[Landing page]

Consultation responses email automation

This user guide sets out how to install an email automation product for Outlook, which will automatically save a database of emails received in response to Local Plan consultations to a central location on Sharepoint.

View the user guide

[Guidance page]

Installing and setting up the email automation for consultation responses

This email automation is for Local Planning Authorities who use the Microsoft suite, and receive responses to consultations by email.

To use the automation you will need to:

- be a Microsoft Outlook user
- have set up a specific Local Plan consultation inbox (shared mailbox)
- have set up a new Sharepoint site (instructions for how to do this are in the **Installing the automation** section below)
- have access to Microsoft PowerApp
- have set up a new environment in Microsoft PowerApp (this is an optional, but recommended step – instructions for how to do this are in the **'How to install the automation'** section below)

You may also need admin access or be able to get admin access to Sharepoint and PowerApps from your IT team.

Why this automation is useful

By using existing functionality in the Microsoft suite, this automation can potentially save one to two months of administration time per consultation as part of the Local Plans process.

It helps Local Planning Authorities automate elements of copying content from individual email responses from Outlook to a database in Sharepoint by automatically:

- saving a log of representations received via Outlook in a database on Sharepoint
- capturing the senders email
- capturing the email subject
- capturing the time and date of the email
- giving each email a unique reference number
- storing attachments in a shared location

- saving the contents of the email in a shared location
- send a reply to the sender that their email has been received (if you choose to turn this feature on)

You can also export the database as a spreadsheet or CSV for further analysis or to upload to other places.

For Local Planning Authorities already using the Microsoft suite, this automation comes at no cost. The total potential time saving is around three to six months of full time equivalent over the duration of the Local Plans process. This does not take into consideration other consultations that happen outside of this process, meaning there are further significant time savings for Planners to spend the time on areas where they can add more meaningful value.

What it does

This automation automatically pulls information from a shared Outlook mailbox into a database, hosted on Sharepoint.

It runs at a set time once per day, making a record of all the emails you've received to that inbox since the last time it ran, and automatically downloading and storing the body text and any email attachments to a Sharepoint site you choose during setup.

These records are stored in a table on Sharepoint, which includes columns that will be completed with the following information for each email response::

- an automatically generated reference number
- the sender's email address
- status
- the date the email was received
- the email subject line
- a link to the email, saved in a Sharepoint folder
- a copy of the email text
- a link to any attachments

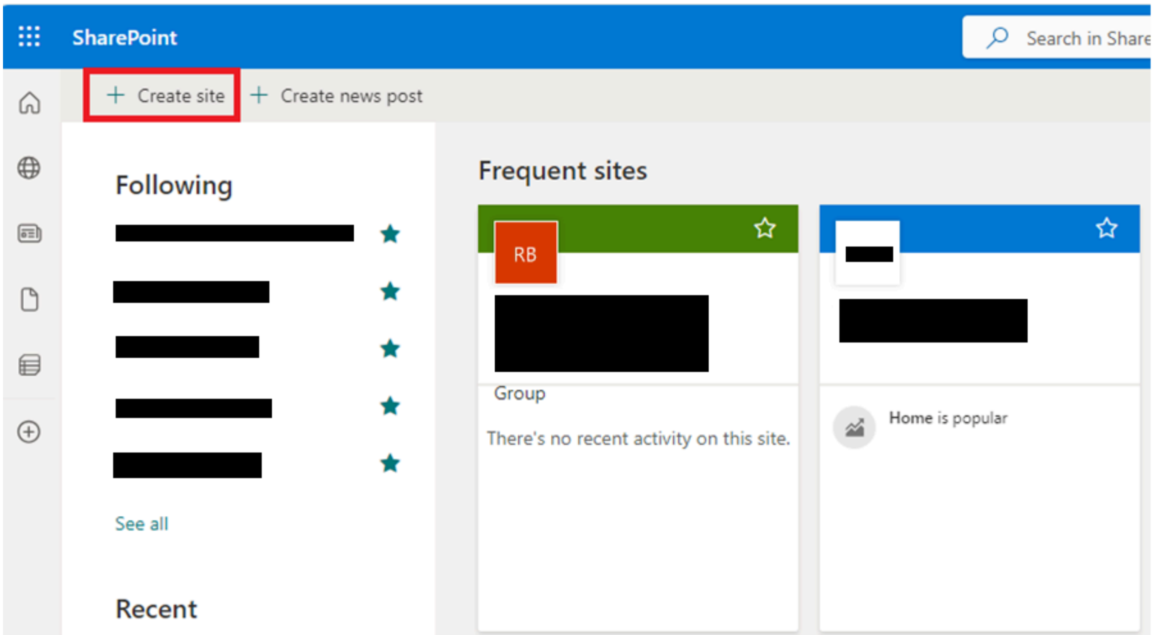
During setup you can also choose whether or not you'd like to turn on an auto-response feature, which will send a pre-written automatic reply to any residents who email your consultation inbox. These responses are sent once per day at the same time, and will **not** send as each email comes in.

How to install the automation

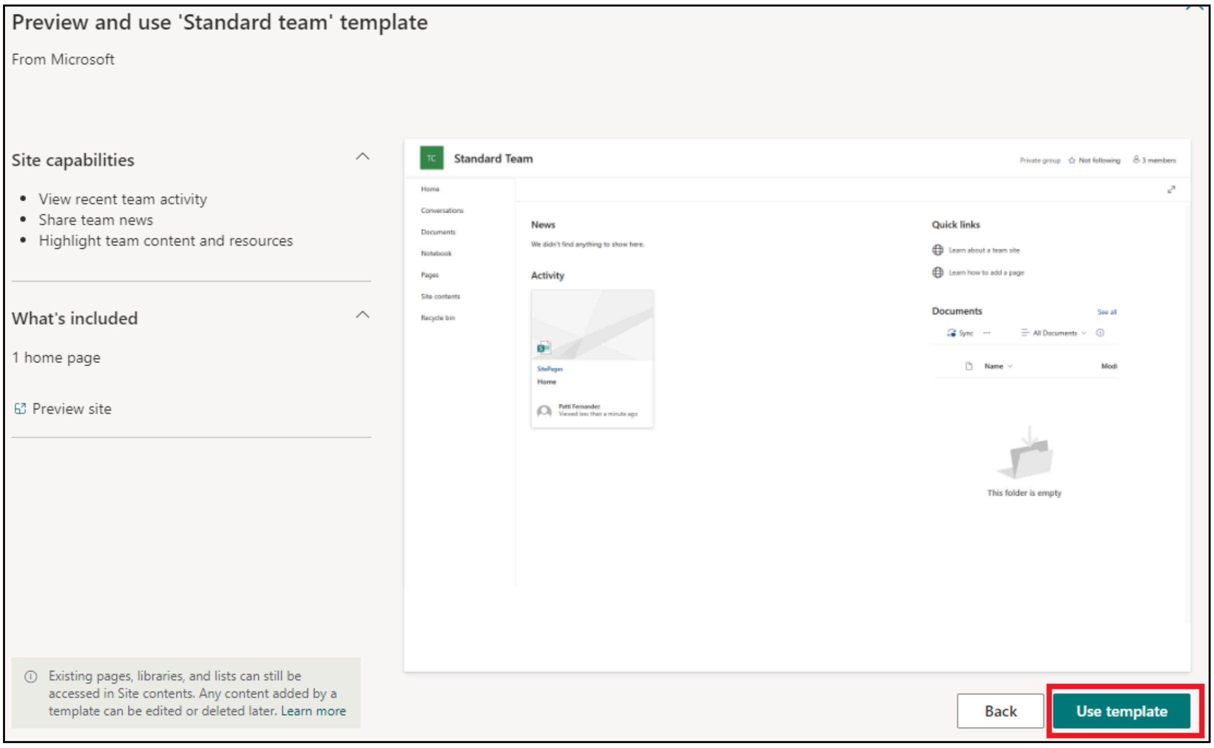
Before you install and turn on this automation you need to create a new Sharepoint site for the email data to be saved to. You optionally also need to create a new Microsoft PowerApp environment for the automation to run in.

Creating a new Sharepoint site

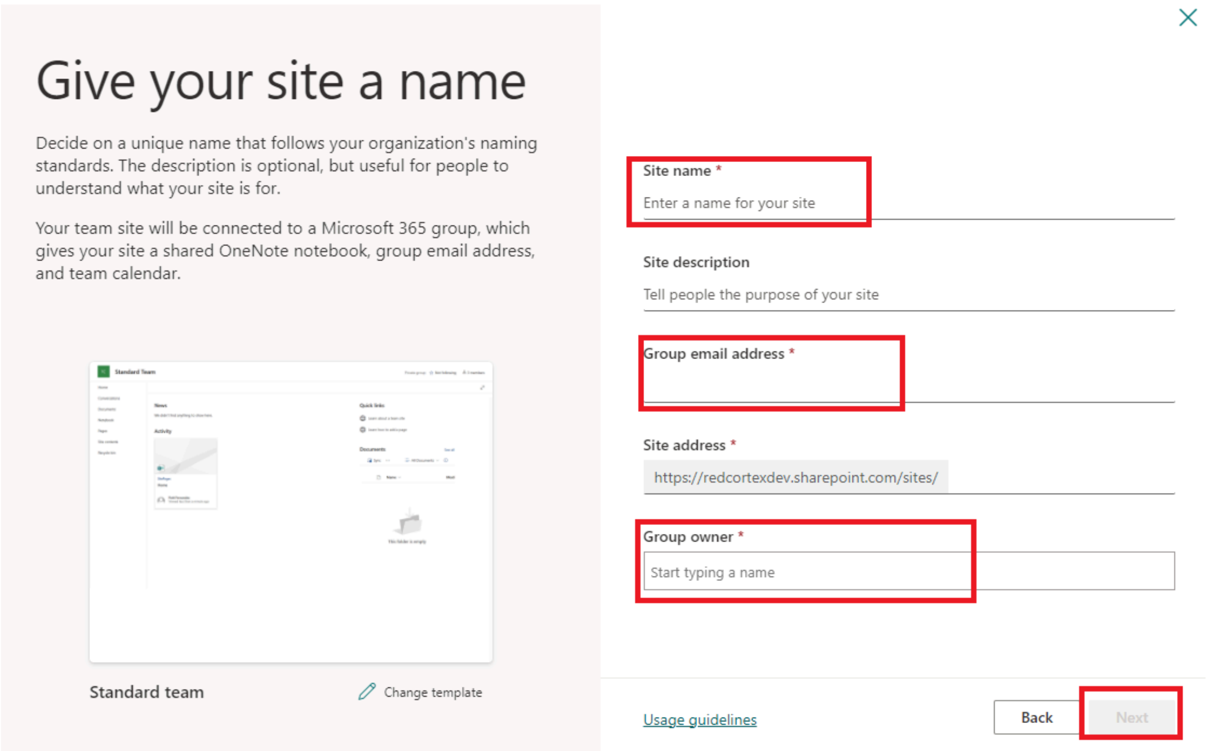
1. Open Sharepoint and select **Create site** on the start page.
   - If you don't see this option, you may not have the right level of Sharepoint access. If this happens, please contact your IT team and ask them either to give you access or create a new site for you.



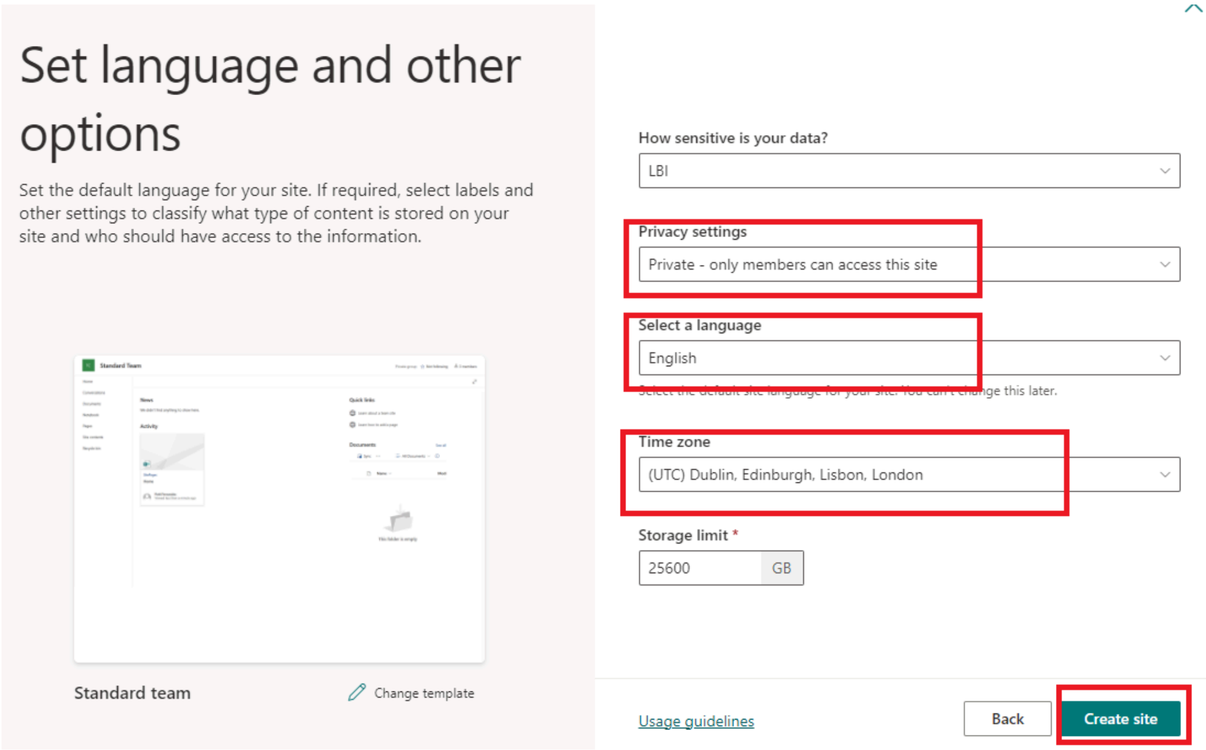
2. Select **Team site** and then the **Standard team** template
3. Select **Use template** on the preview page



4. Give your site a name, for example [Your LPA name] Local Plan Consultation responses, add a description for your Sharepoint site and assign an owner (this can be yourself or anyone else who will have access to your site)



5. Set the privacy settings as **Private - only members can access this site** and then choose your language and timezone



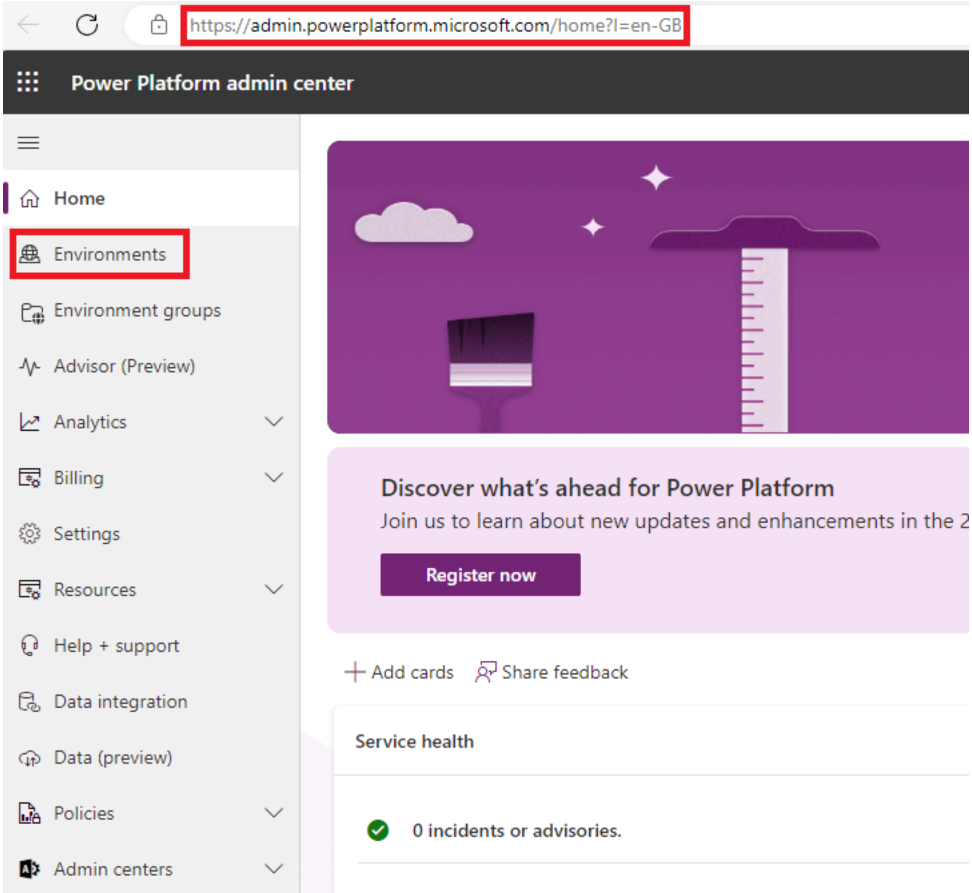
6. Add users to your site using their email addresses. Anyone you want to have access to the Consultation responses will need access to the Sharepoint site.

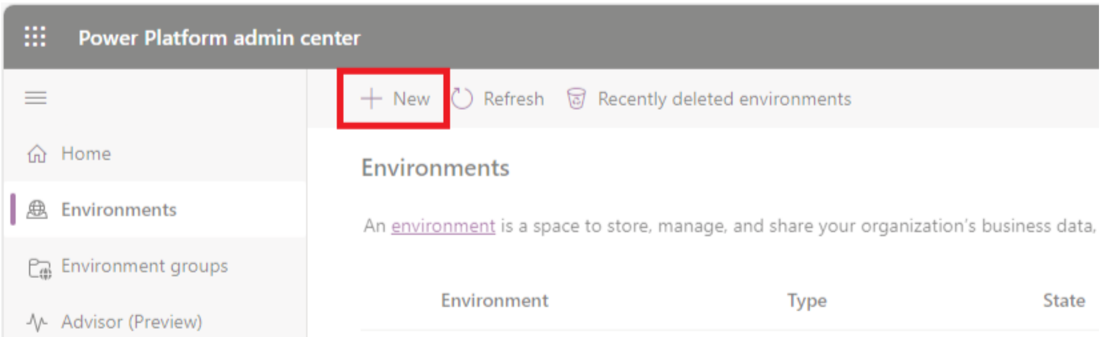
You should create a new Sharepoint site for each Consultation you're running (for example, if you want to set this automation for multiple mailboxes, each mailbox will need its own Sharepoint site)

Creating a new Microsoft PowerApp environment

Creating a new Microsoft PowerApps environment to run the automation in is recommended, but optional. If you'd like to do this, you'll need to be a Dynamics 365 admin user. Ask your IT team if you need support getting this access.

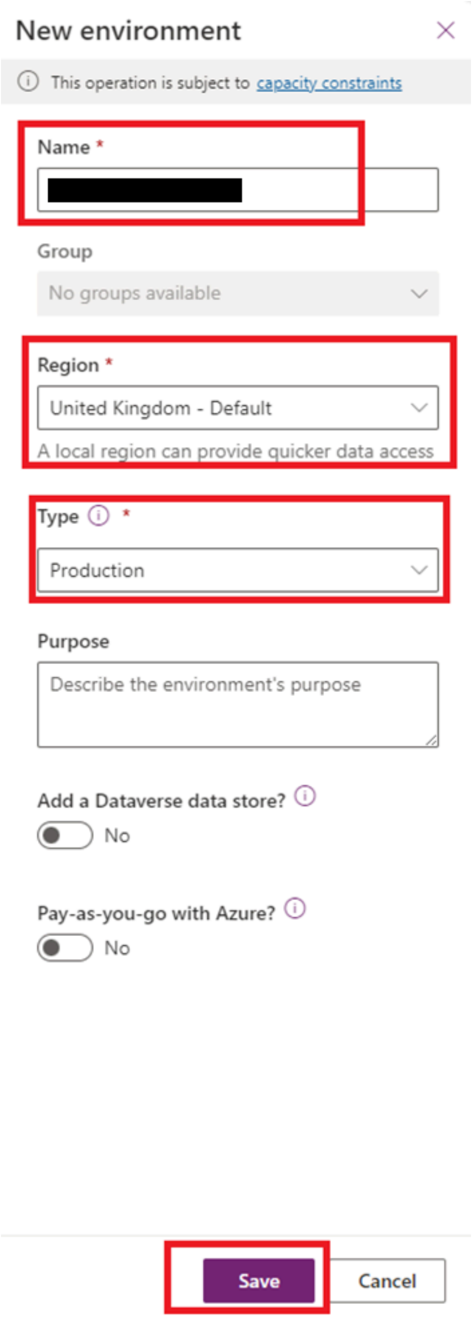
1. Sign in to the Power Platform admin centre – you must be a Dynamics 365 admin, Global admin, or Power Platform admin to set up a new environment
2. In the navigation pane, select **Environments**, and then select **New**





3. On the next page, Give your environment a name (for example, [Your LPA name Consultation responses] and select your region as UK
   - Select **Production** for **Type**
   - Select **No** for **Add a Dataverse data store**
   - Select **No** for **Pay-as-you-go with Azure**

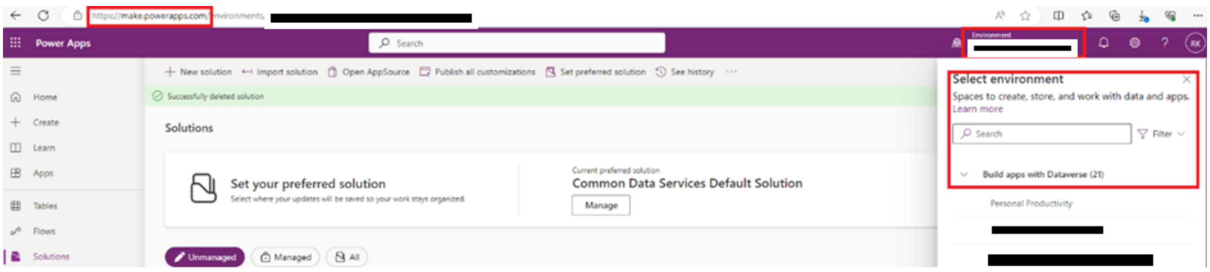
   Then press **Save** to create your environment



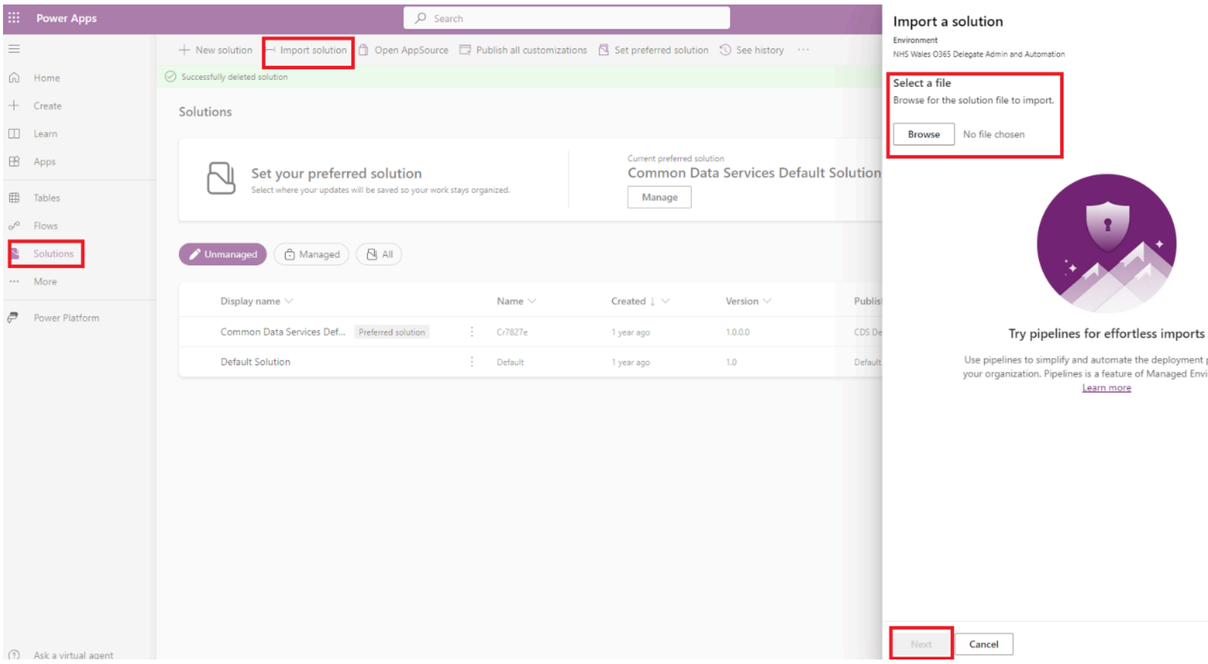
Installing the automation

1. **Add the automation to Powerapps**

- [Download this zip file](#) by clicking the link
- Go to [make.powerapps.com](#) in your browser and sign in (if prompted)
- If you created a new environment to run this automation, use the dropdown menu at the top of the screen to change your environment to the one you created.

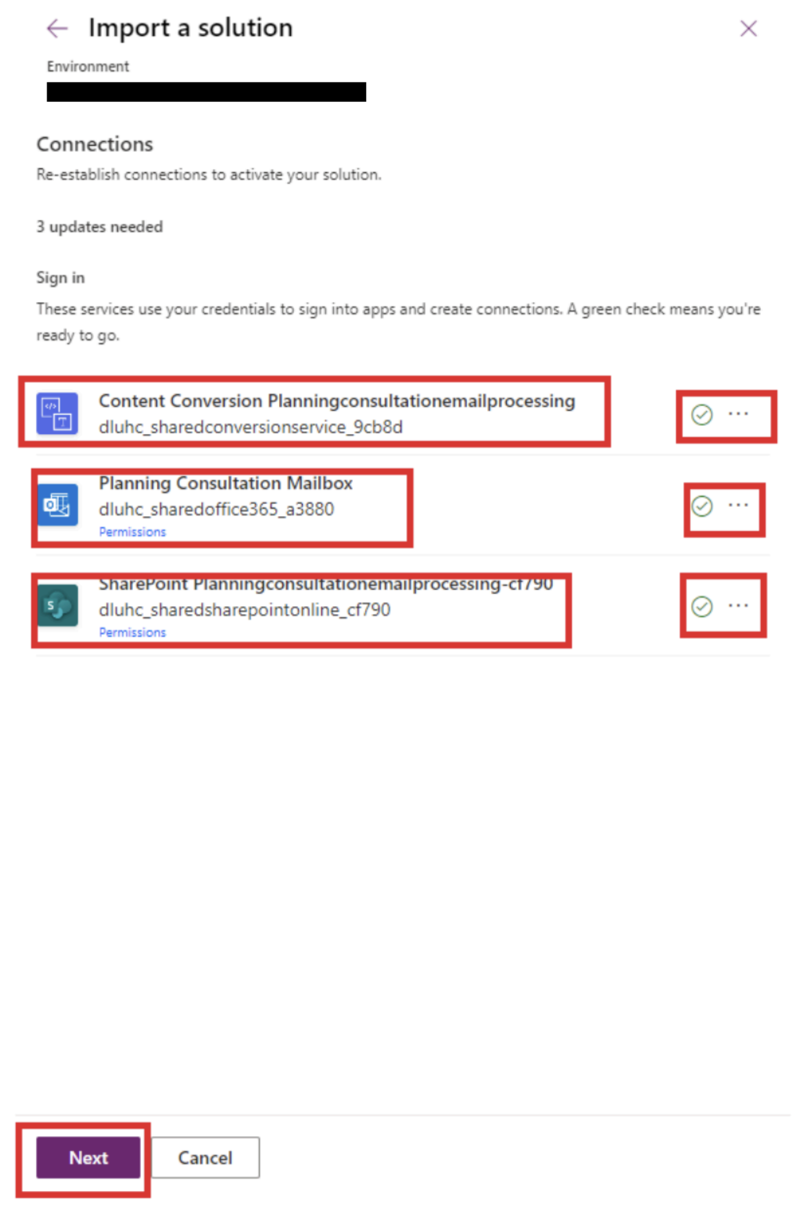


- If you didn't create a new environment, you can skip this step – but make sure "Personal productivity" is the environment selected in the dropdown at the top of your screen
- Select **Solutions** from the left hand side menu, then **Import Solution**
- Select the Browse button and find the zip file in your downloads folder
- Press **Next** to add the automation to Power Platforms

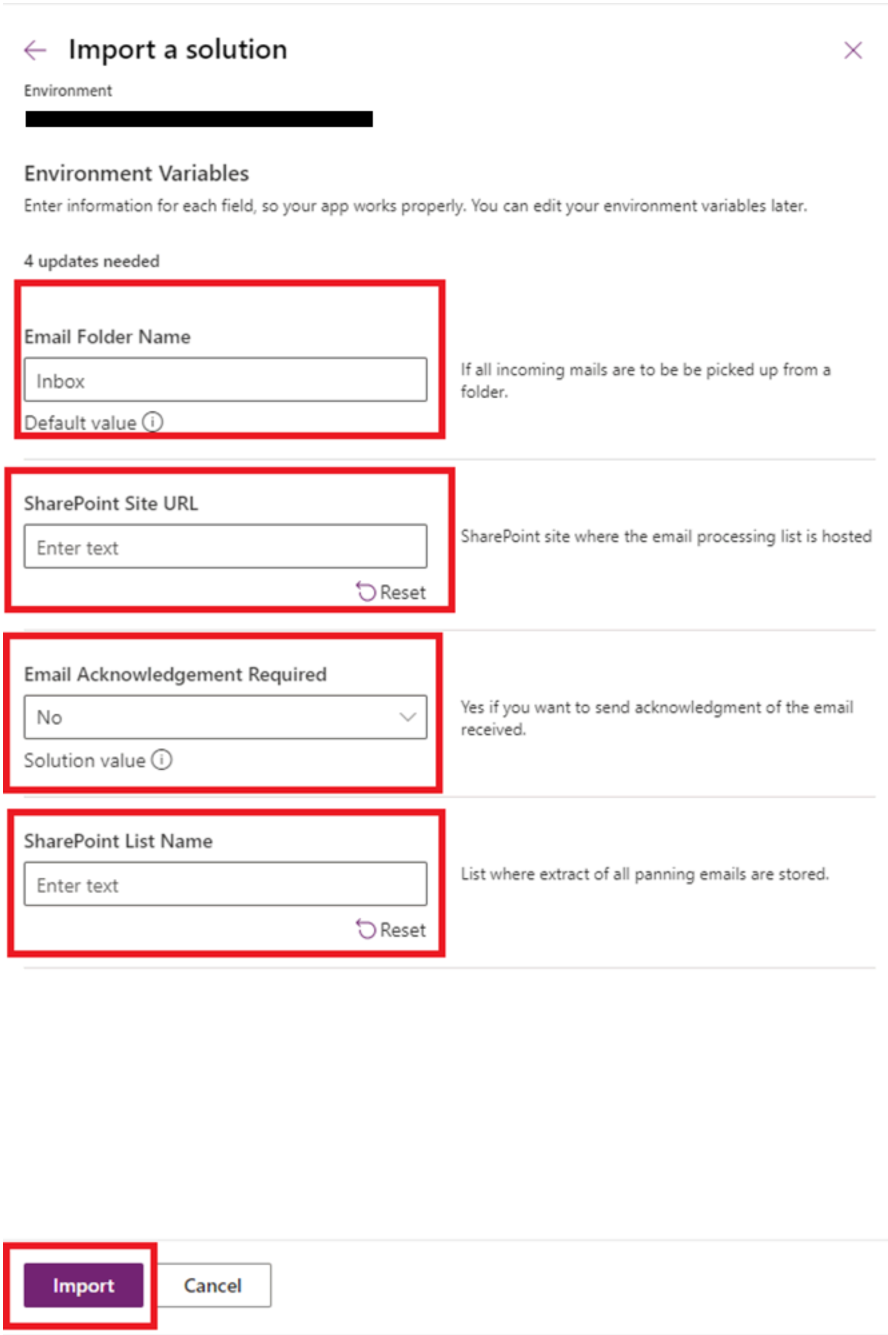


2. Connect the automation to Sharepoint and your mailbox

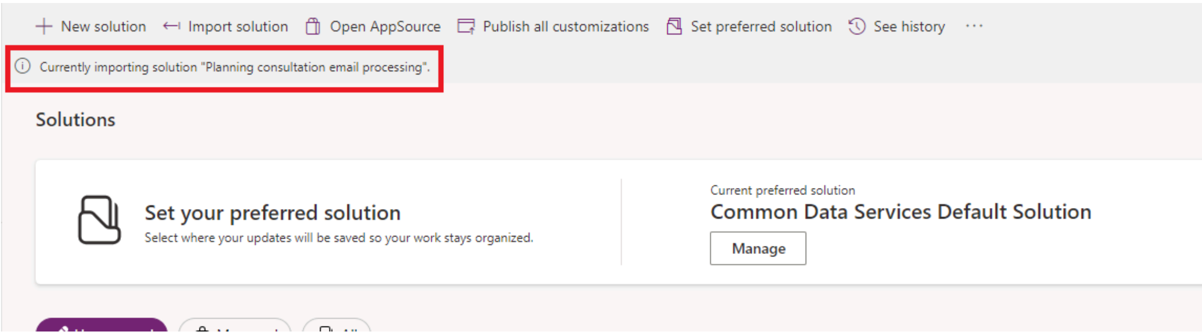
- Add permissions for the mailbox you'd like the automation to run for by selecting **Add new connection** and choosing the account that has access to your shared mailbox
- Sign in to this account, and it will appear on the right hand side of your screen

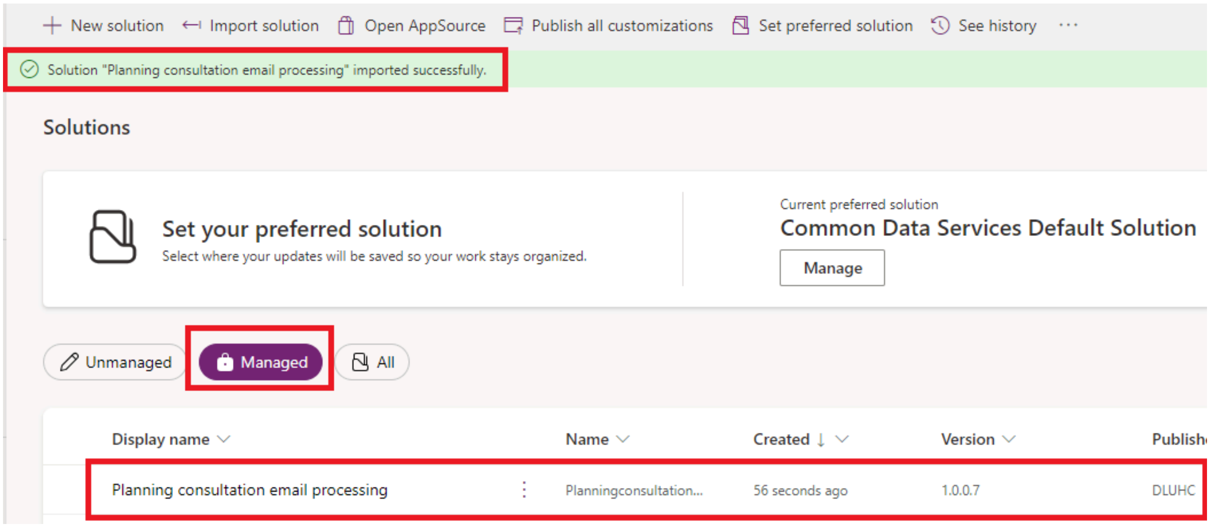


- Add the URL of the Sharepoint site you created earlier to the **Sharepoint site URL field**
- Choose an appropriate list name (for example [your LPA name] Consultation responses) and add it to the **Sharepoint list name** field
- Choose whether you'd like to turn automatic responses on or leave them off
- Choose what mailbox folder you'd like the automation to run from – this will usually be Inbox, but if you've set up rules to automatically forward responses to a different folder, you might want to change it.



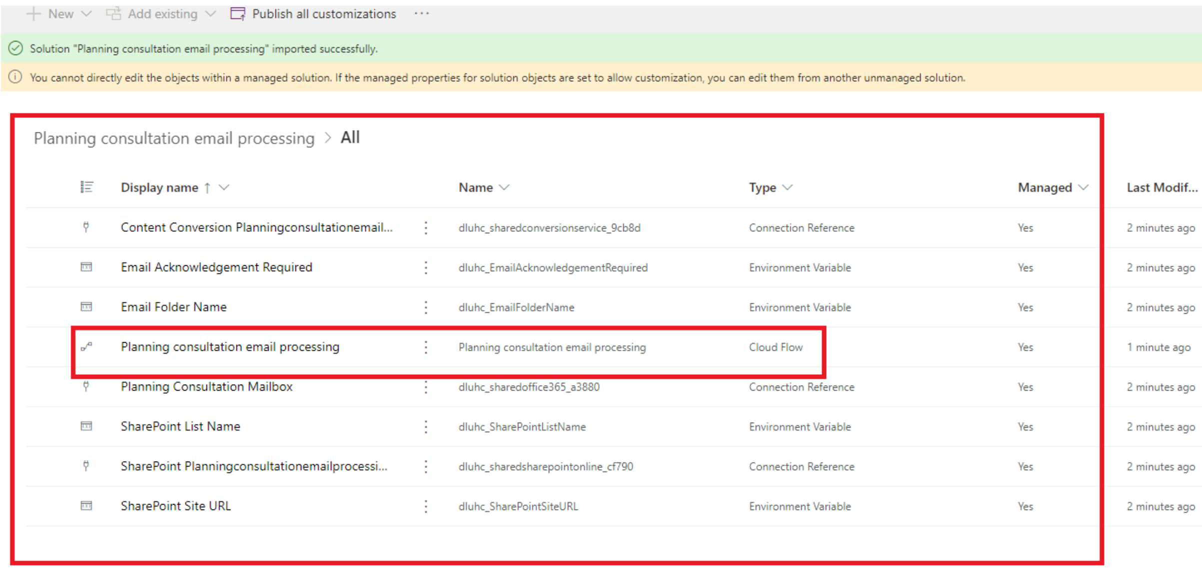
- Press **Import** and wait until the “Currently importing” message at the top of your screen turns into a green bar, which tell you the import has been successful



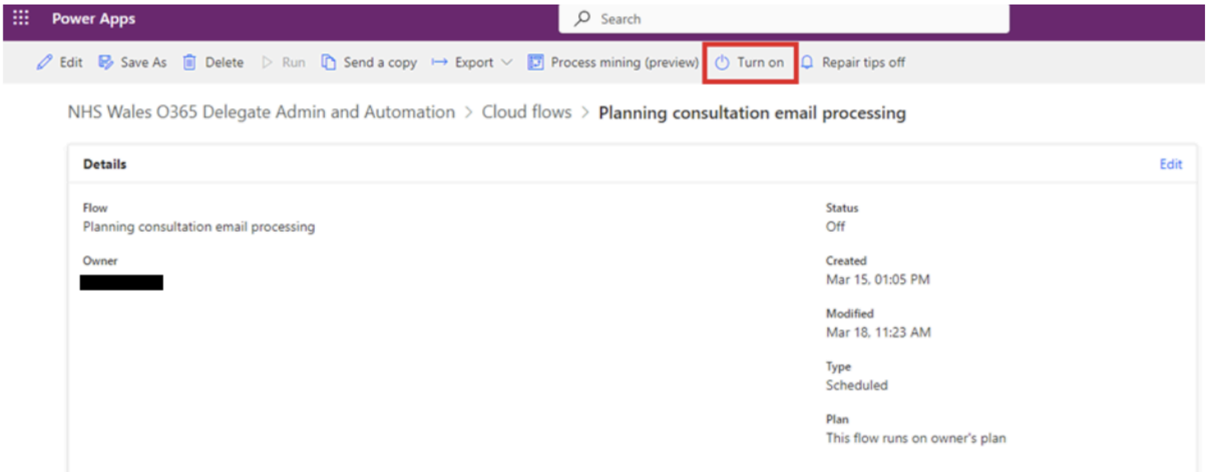


3. Turn the automation on

- Click on your automation in Power Platforms, which will have the list name you specified during setup.



- Select the **Turn on** button at the top of your screen – if the installation has been successful, this will turn into a **Turn off** button.



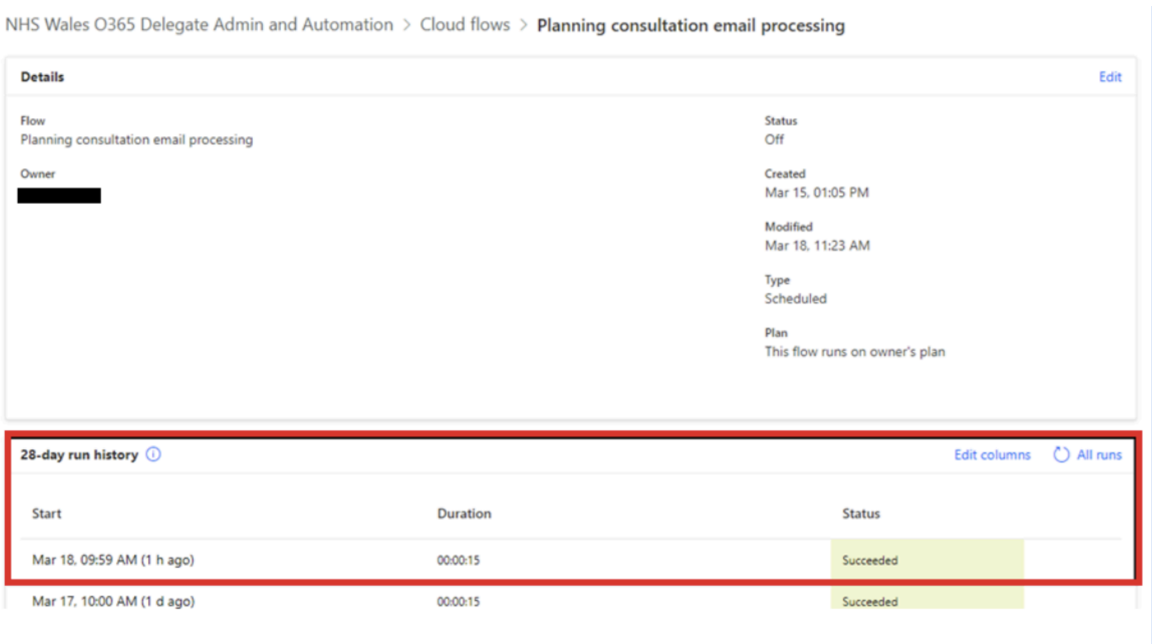
- When you're no longer accepting responses to your consultation, make sure to turn off the automation by selecting the **Turn off** button.

How to test the automation works

To test the automation is working correctly, send an email, including an attachment, to the email address you attached it to.

Then, go back to your automation in Power Platforms, and press the **Run** button at the top of the screen, and the **Next** button that will appear in the sidebar. This will manually run the automation (which usually runs once a day). You can manually run the automation whenever you choose to test it or if you'd like to pull emails into the database outside of the normal run time.

You should be able to see the run history on your Power Platforms page. The run request you've just made will say "**succeeded**"



Once the run request has changed from “**running**” to “**succeeded**”, go back to the Sharepoint site you created and linked to the automation.

Your list name will appear in the quick launch bar. Click on it and you should see a table with the following columns:

- reference
- email address
- status
- date and time
- subject line
- email link
- email text
- attachments

If your automation is working, you should see the data from your test email in the table. If you selected automatic responses, you should also receive an email acknowledgement back to your email address.

If the automation isn’t working, or the run request says “**failed”** next to it, click on the run request.

You’ll see a flow chart, which should have green ticks against every part of the flow that was successful. Finding the parts of the flow chart that weren’t successful should help you troubleshoot the issue. If you need further support, reach out to your IT team.

Exporting your data

If you need to export your database for any reason, go to it and click the **Export** button at the top of the page.

1. Choose **Save as CSV** and download the file
2. Open your file in Excel
3. You'll be able to see most of the email data, including the location in Sharepoint where the email is saved, but you won't be able to see any attachment data except for the number of files that were attached to each email.