

Welcome to our

**MARCH** techshop



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# Presentation

*OVERVIEW*

What is PA?

Tools we use

Basic DIY examples

Complex examples

Demo 1

Demo 2

Examples

# BUT WHAT IS PROCESS AUTOMATION?

**Business process automation, also known as business automation or digital transformation, is the technology-enabled automation of complex business processes.**

**It can streamline a business for simplicity, achieve digital transformation, increase service quality, improve service delivery or contain costs.**



# HOW WE AUTOMATE TASKS:

We use Power Automate! PA is a cloud-based tool by Microsoft that enables users to automate workflows between different apps and users. Examples of processes that can be automated using Power Automate:

- Email notifications
- Social media posts
- Tasks that need approval
- Data collection
- Document management



**Power  
Automate**



# EXAMPLES OF PROCESSES THAT THE AVERAGE JOE CAN AUTOMATE

- **Stationary orders**
- **Onboarding form**
- **Asking for a Google review**
- **Responding to leads**
- **An email with a daily plan**



# SOPHISTICATED AUTOMATIONS

- **Staff onboarding**
- **Travel authorisations**
- **Leave requests**
- **Expense claims**
- **Staff birthdays/ anniversaries**



# EXAMPLE 1 - sending contracts to staff

## Requirement

- Company that had to create hundreds unique updates to employment contracts in PDF and email them to the staff member (didn't need e-signatures)
- Data for staff was coming from different systems.
- The contracts needed to come from different templates based on the staff members role.

## Delivered

- Data for staff was inserted into a single excel document.
- Word templates were created for each different staff role.
- A flow was created that read each line in excel, picked the right template based on the role, merged the staff details into the template then converted the document to PDF and them emailed the document to the staff member. The document and the email were all personalised based on the staff members details. The PDF and record were then uploaded into the staff members file in SharePoint.

## Results

- In previous occasions it took over 200 hours to manually complete this task with a high % of manual error
- The power automate process can also be re-used the next time these changes need to occur.

# EXAMPLE 2 - Use forms to build an ERP/CRM/Safety System

## Requirement

- Have a central staff form to log all safety, compliance, sales and maintenance records into
- Form then needs to create records in SharePoint to track the records or the actions that need to be performed.
- The staff responsible for that department then use the SharePoint lists to track and assign work.

## Delivered

- A single form with was created with branching logic for all the different options. As a user selects an answer to a question, the following questions change based on the previous answer. This makes it as simple as possible for field staff as they only have a single form to complete.
- A single flow gets each form response and based on the answers writes the record into a number of different list in SharePoint
- The list in SharePoint captures all the fields from the form as well as status and priority of the event.
- Several other flows track the items in the SharePoint list and email escalations, approvals and alerts based on the item status/age/type.

## Results

- Reporting for field staff is significantly simpler results in more events being reported and from any device.
- Management dashboards provide full visibility for staff to see priority or high-risk items.
- No additional licenses were required, and all data exists within Microsoft 365
- The system can easily scale to thousands of employees.





*Thank you for attending our*

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