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Microsoft Power Platform Virtual Training Day: Automate Business Processes

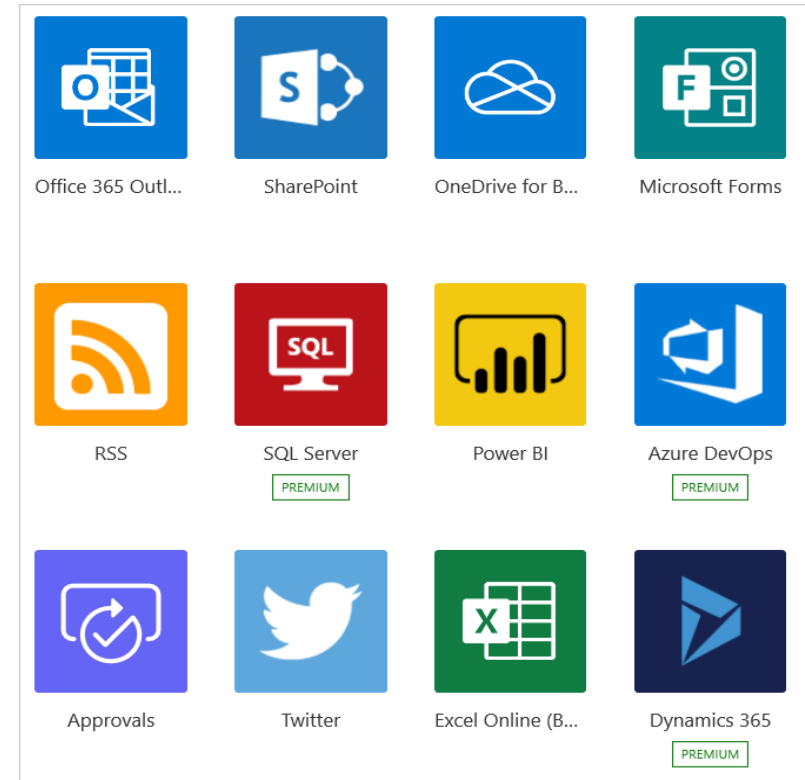


Module 1 - Introduction to Microsoft Power Automate and AI Builder

Introduction to Microsoft Power Automate and AI Builder

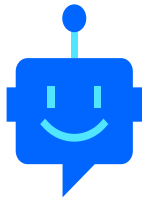
What is Microsoft Power Automate?

Power Automate is an online workflow service that automates actions across the most common apps and services.



Power Automate feature overview

Intelligent automation offerings across RPA, DPA, and AI



UI automation

Automate actions in the UI of any desktop or browser-based task across legacy and modern applications with *UI flows* and *Power Automate Desktop*.

Robotic Process Automation



API automation

Build simple approvals to complex workflows with over *400 pre-built API* connectors and manage business processes.

Digital Process Automation



Infusion of AI

Infuse Artificial Intelligence with *AI Builder* into any workflow to turn structured and unstructured data into actions, without code.

Intelligent Automation

Power Automate flows

Automate actions across multiple tools leveraging API Connectors

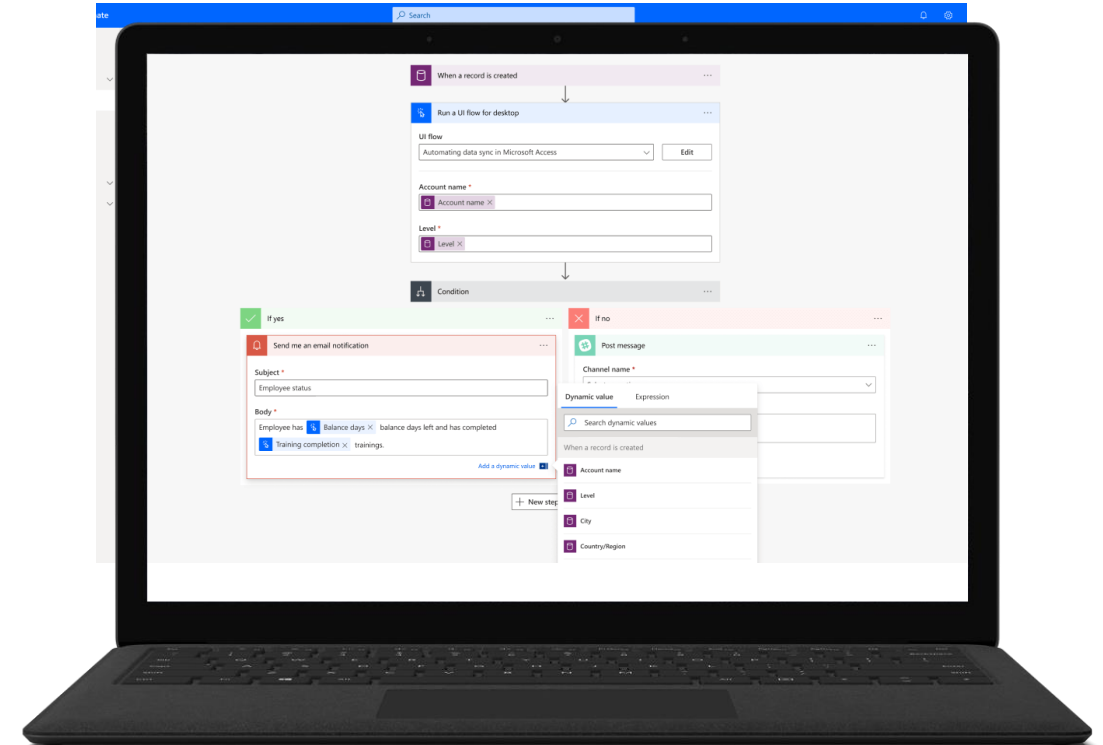
- API Automation offers high performance and high reliability without complex integration.

- Built on the Azure Logic Apps platform and simplified for citizen developers in a SaaS business model.

- Easily connect Business Process flows (BPM) and Power Automate Desktop (RPA) with other flows.

- Flows can work for only specific users or can be shared across the entire organization.

- Easy Drag and Drop experience with dynamics values from previous steps and custom expression.



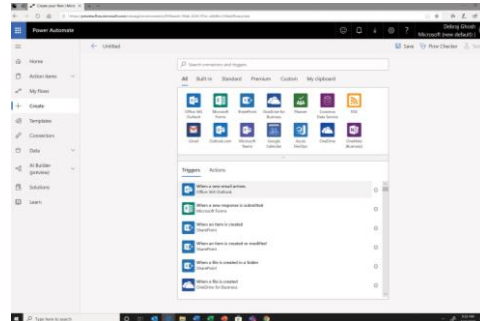
Endless automation with built-in API

Put the power of automation into the hands of all users with pre-built actions, templates and connectors



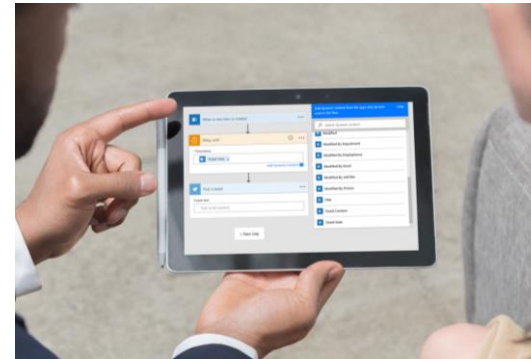
400+ connectors

Connect to **more than 400 1st and 3rd party services with built-in API connectors** for everything from Adobe to Zendesk to on-premises solutions.



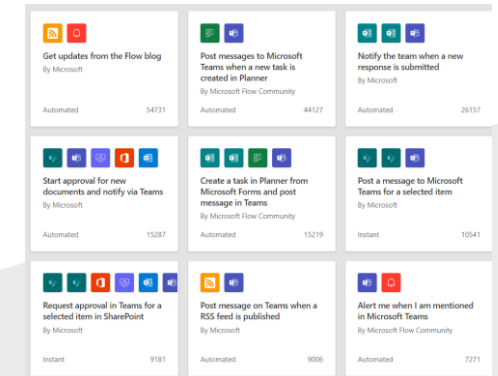
Hundreds of triggers

Initiate your workflows in whatever way is most convenient: **With buttons, through connected cloud apps, or on a schedule.**



Thousands of actions

Choose from built-in actions or create your own, **using cloud services or on-premises solutions.** Automate advanced scenarios without limit.



Pre-built templates

Get started quickly with thousands of **curated, pre-built templates** that make it easier for users to get started automating immediately and **customize** as your needs evolve.

What can you do with Power Automate?

Use Power Automate to automate workflows between your favorite applications and services, sync files, get notifications, collect data, and much more

For example, you can automate these tasks:

Instantly respond to high-priority notifications or emails

Capture, track, and follow up with new sales leads

Copy all email attachments to your OneDrive for Business account

Collect data about your business, and share that information with your team

Automate approval workflows

Where can I create and administer a flow?

You can create a flow and perform administrative tasks in a browser or, if you download the Power Automate mobile app, on your phone.

- Turn flows on or off from wherever you are.
- See when a flow has failed.
- Review detailed run history reports.
- View and filter runs by notification type.

Example: Purchase order approval

PowerApps

↓

Get manager (V2)

* User (UPN)

Getmanager(V... x

Show advanced options ▾

↓

Start and wait for an approval

* Approval type

Approve/Reject - First to respond ▾

* Title

Please approve the Purchase Order

* Assigned to

Mail x

Details

Markdown supported (see <https://aka.ms/approvaldetails>)

Item link

Add a link to the item to approve

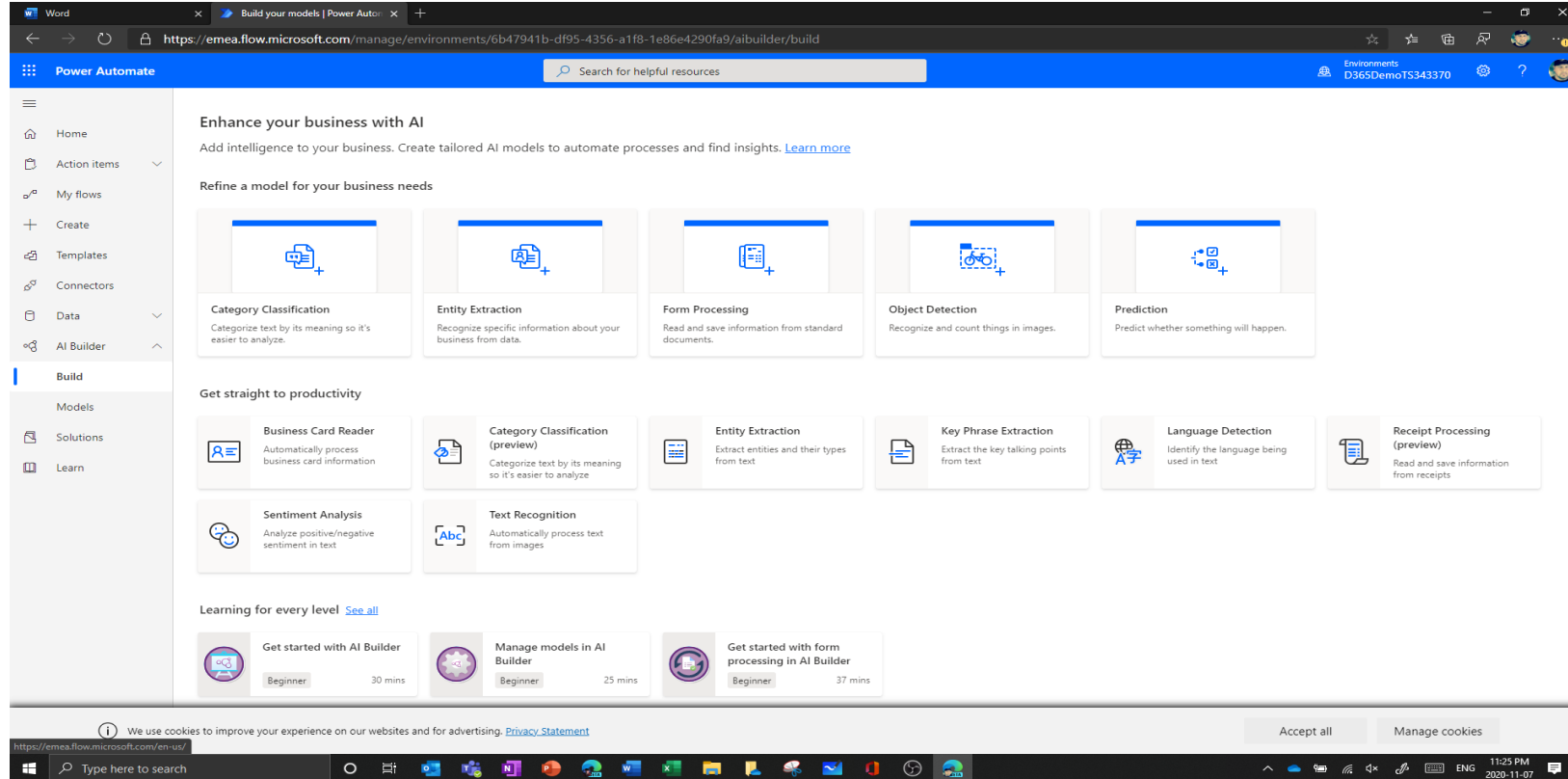
Item link description

Describe the link to the item

Show advanced options ▾

AI Builder

Artificial Intelligence for the Power Platform



Creating Power Automate flows

Key concepts

Every flow has two main parts:

A Trigger:

The starting action of the flow such as new email arriving in your inbox or a new item being added to a SharePoint list

One or more Actions:

What you want to happen when a trigger is invoked such as start the action of creating a new file on OneDrive for Business

Flow capabilities

Automated

Schedule



Instant



Notifications

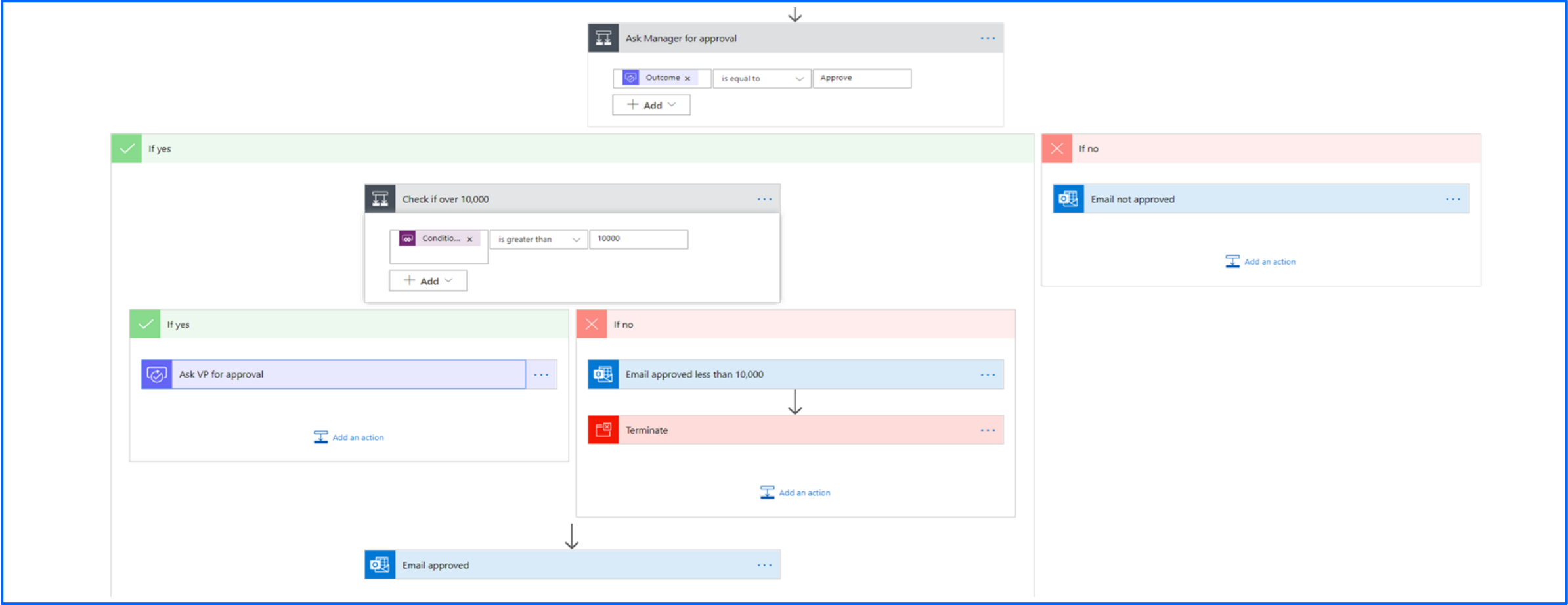


Approvals

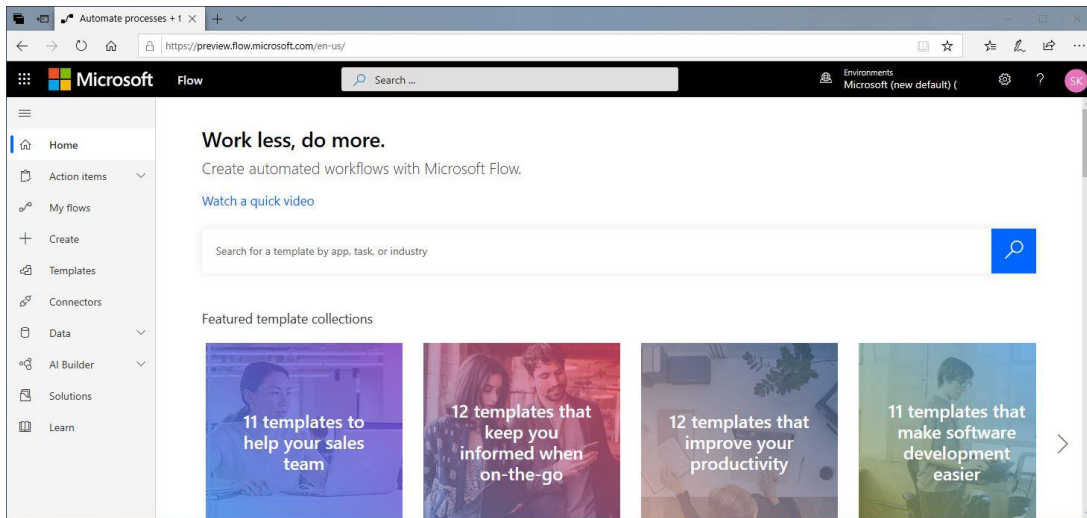


Mobile

Example: Purchase order approval



A brief tour of Power Automate

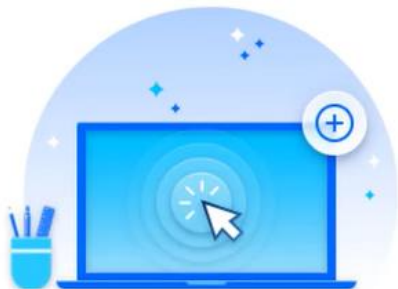


- **Action items**, where you can manage approvals and business process flows.
- **My flows**, where your flows reside.
- **Create**, where you start a new flow.
- **Templates**, where you can take a look at some of the most popular templates. These should give you some great ideas for flows you want to try.
- **Connectors**, where you can connect from one service to another.
- **Data**, where you can access entities, connections, custom connectors and gateways.
- **Solutions**, where you can manage your solutions.
- **Learn**, where you can find information that will help you quickly ramp up on Power Automate.

Flow types



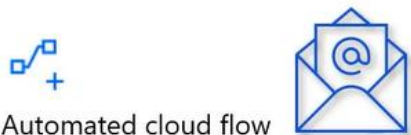
Cloud flows



Desktop flows



Business process flows



Automated cloud flow



Instant cloud flow



Scheduled cloud flow



Power Automate Desktop



Selenium IDE



Windows recorder



AI model in your business process



DEMO

**Create flow from
template**

Dynamic content in Power Automate

Dynamic content

When a record is created

Send an email

* To

test@email.com

* Subject

New Help Request -

Title

Add dynamic content

* Body

Description

Show advanced options

+ New step

Save

Dynamic content

Expression

Search dynamic content

When a record is created (Admin Only) See more

Contact

Unique identifier for Contact associated with Course Help...

Contact Type

Unique identifier for Contact associated with Course Help...

Course

Unique identifier for Course associated with Course Help...

Course Help Me

Unique identifier for entity instances

Course Type

Unique identifier for Course associated with Course Help...

Created By

Unique identifier of the user who created the record.

Created By Type

Unique identifier of the user who created the record.

Created On

Date and time when the record was created.

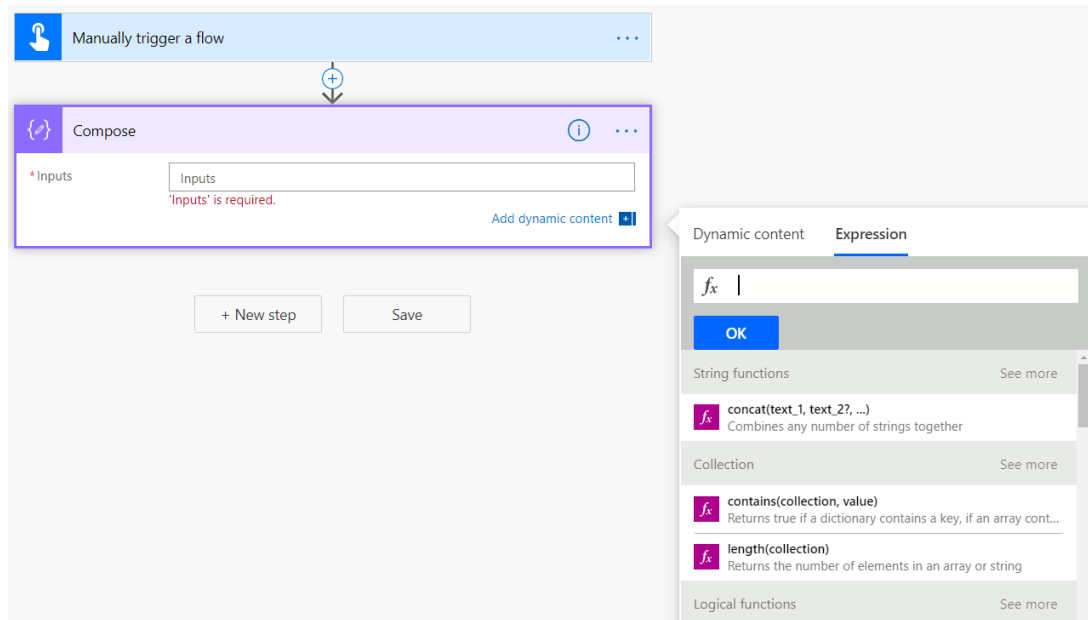
DEMO

Dynamic content

Expressions in Power Automate

Get started with expressions

To write an expression in Power Automate, select a field to open the **Dynamic content** menu and then select **Expression** as shown below.



Tip: Notice in the screenshot that we used a **Manually triggers a flow** trigger and a **Compose** action.

DEMO

**Expressions in
Power Automate**

Introduction to business process flows in Microsoft Power Automate

Introduction to business process flows

Introduction to business process flows

PowerApps Knowledge Admin Assessments > Assessments > New Assessment without any questions

26 Days Remaining MOD Administrator Owner

Assessment Process
Active for 3 days

Assessment (3 D)

Activate

New Assessment without any questions
Knowledge Assessment

General Questions Related

Title	* New Assessment without any questions
Start Date	1/7/2020
End Date	2/7/2020
Difficulty	Intermediate
Total Points	0
Last updated:	1/13/2020 4:10 AM
High Score User	---
High Score	---
Passing Score (%)	---
Notify Manager	Yes
Approval Status	---

Active for 3 days

Passing Score (%) ---

Total Points 0

Last updated: 1/13/2020 4:10 AM

✓ Notify Manager Yes

Create Questions * Mark Complete

Next Stage >

Timeline

Enter a note...

No records to show.

Business process flows

A guide, roadmap,
recipe, ...

Stages and steps

Stage gating

Conditional
branching

Include multiple
tables

Switch at any time

Role tailored

The screenshot displays a Business Process Flow (BPF) for an "Opportunity Sales Process". The top navigation bar shows four stages: "Qualify" (completed with a checkmark), "Develop (< 1 Min)" (current stage with a target icon), "Propose", and "Close". A red box highlights these stage headers. The "Develop" stage is expanded, showing a list of steps: "Customer Need", "Proposed Solution", "Identify Stakeholders", and "Identify Competitors". The last two steps have checkboxes for "mark complete". A green box highlights this list of steps. On the left, a "Summary" pane shows details for the account "Wide World Importers", including "Purchase Timeframe: Immediate", "Currency: US Dollar", and "Budget Amount: \$8,135,000.00". A red callout bubble labeled "Stages" points to the stage headers, and a green callout bubble labeled "Steps" points to the step list. The bottom right shows a "Stakeholders" table with one entry: Ivan Komashinsky, Stakeholder.

Stage	Step	Completion
Qualify	Customer Need	---
	Proposed Solution	---
	Identify Stakeholders	<input type="checkbox"/> mark complete
	Identify Competitors	<input type="checkbox"/> mark complete
Propose		
Close		

Name	Role
Ivan Komashinsky	Stakeholder

When to use business process flows



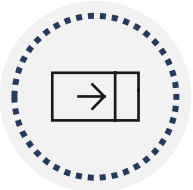
Want to create automated business processes with Dynamics 365 Solutions



Want a simple visual guide to help users complete a process



Want to use out-of-the-box business process flows



Have a Dynamics 365 license and want to create automated business processes with Dataverse

How is it different from a Power Automate flow?

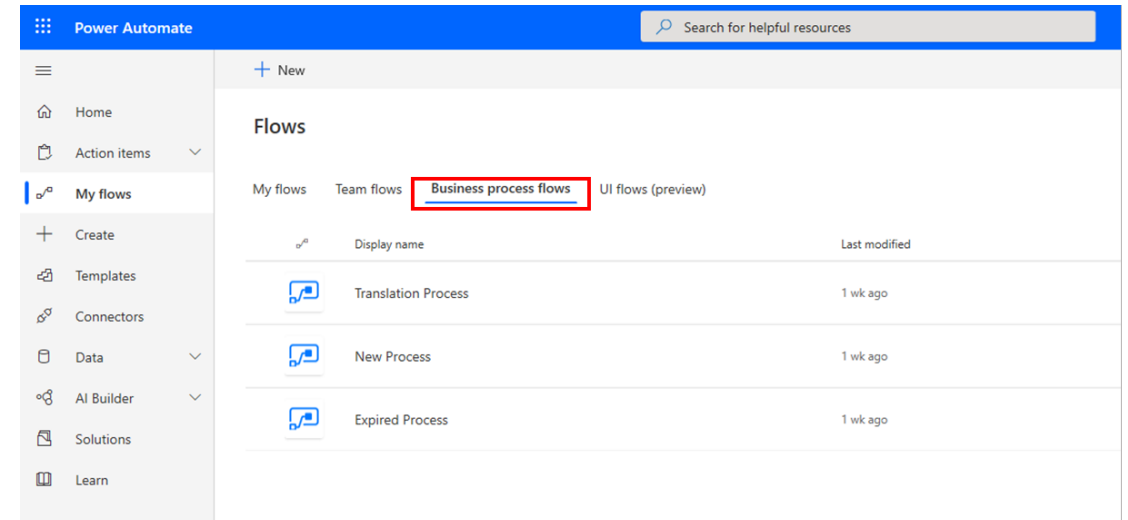
Business process flows offer the following benefits:

Improved outcomes

Consistent stages and work steps across all instances of the process

Improved data collection and reporting

Decreased time to complete the process



When to use

Business Process Flow

Want to create automated business processes with Dataverse Solutions

Want a simple visual guide to help users complete a process

Want to use out-of-the-box business process flows

Have a Dynamics 365 license and want to create automated business processes with Dataverse

Power Automate Flow

Start based on a predefined time interval or after X minutes, hours, or days of some action or event

Want to trigger a flow based on data outside of Dataverse (SharePoint, for example)

Do not want to store data that is captured in the flow in Dataverse

Want to push notifications outside of Outlook (SMS or Gmail, for example)

Want to use and create workflows with only a Microsoft 365 license

DEMO

**Introduction to
business process flows**

Create a business process flow

DEMO

**Create a business
process flow**

Get started with AI Builder

What can you do with AI Builder

What can you do with AI Builder?



Analyze text for classification, key phrases, language, and sentiment



Predict whether something will happen



Process business card information

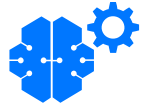


Process text from images



Read and save information from standard documents

Automate with AI builder



Infuse AI into any workflow to turn structured and unstructured data into actions, without code.



Documents

Forms processing
Business card reader
Receipt processing



Natural Language

Language detection
Category classification
Key phrase extraction
Sentiment analysis



Images

Object detection
Text recognition OCR



Decisions

Predictions

What you can do with AI Builder

You can use AI Builder to create custom AI models that suit the needs of your business, or you can choose from a selection of prebuilt models

The screenshot displays the Microsoft Power Apps AI Builder interface. The top navigation bar is purple and includes the 'Power Apps | AI Builder' title, an 'Environment' dropdown set to 'Virtual Training Days', and icons for notifications, settings, help, and a user profile. A left-hand navigation pane lists various app development options: Home, Learn, Apps, Create, Data, Flows, Chatbots, AI Builder (selected), Build, Models, and Solutions. The main workspace is titled 'Models > Invoices' and indicates the model is a 'Form Processing' type, 'Not published', and created by 'Kym Dupuis'. It features three primary panels: 1. 'Training document' showing a sample invoice from 'Contoso Electronics' with a table of items and a 'Publishing' button. 2. 'Selected fields' listing extracted data points like Date, Invoice Number, Product, Qty, Amount, Tax, Sub-Total, Total, Supplier, and Supplier Address. 3. 'How your model is used' showing integration options with 'Power Automate' and 'Power Apps', both marked as 'Model isn't published'.

Power Apps | AI Builder Environment: Virtual Training Days

Models > **Invoices**
Form Processing • Not published • Kym Dupuis

Training document [See details](#)

Selected fields [See all \(12\)](#)

How your model is used

Training document details:

Contoso Electronics
2145 1st Ave NE
Bellevue, WA 98004
Phone: (206) 555-1234
Email: sales@contoso.com

INVOICE
Invoice # 1007
Date: 10/15/2023
Due Date: 11/15/2023
Amount Due: \$1,102.87

Qty	Product	Unit Price	Total Price
1	Wireless Mouse	\$12.00	\$12.00
2	USB Cable	\$5.00	\$10.00
1	Keyboard	\$25.00	\$25.00
1	Monitor	\$100.00	\$100.00
1	Headset	\$20.00	\$20.00
1	Printer	\$50.00	\$50.00
1	Scanner	\$100.00	\$100.00
1	Software License	\$500.00	\$500.00
1	Service Contract	\$100.00	\$100.00
1	Tax	\$12.87	\$12.87
	Total		\$1,102.87

Selected fields: Date, Invoice Number, Product, Qty, Amount, Tax, Sub-Total, Total, Supplier, Supplier Address

How your model is used:

- Power Automate**
Model isn't published
- Power Apps**
Model isn't published

Buttons: Publishing, Quick test

Where you can use AI Builder

You can access AI Builder within Power Apps and Power Automate

The screenshot displays the Microsoft Power Apps AI Builder interface. At the top, a purple header bar contains the text "Power Apps | AI Builder" on the left and navigation icons (Environment, Virtual Training Days, notifications, settings, help, and user profile) on the right. Below the header, a light purple banner states: "You have 28 days and 99% capacity left in your free trial. You won't be able to use your models after your trial ends. [Learn more](#)".

The main content area is divided into two sections. The first section, "Enhance your business with AI", includes a sub-header "Add intelligence to your business. Create tailored AI models to automate processes and find insights. [Learn more](#)". Below this is the heading "Refine a model for your business needs", followed by five feature cards:

- Category Classification**: Categorize text by its meaning so it's easier to analyze.
- Entity Extraction**: Recognize specific information about your business from data.
- Form Processing**: Read and save information from standard documents.
- Object Detection**: Recognize and count things in images.
- Prediction**: Predict whether something will happen.

The second section, "Get straight to productivity", features six feature cards:

- Business Card Reader**: Automatically process business card information.
- Category Classification (preview)**: Categorize text by its meaning so it's easier to analyze.
- Entity Extraction**: Extract entities and their types from text.
- Key Phrase Extraction**: Extract the key talking points from text.
- Language Detection**: Identify the language being used in text.
- Receipt Processing (preview)**: Read and save information from receipts.

A left-hand navigation pane is visible, showing options like Home, Learn, Apps, Create, Data, Flows, Chatbots, AI Builder, Build, Models, and Solutions.

Create an AI model

DEMO

Create an AI model

Using AI Builder with Power Automate

DEMO

**Using AI Builder with
Power Automate**

**Automate processes with Robotic Process
Automation and Power Automate Desktop**

Build desktop flows

Introduction

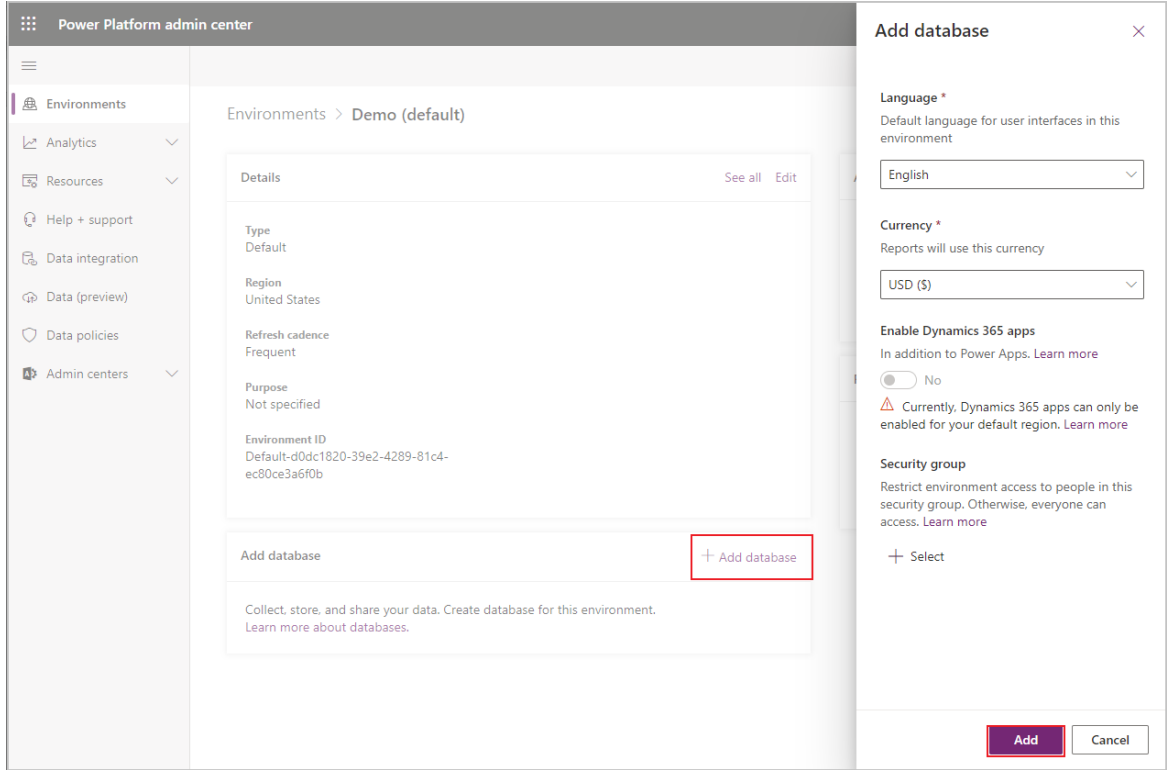
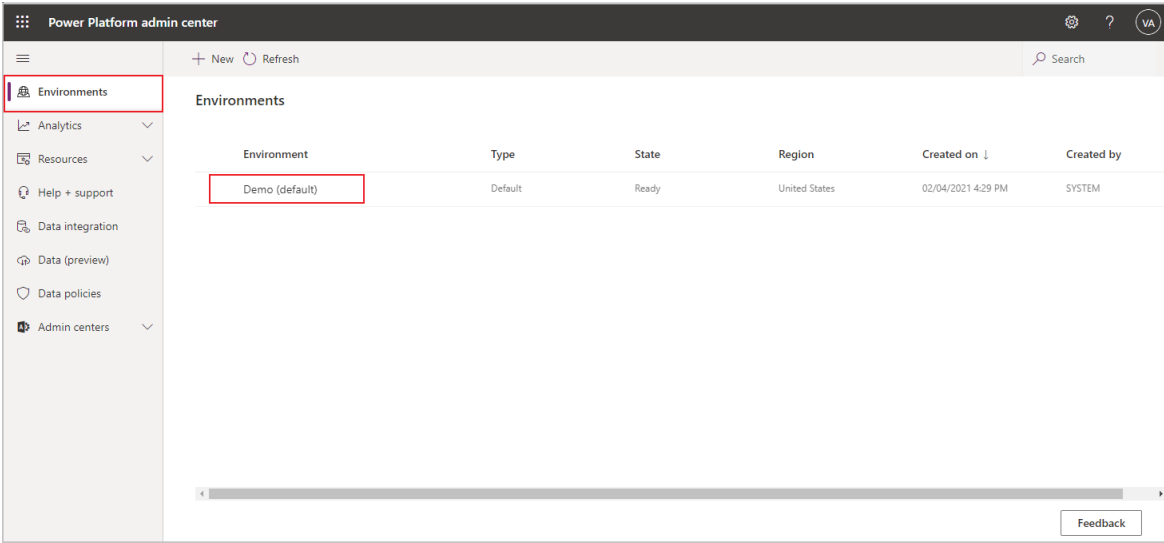
Repetitive tasks consume many workers' days, decreasing productivity and creating a less-engaging work environment.

- Learn about Power Automate Desktop flows.
- Create a new desktop flow.
- Record actions that are performed in a desktop-based application.
- Perform a test run of the new desktop flow.

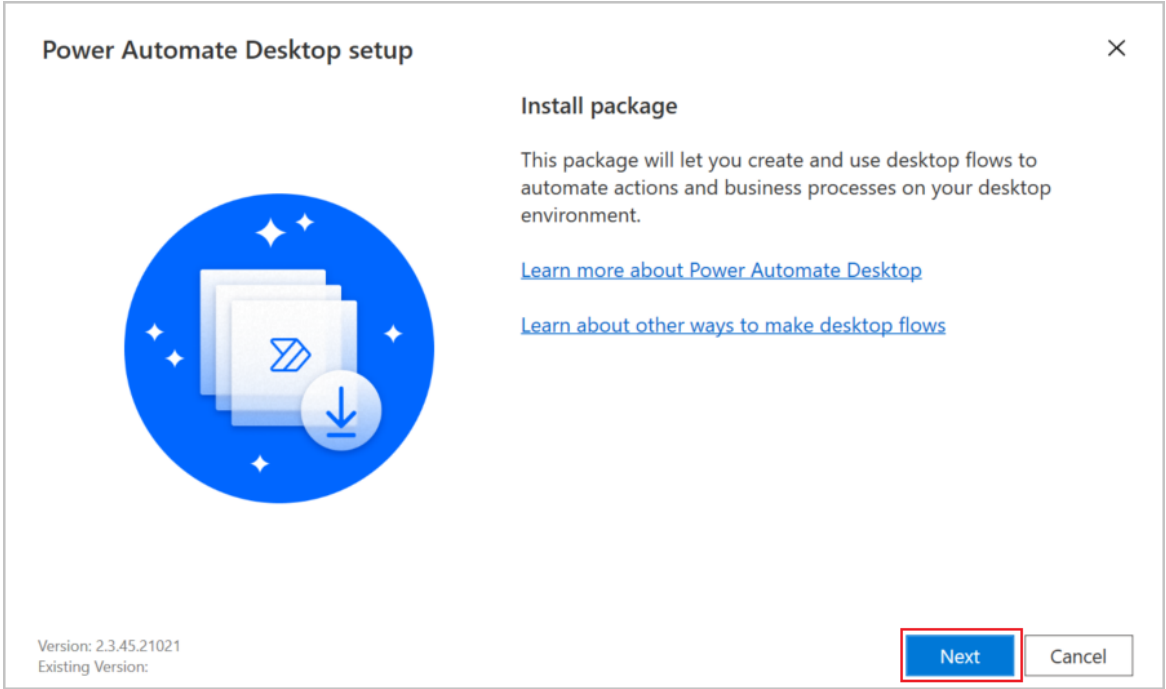
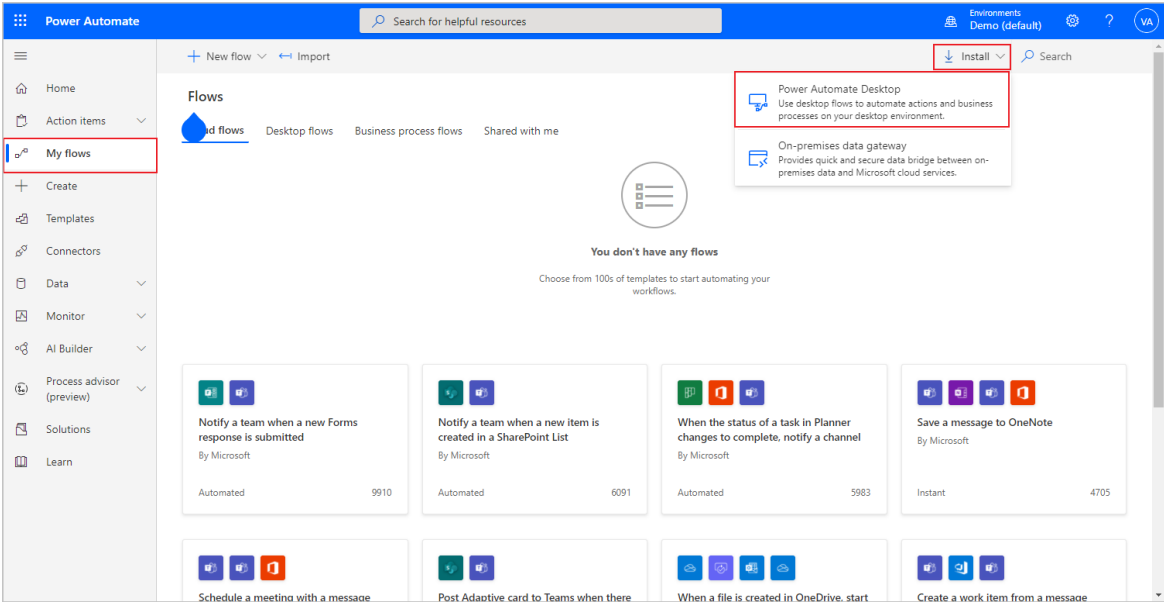
Set up the environment

Creating and running automation systems in Power Automate requires you to have access to make changes to the environments in your tenant and to have the appropriate licenses and permissions.

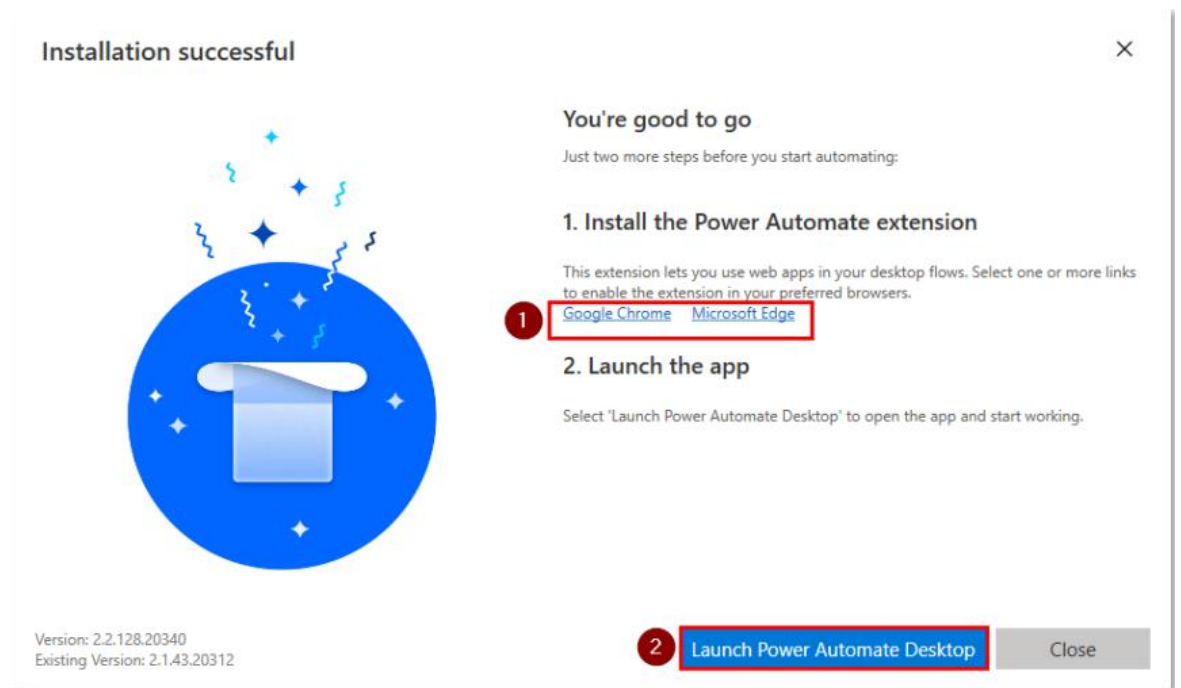
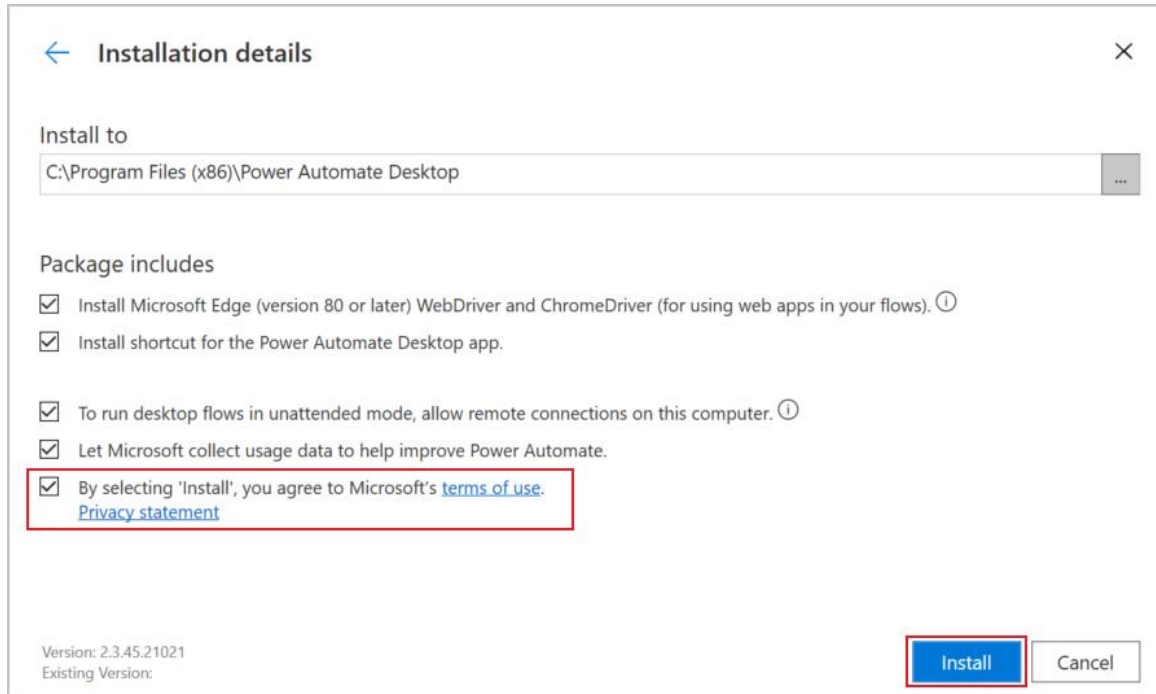
Create a trial environment with database



Power Automate Desktop

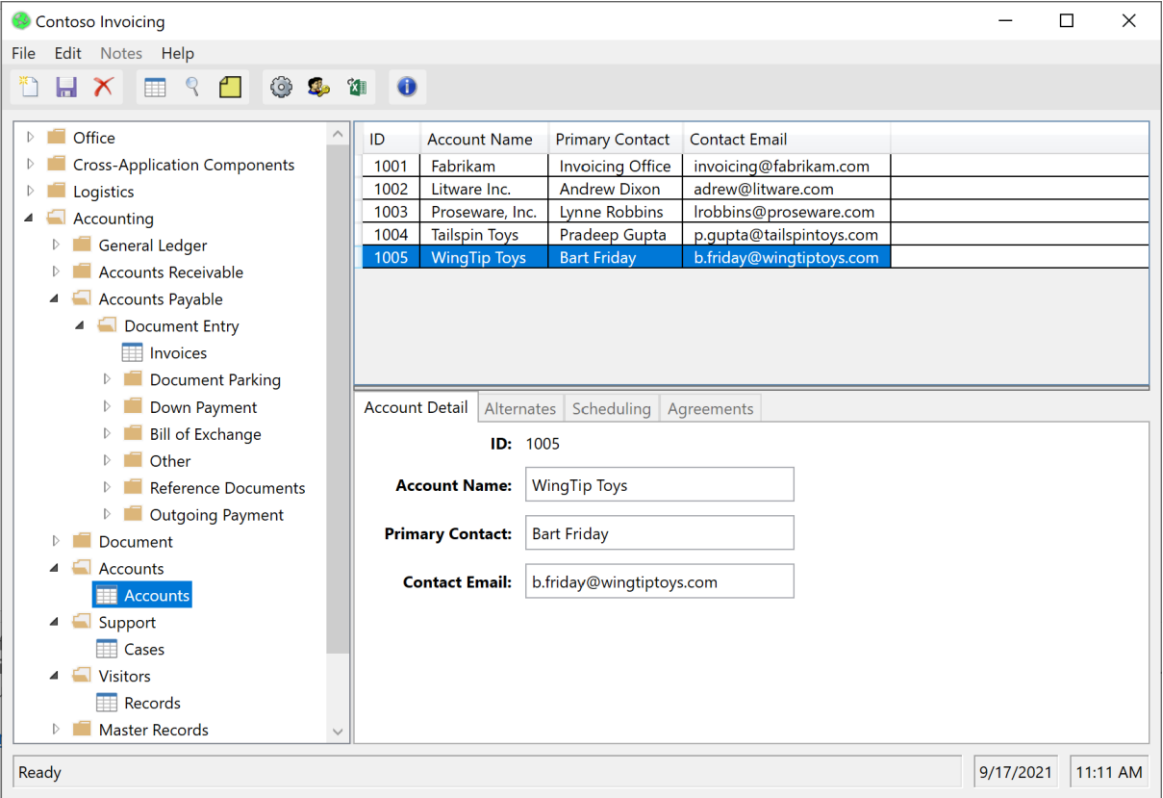


Power Automate Desktop



Contoso Invoicing app

A major benefit of using desktop flows is the ability to perform actions on desktop applications.



DEMO

**Create your first
Power Automate
Desktop flow**

Define input and output parameters in Power Automate

Introduction

Automating repetitive tasks will allow you to increase productivity and to spend time on more meaningful tasks.

- Create a desktop flow with predefined inputs.
- Record actions that are performed in the desktop-based Contoso Invoicing application by using these inputs and capturing application data for output.
- Perform a test run of a new desktop flow with a new set of inputs.

DEMO

**Define input and
output parameters in
Power Automate**

Optimize your business process with process
advisor

Introduction

Efficiency is the goal of all organizations.

Process advisor maps your process and begins automation to help simplify your business processes and increase efficiency.

Get familiar with process advisor

Power Automate

Environments
Demo (default)

?

VA

Home

Action items

My flows

Create

Templates

Connectors

Data

Monitor

AI Builder

Process advisor

Create

Processes

Solutions

Learn

Optimize your business processes

Use process advisor to identify opportunities and refine your business processes. [Learn more](#)

Build a process

Create a new process

Set up a process, then share it so others can add their recordings.

Add a new recording

Record actions to add to an existing process.

Start with a process

We'll help you find opportunities to improve your business operations. First, set up a process and share it with your team.

1 of 2

Next

Learning more about processes

Download Power Automate Desktop

How to create a process

How to share a process

Description

Submit a new invoice using Contoso Invoice App

Owner

Virtual Agent

Created

5/13/2021, 2:05 PM

Status

Analyzed

Modified by

Virtual Agent

Modified

5/13/2021, 2:05 PM

Analyzed

12/14/2020, 8:45 AM

Analyzed recordings

7

Co-owners

VA

Contributors

Recordings

+ New recording

Name	Created by	Created	Modified by	Modified ↓	Status
Shakti Menon 12/1/2020, 11:06 AM	Virtual Agent	7 min ago	Virtual Agent	7 min ago	Analyzed
Wasanthi Gamage 12/7/2020, 6:46 PM	Virtual Agent	7 min ago	Virtual Agent	7 min ago	Analyzed
Egon Nilsson 12/7/2020, 6:48 PM	Virtual Agent	7 min ago	Virtual Agent	7 min ago	Analyzed
Preston Morales 12/1/2020, 11:01 AM	Virtual Agent	7 min ago	Virtual Agent	7 min ago	Analyzed
Christopher Reed 12/7/2020, 6:30 PM	Virtual Agent	7 min ago	Virtual Agent	7 min ago	Analyzed
Preston Morales 12/7/2020, 6:38 PM	Virtual Agent	7 min ago	Virtual Agent	7 min ago	Analyzed

See all

DEMO

**Optimize your
business process with
process advisor**