Webinar: How To Harness Microsoft Power Automate To Digitise Your Paper Processes

7\textsuperscript{th} May 2020
Thank you for joining – we’ll be starting soon

the I.T. team
Maintaining the health of your I.T. system
WHAT WE WILL COVER TODAY?

- Why should you consider Automating and going Paperless?
- Outline of Power Automate and how it works
- Process that you can automate
- Several Power Automate Examples that we use
- Other tools to consider that can assist automation or going paperless
WHAT DO WE HOPE YOU TAKE AWAY?

• Understand Power Automate (and be able to explain it to a colleague)
• Take useful/practical examples away to your organisations
• Be confident that you can implement or make progress yourself.
• Start using Power Automate soon!
About the I.T. team

- Formed in 2011
- Office 365 since its inception
- Managed Services/IT support
- A wide range of IT services
- Major NFP base of customers
- Providing IT services to NZ & Australian organisations
WHY CONSIDER AUTOMATION/PAPERLESS?

• Obviously, the environmental side
• Improve and accelerate processes
• Implementing processes easily
• Allow your organisation to function (in a lockdown scenario!)
• Keep tight records (digitally) of all activity
PROCESSES THAT ARE COMMONLY PAPER BASED

- Time Sheets
- Purchase requests
- Expense Claims
- Credit Card requests
- H&S Incidents
- Travel Requests
- New Client Forms
- Staff Induction

Maintaining the health of your I.T. system
WHAT IS POWER AUTOMATE?
POWER AUTOMATE INTRO
WHAT IS POWER AUTOMATE?

- Microsoft Product/Service (part of Office 365)
- Part of the Microsoft Power Platform
- Formerly called Microsoft Flow
- For organisations and individuals
- Low or no code
- Many templates available
WHAT DOES A FLOW LOOK LIKE?
HOW DOES A FLOW START?

- Triggers
  - Email received
  - Form filled out
  - Document uploaded
  - Tweet mention
- Buttons
- Schedules

Maintaining the health of your I.T. system
MICROSOFT FORMS

Maintaining the health of your I.T. system
DEMOS
INTERNAL PURCHASES - OVERVIEW

What is it?
• A process to request approval for purchasing something for internal use, and/or on a company credit card

How does it work?
• Details gathered in a Microsoft form
• Approval sent to nominated person
• Details sent to Accounts Team on approval
INTERNAL PURCHASES - OVERVIEW

What did we previously do?

• Paper forms, filled out by hand and then put on manager’s desk
• Often got lost, buried, or forgotten!
• Not easy for queries to be shared
• Staff would circumvent the process
• Forms weren’t always filed, defeating the validity of the approval
Microsoft Partner Network

Dear Partner,

We have an interesting new study to help Microsoft gain a greater understanding of the current landscape for partners who sell Office 365. We would love to include input from your organization.

Follow this link to the Survey:
Take the Survey

The questions within the survey will be customized to be relevant to your responses. For most, it will take about 15 minutes to complete, though time may be shorter or longer depending on your unique responses. We appreciate your continuing involvement in the Microsoft Partner Research Panel (MSFRP). Your time and thoughtful feedback are very much appreciated!

Sincerely,
Microsoft Partner Research Panel Team

MDD Research and the Microsoft Partner Research Panel recognize the widespread disruptions COVID-19 (Coronavirus) is creating for individuals and businesses; we have added many of our practices to protect the health of research participants, employees, and community. Fortunately, online research is a safe and effective way for people to continue to help shape decisions made by a wide range of companies, as well as maintain stability in business practices whenever possible. This transition is universal due to current circumstances, you may opt out of this specific study by emailing help. We wish you and everyone in your organization all the best.

If you experience any problems accessing the above website, please email msfrp@microsoft.com

Unsubscribe | Privacy Statement
Microsoft Corporation
One Microsoft Way
Redmond, WA 98052

Ben Hewitt
item from Engineers - Backup
Wed 11:24 AM

Annal Chandran (PCToR)
Update on AT accounts
Wed 11:14 AM

Mark Taylor; Ben Hewitt
Skills email migration - next
Wed 8:57 AM
Microsoft Flow <maccount@microsoft.com>
To: Lucy Rens

Re: Internal Purchase Requiring Approval

Approved

Date Submitted: Wednesday, April 22, 2020 7:49 PM GMT
Comments: We already have some on order. They should arrive tomorrow.

Get the Flow app to receive push notifications and grant approvals anywhere.

Learn more

This message was created by an automated workflow in Microsoft Flow. Do not reply.

Microsoft Corporation 2020.
INTERNAL PURCHASES - WE USE THIS FOR

• Internal Purchases
• Credit Card Approvals
• Credit Approvals
• Time off requests
INTERNAL PURCHASES – SO FAR...

18 MONTHS

240 HOURS SAVED!!
IMPORTANT NOTIFICATIONS - OVERVIEW

What is it?
• Notifying our Health & Safety team when incidents, near misses, or potentially hazardous onsite work is taking place

How does it work?
• Details collected via a Microsoft form
• H&S Committee notified directly in Teams, alerted immediately
IMPORTANT NOTIFICATIONS - OVERVIEW

What did we used to do?

• Email
• Phone call
• Paper form
• No central record
• Items not consistently reported
Welcome to the Health, Safety, and Wellness hub!

Here you'll find all sorts of information about how we manage this in the workplace, and also how to let us know if you have any Health, Safety, or Wellness related incidents.

Please see our COVID-19 Page for resources and information on how to stay healthy and safe!

- I'd like to report an Incident
- I've noticed a Hazard
- I'd like to check our onsite guidelines
- Vehicle Accident Insurance Form
- Monthly Office Checklist
- I need to complete an Onsite Work form
IMPORTANT NOTIFICATIONS - WE USE THIS FOR...

- HEALTH & SAFETY NOTIFICATIONS
- SECURITY INCIDENTS/BREACHES
DAILY STANDUP - OVERVIEW

What is it?
• Tool to gather information from our engineering team, on how their workload is looking for the day

How does it work?
• PowerApp on mobile
• Teams bot chat
• Information collated into a spreadsheet, with a daily report
Welcome to standup!

Are you ready to submit your entry for today?

[Yes] [Not yet]

the I.T. team
Maintaining the health of your I.T. system
Please enter your standup data below.

How busy are you for project work today?
3 - Some project work planned today

How busy are you with BAU work today?
2 - A small amount of BAU

Do you have any availability notes for the team today?
I'm booked onsite between 1pm-3pm, and will not be contactable during this time.

Submit
<table>
<thead>
<tr>
<th>Who</th>
<th>Status</th>
<th>Projects</th>
<th>Support</th>
<th>Availability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alex Vernel</td>
<td>Checked In</td>
<td>3 - Some project work planned today</td>
<td>1 - No BAU items planned</td>
<td>This morning I am on back to back Teams calls, available from 11am.</td>
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<tr>
<td>AJ Jackson</td>
<td>Not Checked</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Igor Lister</td>
<td>Not Checked</td>
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<tr>
<td>Elia Stiefan</td>
<td>Checked In</td>
<td>3 - Some project work planned today</td>
<td></td>
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<tr>
<td>Joe Fournie</td>
<td>Not Checked</td>
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<tr>
<td>Andy Davis</td>
<td>Checked In</td>
<td>2 - Some I could work on, but not much</td>
<td>3 - There are some BAU items I need to work on</td>
<td>I'm heading onsite at 2pm, so if you need anything please see me before then.</td>
</tr>
<tr>
<td>Lucy Rees</td>
<td>Checked In</td>
<td>3 - Some project work planned today</td>
<td>2 - A small amount of BAU</td>
<td>I'm booked onsite between 1pm-3pm, and will not be contactable during this time.</td>
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<td>Canon Daly</td>
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What is it?
• Process to send documents for approval to those who need to sign off
• Useful for Boards, Sales proposals

How does it work?
• Built in to Sharepoint
• Specified item gets sent for approval
• Sign-off status column to track
<table>
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<th>Sign-off status</th>
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Cross-Cultural Marketing Campaigns

Where We Can Improve and What We Have Done Right
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What are buttons?
• Part of the mobile app
• Click to start a flow
• Big focus on personal productivity
MAKING A SIMPLE BUTTON
MAKING A SIMPLE BUTTON
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MAKING A SIMPLE BUTTON
ADVANCED BUTTONS
ADVANCED BUTTONS
HOW TO START?

- Start with templates
- Get used to the backend
- Think of one process you’re struggling with, and give it a go
• Keep track of your social media updates
• Automate some Social media activity
• Team quiz scoring
• Induction processes
• CRM integrations
PANDADOCS

• Proposed based system (used by us)
• Short and long quotes/proposals
• Allows to track activity
• Obtains sign off by customers
Regulations

and

Conditions of Employment

SAMPLE EMPLOYEE CONTRACT

2 simple steps to complete this document
OFFICE LENS

- Alternative to a Scanner
- Microsoft Product/Service
- Effective at capturing text on scanned document.
- Feature rich
- Very useful in a lockdown scenario if you don’t have access to a scanner!
Office Lens

Office Lens makes pictures of whiteboards and documents readable. Office Lens can convert images to editable Word, PowerPoint, and PDF files, and you can even save images to OneNote or OneDrive. Office Lens is like having a scanner in your pocket. Like magic, it will digitize notes on whiteboards or blackboards.

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Photo</td>
<td>Saves images of scenery or people</td>
</tr>
<tr>
<td>Document</td>
<td>Trims and colors images perfectly</td>
</tr>
<tr>
<td>Whiteboard</td>
<td>Straightens, gets rid of glare and shadows</td>
</tr>
</tbody>
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Table: Office Lens Processing Modes
WHERE TO FROM HERE?

• Start thinking your processes that could be automated. Consider your time savings.

• Get started yourself. See how you get on. Find templates and try to get one of them going.

• If you struggle or would like someone else to get started, we can help.

• Download the Mobile App for a play.

• Read our Blog on Power Automate, has a bit more on our journey. https://www.theitteam.co.nz/microsoft-power-automate-18-months-on/

• Go here for the pages: http://flow.microsoft.com
COMMON QUESTIONS

- How shall I get started?
- Which licenses are required for Power Automate?
- Can we get hold of the example templates?
- Does you need Office 365?
- If we don’t have Paper Processes, is this valuable?
- Are we too small to use this?
- Do I need to be a developer/techie to do this?
the I.T. team has been in business since 2004.

Our focus has always been on offering a fresh range of I.T. related services and support designed to help client organisations maximise productivity and protect themselves from all kinds of data related risks.