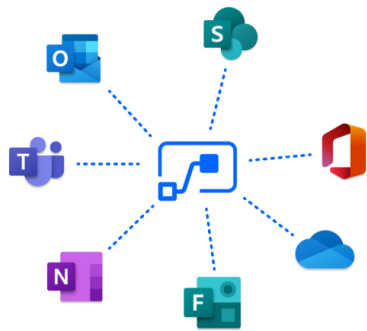An Introduction to:

Power Automate: Getting Familiar with the Flow

Estimate Read Time: 20 minutes

Requirements:

- License by User Plan that Enables Full-Automated Flows

- Alternatively a Student License or Free-Trial with Limited Pro-Feature Functionality will be Adequate

Tips

For optimal use of all applications used in this tutorial, ensure that you are connected to a wifi network with a minimum 10mb upload and 10mb download connection.

Computer Requirements

- Reliable Internet Connection

- Access to Microsoft Suite

- Microsoft Business or Student Account

- Working Email Address in MS Outlook

Preparation

1. Logon to https://account.microsoft.com/account?lang=en-hk and create an account or if you already have an account, proceed to step 2.

2. With either a business or school account, navigate to https://powerautomate.microsoft.com/en-us/ and select the *Start Free* option highlighted in blue.

3. Sign in with either a student or business account. Note: You must have a student or business account to continue

4. Enter a business or school email address and open the link sent by Microsoft. Alternatively select *Sign In* and sign into your Microsoft account.

5. You are now viewing the Microsoft PowerAutomate Studio. Alternatively you can download the Power Automate desktop app by following the below link: https://docs.microsoft.com/en-us/power-automate/desktop-flows/install

6. Get comfortable and ready to dive into an exciting new workflow that Power Automate has to offer!

Getting Started

Before we begin, open the following applications either on your desktop or through a web-browser of your choice: Microsoft Outlook, Microsoft Sharepoint and the Cadence Data Generator Program on a platform of your choice.

Once you have these applications open we can begin creating a flow in Microsoft Power Automate. Rather than employing a template that already exists, we are going to create one from scratch that will best suit the data generator program that complements this use-case.

Step 1-Creating Our Flow

To start, go ahead and navigate to the *Home* tab in Power Automate that will be located in the left menu bar:
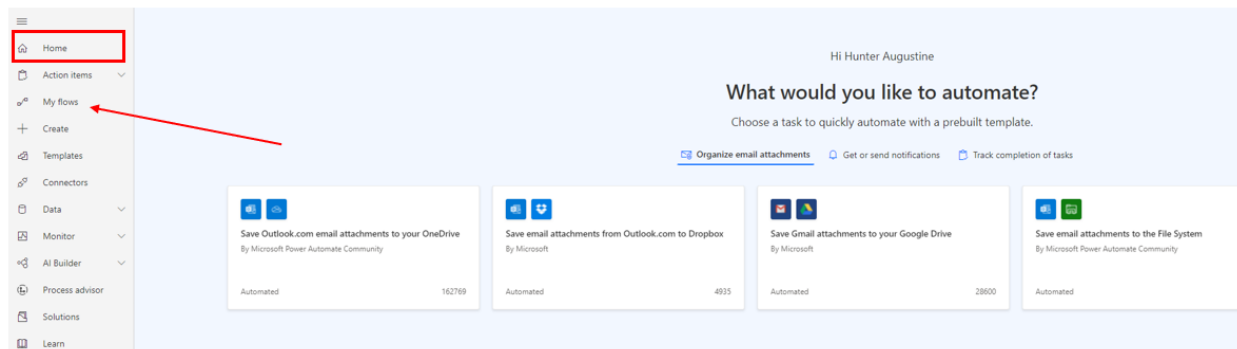
Once here, click on the menu option that says *My Flows*. This will open up a new view.

In this new view, navigate to the top menu bar and select the + icon with the text *New flow* right next to it. On the drop down menu option select: *Automated Cloud Flow*

The new menu option that appears will look something like the bottom right image:
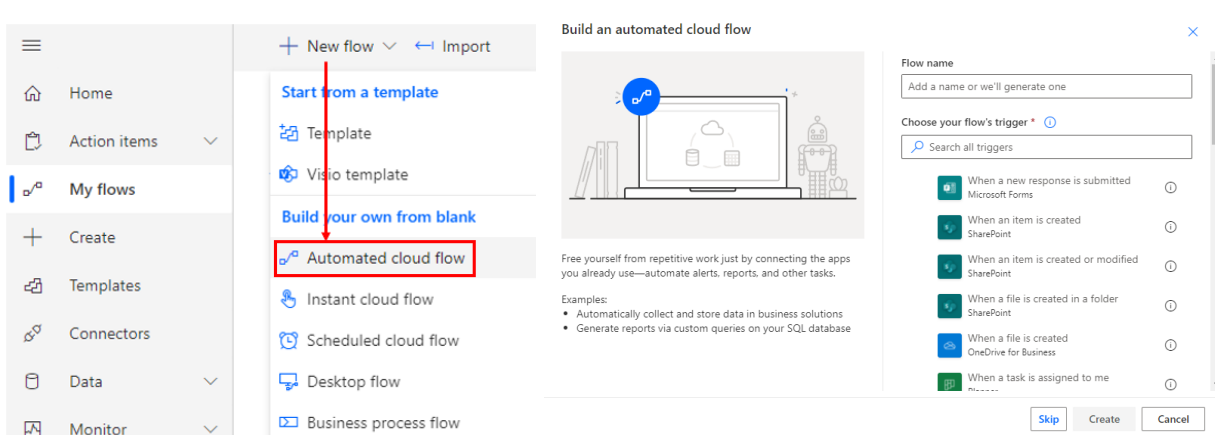
Step 2-Triggering Our Flow

Under Flow Name, type a name that helps you remember the purpose of this flow. I have entered "Cadence Attachment Redirection" for this example. Under *Choose Your Flow's Trigger*, start typing the word **Email.** When it appears, select the option "When a new email arrives" followed by the latest version (mine is V3) and select *Create* in the bottom bar.
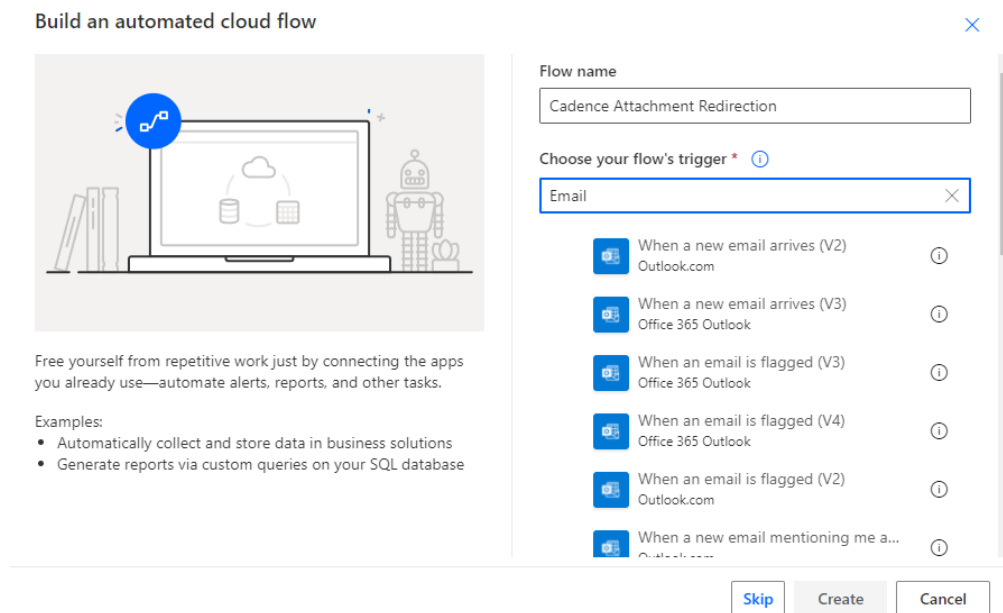
Wait 30 seconds for a new window to appear. This window is the flow environment where you will be controlling aspects such as triggers and steps to follow as a sequence of events that achieve the automated task you want to accomplish. Expand the blue menu option that says *Show Advanced Options ^*
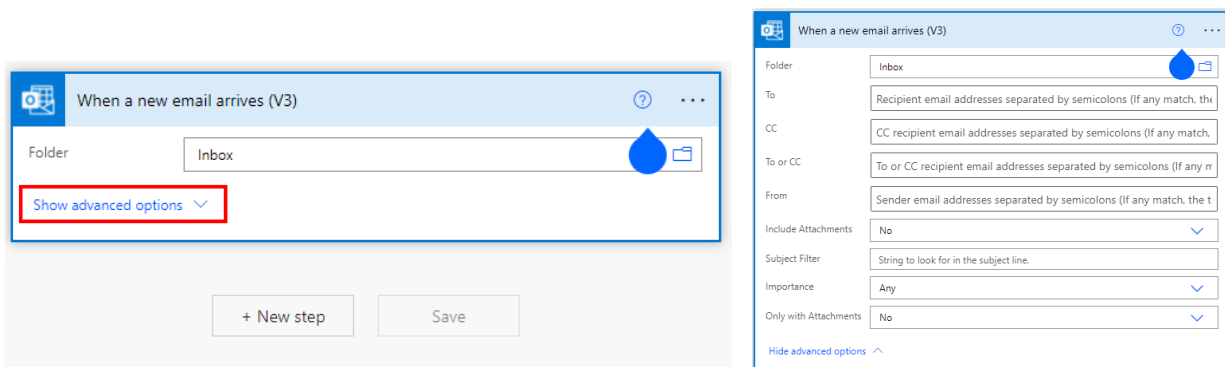
Step 3-Identifying a Recipient

Enter the recipient you want the email to send to, optionally including a carbon copy and a sender's address. Under the *Include Attachments* menu option, change the field to say "Yes" and create a subject that is the same as that written in the Data Generator Subject field. (Contact a team member for more information on this). Leave the importance as "Any" and in the *Only with Attachments* menu option, change the field to say "Yes". See below an example trigger. Select the +*Next Step* option to add an operation to this flow that will save a file in Microsoft SharePoint.
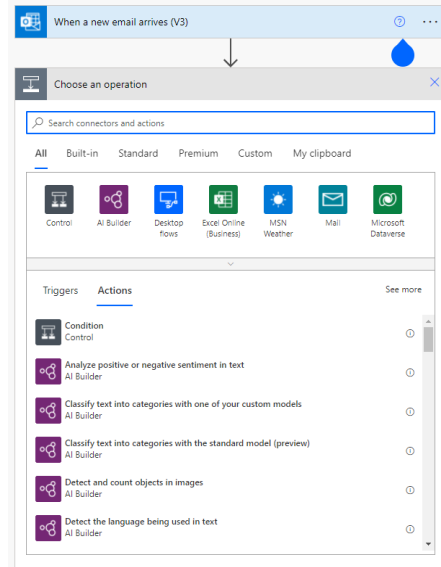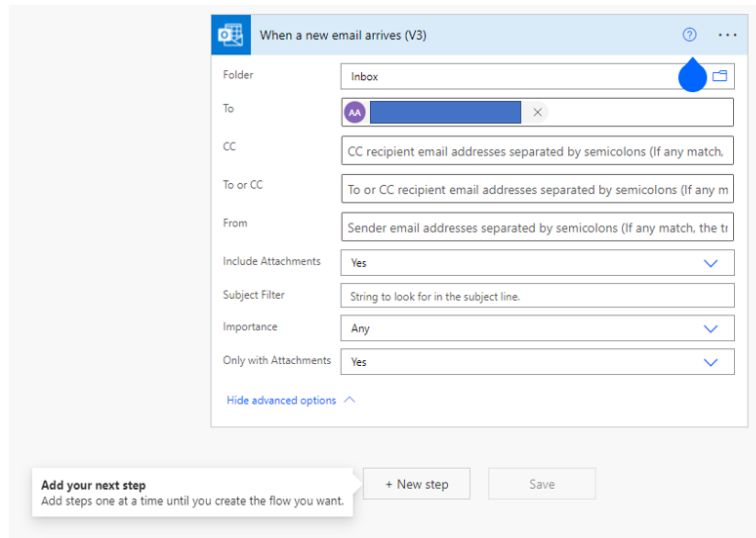
## Step 4-Creating a File from the Attachment

In the search box, under the *Choose an Operation* title, start typing the words "Create File". You might see or will have to scroll down the menu until you can see the option that says *Create File* (SharePoint). Select this option.
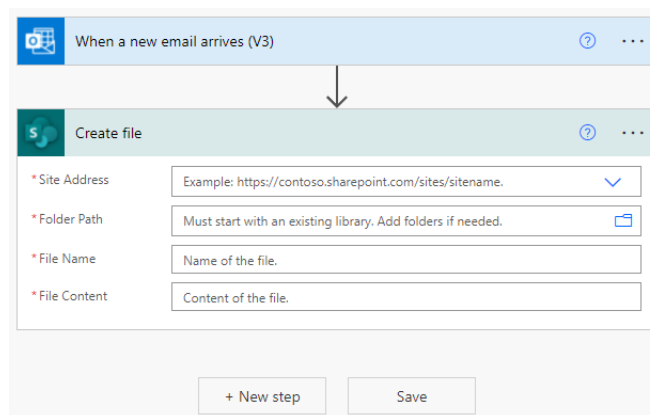

Before proceeding further, save your progress by selecting the *save* icon on the top right corner and open the location where you want to send the attachments generated from the Cadence Data Generator Program. Identify the path where you want the attachments saved in sharepoint.

Step 5-Accessing the SharePoint Link

In SharePoint, select the home tab from the left menu bar, and select either a group, personal documents location or other section where you want these files saved. In this example, we are working with a team group in SharePoint as can be seen below:
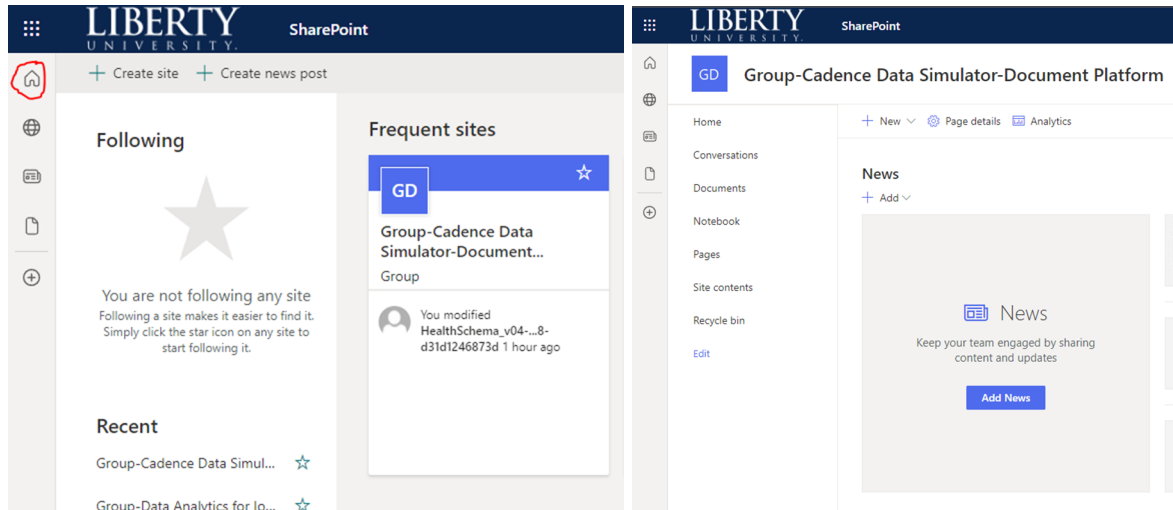
Select the Page Details Gear Icon, and copy the link that appears in the right hand drop-down menu:
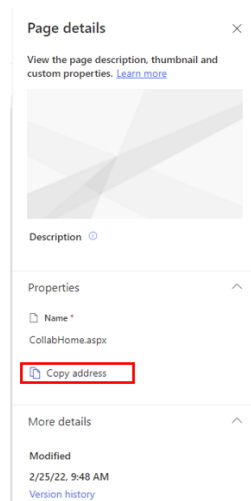
Keep this address handy for the next step that follows.

Navigate back to the PowerBI flow developer site and paste the site address you just copied under the field that says *Site Address*

Step 6-Including the Name and Content

Beside the *Folder Path* option, select the folder icon and navigate to the location at the address just pasted where you would like the attachments to be located. Select the *File Name* field and scroll down to the option that says "Attachment Name" and select it. For the *File Content* field, select the text box and on the side panel, select the *Attachments Content* option that is suggested under *Dynamic Content:*

Step 7-Testing the Flow

Once all the fields have been filled, select the *Save* option on the bottom right. Navigate to the test option on the top right and select the *Manually* button. Then send an email that includes an attachment to the email you specified in the trigger portion of the automated flow. If the automation works, you will notice that the attachment is sent to the address defined in Step 3, and is automatically dropped into the SharePoint folder located in Step 5!