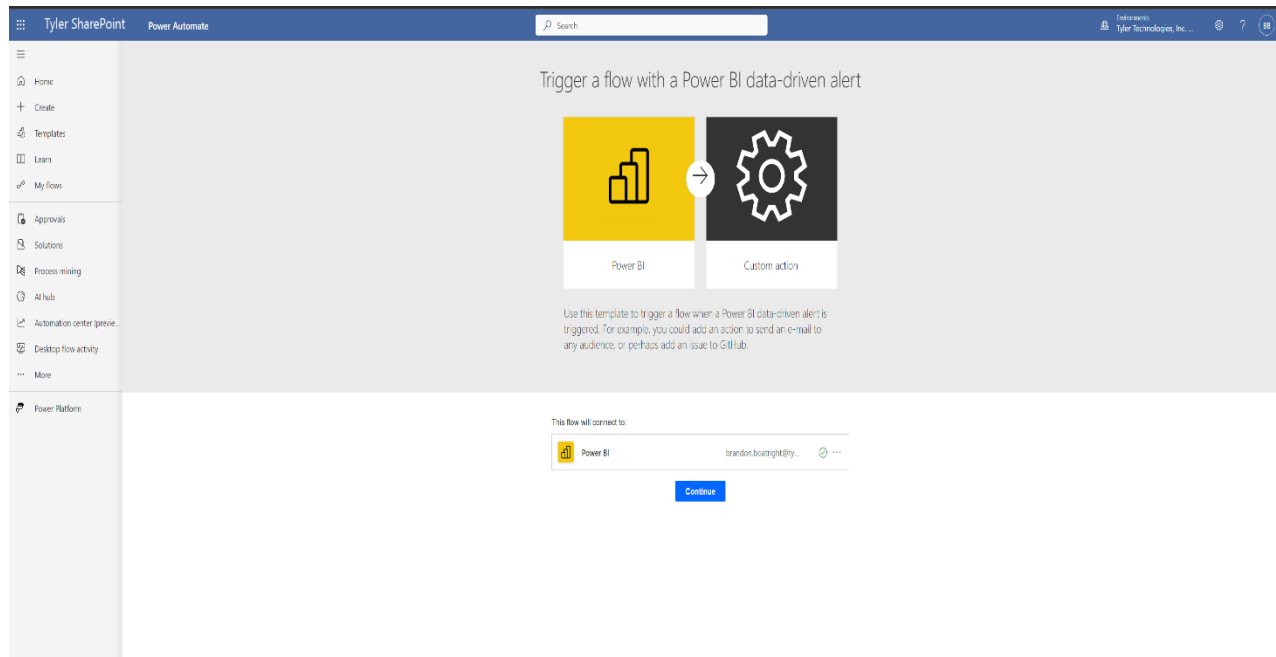


Step-by-Step Power Automate Flow Setup

1. Create a New Flow

- Go to **Power Automate** and create an **Automated Flow**.
- Choose the **When a file is created (properties only)** trigger in SharePoint.
- **Pro Tip: There are templates you can use to base off in Power Automate that have existing foundational presets linking to Power BI.**

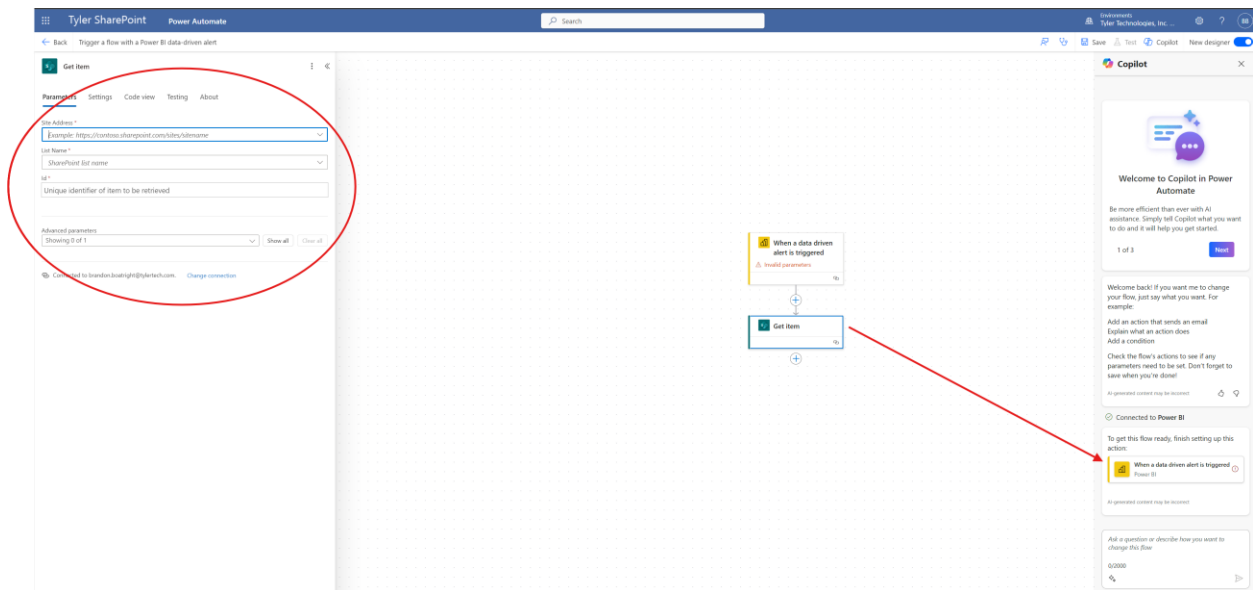


2. Trigger: Monitor the SharePoint Folder

- **Action:** Select **When a file is created (properties only)** from SharePoint.
- **Site Address:** Enter the SharePoint site where the data will be stored.
- **Folder:** Specify the SharePoint folder where new files will be uploaded (/Shared Documents/ChatPhoneData/).

3. Action: Get File Content

- **Action:** Select **Get file content** from SharePoint.
- **Site Address:** Enter the same SharePoint site.
- **File Identifier:** Use the dynamic content to get the file that triggered the flow



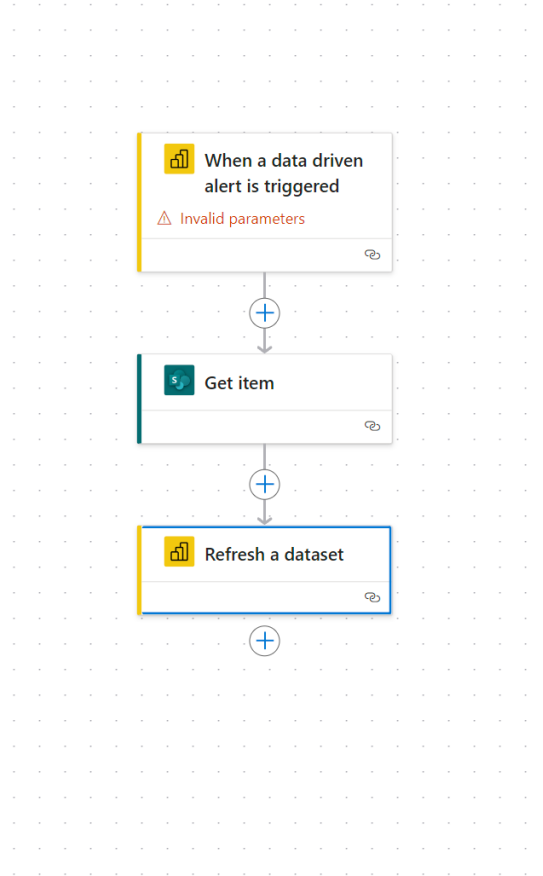
4. Optional: Parse Data (If Needed)

- If your data is in **Excel** format, use **List rows present in a table** to extract the data:
 - **Action:** Use the **Excel Online** connector.
 - **File:** Use the dynamic content from the uploaded file.
 - **Table:** Select the table in the Excel file to retrieve rows.

5. Action: Refresh Power BI Dataset

- **Action:** Select **Refresh a dataset** from the Power BI connector.
- **Workspace:** Select the Power BI workspace where the dataset is located.

- **Dataset:** Choose the dataset connected to the new file data (e.g., Chat_vs_Phone_Times).



6. Optional: Send Confirmation Notification

You can add an optional step to notify relevant stakeholders once the dataset has been updated.

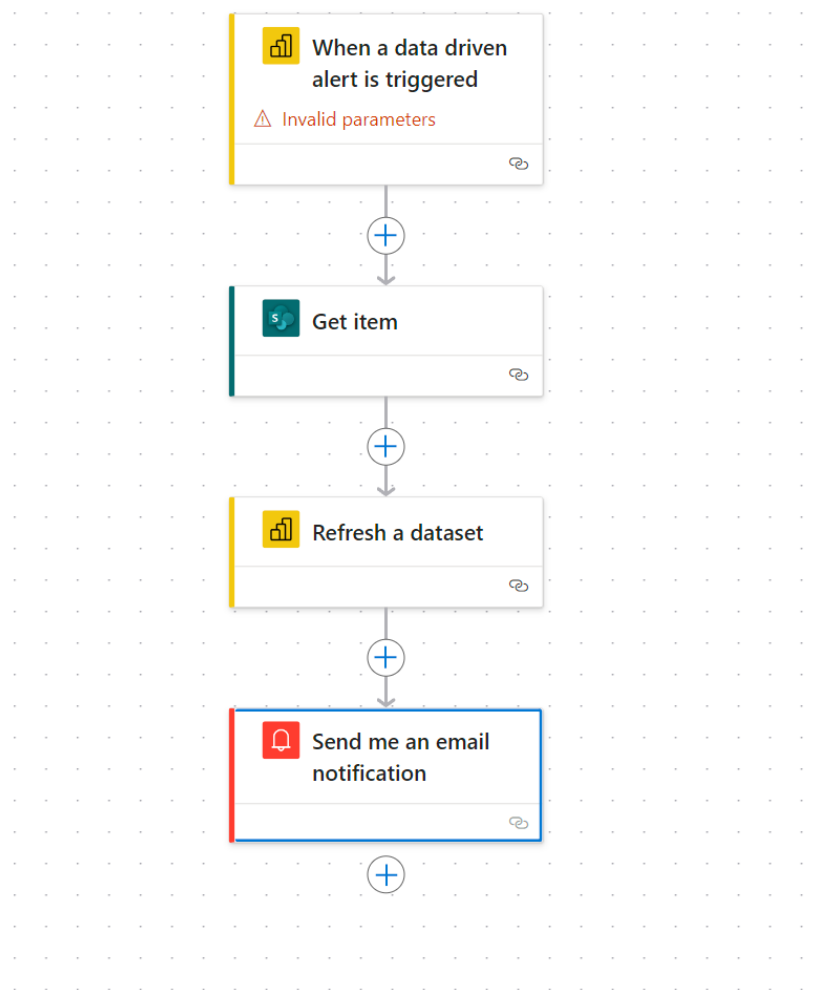
- **Action:** Use **Send an email** or **Post a message in Microsoft Teams** to inform stakeholders.

Optional Action:

Name: Send an email or Post a message in Teams

To: team@company.com

Message: The *****dataset has been updated with the latest hold time data.



Complete Power Automate Flow Diagram

Here's the full flow process:

1. **Trigger:** New file uploaded to SharePoint.
2. **Action:** Retrieve the file content.
3. **Optional:** Parse data from the file (if necessary).
4. **Action:** Refresh the Power BI dataset to reflect the new data.
5. **Optional:** Notify stakeholders of the update.

Advanced Features (Not required but certainly could be helpful)

- **Error Handling:** Add conditions or error handling to manage situations like incorrect file formats or missing data.
- **Data Transformation:** Consider adding steps to clean or transform data before updating Power BI.