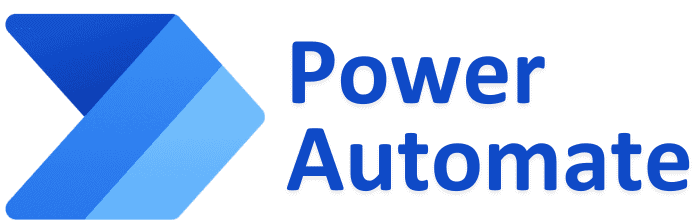
A red and black logo

Description automatically generatedA red and black logo

Description automatically generated**Standard Operating Procedure for Power Automate Automatic Email System**

|  |  |
| --- | --- |
| **Procedure Name:** | Automated Employee Probation & Birthday Email Workflow via Power Automate |
| **Issued on:** | 06/25/2025 |
| **Issued by:** | Stone Chen, Jayden Leung, James Guo |

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# **Preparatory Information:**

|  |  |
| --- | --- |
| Objective | To automate the process of sending happy birthday, probation, holiday emails. |
| Department | Human Capital |
| Materials & Resources Needed | Microsoft Power Automate, Microsoft Excel/SharePoint, Microsoft 365 mailbox credentials, Training Resources |
| Task Frequency | Probation Emails: Monthly  Birthday Emails: Daily |
| Procedure Overview | Probation Email:   1. Retrieves employee probation data from SharePoint list. 2. For employees whose probation period ends in 14 days, the system sends reminder emails to them and their supervisor and creates calendar events based on their team type. 3. For employees whose probation period ends today, the system sends emails with a probation review form to them and their supervisor notifying them of the result based on their team type.   Birthday Email:   1. Retrieves employee data from SharePoint list. 2. Send birthday greetings via email to employees whose birthday is today. |

# **Roles & Responsibilities**

**Creators:**

1. **Human Capital Department Team**: Responsible for designing and implementing the automated email notification system, ensuring it meets the needs of the organization.
2. **IT Department**: Provides technical support and expertise in integrating Power Automate with existing systems and ensuring data security.
3. **Process Improvement Team**: Assists in analyzing current workflows and identifying areas for automation and efficiency.

**Stakeholders:**

1. **Human Capital Department Manager**: Oversees the implementation of the SOP and ensures alignment with departmental goals and best practices.
2. **Executive Leadership**: Provides strategic direction and ensures that the automated email system aligns with the company’s overall business objectives.
3. **Compliance Officer**: Ensures that the automated processes adhere to legal and regulatory requirements regarding employee communications and data handling.

**End-Users:**

1. **HR Staff**: Will utilize the automated system to send out probation reminders and birthday greetings, providing feedback on its functionality and effectiveness.
2. **All Employees**: Recipients of the automated emails, whose engagement and morale will be impacted by the timely and consistent communication.
3. **Clients/Customers**: While not direct users of the SOP, their satisfaction may be influenced by the improved employee engagement and morale resulting from timely recognition and communication.

# **Revision History:**

|  |  |  |
| --- | --- | --- |
| MM/DD/YYYY | Name | Revisions Made |
| 6/25/2025 | SOP – Power Automate Email Automation 2025 | First Draft |
|  |  |  |

# **Methodology & Procedure**

\*\*5. Step-by-Step Instructions\*\*

Break down each component clearly. Use screenshots or numbered steps where possible.

1. Data Source Setup

1.1 Creating a new SharePoint Site

* Click on “Create” (plus button).
* Select “Site” from the dropdown menu.

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* Choose a **Team site**

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* Select “Standard team” from the template options.

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* Enter the site name (e.g. “Employee Birthdays”) and description (optional).

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* Set the privacy settings (Public or Private).
* Add desired members to the SharePoint site (Note: can always add new members after site is created)
* Copy the Site address for later use.
* Click “Finish” to create the site.

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* 1. Setting Up Lists in SharePoint
* Navigate to the newly created SharePoint site.
* Click on “New” and select “List.”

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* Choose “Blank list” or use a template

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* Name the list (e.g. “Probation Dates”).
* \*\*PROBATION EMAIL\*\* Add columns for:
  + Employee Full Name (Single line of text)
  + Employee (Person)
  + Work Email (Single line of text)
  + ProbCompDate (Date and time)
  + Job Title (Single line of text)
  + Line Manager Email (Single line of text)
  + Line Manager Name (Single line of text)
  + Team (Single line of text)
* \*\*BIRTHDAY EMAIL\*\* Add columns for:
  + Employee First Name (Single line of text)
  + Employee Last Name (Single line of text)
  + Work Email (Single line of text)
  + Date of Birth (Date and time)
  + HR Email (Single line of text)

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**Column/Field Types**

* PROBATION EMAIL LIST DEMO:

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**Site Name**

**Data**

**List Name**

1. Power Automate Log-in

2.1 Navigating to Microsoft Power Automate

* On your desired search engine browser, navigate to [Microsoft Power Automate](https://www.microsoft.com/en-us/power-platform/products/power-automate)

2.2 Signing in to Microsoft Power Automate

* Click “Sign in” at the top right corner of the web page
* Sign in using Microsoft 365 mailbox credentials

*\*\*Use a \_\_\_\_\_\_\_@pag.com email address in order to connect to the “PAG Consulting Limited” Environment within Microsoft Power Automate\*\**

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OR (Alternative Method)

2.1 Navigating to the PAG SharePoint Homepage

* On your desired search engine browser, navigate to the [PAG SharePoint Homepage](https://pagcloud.sharepoint.com/SitePages/Home.aspx)

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2.2 Opening Microsoft Power Automate

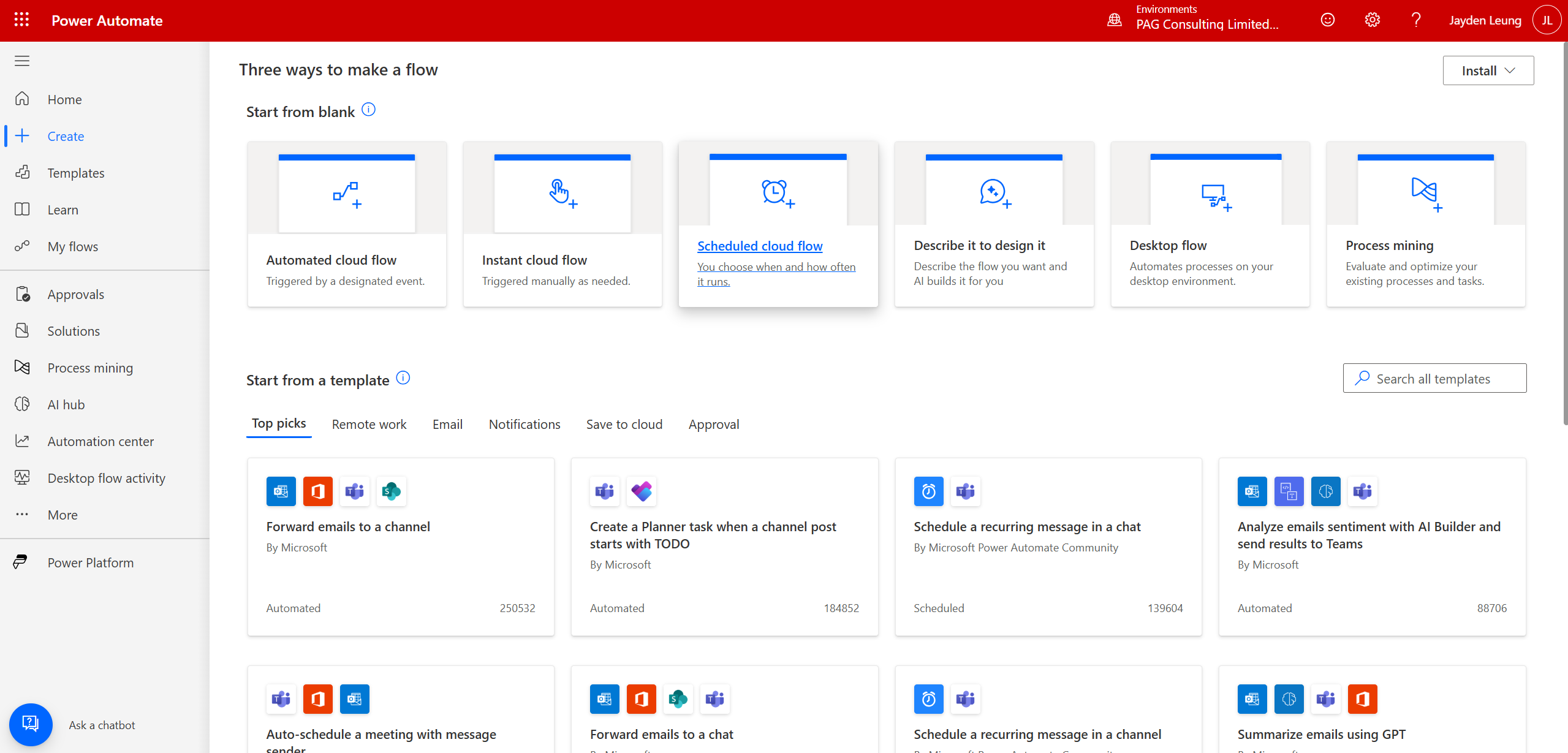
* At the top left-hand corner, click the nine dots and proceed to click the Power Automate button to open the application

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1. Scheduled Cloud Flow Creation
   1. Creating a scheduled cloud flow

* From the home screen, click on “+ Create” and click on “Scheduled cloud flow”



* Enter a name for the flow (e.g., “Probation Email Automation”)
* Set the flow to run:
  + For probation emails: Set to repeat every 1 day starting at an early start time (e.g. 06:00 AM)

*\*\*Note: the flow will run starting at this time every day\*\**

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3.2 Creating the Probation Update Email Automation flow

* Add a new step by clicking on “+ New Step”
* Search for and select “Get future time”

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* Set “Interval” to “14” and “Time unit” to “Day” (Note: this block gets the future time 14 days in the future)

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* Search for and select “Substring” to add a substring block

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* Type “/” or click the lightning bolt beside the text box to insert dynamic content

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* Select the “Future time” block from the dynamic content list

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* Set “Starting Position” to 0 and “Length” to 10 (click the dropdown arrow to access Advanced parameters, then click the check box for Length)

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**Output of “Substring”:**

**YYYY-MM-DD**

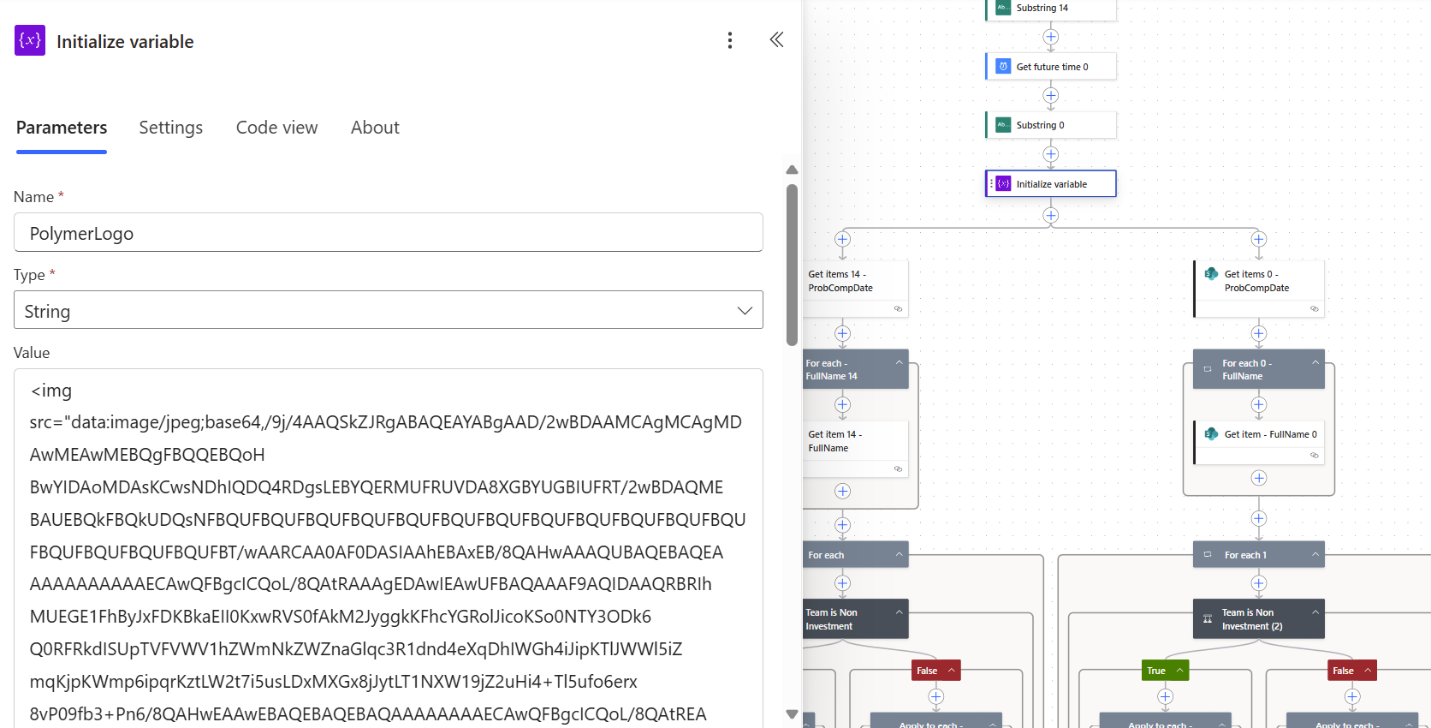
* Repeat the same process above, only changing the “Interval” to 0 for the second “Get future time” block.

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**Gets the current time**

* To include an image in the email, search and select Initialize variable. Type the name of the picture in Name, set Type as ‘String’. Value will be filled in the next step.



* Now, we are going to encode the image to include it in the Value field. Open up Terminal, and use cd to jump to the directory where you store the image. For example, if the image is called polymer.jpg and is stored in Documents directory, we type ‘cd Documents’ to jump to Documents directory, and then ‘certutil -encode polymer.jpg code.txt’ to encode the image into code.txt (You don’t need to create the code.txt file).
* Make sure the path of the Documents directory is ‘This PC’, ‘Windows (C:)’, ‘Users’, choose the folder named after your account, then ‘Documents’.

A screenshot of a computer program

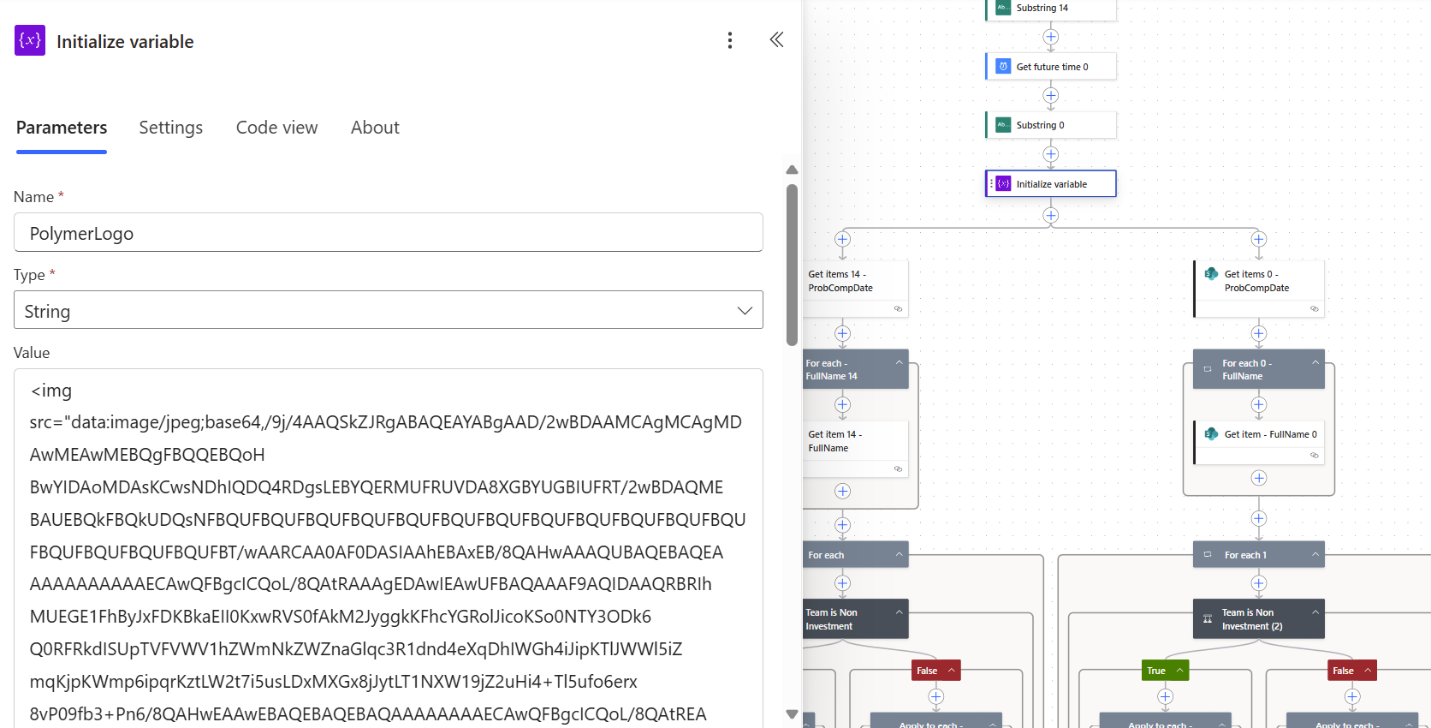
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* If input or file is incorrect, it will indicate that the file cannot be found, otherwise it says command completed successfully. Open code.txt generated from the command, copy the content in between begin and end certificates.

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* <img src="data:image/jpeg;base64,Paste Here" />
* Replace the red text above with the content you just copied, and copy and paste the whole thing into Value section of the Initialize variable component.



* Hover over the “+” button below the “Initialize variable” block, right-click, and select “Add a parallel branch”
* Search for and select “Get Items”, input the Site Address you copied earlier, select and choose your List Name. In Advanced parameters choose Filter Query, type ‘EndDate eq '@{body('Substring\_14')}'’. *(Note: body(‘Substring 14’) represents the dynamic content from Substring 14 block)*
* This filters the list and keeps the entries whose end date is 14 days prior to the probation complete date.

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* \*\*Navigate to the “Settings” tab, and under “Networking”, ensure “Pagination” is “On” and set the “Threshold” to 1000

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* Search for and select “For each” to add a for each block below the “Get item 14 – ProbCompDate” SharePoint block.
* In parameters, select the lightning icon on the right, and choose body/value under the “Get item 14 – ProbCompDate” SharePoint block.

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* After the For each block, search for and select “Get Item” block (No s here!), input the Site Address you copied earlier, select and choose your List Name. Choose ID under ProbCompDate in the ID field.

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* Again, create another For each block, and select body/value from ProbCompDate like earlier.

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* Search for and select “Condition” to add a conditional block below the For each block.
* Under the “True” branch of the selected condition above, search for and select “Apply to each” to create an “Apply to each” loop

*(Note: an “Apply to each” loop is a control flow action that iterates through a collection of items in a list, allowing you to perform the same set of actions on each item)*

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* In the “Select an output from previous steps” box, click on the lightning bolt to insert dynamic content and select “body/value” from the “Get item**s** 14 - ProbCompDate” SharePoint block

*(Note: “body/value” represents the list of items from the “EmployeeProbationDatesDatabase” SharePoint List)*

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* Within the “Apply to each” loop, search for and select “compose” to add a compose block *(Purpose: Get the first name of the line manager)*

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* Click on the “Compose” block just created and under the “Parameters” tab, click on “fx” or type “/” to insert an expression

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* Type in the preliminary line of code into the text editor (Note: this line contains two functions: “first()” returns the first element from the passed-in string, “split()” splits the string using a separator (a single-space)

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**Text Editor**

* Move to the “Dynamic content” tab
* Type “Line Manager Name” in the search bar

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* Ensure cursor is in between “(“ and “,”



* Select “Line Manager Name” under the “Get item**s** 14 – ProbCompDate” SharePoint block

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* Click on the “Update” button to upload the function to the “Compose” block
* Repeat the same process from the above “Compose” block *(Purpose: Get the first name of the employee)*
  + Replace the first parameter from above by searching “Employee Full Name” in the dynamic content search bar, and selecting “Employee Full Name from the “Get item**s** 14 – ProbCompDate” SharePoint block

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**1st Parameter**



* Search for and select “Get file content” to add a “Get file content” **SharePoint** block *(Purpose: Retrieve file content of the “Probation Review Form\_Non-Investment\_2024.docx” file)*

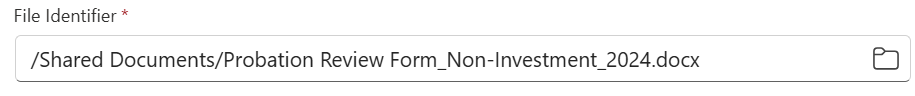
A screenshot of a computer

AI-generated content may be incorrect.

* Set “Site Address” to the SharePoint site you previously created (e.g. “Probation Dates”)



* Set “File Identifier” to the file of interest by clicking on the folder button, navigating to the folder that contains the document, and clicking on the file



A close-up of a document

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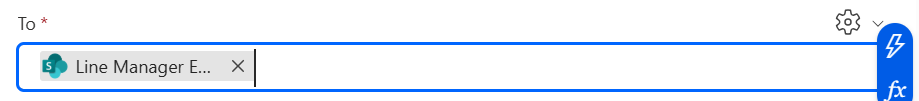
3.3 Sending the Email

* Search for and select “send an email” to add the “Send an email (V2)” Office 365 Outlook block

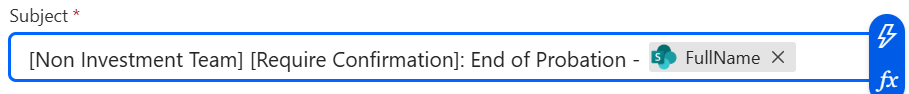
A screenshot of a email notification

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* Under the “Parameters” tab:
  + Under the “To” field, insert the SharePoint “Line Manager Email” dynamic content



* + Under the “Subject” field, type in the email subject header “[Non Investment Team] [Require Confirmation]: End of Probation – “ followed by an inserted SharePoint “Employee Full Name” dynamic content



* + Under the “Body” field, type in the following **[Non Investment Team] [Require Confirmation]** email template to the **Line Manager**:

Hi [hiring manager],

[Name] coming to the end on [Date]. Please confirm whether you were satisfied with his/her performance.

We have attached the probation review form for you to fill in your comments and feedback.

Upon completion of the form, please schedule a probation review session with your team member and return the completed form to us by [Date]. We will then ask your teammate for their endorsement.

We have also attached the new hire requirement form that was previously submitted, for your reference.

Thank you.

Thanks & regards

[Polymer Logo]

**Human Capital**

* + In the unfilled space “[hiring manager]”, insert the “Outputs” dynamic content under the “Compose - [Non Investment Team] Line Manager First Name 14” block

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* + In the unfilled space “[Name]”, insert the “Employee Full Name” dynamic content under the “Get item**s** 14 - ProbCompDate” block

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* + In the unfilled space “[Date]”, insert the “ProbCompDate” dynamic content under the “Get item**s** 14 - ProbCompDate” block

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* + In the unfilled space “[Polymer Logo]”, insert the “Polymer Logo” dynamic content under the “Variables” block

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* Under the “Advanced parameters” tab, check the “CC” and “Attachments” boxes (Note: other parameters such as “BCC”, “From (Send as)”, “Sensitivity”, “Importance”, and “Reply To” can be used if desired)

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* Under the “CC” advanced parameter, click the gear icon and click “Use dynamic content”
* Type in [HKHumancapital@polymercapital.com](mailto:HKHumancapital@polymercapital.com) and press “Enter” to add the email address

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* Under the “Attachments” advanced parameter, type in “Probation Review Form\_Non-Investment\_2024” into the “Name – 1” text box & insert the “File content” dynamic content under the “Get file content – Probation Review Form Non-Investment 2024 [Line Manager]” SharePoint block

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* **Repeat the same process for the following loops/blocks:**
  + **“Apply to each - [Investment Team] [Require Confirmation] - End of Probation”**

INVESTMENT TEAM TEMPLATE [LINE MANAGER]:

Hi [Hiring manager],

[Name]’s probation is coming to the end of [Date] and I want to check whether you were satisfied with [his/her] performance.

Could you confirm whether [Name] has successfully passed probation?

Thank you.

Thanks & regards,

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Human Capital

* + **“Apply to each - End of Probation Email [Non Investment Team] [Employee]” loop**

Non-Investment Team Template [Employee]:

Hi [name],

We are delighted to inform you that you have successfully completed and passed the probationary period.

Please see attached for the Probation Review Form that your manager has gone through with you. Please sign the attached copy and return to us in the next 2 days.

Thanks & regards

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**Human Capital**

* + **“Apply to each - End of Probation Email [Investment Team] [Employee]” loop**

Investment Team Template [Employee]:

Hi [name],

We are delighted to inform you that you have successfully completed and passed the probationary period.

Thanks & regards

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Human Capital

* **FINAL COMPLETED FLOW (Probation Email):**

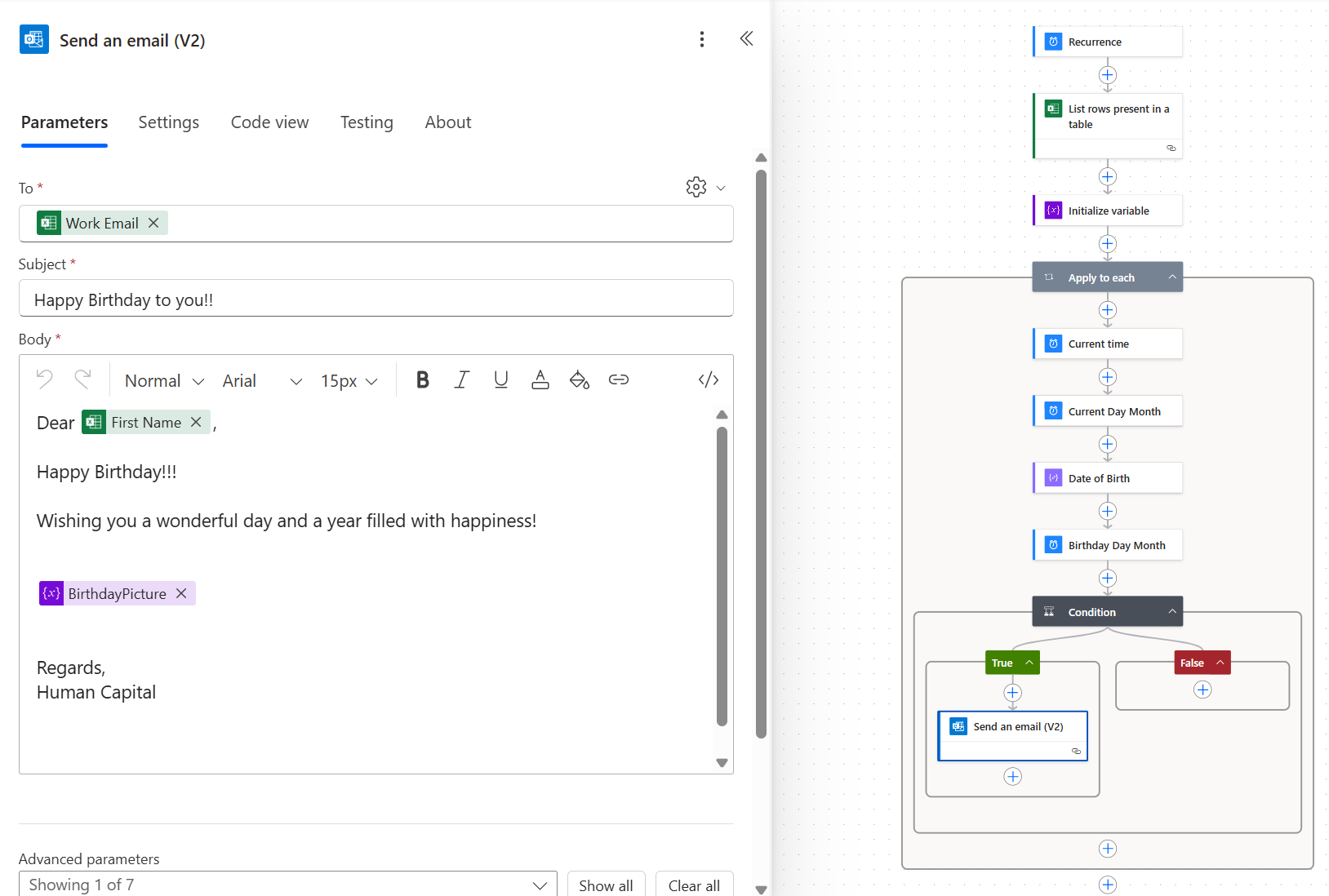
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* **FINAL COMPLETED FLOW (Birthday Email):**



* Save and test the flow (manually or automatically)

# **Troubleshooting & Tips**

**6.1 Common Issues and Solutions**

**Issue 1: Flow Not Triggering as Expected**

* **Solution**:
  + Check the flow's trigger settings to ensure the schedule is correctly configured (e.g., daily, weekly).
  + Verify that the flow is turned on and not in a disabled state.
  + Review the run history in Power Automate to identify any errors or skipped runs.

**Issue 2: Emails Not Sending**

* **Solution**:
  + Ensure that the email addresses in the SharePoint list are correctly formatted and valid.
  + Check the "Send an email (V2)" action to confirm that the dynamic content is correctly inserted.
  + Review the flow run history for any error messages related to the email action.

**Issue 3: Incorrect Data in Emails**

* **Solution**:
  + Double-check the dynamic content being used in the email body to ensure it corresponds to the correct fields in the SharePoint list.
  + Test the flow with sample data to verify that the correct information is being pulled from the list.

**Issue 4: Flow Runs Too Frequently or Not Enough**

* **Solution**:
  + Review the recurrence settings in the flow to ensure the frequency (daily, weekly) and time are set as intended.
  + Adjust the interval settings if necessary to meet the desired schedule.

**Issue 5: Image Not Displaying in Email**

* **Solution**:
  + Ensure that the image is correctly encoded and that the base64 string is properly formatted in the email body.
  + Test the image link in a web browser to confirm it displays correctly.

**6.2 Best Practices**

**1. Regularly Review Flow Performance**

* Periodically check the flow run history to monitor for any errors or issues. This helps in identifying and resolving problems quickly.

**2. Use Descriptive Names for Flows and Variables**

* Name flows and variables clearly to make it easier to understand their purpose. This will help in troubleshooting and future modifications.

**3. Document Changes**

* Keep a log of any changes made to the flow or SharePoint lists. This documentation can help track issues and understand the flow's evolution over time.

**4. Test with Sample Data**

* Before deploying the flow for actual use, test it with sample data to ensure that all components work as expected. This can help catch errors before they affect real users.

**5. Communicate with Stakeholders**

* Keep open lines of communication with team members and stakeholders. If there are changes in processes or data requirements, ensure everyone is informed.

**6. Backup Important Data**

* Regularly back up the SharePoint lists and any important documents used in the flow. This ensures that you can recover data in case of accidental deletion or corruption.

**7. Seek Help When Needed**

* If you encounter issues that you cannot resolve, do not hesitate to reach out to IT support or consult Microsoft’s documentation and community forums for assistance.

# **References & Glossary**

Microsoft Power Automate Documentation

[Official Microsoft Power Automate documentation - Power Automate | Microsoft Learn](https://learn.microsoft.com/en-us/power-automate/)

Power Automate Send 7 or 14 day Task Due Reminder Emails: <https://www.youtube.com/watch?v=ytyLBhwGadQ>

How to Add an Image to Email in Power Automate: <https://www.youtube.com/watch?v=mBBMF3AlL_w>