



Practical tips and tricks and business examples with SharePoint Online and Power Automate

Michelle Wong • 23th October 2021

BIWUG



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Speaker

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- Microsoft 365 Consultant
- MVP Business Applications
- Focus on Office 365 and Power Platform
- 365 Power Consulting Services



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Agenda

- Why SharePoint Online and Power Automate?
- Licensing
- Business case scenario 1 – Content Approvals
- Business case scenario 2 – Advanced Content Approval flow
- Business case scenario 3 – HR business process case

Why SharePoint Online?

- SharePoint Online
 - web-based platform (SAAS) hosted in Microsoft cloud
 - document storage, sharing and management
 - helps organisation to share and collaborate with colleagues and (external) customers
 - it's flexible, scalable, customisable and easy to use and to understand
 - It integrated with other Microsoft tools like Teams and OneDrive documents



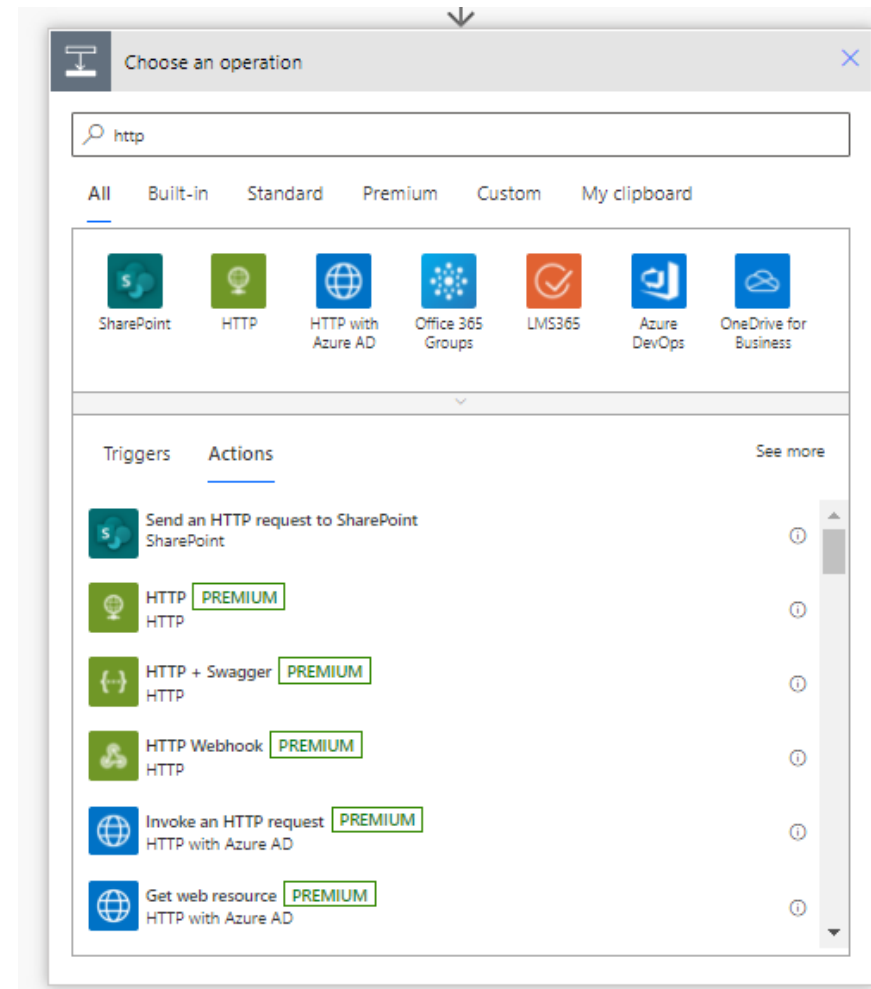
Benefits why Power Automate?

- Power Automate
 - is a user-friendly workflow and business process optimization tool
 - can streamline workflows and enable business transformation
 - based on no-code, low-code principle, it's accessible to everyone
 - helps business tackle activities more efficiently
 - enhance operational outcomes and reduce costs
 - improve cybersecurity by integrating workflows with Azure Active Directory and other Microsoft security solutions



Licensing

- SharePoint Online is included in all Office 365 plans
 - SharePoint Online standalone plan
- Power Automate
 - Included in Office 365 licenses (Business Essentials, Premium, E1-E5 enterprise plans)
 - Included in Dynamics 365 licenses
 - Included in Power Apps license
 - Power Automate per flow plan 1 or plan 2
 - Power Automate per user plan 1 or plan 2
- Note: Extra per user/flow plan 1 to use advanced premium actions



Business case scenario 1

“We want a way to manage our documents and a good overview is necessary.”



Use OOB SharePoint Online content approval

- Request Approval via SharePoint Online List:
 - Power Automate > Configure flows > Content approval
 - Approval Status, Approver comments column will be available
 - Set Format Approval Status column with conditional formatting

The screenshot displays the SharePoint Online interface. At the top, a navigation bar includes options like '+ New', 'Upload', 'Edit in grid view', 'Sync', 'Add shortcut to OneDrive', 'Export to Excel', 'Power Apps', and 'Automate'. A dropdown menu for 'Automate' is open, showing 'Set a reminder', 'Power Automate', 'Create a flow', 'See your flows', and 'Configure flows'. The 'Configure flows' option is highlighted. Below the navigation bar, the 'Approval List' is shown. It contains a table with columns: Name, Approval Status, Approver Comments, Next Reviewer Date, Version, Modified By, and Document Owner. The 'Approval Status' column is highlighted with a red box. The table lists several documents with their respective approval statuses: 'CheckCheck.docx' (Pending), 'Derde excel.xlsx' (Rejected), 'Derde powerpoint.pptx' (Pending), 'Doc1.docx' (Pending), 'Doc3.docx' (Pending), 'Doc5.pptx' (Approved), 'Procedure.docx' (Pending), and 'SameData.docx' (Pending). To the right of the table, the 'Configure Flow options' panel is visible. It asks 'Do you want approvals in this library?' with a toggle set to 'On'. Below this, it asks 'Select the approval mode for this library' with two radio buttons: 'Request sign-off' and 'Content approval'. The 'Content approval' option is selected and highlighted with a red box. At the bottom of the panel are 'Save' and 'Cancel' buttons.

Name	Approval Status	Approver Comments	Next Reviewer Date	Version	Modified By	Document Owner
CheckCheck.docx	Pending		10/24/2021	2.0	6 minutes ago	Michelle Wong
Derde excel.xlsx	Rejected	Rejected. Info incomplete		1.0	About an hour ago	Michelle Wong
Derde powerpoint.pptx	Pending		10/19/2021	2.0	6 minutes ago	Michelle Wong
Doc1.docx	Pending		10/6/2021	2.0	6 minutes ago	Michelle Wong
Doc3.docx	Pending		10/27/2021	2.0	6 minutes ago	Michelle Wong
Doc5.pptx	Approved			1.0	2 hours ago	Michelle Wong
Procedure.docx	Pending		10/13/2021	2.0	6 minutes ago	Michelle Wong
SameData.docx	Pending		10/13/2021	2.0	6 minutes ago	Michelle Wong

Business case scenario 1

“We want a way to manage our documents and a good overview is necessary.”

“We want to get noticed when a document needs to be reviewed again.”



Business case scenario 1

+ New

Upload

Edit in grid view

Sync

Add shortcut to OneDrive

Export to Excel

Power Apps

Automate

...

Set a reminder

Next Reviewer Date

Power Automate

Approval List

Name	Approval Status	Approver Comments	Next Reviewer Date	Version	Modified	Modified By	Document Owner	+ Add col
CheckCheck.docx	Pending		10/24/2021	2.0	A few seconds ago	Michelle Wong	Michelle Wong	
Derde excel.xlsx	Rejected	Rejected. Info incomplete		1.0	About an hour ago	Michelle Wong	Michelle Wong	
Derde powerpoint.pptx	Pending		10/19/2021	2.0	A few seconds ago	Michelle Wong	Michelle Wong	
Doc1.docx	Pending		10/6/2021	2.0	A few seconds ago	Michelle Wong	Michelle Wong	
Doc3.docx	Pending		10/27/2021	2.0	A few seconds ago	Michelle Wong	Michelle Wong	
Doc5.pptx	Approved			1.0	About an hour ago	Michelle Wong	Michelle Wong	
Procedure.docx	Pending		10/13/2021	2.0	A few seconds ago	Michelle Wong	Ryan Yue	
SameData.docx	Pending		10/13/2021	2.0	A few seconds ago	Michelle Wong	Ryan Yue	

Set a reminder

Get an email reminder

Flow type: Scheduled

Remind me a number of days in advance of the date in the column

Sign in *

This flow uses the following apps. A green check means you're ready to go.

SharePoint

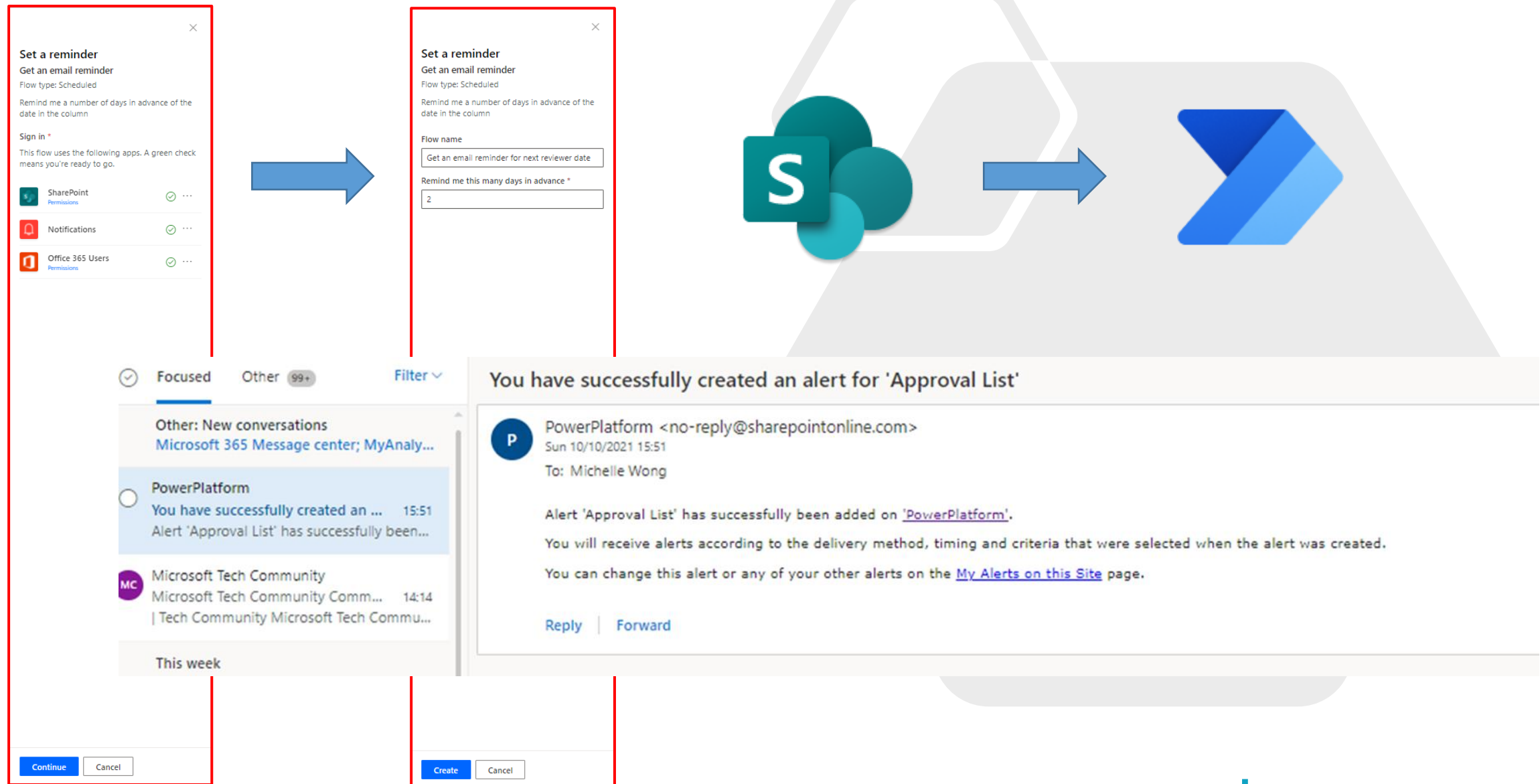
Notifications

Office 365 Users

Continue

Cancel

Business case scenario 1



Business case scenario 1

The image shows a screenshot of a Microsoft 365 inbox and the Power Automate interface. The inbox on the left shows a message from PowerPlatform with the subject 'You have successfully created an alert for 'Approval List''. The main content area shows the details of this email, including the sender 'PowerPlatform <no-reply@sharepointonline.com>' and the body text: 'Alert 'Approval List' has successfully been added on 'PowerPlatform'. You will receive alerts according to the delivery method, timing and criteria that were selected when the alert was created. You can change this alert or any of your other alerts on the [My Alerts on this Site](#) page.' Below the email, there are links for 'Reply' and 'Forward'.

Below the inbox, the Power Automate interface is visible. The top bar shows 'Power Automate' and a search bar. The left sidebar contains navigation options: Home, Action items, My flows, Create, Templates, and Connectors. The main area shows a list of flows under the 'Cloud flows' tab. A red box highlights a flow named 'Get an email reminder for next reviewer date', which was modified '10 sec ago' and is of type 'Scheduled'. A blue box with the text 'Created without any code' is also visible in the main area. A cartoon cat character is on the right side of the interface.

Name	Modified	Type
Get an email reminder for next reviewer date	10 sec ago	Scheduled



Demo – Business scenario 1

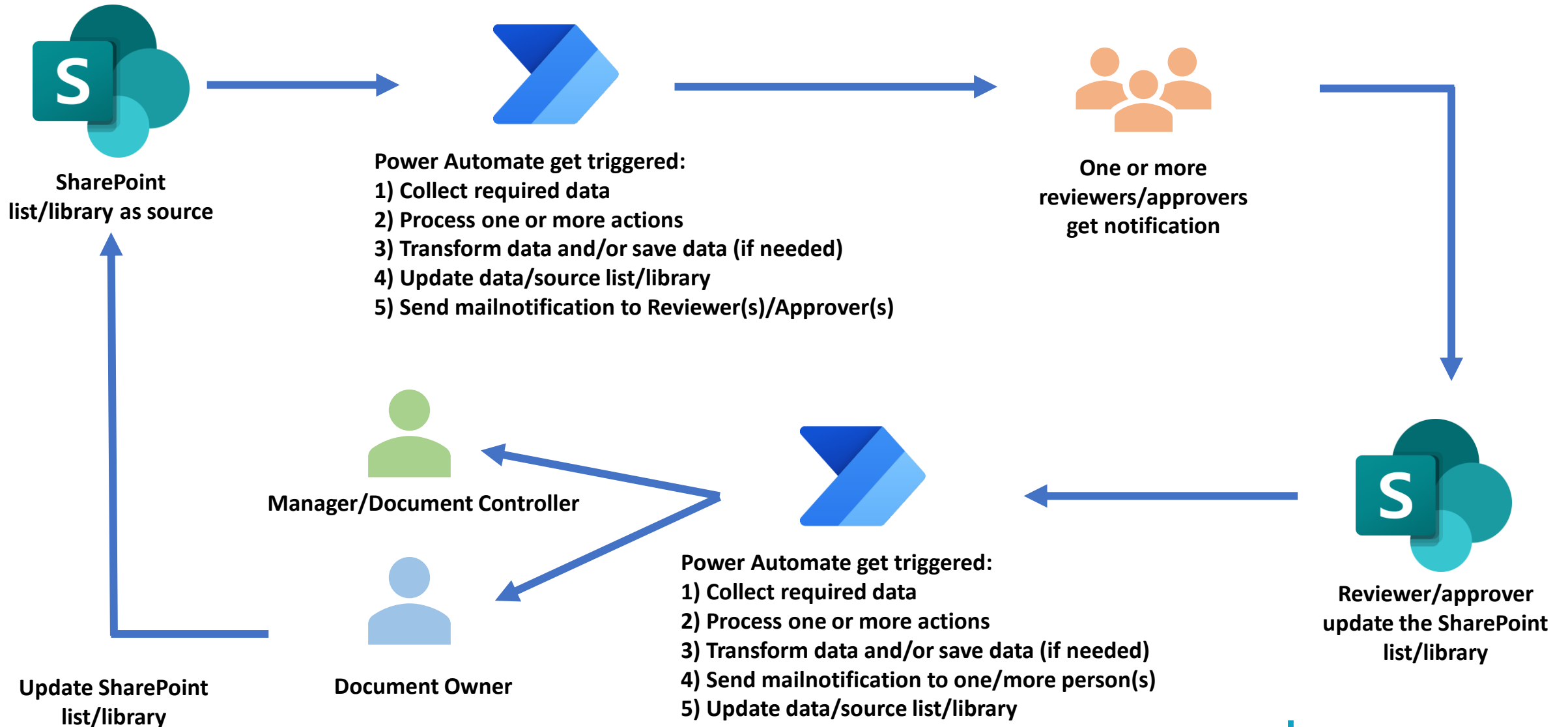
SharePoint Online library list

But what if you want more... than that?

The power of Power Automate comes in!



Enlarge the Business proces with 'Flow'

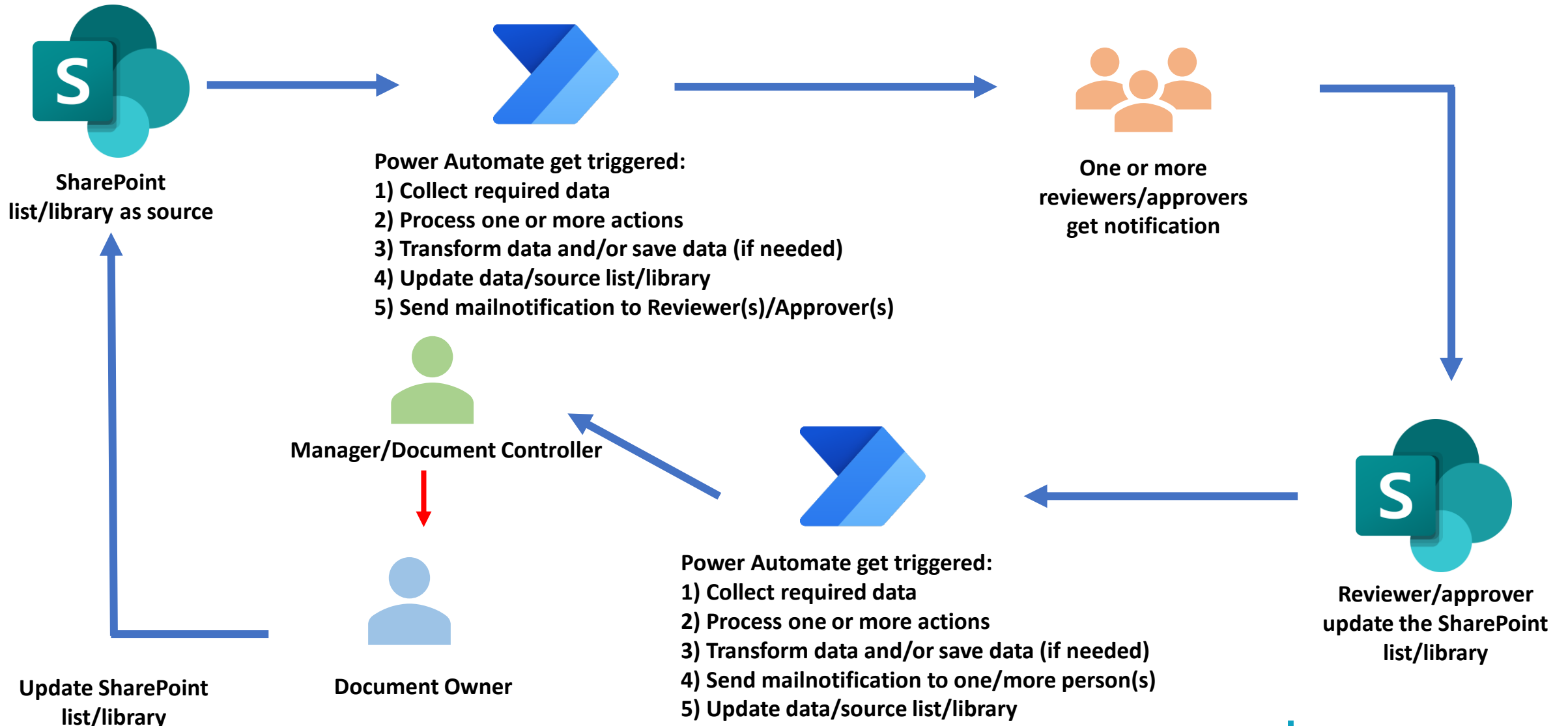




Demo – Business scenario 2

Advanced Content approval flow

Enlarge the Business proces with 'Flow'



Cool isn't?

The power of Power Automate 



Cool isn't? But wait...
we can do much more

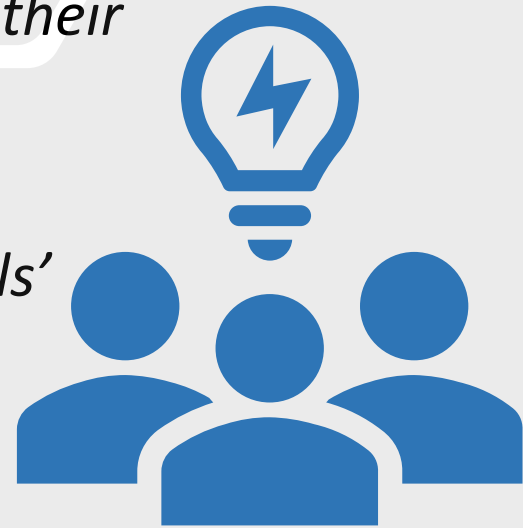
The power of Power Automate



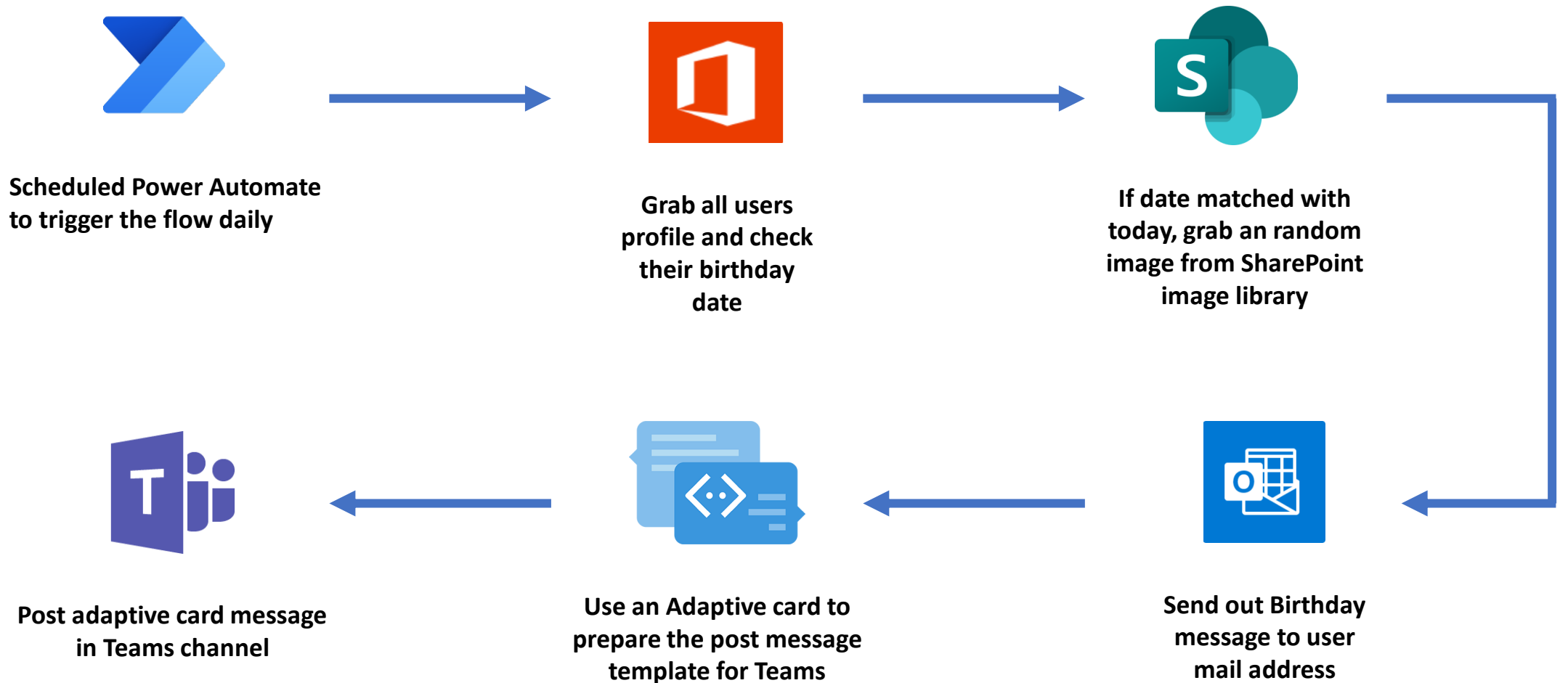
Business case scenario 3

“We want to send a digital birthday card to our colleague on their birthday by e-mail.”

“If possible, we want to post a message in our ‘Fun and socials’ Teams channel to let other colleagues noticed.”



Enlarge Business proces flow with 'others'





Demo – Business scenario 3

HR business process case

Summary

Powerful alone. Better together!



Any questions?



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The logo consists of two interlocking circular shapes, each divided into four segments of different shades of blue and teal, creating a stylized 'cd' monogram.

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