power Automate connector.

14. **Notify on External Sharing Activity:**
    - **How it Works:** This might leverage SharePoint audit logs or specific triggers (if available, sometimes requires premium licensing or more complex setup). When an external sharing event occurs on a document within a sensitive library (identified perhaps by site or library property).
    - **Action:** Sends a notification to a compliance officer, site owner, or the document owner, alerting them that a specific document has been shared externally, potentially including details about who shared it and with whom.
    - **Benefit:** Increases visibility and oversight of external sharing, helping to enforce security and compliance policies. Feasibility might depend on specific M365 license levels and audit settings.
15. **Collaborative Server Build Task Handoff Notifications:**
    - **How it Works:** Uses a SharePoint List to track build tasks with columns like Task Title, Responsible Department, Sequence, Status. When a task's Status is updated to "Completed", a flow triggers.
    - **Action:** It finds the next task based on the Sequence number and sends a notification (Teams/Email) to the Responsible Department or Assigned To person for that next task, informing them it's their turn and providing a link.
    - **Benefit:** Automates handoffs between teams/individuals in a sequential process, reduces waiting time, improves visibility. Complements systems like Jira for lightweight status updates and notifications within M365. Relies on the list structure and sequence logic.
16. **Simple Asset Tracking & Warranty Reminders:**
    - **How it Works:** Uses a SharePoint List to track physical assets with metadata like Asset Tag, Model, Assigned User, Purchase Date, Warranty Expiry Date. A scheduled flow runs regularly.
    - **Action:** Checks for assets where the Warranty Expiry Date is approaching (e.g., within 60 days). Sends a notification to the IT team or asset manager.
    - **Benefit:** Proactive management of hardware lifecycle, helps plan replacements or renewals. Depends on accurate asset data entry in the list.
17. **Onboarding/Offboarding Checklist Task Management:**
    - **How it Works:** Uses a SharePoint List perhaps triggered by an HR system or manual entry for a new hire/departure. The list contains standard tasks assigned to different departments (Task, Responsible Dept, Due Date, Status). When a preceding task's Status is marked "Completed" (or based on due dates).
    - **Action:** Power Automate notifies the Responsible Dept for the next task(s) that action is required. Could also send summary notifications to HR or the hiring manager.
    - **Benefit:** Streamlines complex cross-departmental processes, ensures tasks aren't missed, improves the onboarding/offboarding experience. Relies on a well-defined task list and dependencies.
18. **Internal Training Registration & Communication:**
    - **How it Works:** Uses a SharePoint list where employees can register for internal training sessions (potentially via Power Apps or Forms interface). Metadata includes Session Name, Session Date, Attendee Name, Attendee Email, Status (Registered, Attended, Cancelled). When a new registration is added, or as the session date approaches.
    - **Action:** Send automated confirmation emails upon registration. Send reminder emails with meeting links a day before the Session Date. Send post-session links to materials or feedback forms.
    - **Benefit:** Automates the administrative overhead of managing internal training logistics.

Depends on the registration list structure.

19. **Industry Relevant Alerts:**
    - **How it Works:** Uses Power Automate connectors (potentially premium) for news feeds (RSS) or web monitoring services, or perhaps triggers from emails sent to a specific monitoring inbox. The flow scans for keywords (competitors, suppliers, policies).
    - **Action:** If a relevant mention is found, create an item in a dedicated SharePoint "Market Intelligence" list with details (Source, Date, Snippet, Link) and notify the relevant team via Teams/Email.
    - **Benefit:** Provides timely alerts on such activities based on public information feeds. Reliability depends heavily on the quality of the information source/connector.
20. **Customer Feedback Aggregation & Tagging:**
    - **How it Works:** Triggers when a response is submitted to a Microsoft Form designed for customer feedback.
    - **Action:** The flow takes the form responses, potentially uses AI Builder (premium feature) for sentiment analysis or keyword extraction, and then creates a new item in a SharePoint "Customer Feedback" list, populating metadata columns like Product, Feature, Sentiment, Feedback Category, Submission Date. Could notify relevant product managers.
    - **Benefit:** Centralizes and structures customer feedback from various sources, making it easier to analyze trends and route to the correct teams. Depends on Form structure and potentially AI Builder for advanced analysis.

Considerations:

- **Feasibility:** All the scenarios listed above are technically feasible using Power Automate in conjunction with a well-structured SharePoint environment (Lists and Libraries with metadata). They represent common or creative-but-achievable use cases.
- **Dependencies:** Success *critically depends* on the Information Architecture being implemented correctly (relevant lists, libraries, site columns, content types) and, crucially, on **users consistently and accurately populating the metadata**. Without good data, automation can't work effectively. Training and change management are key.
- **Effort:** While feasible, these are not "out-of-the-box" features. Each automated flow needs to be designed, built, tested, and maintained. Complexity varies significantly – simple notifications are relatively easy, while complex multi-stage approvals or integrations require more expertise and effort. Don't underestimate the development and testing time.
- **Licensing:** Most examples primarily use standard SharePoint and Office 365 connectors included with many Microsoft 365 plans. However, some scenarios *could* involve:
    - **Premium Connectors:** Required for integrating with some third-party services (like specific CRM systems, e-signature platforms, or some web monitoring services). Premium connectors typically require additional Power Automate licenses per user or per flow.
    - **AI Builder:** Used for features like sentiment analysis or keyword extraction; requires specific AI Builder credits/licensing.
    - **Dataverse (Formerly CDS):** Might be needed for very complex scenarios or long-running workflows (approvals lasting > 30 days) and has its own capacity/licensing considerations.
    - **HTTP Requests:** Advanced flows might use generic HTTP actions to connect to other systems, which can sometimes require premium licensing depending on the setup.