Automated Birthday Greeting System using Power Automate

# Objective

To automate the process of sending birthday-related emails to improve workplace morale and efficiency. The system ensures that the Assistant HR is reminded a day before any staff member’s birthday, allowing time for preparation and celebration. On the actual birthday, the concerned staff member receives a birthday greeting.

# Tools Used

• Microsoft Power Automate

• Microsoft Excel (Online)

• Microsoft Outlook (Office 365)

# Data Source (Excel Sheet Structure)

The Excel sheet is stored in OneDrive or SharePoint and formatted as a table named 'tblBirthdays'. It includes the following columns:

• Name

• Email

• Birthday (in yyyy-mm-dd format)

# Flow Structure

## Flow 1: Pre-Birthday Reminder to Assistant HR

• Trigger: Scheduled to run daily at 8:00 AM

• Action Steps:

1. List rows present in the Excel table

2. Apply to each row

3. Use an expression to check if the birthday is tomorrow (compare day and month only)

4. If condition is true, send an Outlook email to the Assistant HR with the staff's name and birthday details

## Flow 2: Birthday Greeting to Staff

• Trigger: Scheduled to run daily at 8:30 AM

• Action Steps:

1. List rows present in the Excel table

2. Apply to each row

3. Use an expression to check if today is the birthday (compare day and month only)

4. If condition is true, send a personalized birthday greeting via Outlook to the staff member

# Key Expressions Used

To compare day and month ignoring the year, use expressions like:

For checking tomorrow:

formatDateTime(addDays(utcNow(), 1), 'MM-dd') == formatDateTime(items('Apply\_to\_each')?['Birthday'], 'MM-dd')

For checking today:

formatDateTime(utcNow(), 'MM-dd') == formatDateTime(items('Apply\_to\_each')?['Birthday'], 'MM-dd')

# Benefits

• Enhances staff morale through timely celebration of birthdays

• Reduces manual tracking and follow-up by HR personnel

• Demonstrates the potential of low-code/no-code automation tools in HR operations

# Conclusion

This automation project showcases how simple Power Automate flows can replace repetitive tasks, improve internal communication, and contribute to a positive organizational culture. It also highlights the integration of Microsoft tools to build efficient workflows.