CERTIFLOW DETAILED PROCESS

★ Title: CertiFlow – AI Workshop Certificate Automation Using Microsoft Power Platform

Purpose: Automate certificate generation, delivery, and tracking using Microsoft 365 tools (Forms, Excel, Power Automate, SharePoint, Outlook)

Step-by-Step Procedure

Phase 1: Setup - Microsoft Form for Registration

- Create a form titled "AI Workshop Registration"
- Include fields: Full Name, Roll Number, Outlook Email, Event Name, Date (default value)
- Share the form link for registrations Outcome: Participant details collected via form

Phase 2: Store Data in Excel (Forms for Excel)

- Use Forms for Excel via OneDrive
- Ensure fields match the registration form
- Excel file becomes the source for Power Automate Outcome: Live Excel sheet with all form responses

Phase 3: SharePoint Setup

- Create a **Team Site** (e.g., CertiFlow Site)
- Add:
 - Document Library ("Certificates") for storing certificate files
 - List ("Certificate Tracker") for tracking participant details and certificate links Outcome: Organized SharePoint site for storage and tracking

Phase 4: Power Automate Flow – Certificate Automation

- Create an Automated Cloud Flow
- Trigger: Manual or Scheduled

- Actions:
 - List rows from Excel
 - Condition: If Participation Status = "Participated"
 - **V** TRUE:
 - Compose HTML certificate
 - Create file in SharePoint
 - Get file content
 - Send email with certificate
 - Log details in SharePoint list
 - FALSE:
 - Send "Not participated" email
 - Log details without certificate link
 Outcome: Certificates auto-generated, emailed, and logged

Phase 5: Dashboard & Tracking

- Filter Excel for "Participated" entries
- Use Pivot Tables or Form summary to show:
 - Total Registrations
 - o Number of Participants
 - Gender/Branch-wise stats (optional)
- Add slicers or charts for visualization
 Outcome: Dashboard for participation analysis

Phase 6: Testing & Result

- Submit test responses
- Run the flow
- Verify:
 - o Certificate email for "Participated"
 - o Notification email for "Not Participated"
 - Certificate files in SharePoint
 - Records in SharePoint list

Outcome: Successful automation test

Final Result

- Certificate generation is fully automated
- Personalized emails sent to participants
- SharePoint list logs complete data
- Reusable for future events or workshops