

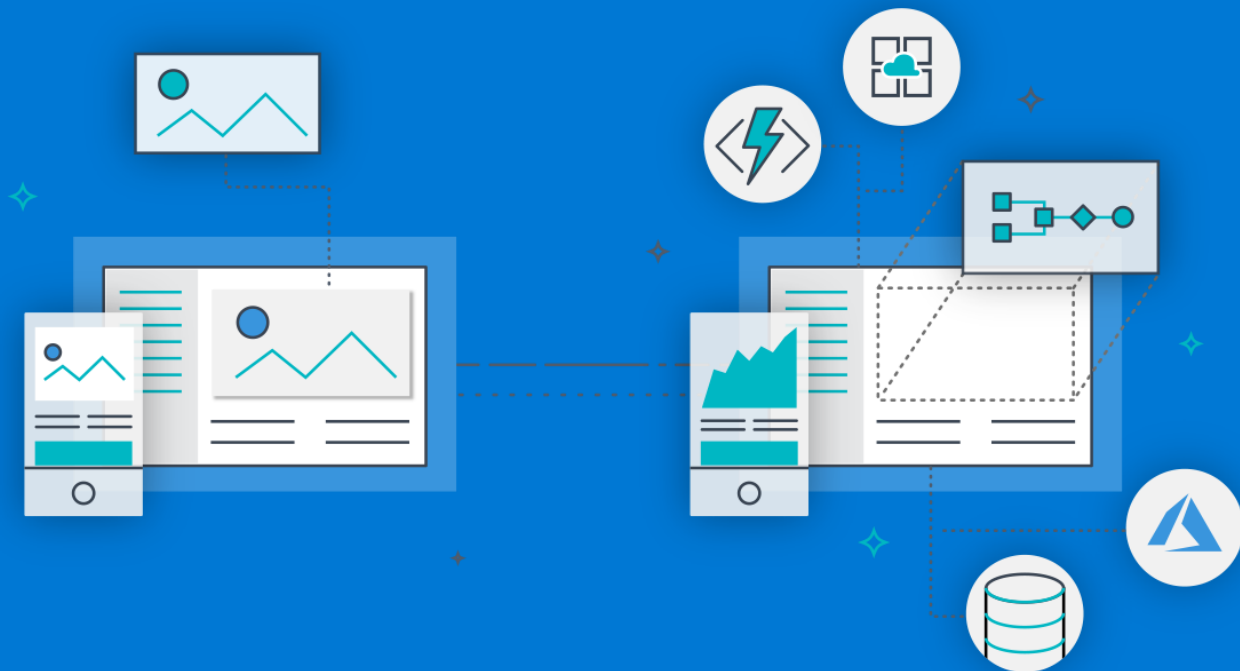


App in a Day

Business Application Platform

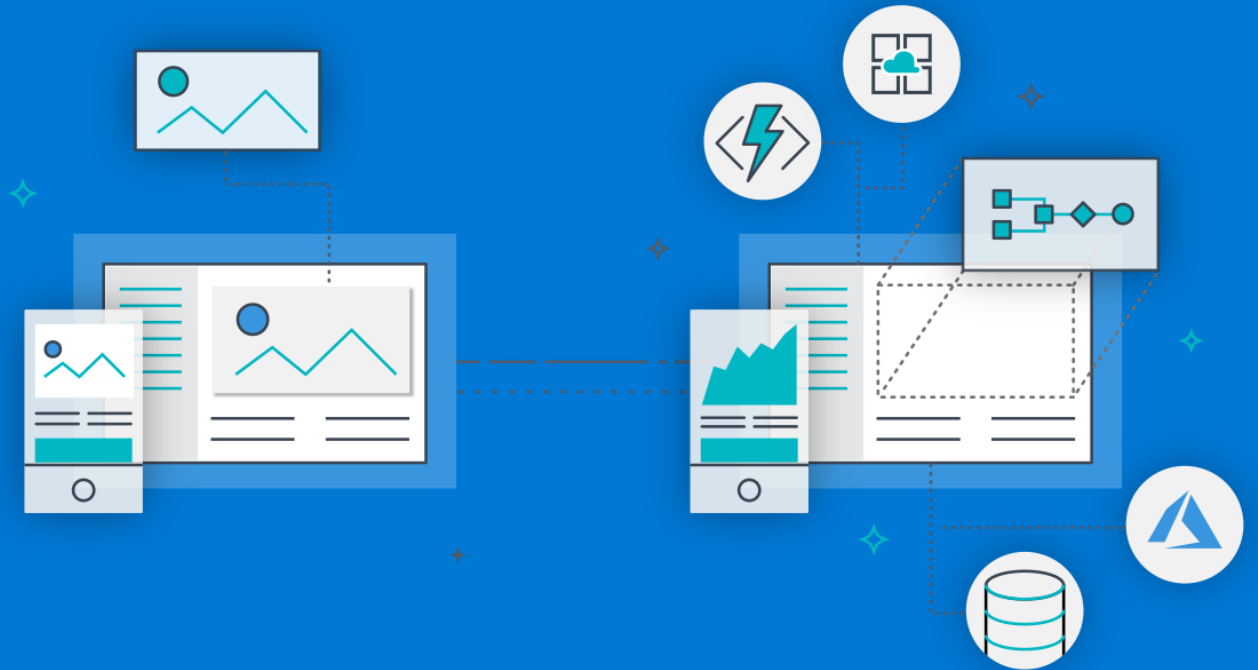
Power Apps, Power Automate
& Common Data Service (CDS)

Eric Sauv , XRM Vision

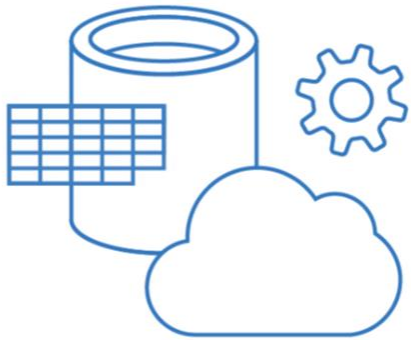


Power Automate

Eric Sauv , XRM Vision



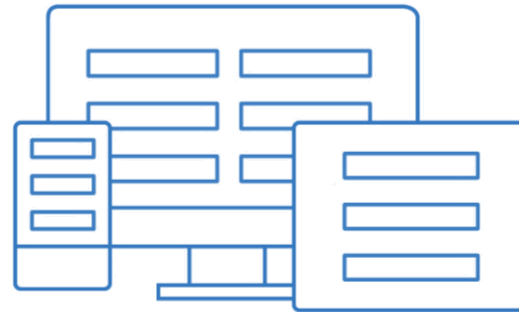
Power Automate is a service for automating workflows across apps and services



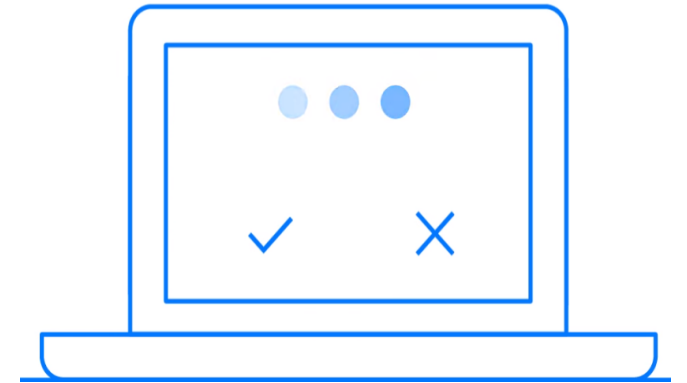
Connect to data & systems you're already using; create the data you need



Create workflows using triggers & actions without code or scripts



Edit flows on web and mobile



Approve requests or manage them on web and mobile

Common Scenarios

Automated approvals across data stores and services

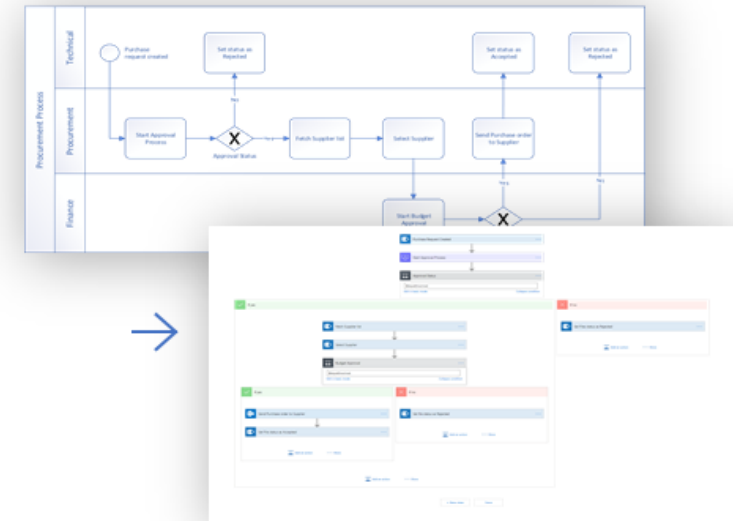
Recurring processing – e.g. expire all records over 7 days

Process guidance – interactive step by step completion of common business processes

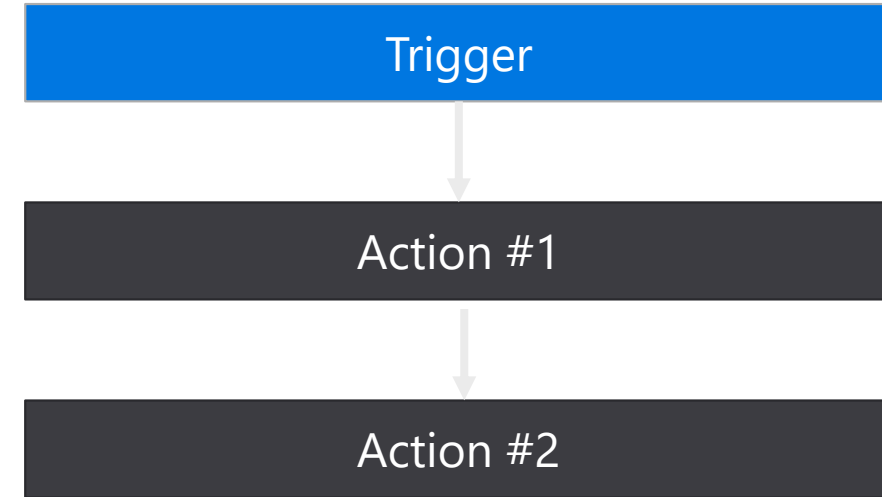
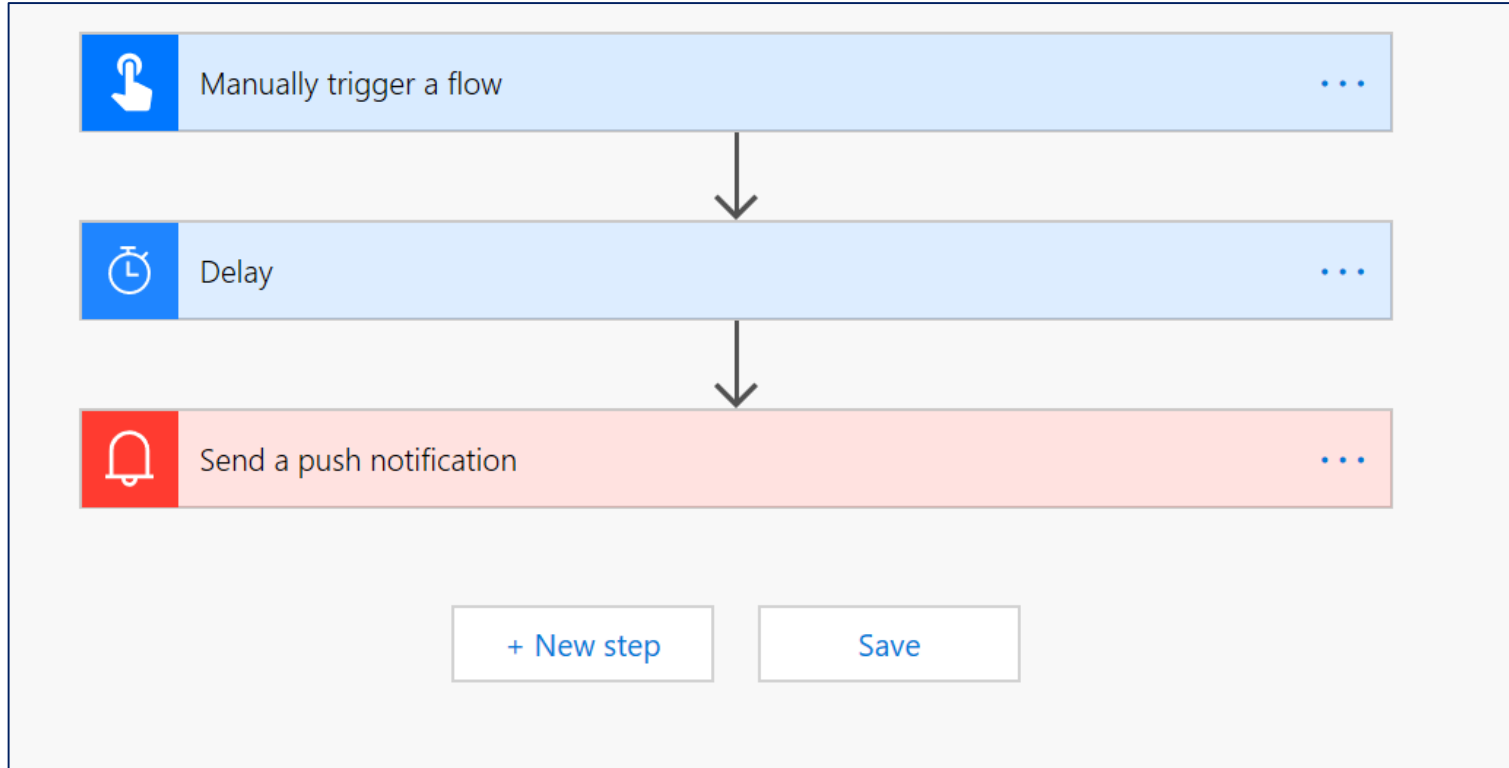
Automated triggering from data or service events e.g. record or file created

Mobile user clicks a button to kick off automation including context

Power App app user clicks a button to launch a flow in the background



What does a flow look like?



What makes up a flow?

Example: Notification flow

Trigger—the event that kicks off the flow:

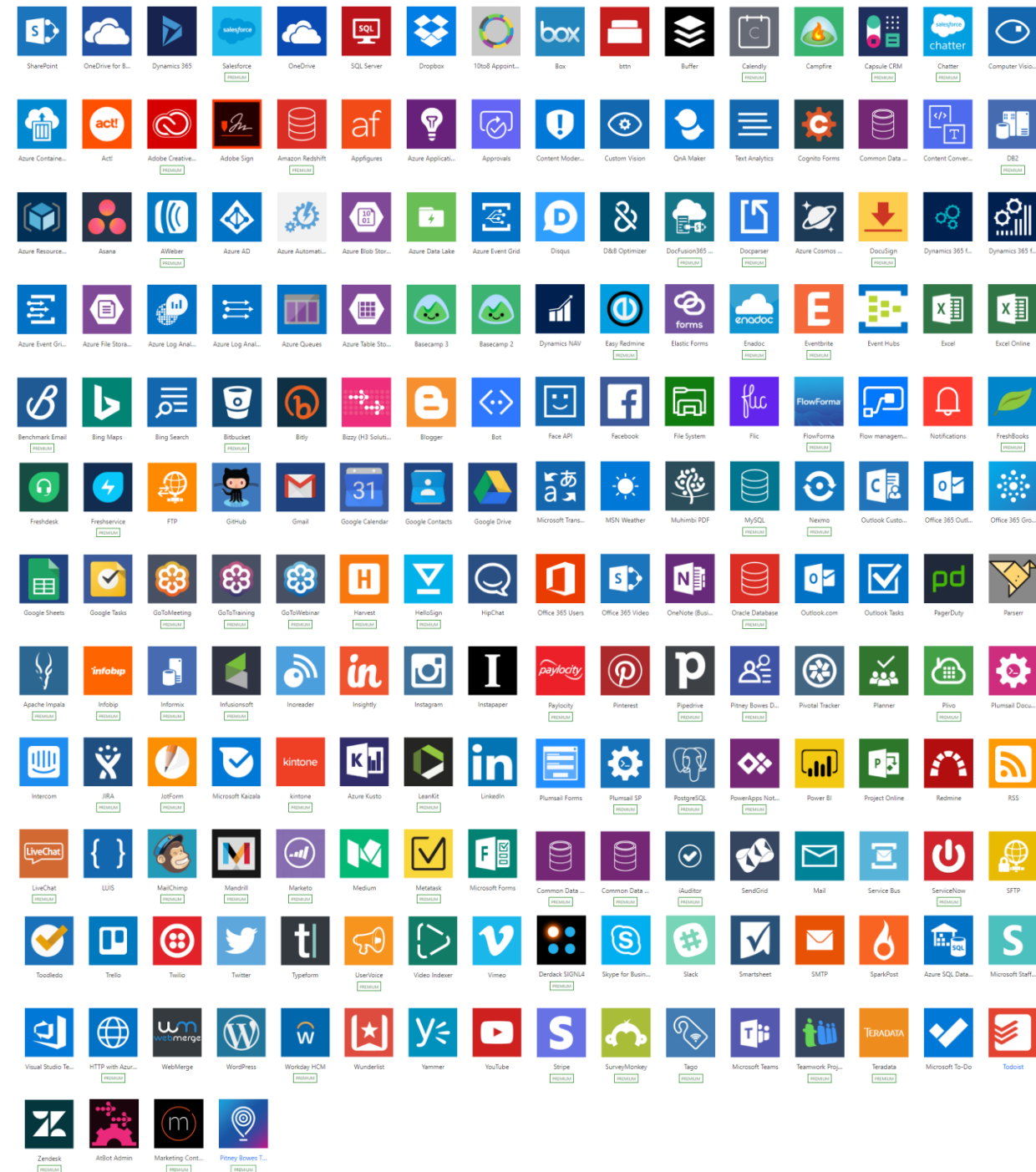
- Manual via button or Power Apps
- On a schedule
- On an event in the cloud

Actions—what the flow does
Uses data from the trigger

The screenshot displays a Microsoft Power Automate flow configuration. The top section, titled "When a record is created, updated or deleted", is the trigger. It includes fields for "Trigger condition" (set to "Create or Update"), "The entity name" (set to "Accounts"), and "Scope" (set to "Organization"). Below these is a "Filtering attributes" field with a placeholder text: "Comma-separated list of attributes. The trigger fires if at least one of these". A "Hide advanced options" link is at the bottom of this section. An arrow points down to the action section, titled "Send an email notification (V3)". This section includes fields for "To" (set to "Owner (Value)"), "Subject" (set to "Account record change"), and "Email Body". The email body is formatted with a salutation "Dear Owner (Value)," followed by a message: "Your assigned account record Account Name has been changed. Please review the record at your convenience." A "Show advanced options" link is at the bottom of the action section.

Integration + Connectivity

- Built-in connectivity to 250+ SaaS cloud services, file providers, databases, web APIs, productivity apps, and more
- Connect to on-premises systems via Data Gateway
- Pluggable extensibility via Custom Connectors to integrate existing LOB systems into flow



Characteristics of automated flows

- ⚡ Starts with an event or trigger
- 📋 Performs any number of actions
- 🔗 Can have conditional logic
- 🔄 Can call other workflows



What can business process flows do?



Create stages or screens that enforce a certain sequence of steps



For each stage, collect data from the user and / or and kick off automated workflows



Create branching logic based on the data

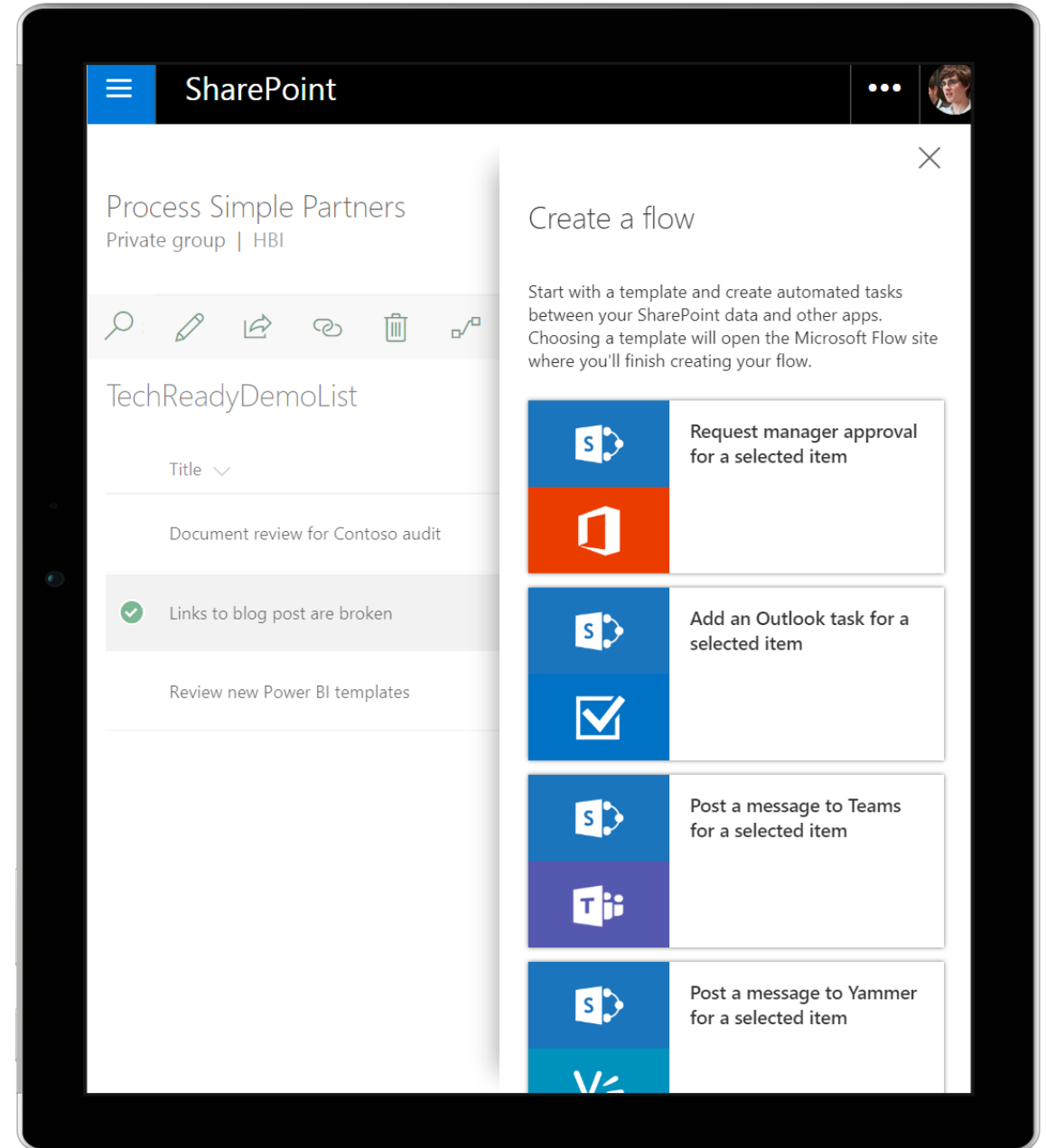


Flow & SharePoint & OneDrive

Flow button appears in all Modern Lists and Document Libraries

There are two states for the button:

1. When you don't have a file selected
 - You can create flows that run in the background on that list
2. When you have a file selected
 - You can create manual flows that run on that specific file
 - All manual flows already tied to that document library appear on the menu when you open it



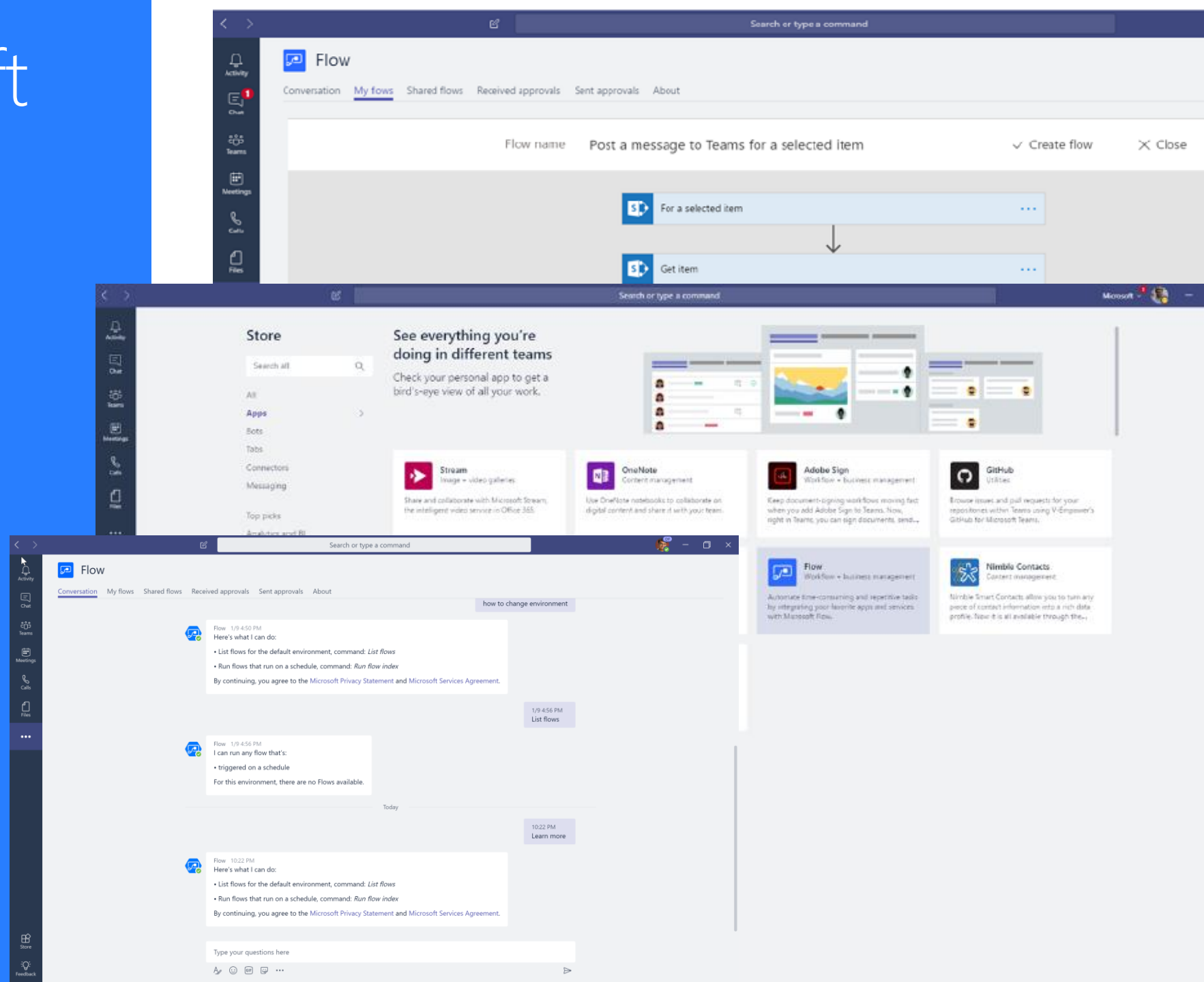
Flow & Microsoft Teams

Within Teams

- Access personal flows
- Create new flows
- Approvals center

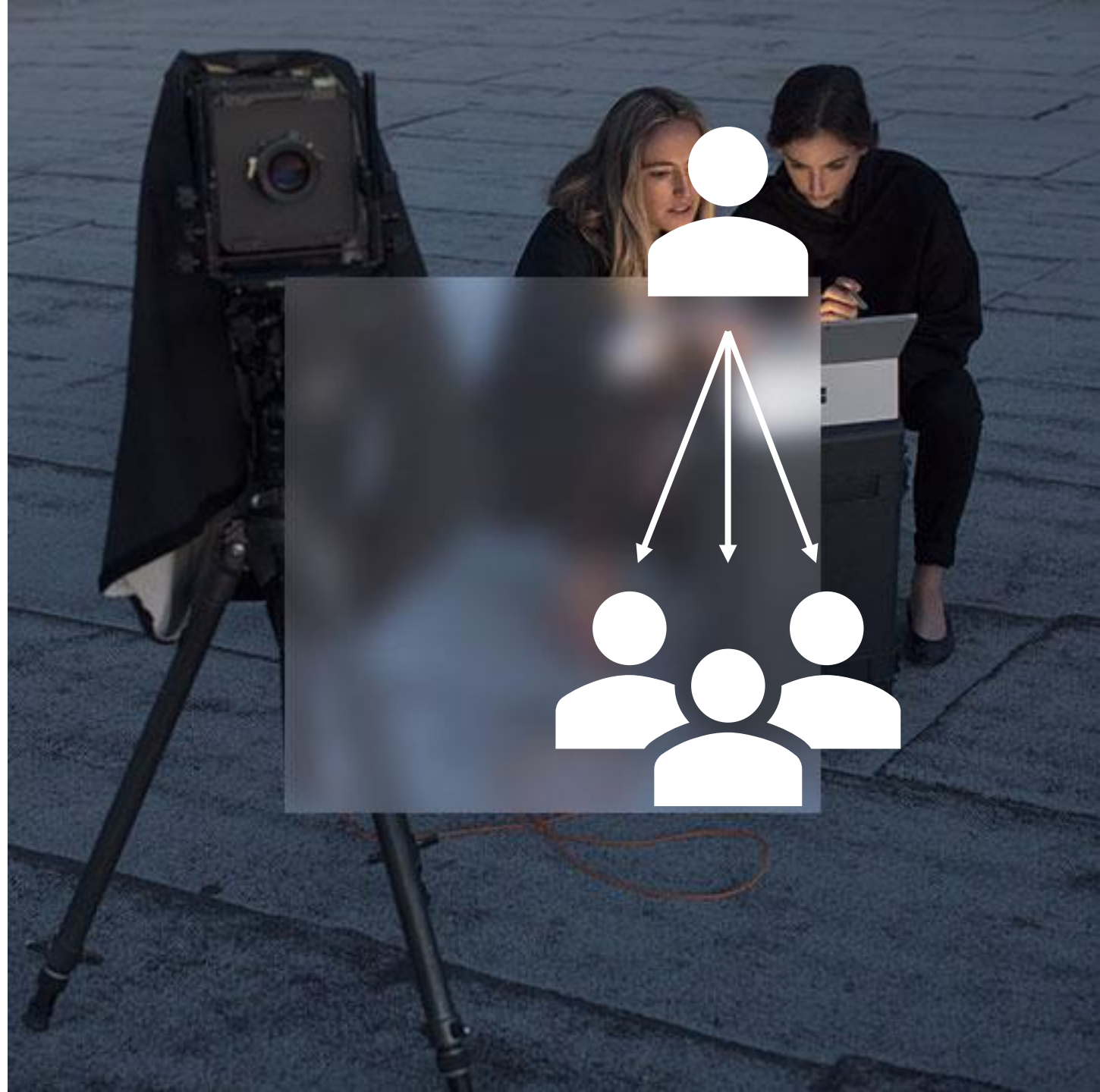
Use the flow bot to

- Trigger schedule based flows



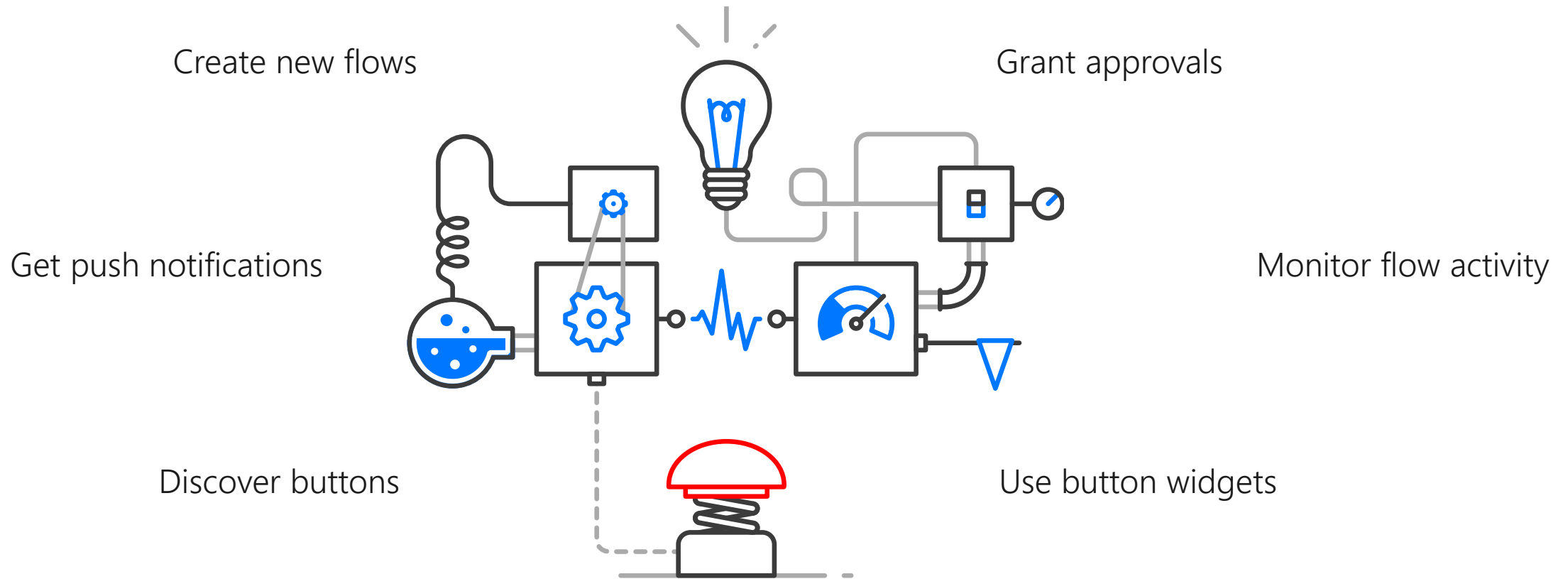
Flow sharing

- Many people can own a flow at once
- Use **buttons** to share the ability to *run* flows throughout your organization
- Use **approvals** for people to *participate* in a flow without knowing it's a flow



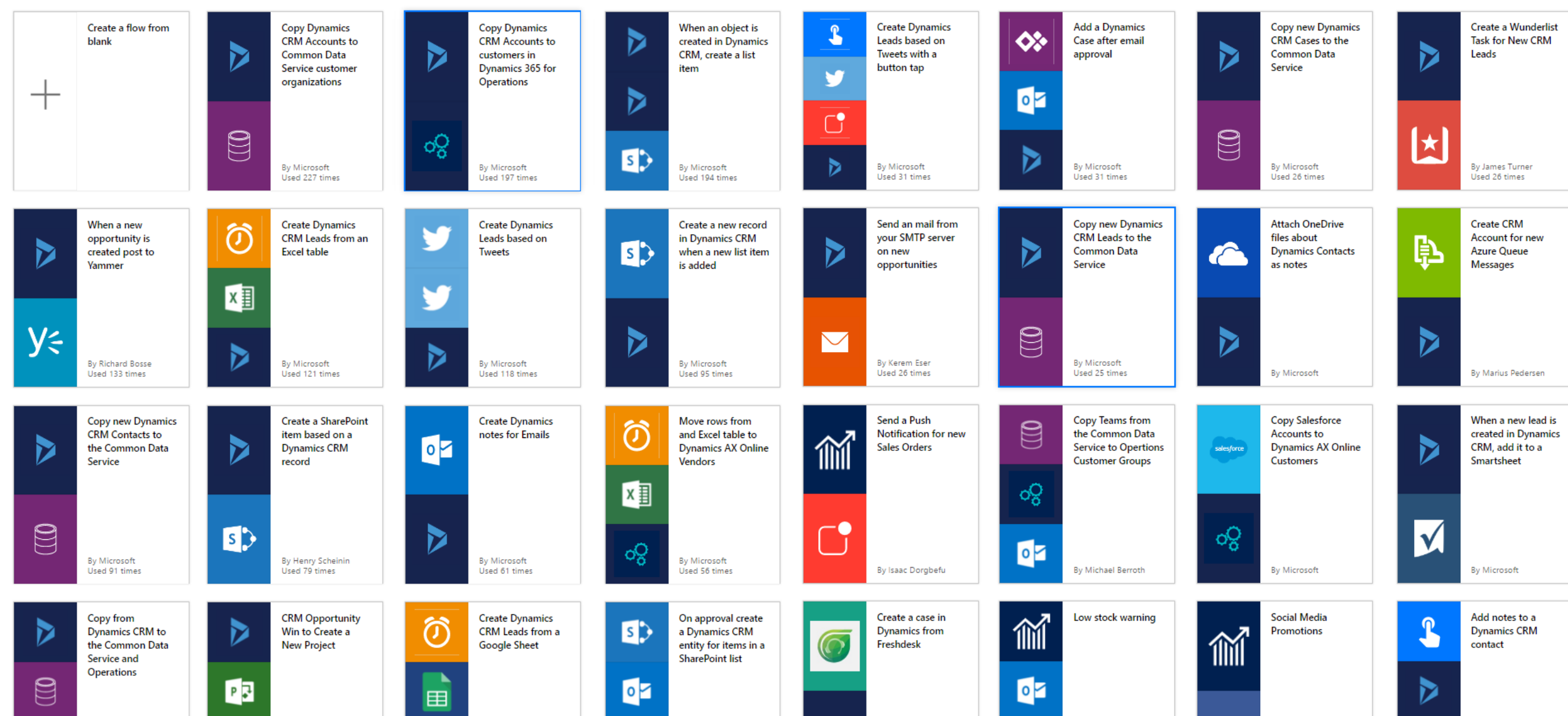
Power Automate Mobile & Devices

Work less and do more, from anywhere



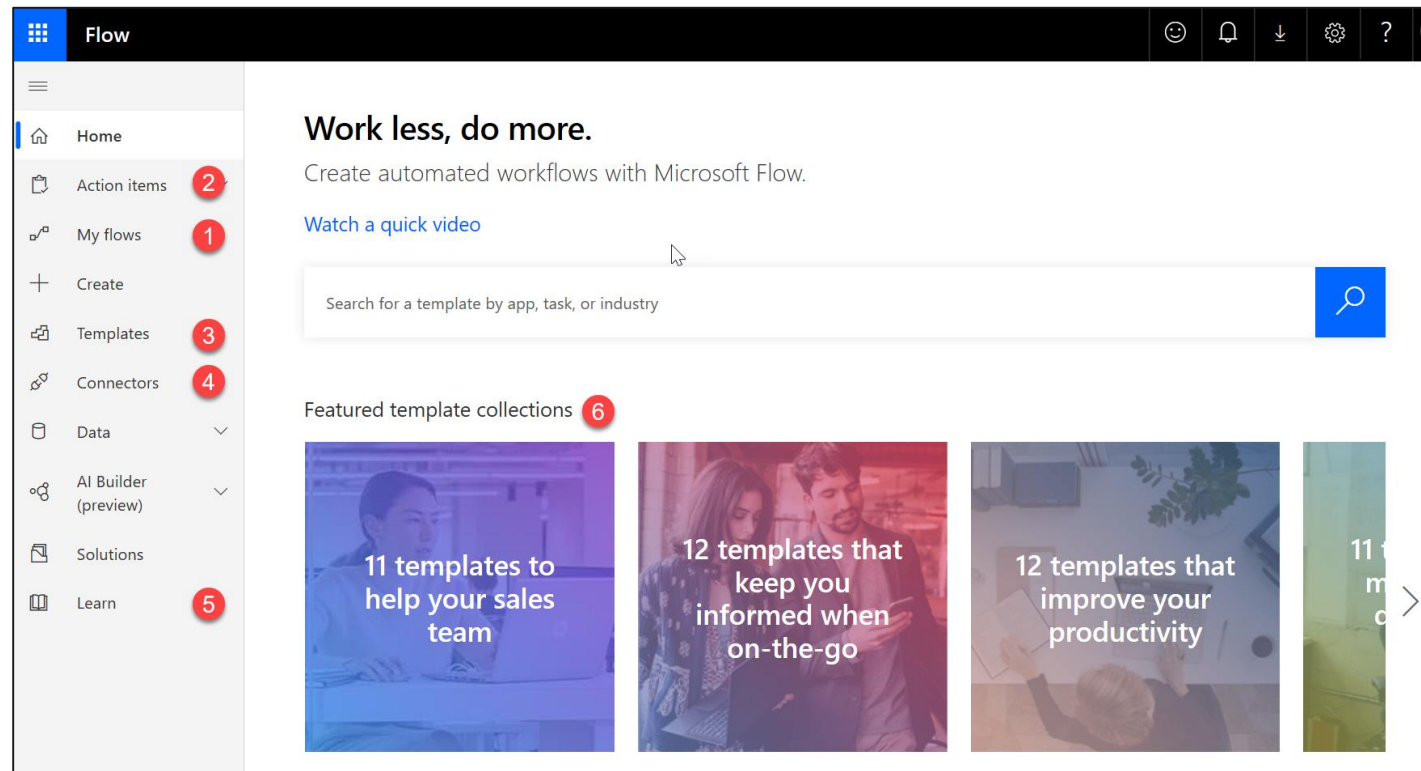
Create, run, and manage automated workflows between your favorite apps and services – even when you're on the go!

Templates help users to get started with Power Automate



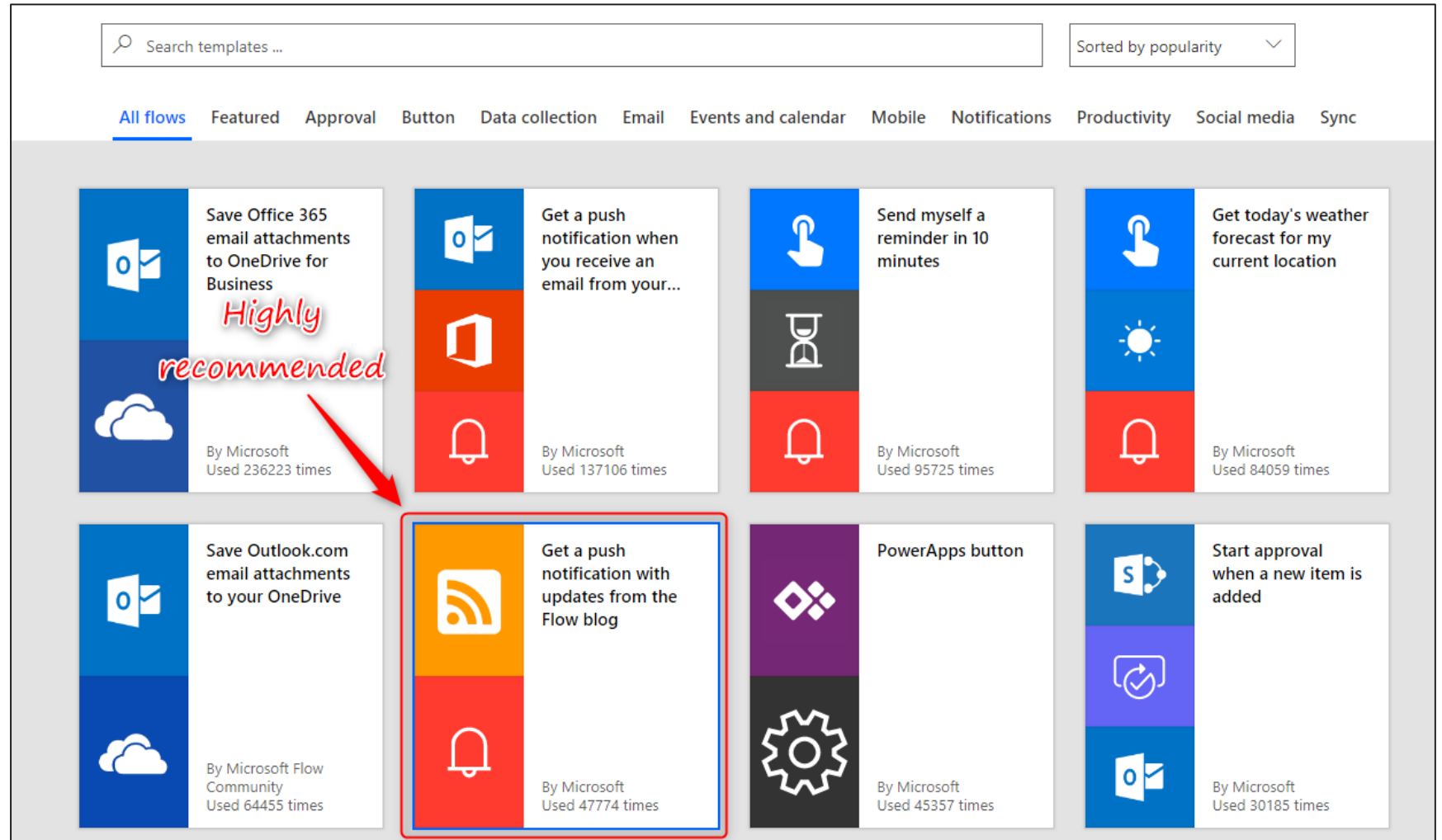
Power Automate Portal [\[https://flow.microsoft.com\]](https://flow.microsoft.com)

1. **My flows**, where your flows live.
2. **Approvals**, where you can automate and streamline your approval process.
3. **Templates**, which is a great place to start.
4. **Connectors**, where you can connect from one service to another.
5. **Learn**, where you can gain information that will help you ramp up quickly on Power Automate.
6. **Featured template collections**, collections of templates by industry or role



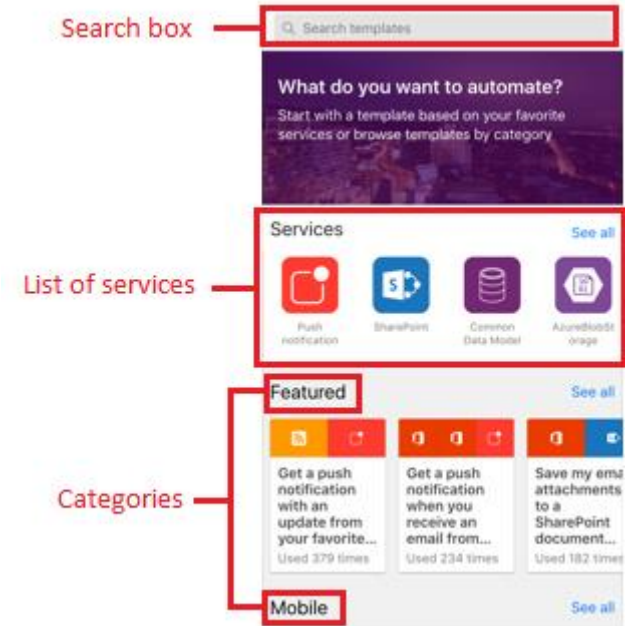
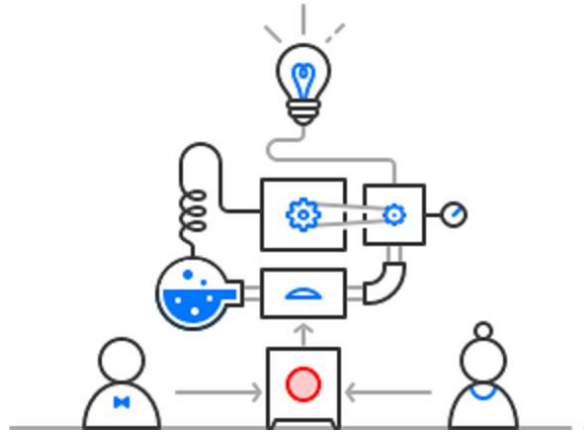
Power Automate templates

Highly recommend running the “Get a push notification with updates from the flow blog” template



Power Automate mobile app

- Get notifications
- Manage approvals
- See flow details
- See flow run activity
- Flow buttons



Go to the app store on your device and search for "Microsoft Flow"



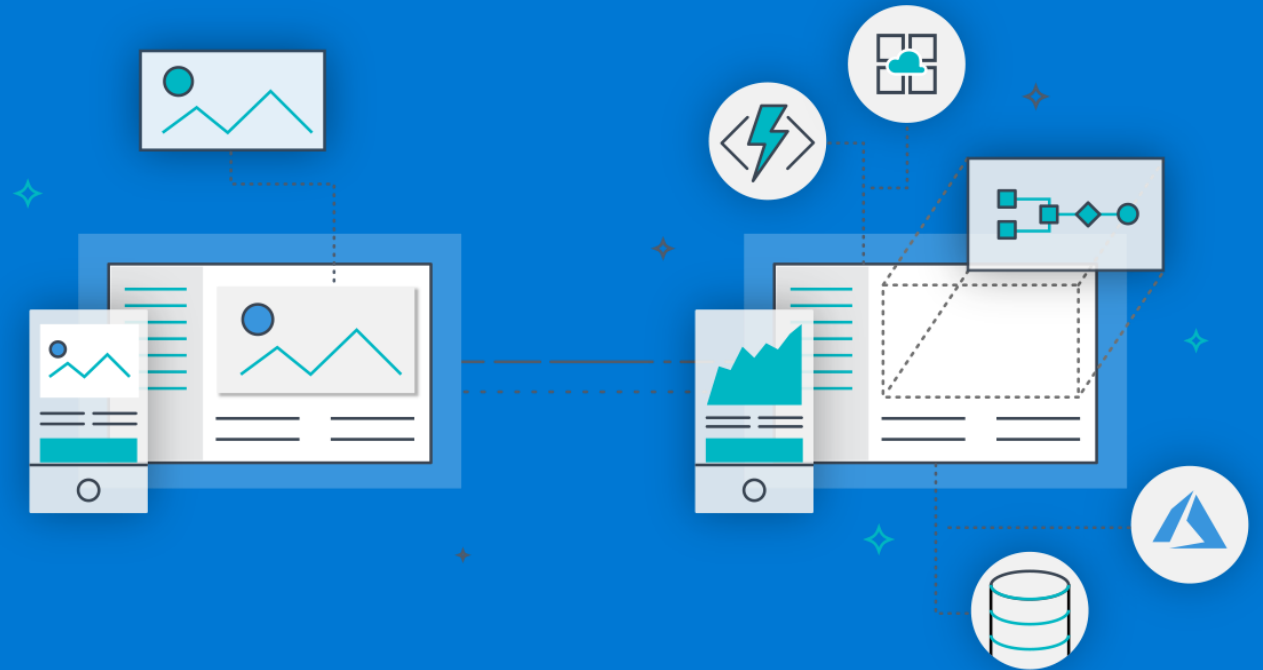
Apple Store: <https://itunes.apple.com/us/app/microsoft-flow/id1094928825?mt=8>

Google Play: <https://play.google.com/store/apps/details?id=com.microsoft.flow>

Windows Store: <https://aka.ms/flowmobiledownloadwp>

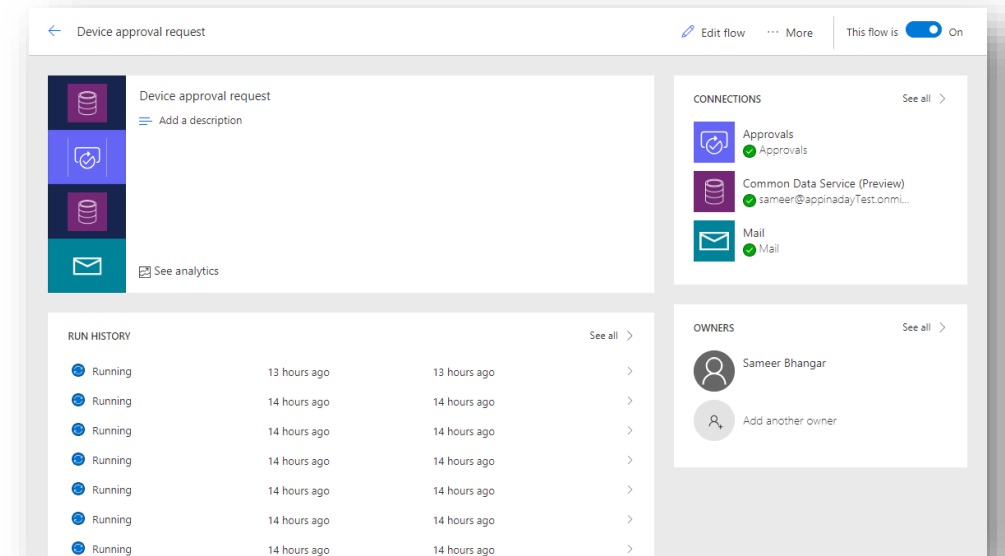
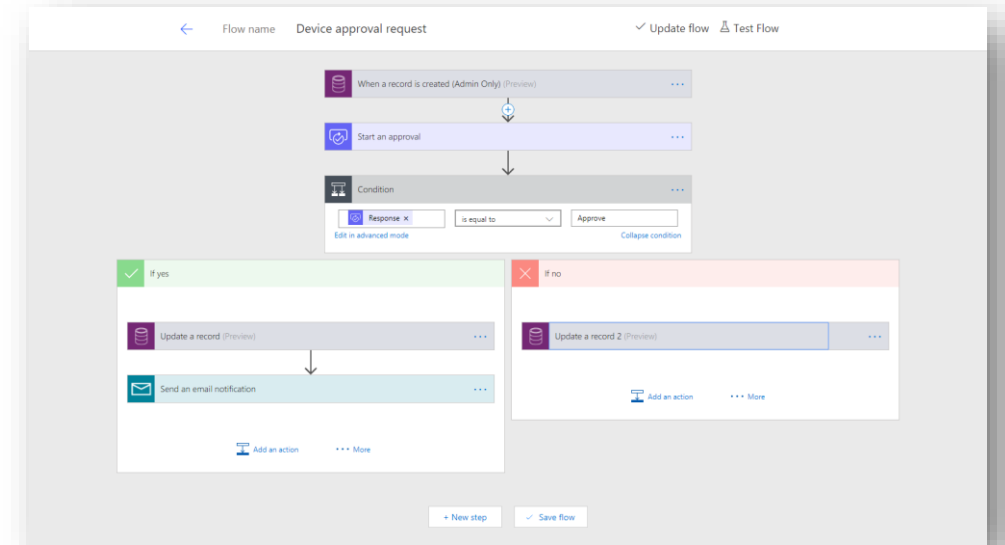
Hands-on-lab

Module 4: Power Automate



Lab objectives

- Trigger a flow when a new record is created in CDS
- Send an approval request
- Conditional branching based on the approval response
- Send email notifications
- Update the CDS record with the approval status and the approver's comments
- Use the approval center on web and mobile
- Check the status of flow runs





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