

# Microsoft Power Automate





## Power Automate

2x

the velocity to create a flow

+13pts

NPS increased to 45.87  
for copilot creators

# T Mobile™

"Copilot in Power Automate takes seconds to create flows that commonly take me 10-15 minutes to create manually. This lets me skip the busywork of creating basic flow structures and I can get right to the advanced customization that I need to focus on. This time delta is even larger for novice builders still learning the tools."

- Brian Hodel , Principal Developer, T-Mobile

ACCELERATE PROFESSIONAL DEVELOPERS AND EMPOWER BUSINESS USERS

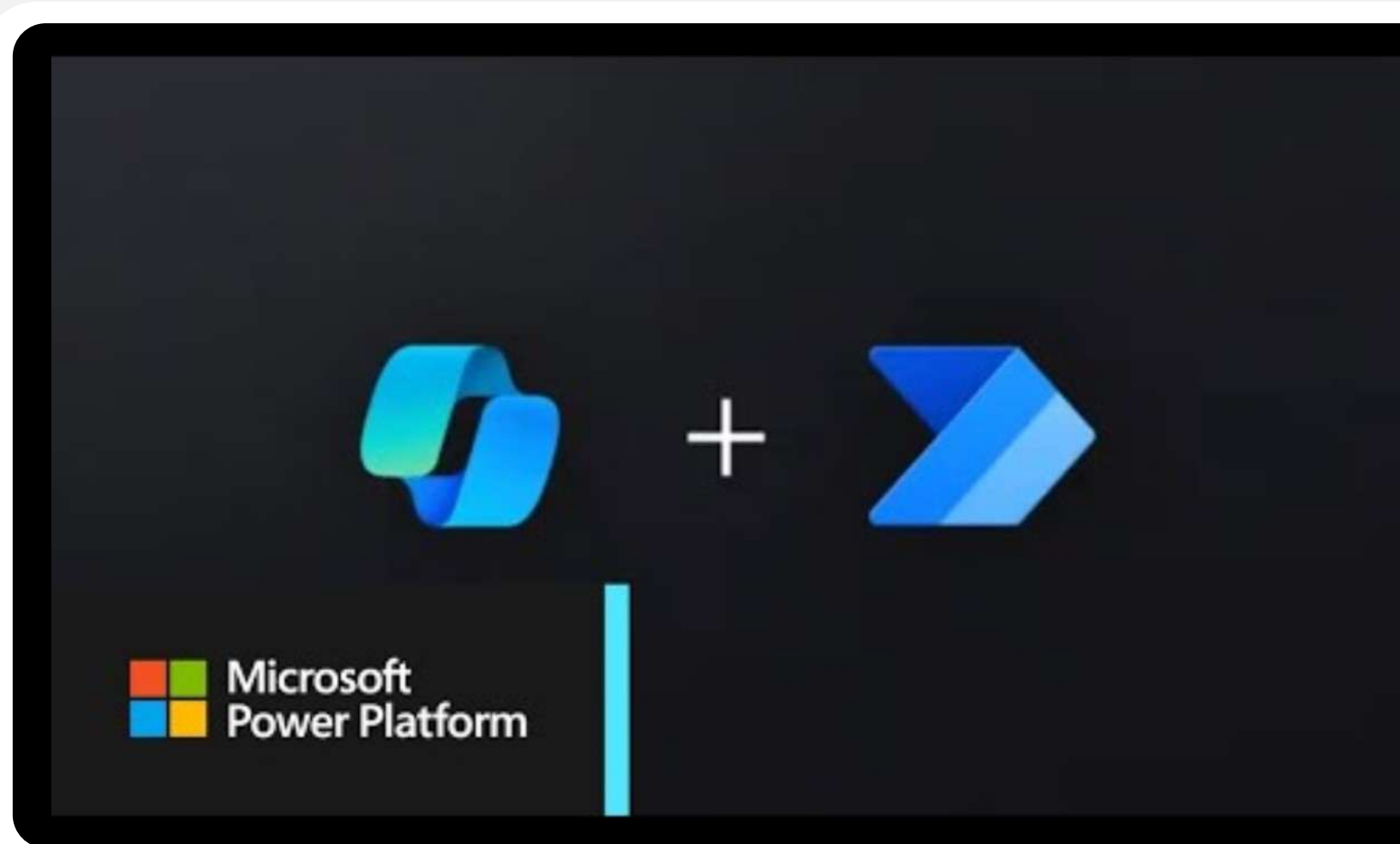
# Copilot in Power Automate

**Build workflows** using natural language for accessible, conversation-first experiences for everyone.

**Understand and optimize** processes with assistance for bottlenecks and opportunities to automate.

**Manage your processes** more effectively by querying for telemetry.

**Get assistance** from documentation and receive recommendations for next steps, best practices, opportunities to improve.



ACCELERATE PROFESSIONAL DEVELOPERS AND EMPOWER BUSINESS USERS

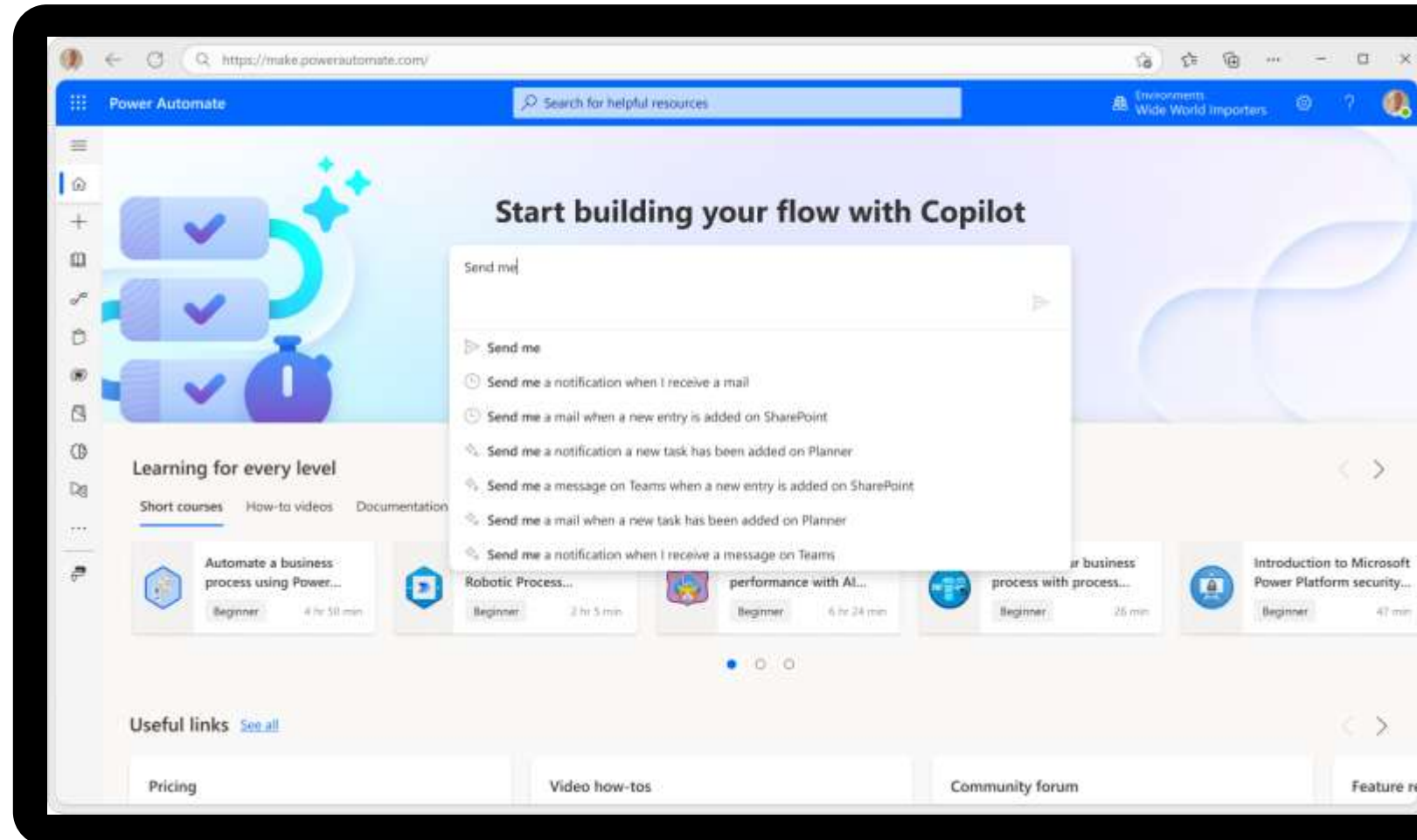
# Copilot for automation

Build, edit, and extend workflows through conversation.

Get suggestions for next best action when authoring flows.

Use natural language to write code and Power FX.

Answer questions about the flow being edited and create a description.



ACCELERATE PROFESSIONAL DEVELOPERS AND EMPOWER BUSINESS USERS

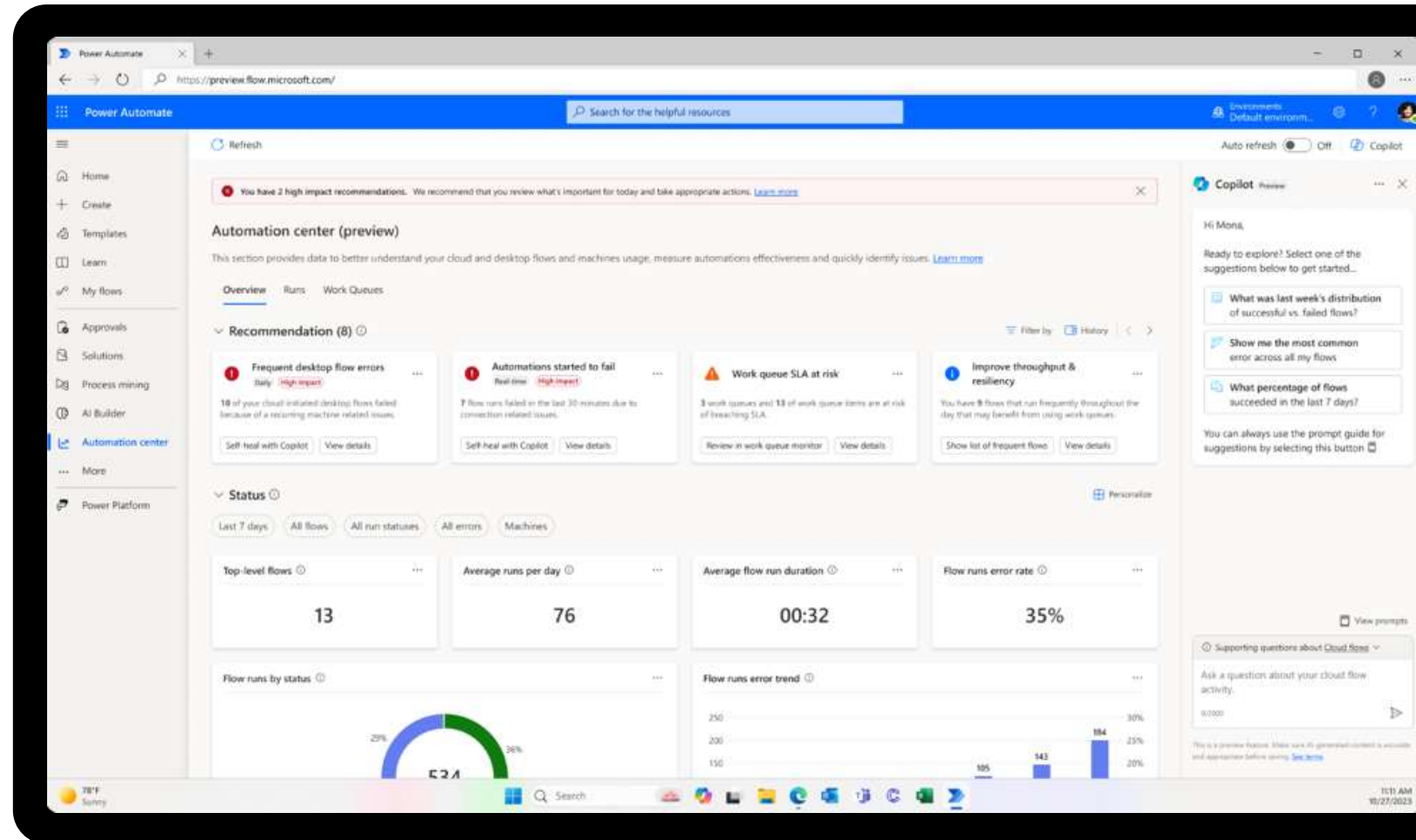
# Copilot for administration

Democratize access to insights by asking Copilot activity-specific questions using natural language.

Use Copilot to query cloud and desktop flow telemetry, work queue throughput, and documentation.

Get recommendations with actionable insights and guidance on best practices.

Identify runtime flow failures and proactively suggest guidance to fix it



## ACCELERATE DATA INGESTION AND PROCESS ANALYTICS

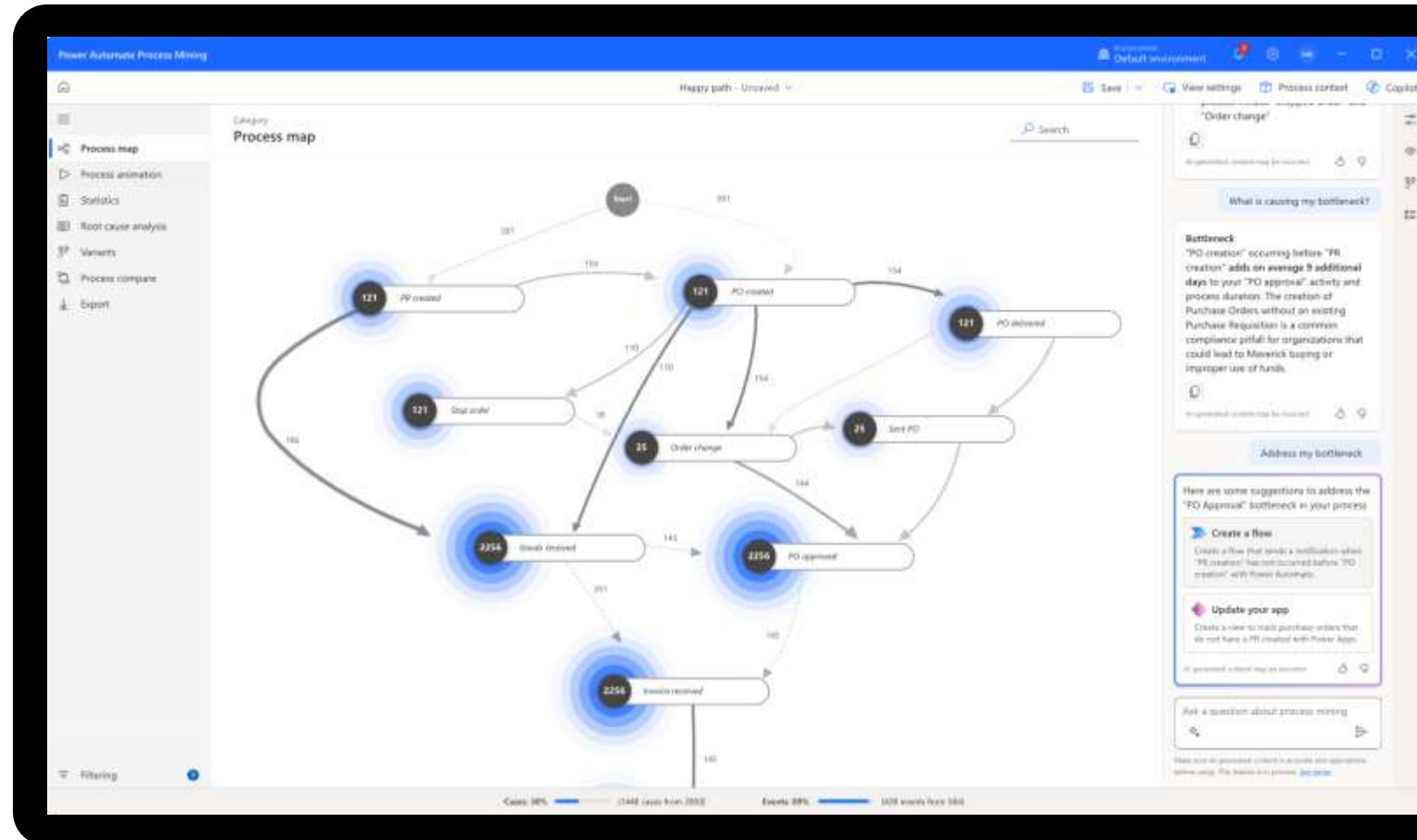
# Copilot for process mining

**Surface top insights** in your process and drill-down for deeper discovery

**Ask questions** about process data or process mining

**Automap** ingested data to the required data schema

**Offer recommendations** on how to improve by creating an automation or updating an app



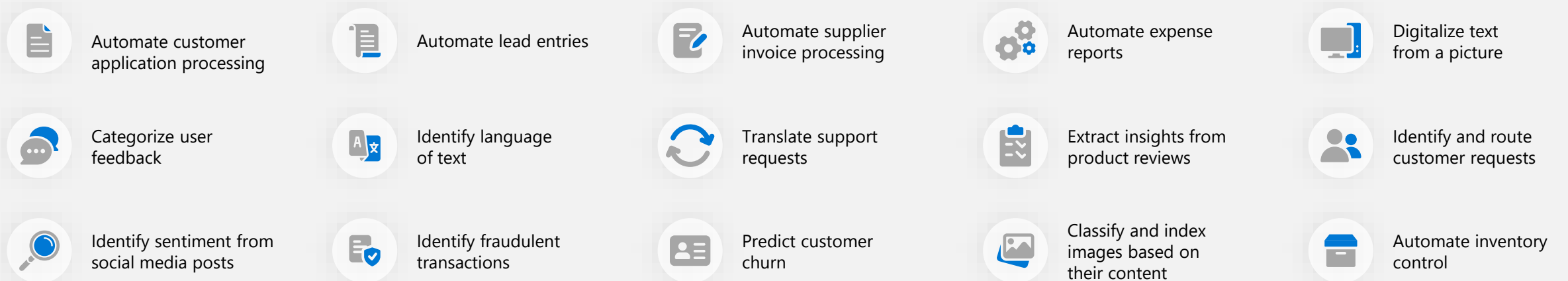
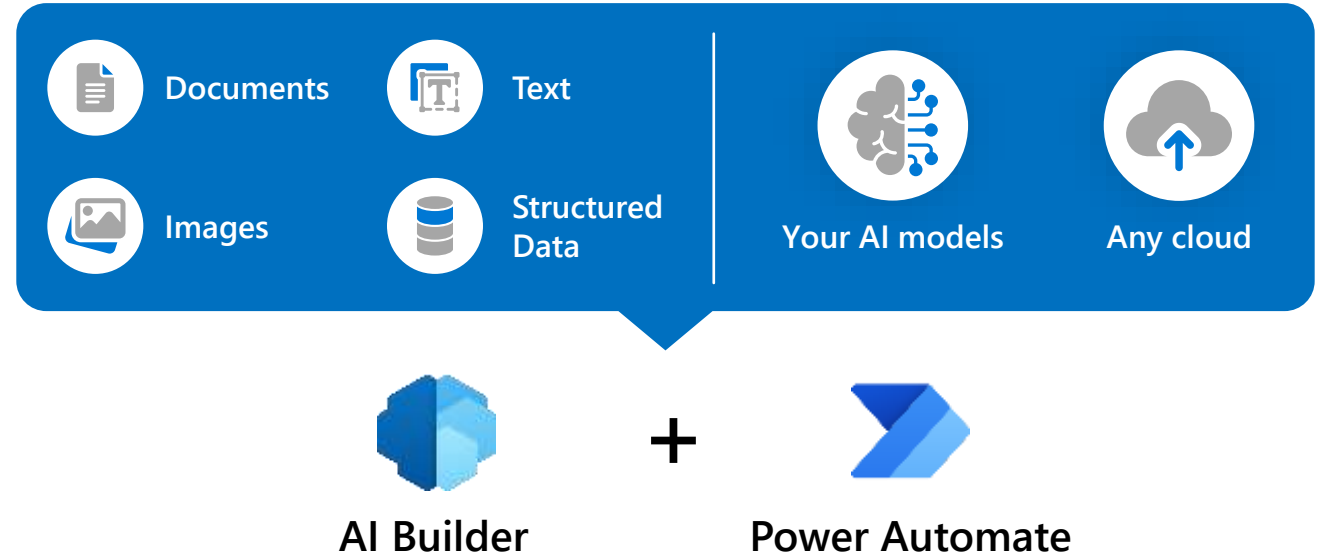
# Enhance automation with AI Builder

## Create intelligent experiences

**Invoke an AI model** with specific workflows, data, and AI Builder

**Embed AI** into processes without the help of a data scientist

Build **robust, dynamic automations**



# Broad applications with powerful results

**Maximize your ROI** by automating large-scale processes, managing and exporting data, streamlining recurring reporting, and so much more.

## Many industries

Telecommunications

Financial

Healthcare

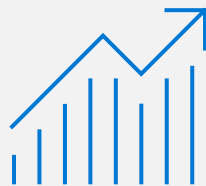
Retail

Manufacturing

## Many departments



HR



Finance



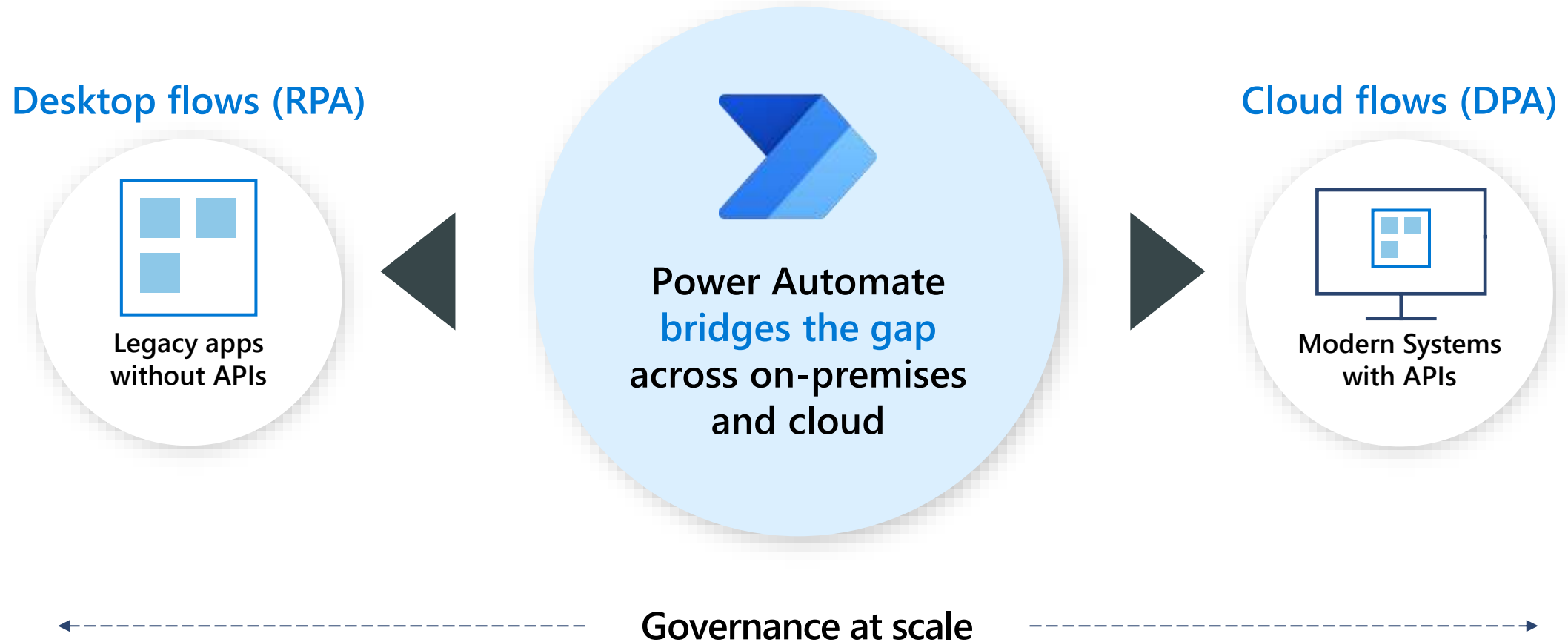
Customer  
management



IT

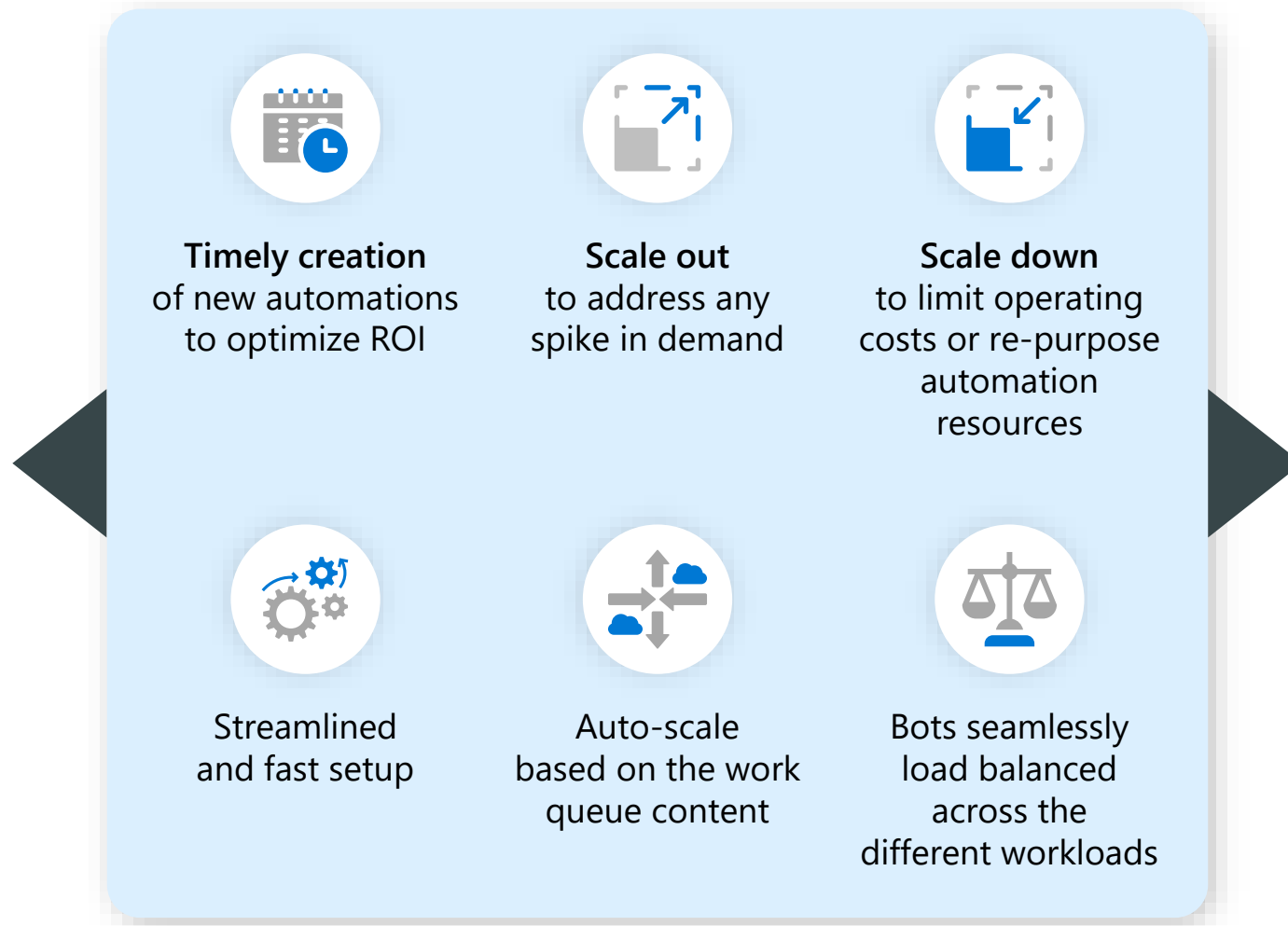
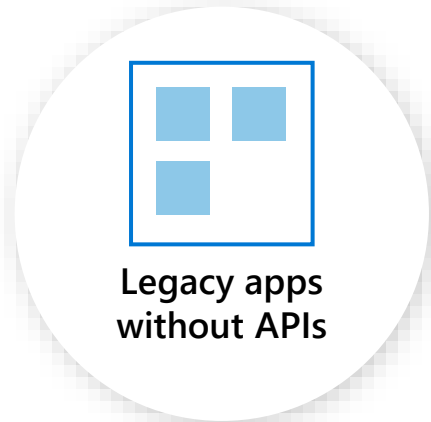


# Automate across legacy and modern applications

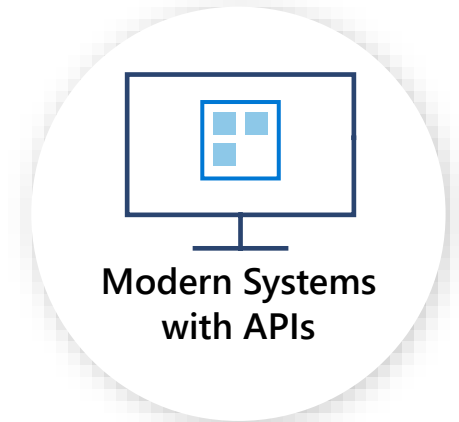


# Automate across legacy and modern applications

## Desktop flows (RPA)



## Cloud flows (DPA)



BUILT TO WORK TOGETHER

# Low-code + pro-code

1

**GitHub**

#1 developer community

2

**Azure**

Any language, any platform

3

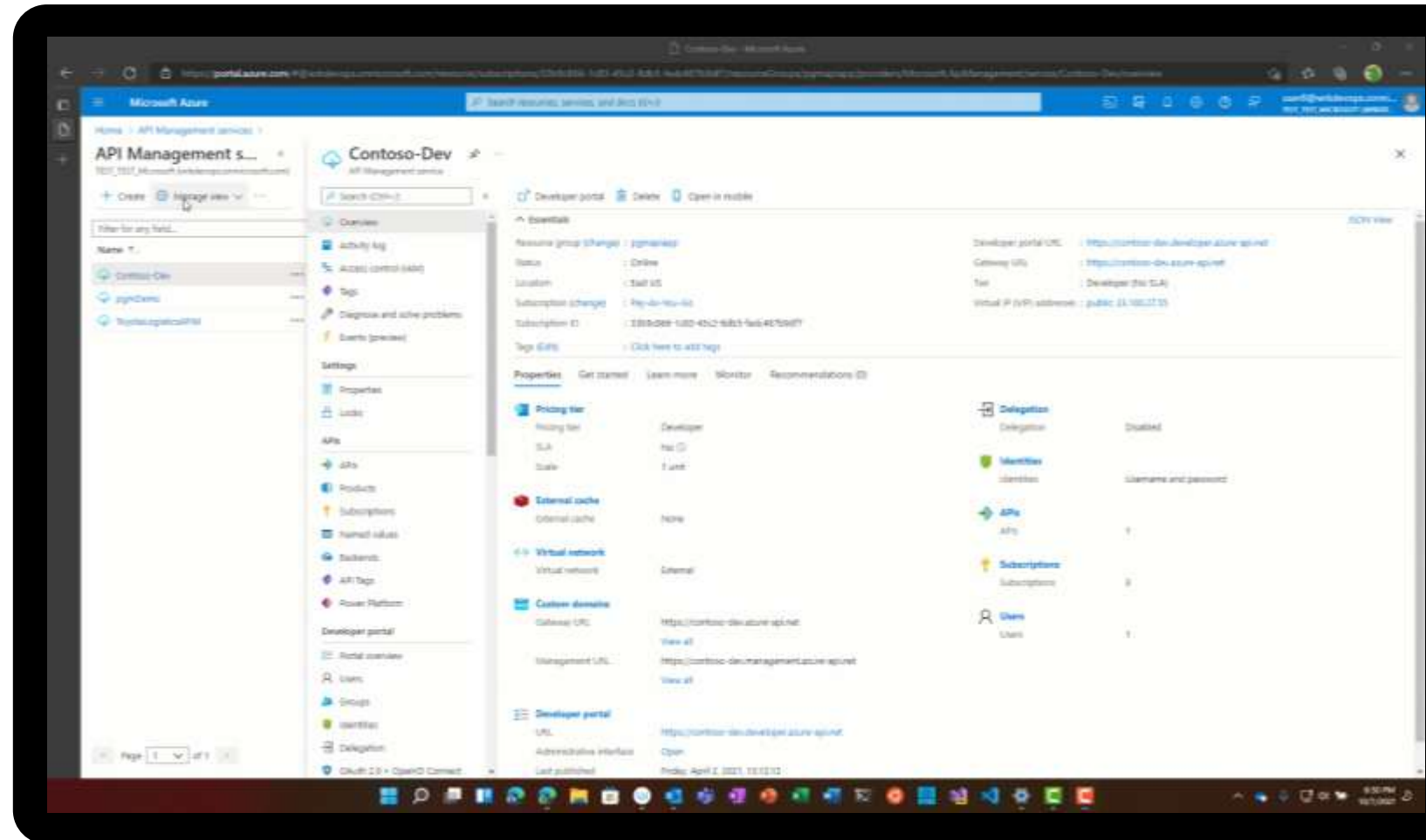
**Visual Studio**

#1 developer tool

4

**Power Platform**

#1 low-code platform





# Connect between 1,400+ API connectors

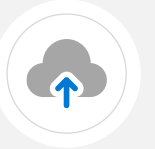
**Built-in connectivity** to cloud services, content services, databases, and APIs

**Seamless hybrid connectivity** via the on-premises data gateway

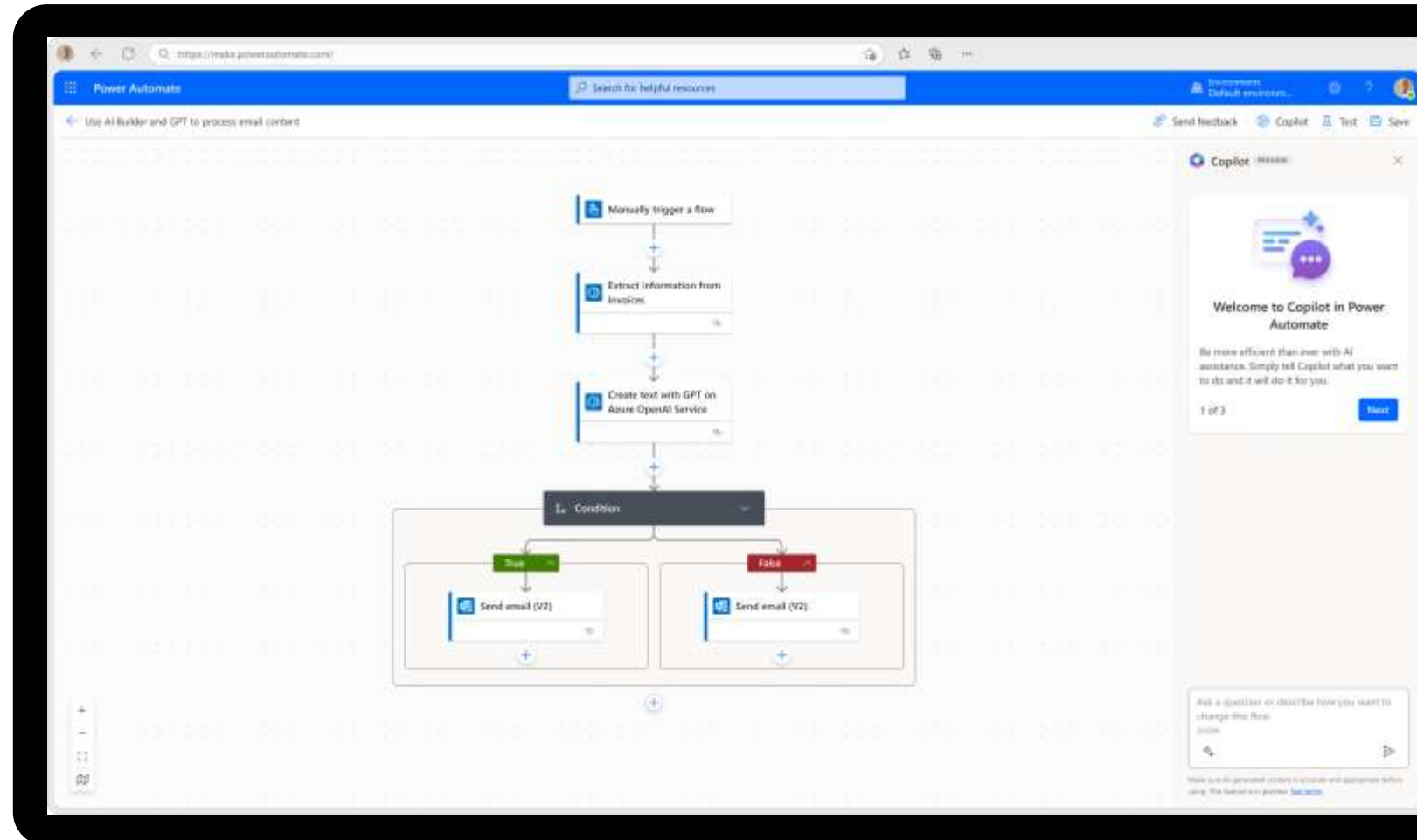
**Custom connectors** as building blocks for citizen developers



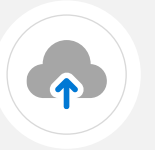
# Cloud flows designer



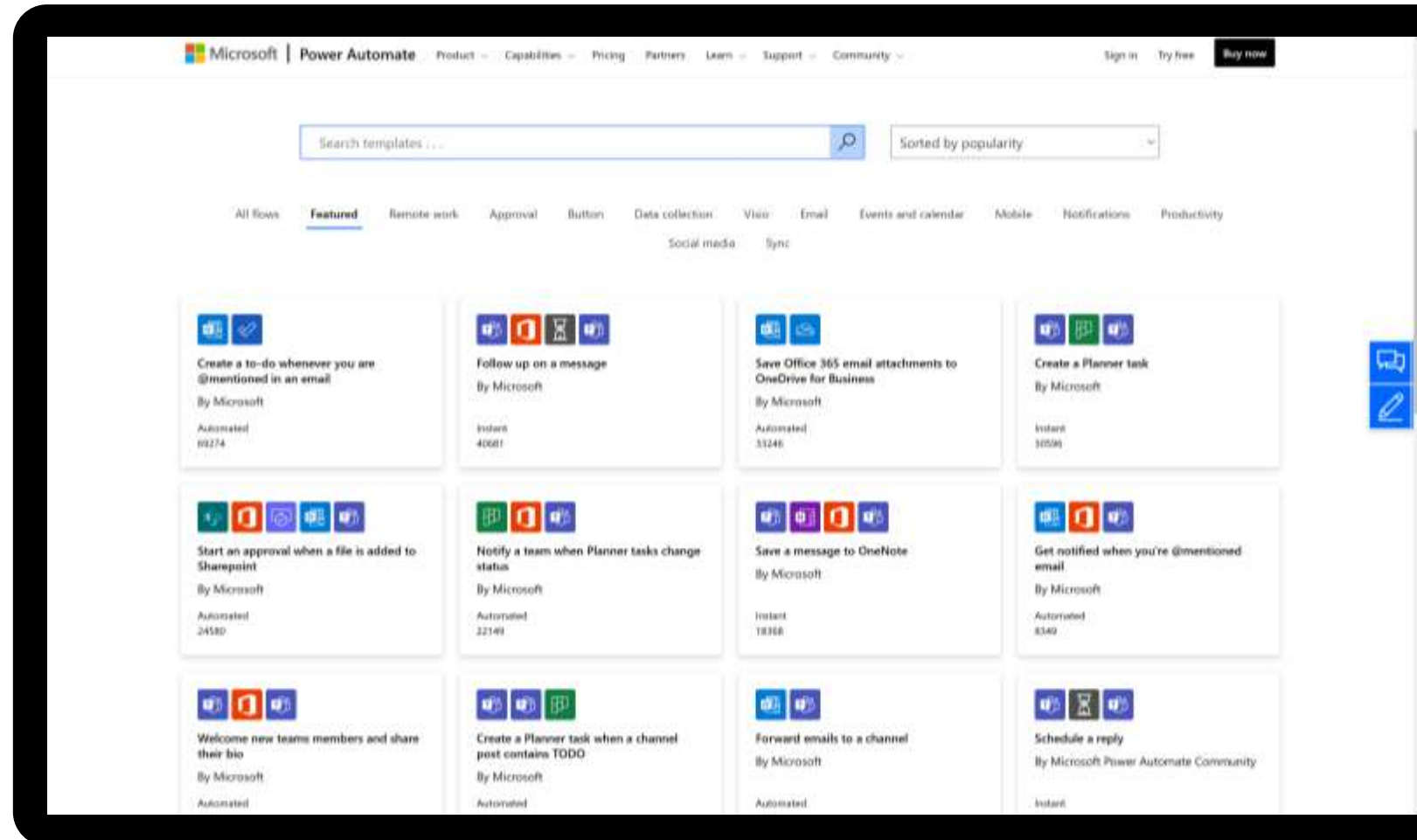
Use API connectors,  
triggers, logic, and  
AI with GPT



# Templates



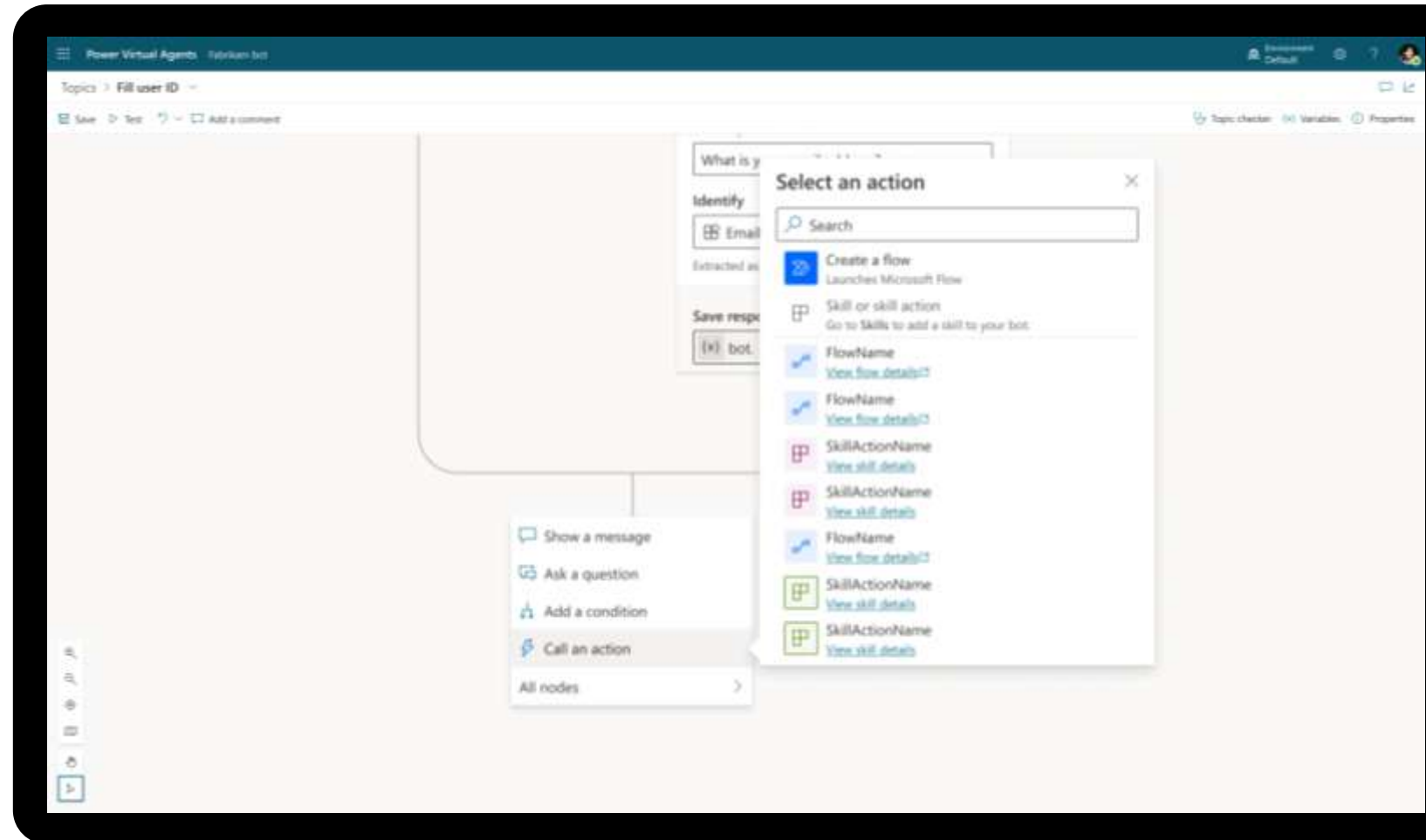
Get started quickly  
with prebuilt,  
searchable templates





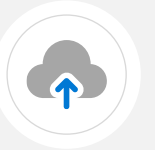
# In custom copilots

Automate through  
conversation in  
Copilot Studio

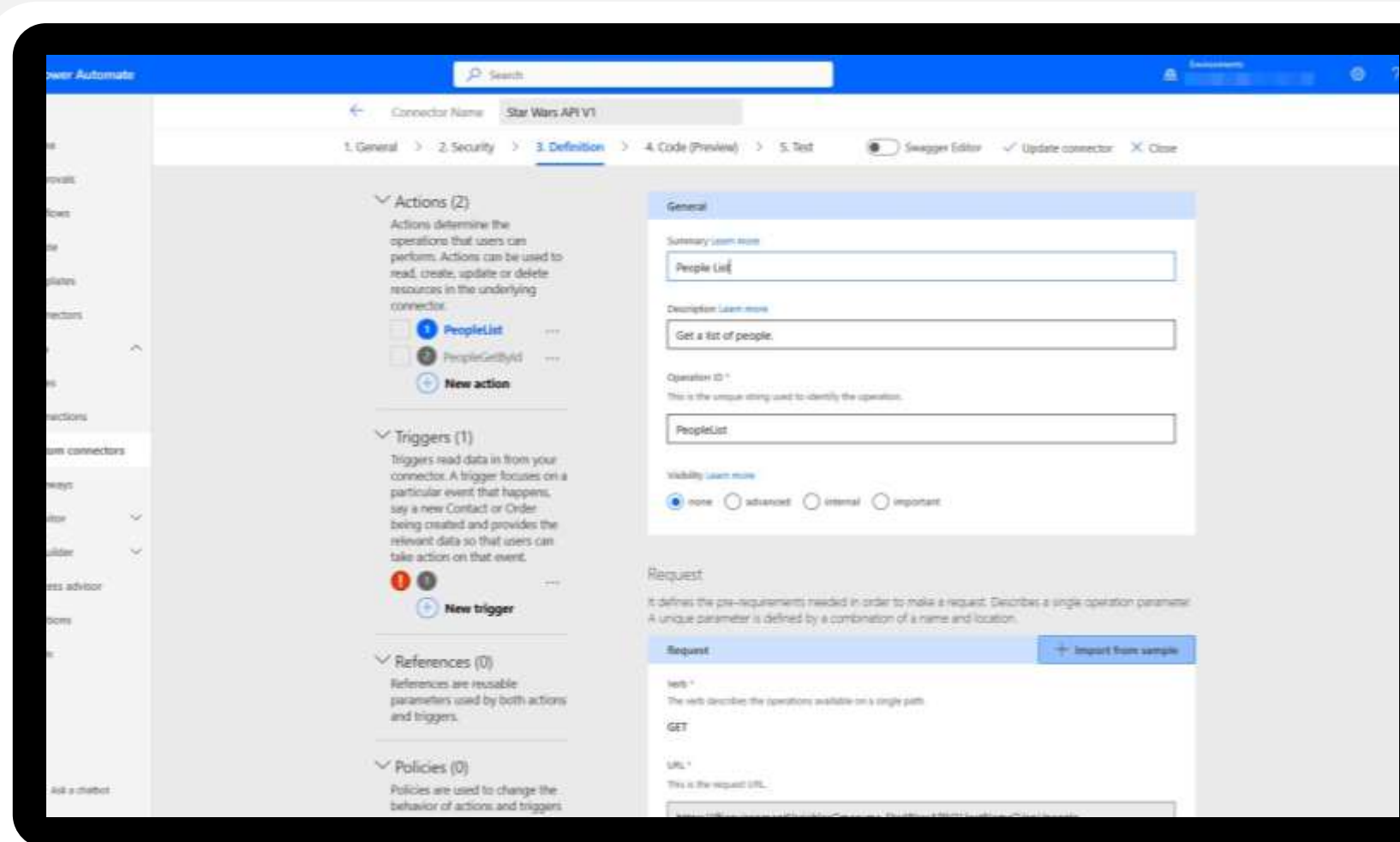




# Custom APIs



Create and use  
custom connectors for  
more scenarios







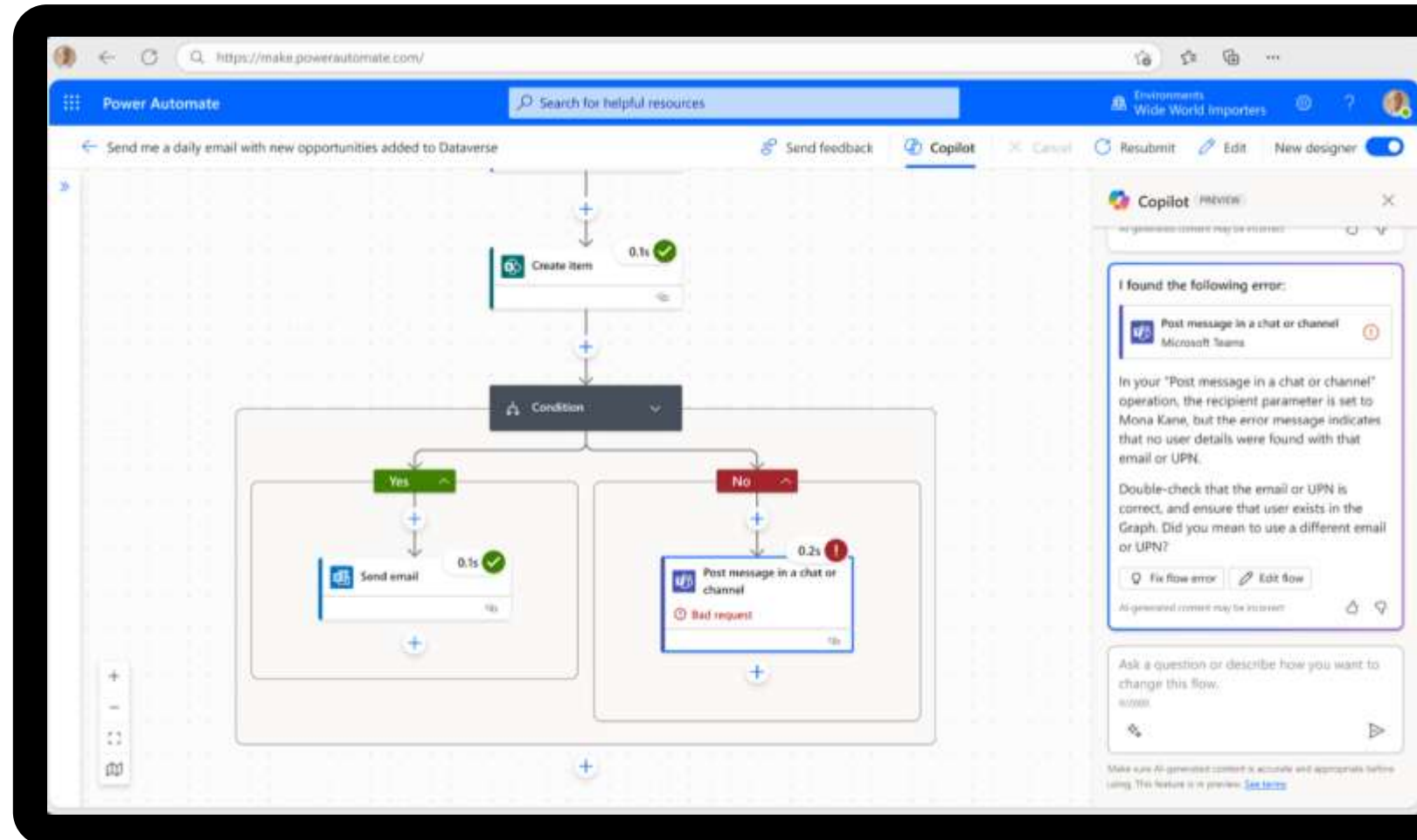
# Troubleshoot cloud flows

Identify runtime flow failures and proactively suggest guidance to fix it

Human-readable summary of the error and, when possible, attempts to provide a solution to correct the error

Reduce the time and effort required to troubleshoot and resolve issues.

Assist in identifying and resolving errors that might occur during the testing of cloud flows or when reviewing flow run history



# What are desktop flows?

Desktop flows enable you to automate repetitive tasks using software robots that act like humans.

It opens the world of automation to include software that's old or new, on-premises or in the cloud.

Employees focus on high-value activities, improving compliance and job satisfaction while removing human error.



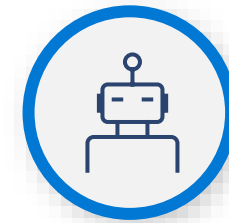
Focus on what's most important.  
Automate the rest.



# Desktop flows run with human interaction or in the background



**Attended**



**Unattended**

## Interaction

Human operator initiates and often interacts with the desktop flow while it is running

Bots on dedicated machines do the work with no human operator present

## Example

Call center agents that need to run a flow whenever they get a call

Backoffice orders, purchase orders, invoicing, IT related tasks

# Automate any task



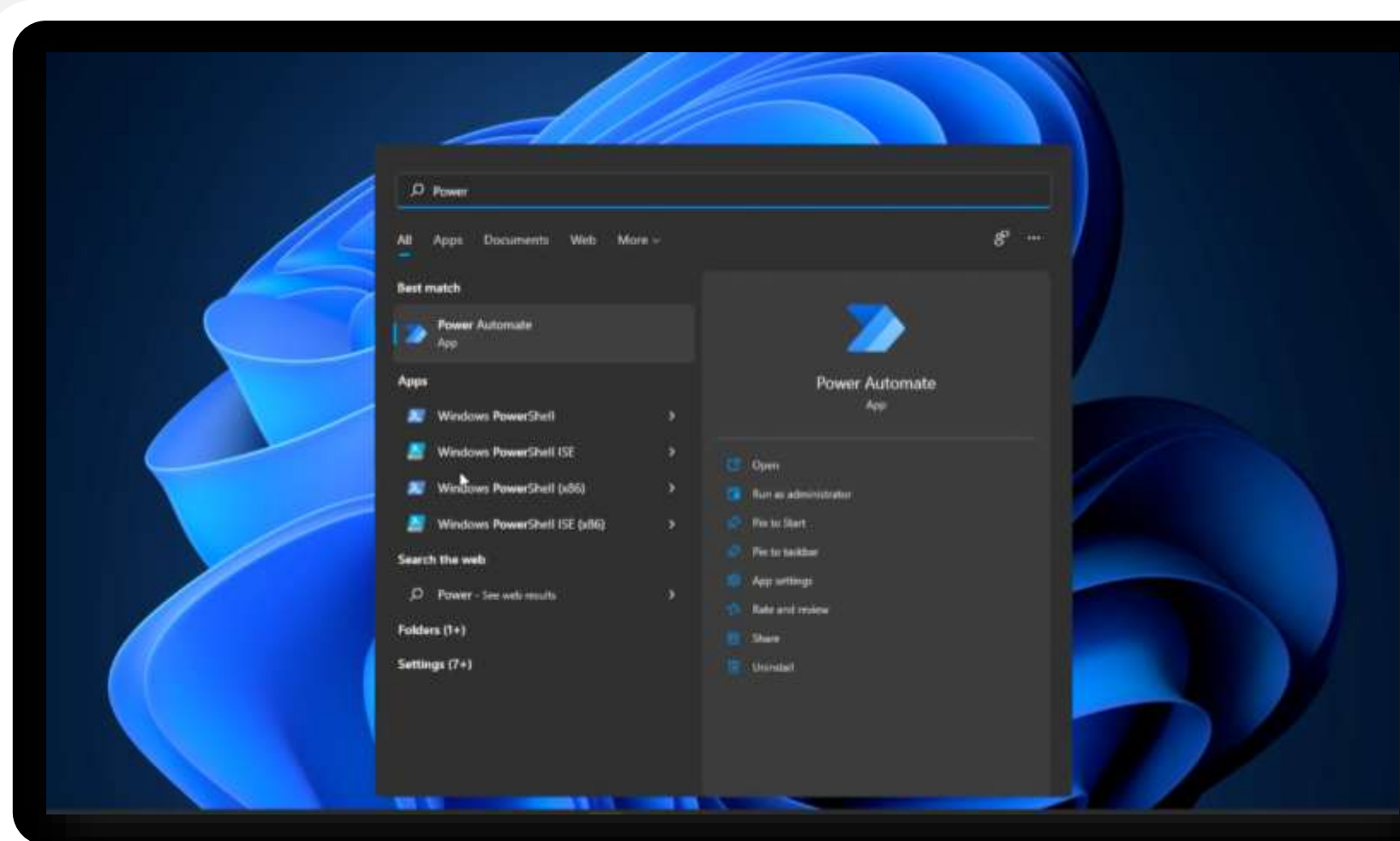
Create quickly and easily with **desktop flow designer**

Manage your environment with **enterprise governance and security**

Deploy confidently with **troubleshooting** and **monitoring**

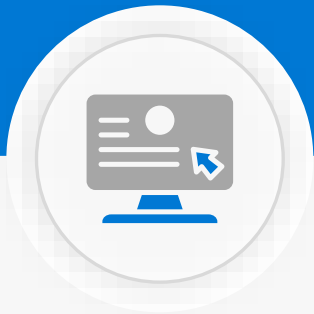
**Automate with flexibility** to maximize ROI

Automate with **scalable hosted infrastructure**



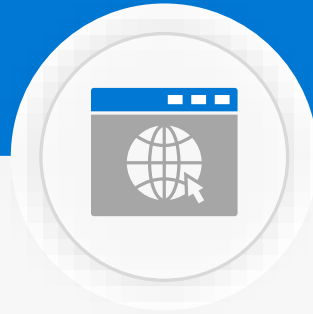
# Bridge old and new systems

Use desktop flows to connect between legacy and modern systems



## Desktop applications

Win32  
Java  
Citrix  
SAP  
AS400  
Other legacy systems



## Browsers

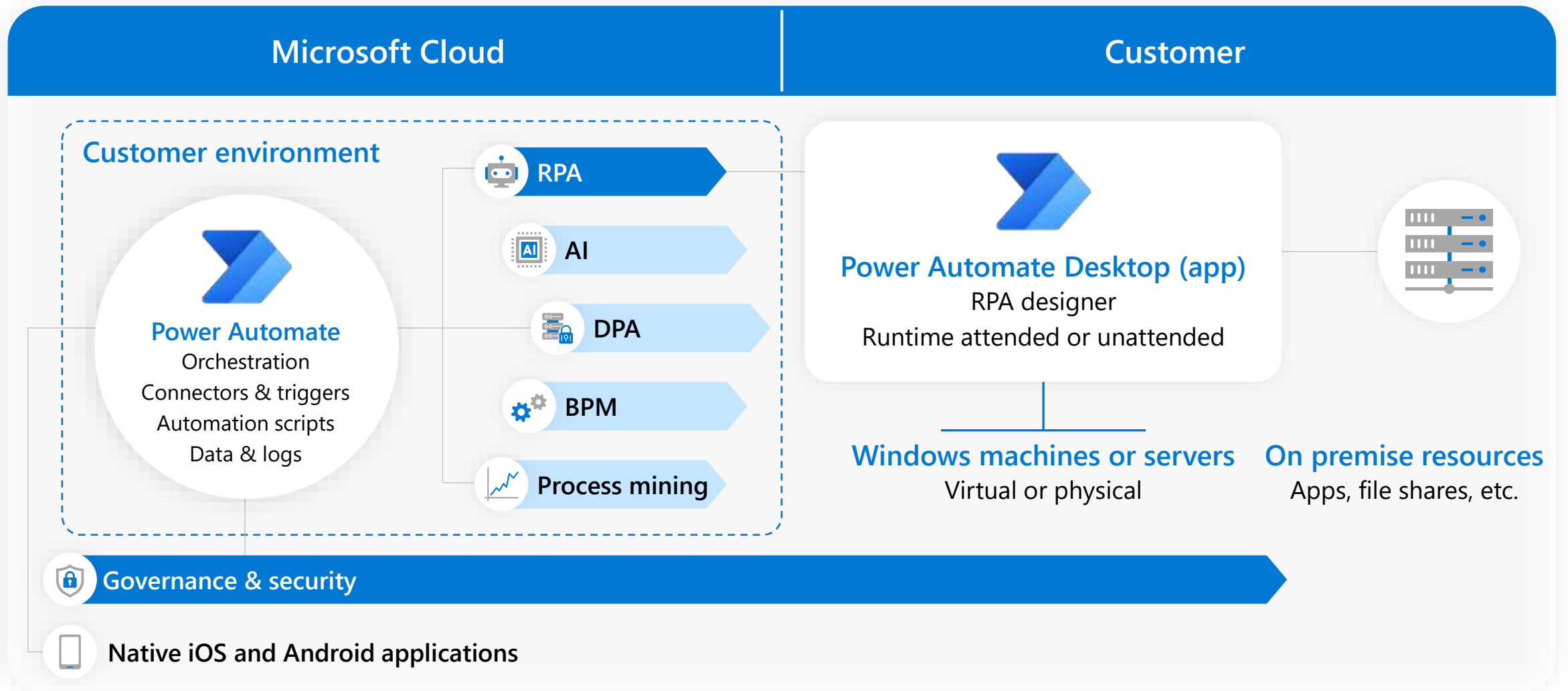
Microsoft Edge  
Google Chrome  
Firefox  
Internet Explorer



## Virtual desktops

Citrix  
RDP

# Desktop flows logical architecture



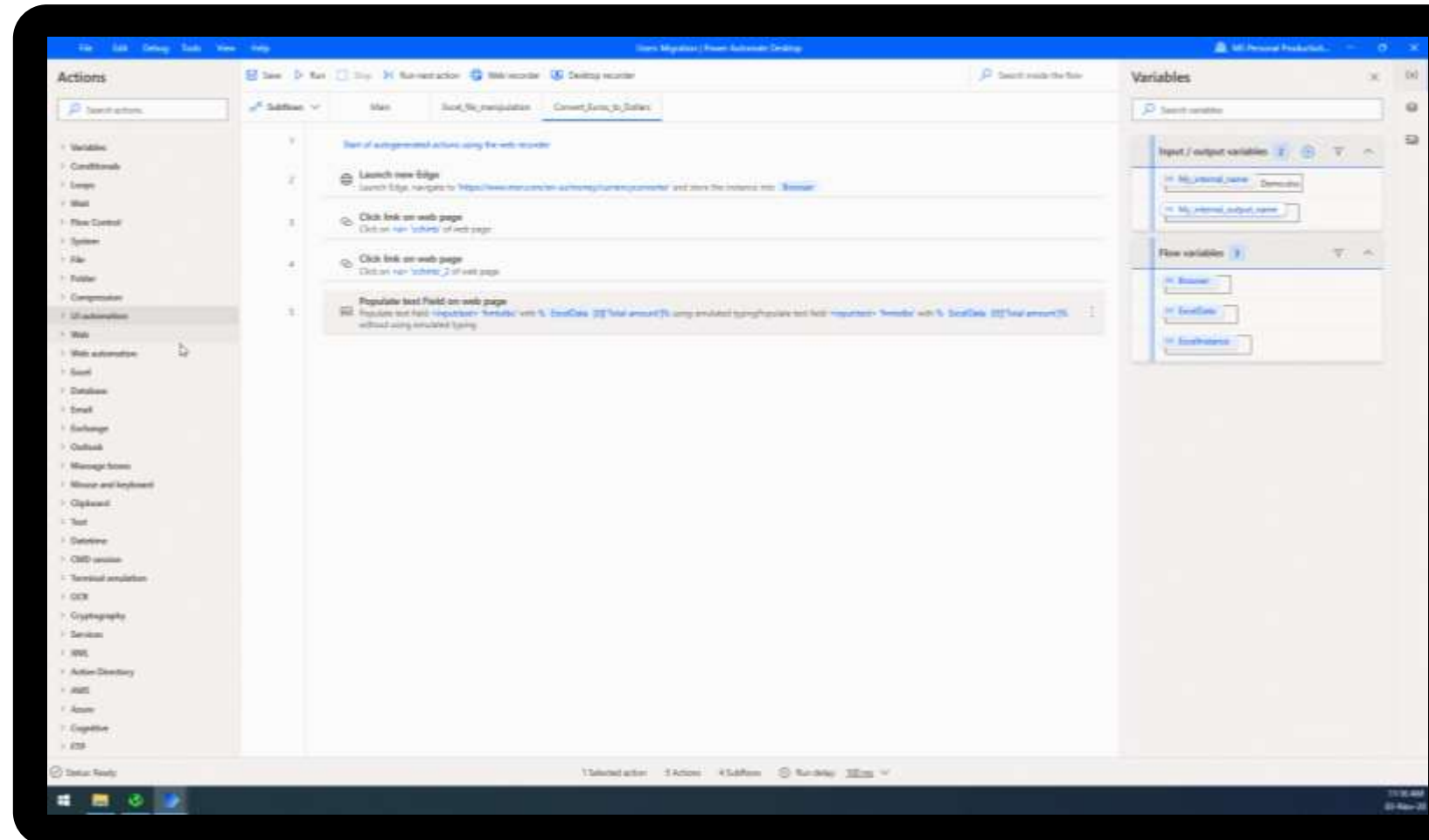
# Desktop flow designer



Intuitive **drag-and-drop** interface with **400+ prebuilt actions** to create each step in your desktop flow

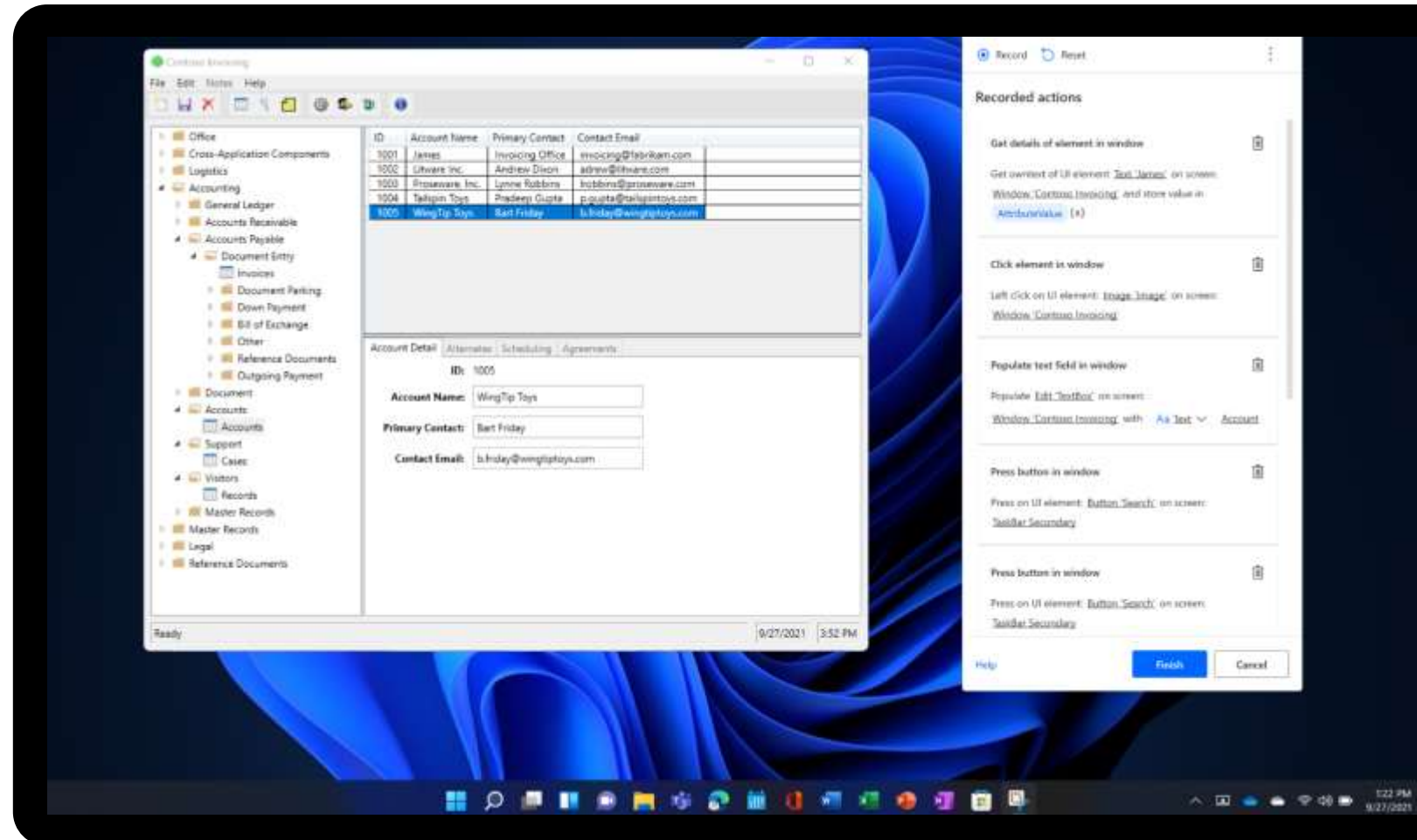
Use the **recorder** to capture your own actions, such as mouse clicks and keyboard inputs

Start quickly with **prebuilt examples** that are ready to run, or **share flows with others** for collaboration



# Desktop recorder

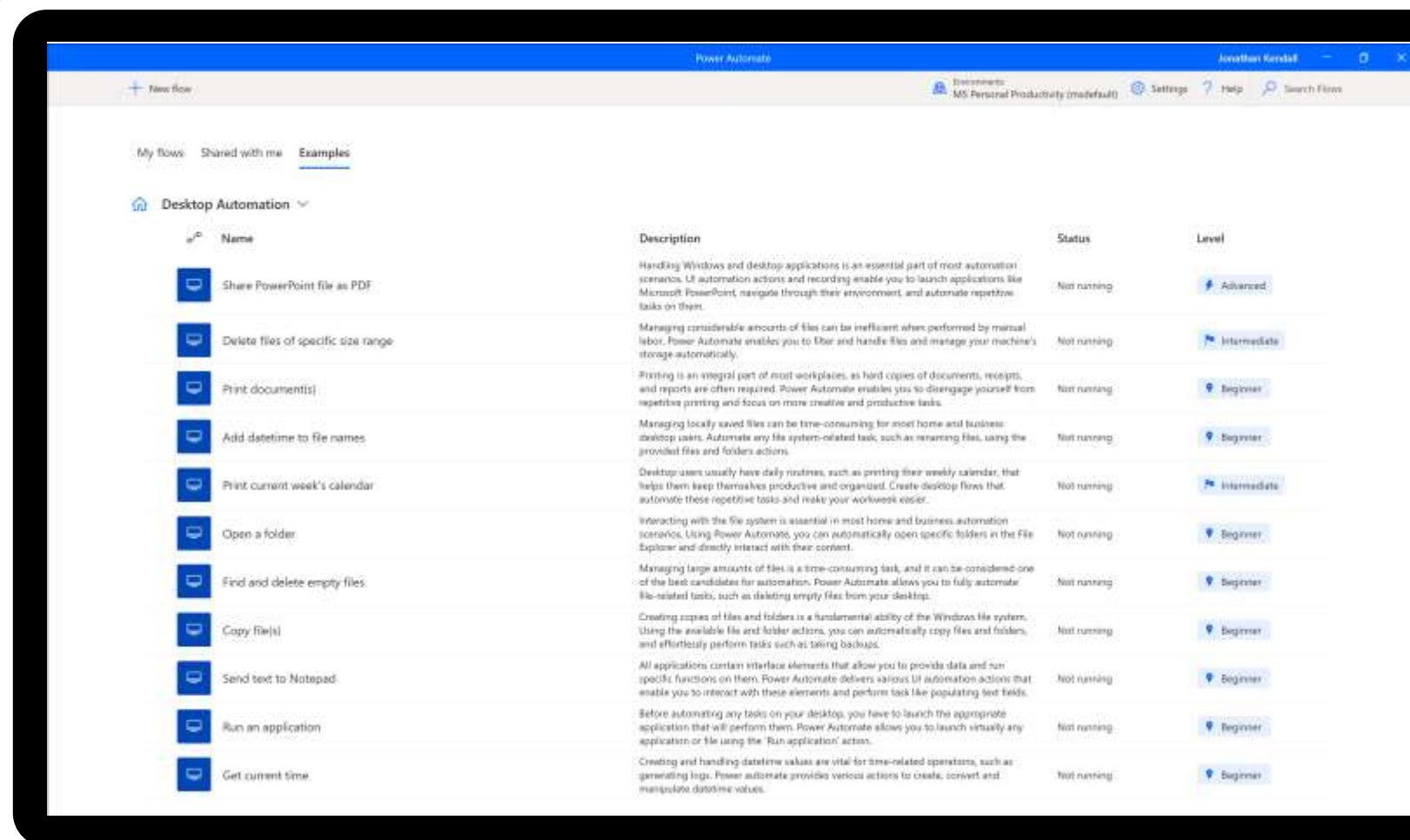
Use the recorder to capture your own actions





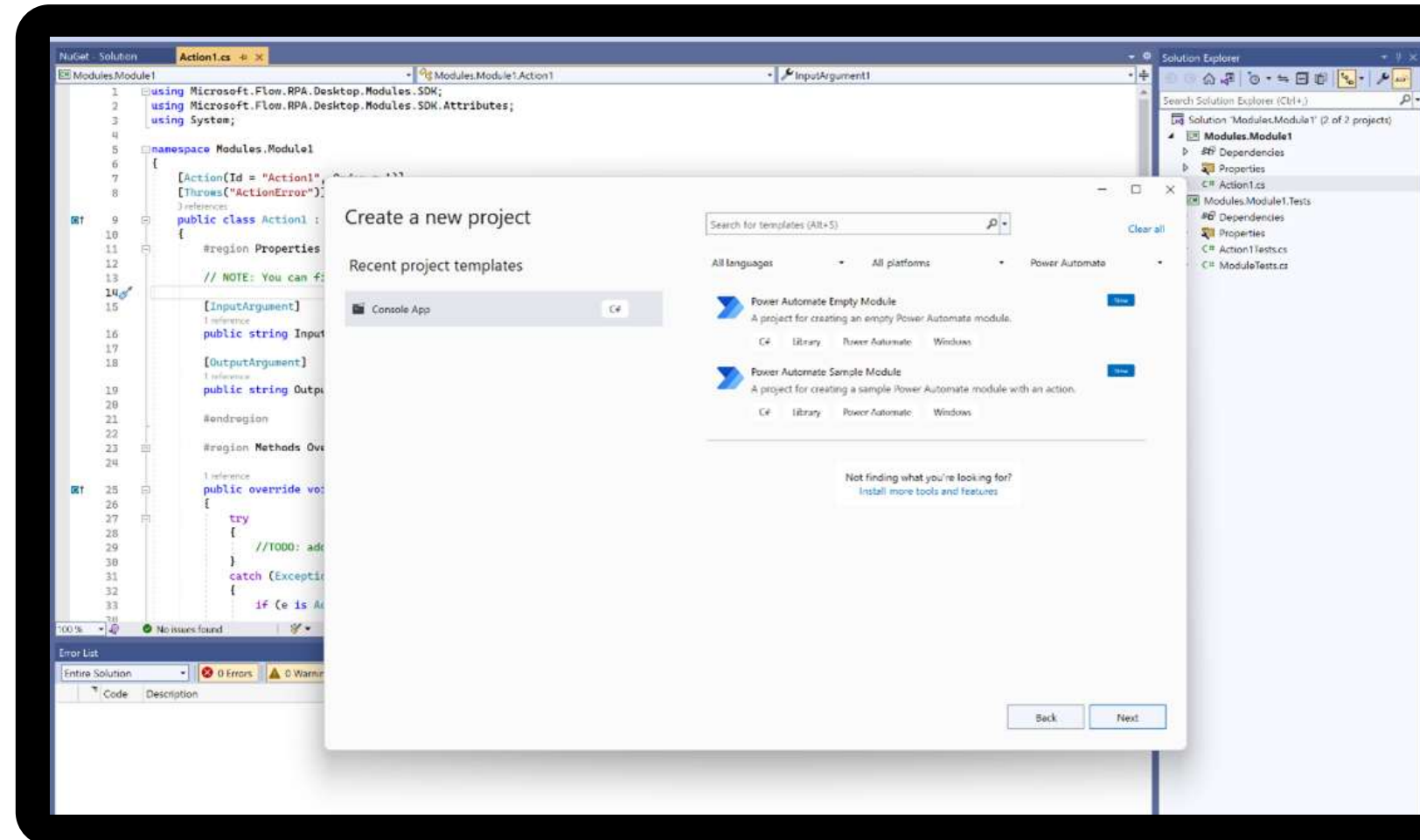
# Examples

Use ready-to-customize desktop flows



# Actions SDK

Create custom actions  
for homegrown or  
legacy apps





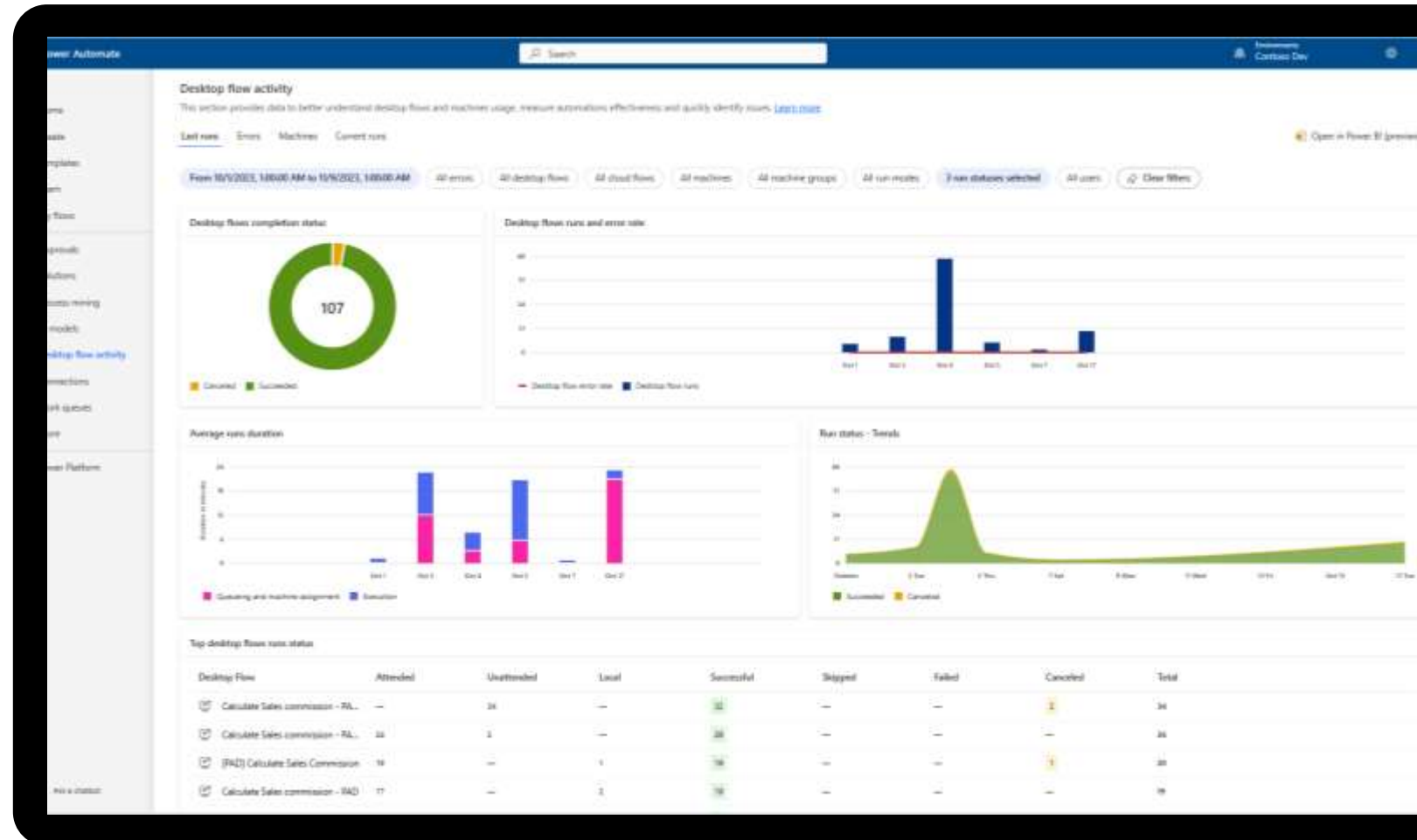
# Optimize your RPA infrastructure

**Monitor** queue and flow status

**Prioritize** critical workloads

**Add, remove, or reassign** resources as needed

**Create** custom VMs for specialized applications & configurations



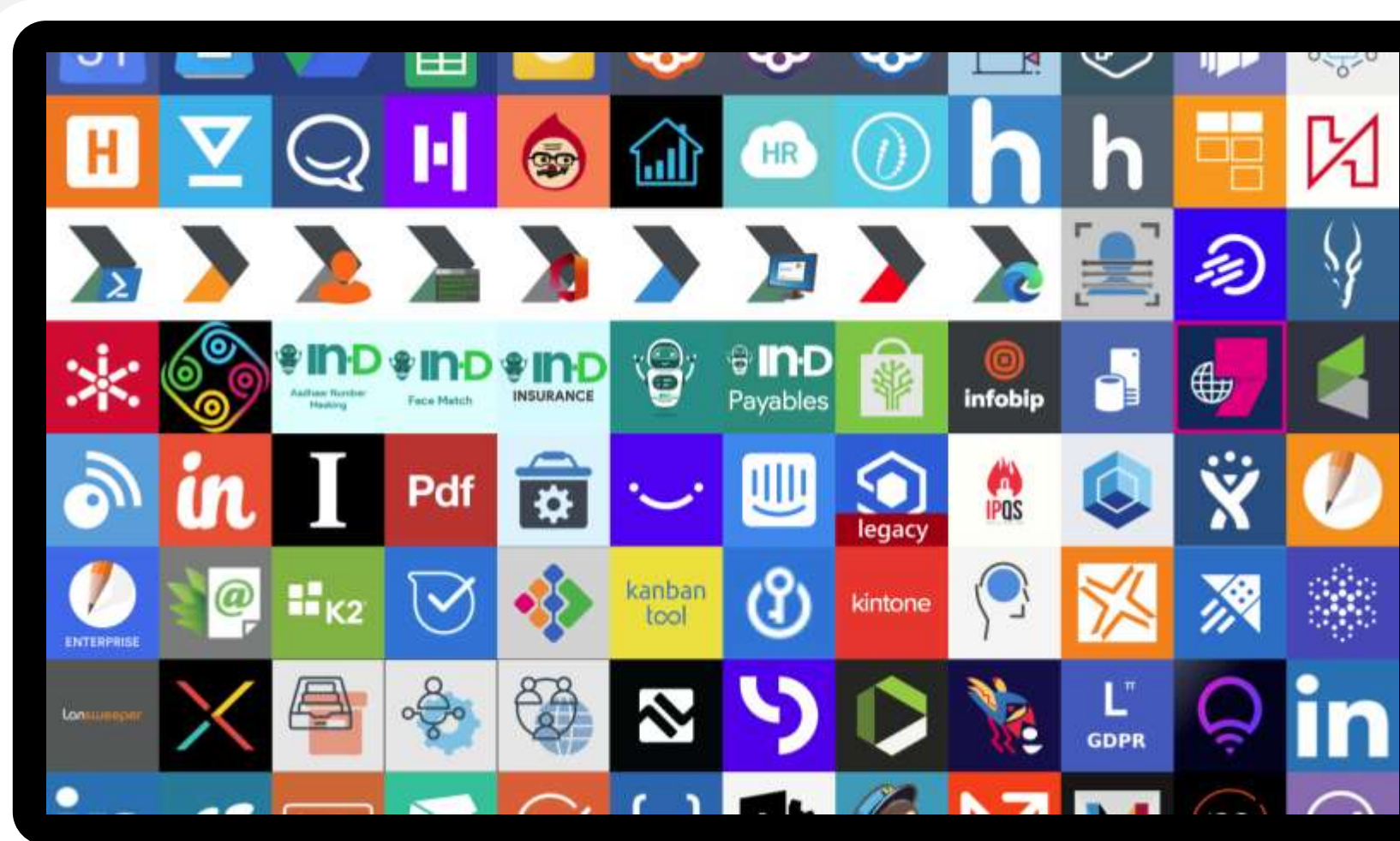


# Triggers & schedules

Thousands of **pre-built** automated triggers

View and run **scheduled desktop flows**

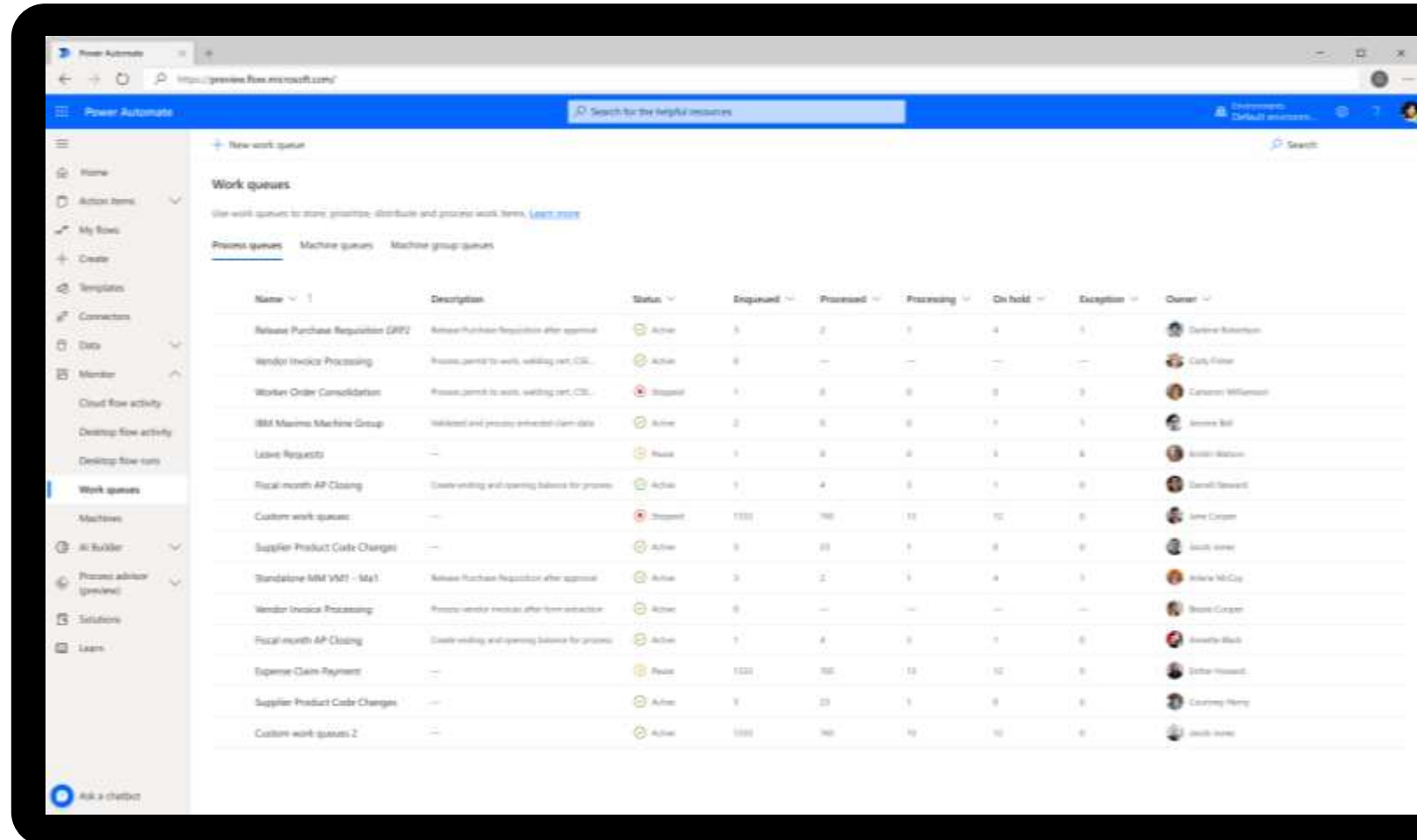
Trigger manually from your **desktop or the cloud**





# Work queues

Use work queues to help prioritize work items effectively across their organization, providing full **digital workforce management.**



Name	Description	Status	Enqueued	Processed	Processing	On hold	Exceptions	Owner
Release Purchase Requisition ERP2	Release Purchase Requisition after approval	Active	5	2	1	4	3	Danette Robertson
Vendor Invoice Processing	Process vendor invoice after term extraction	Active	0	—	—	—	—	Clark Fisher
Work Order Consolidation	Process permit to work, welding cert, CCL	Stopped	1	0	0	0	0	Carsten Williamson
IBM Maximo Machine Group	Initiated and process external claim data	Active	2	0	0	1	1	James Bell
Leave Requests	—	Pause	1	0	0	1	1	Arden Watson
Fiscal month AP Closing	Create ending and opening balance for groups	Active	1	4	0	1	0	Danell Stewart
Custom work queues	—	Stopped	1000	700	10	10	0	John Cooper
Supplier Product Code Changes	—	Active	0	20	0	0	0	Jack Jones
Standalone MM VM1 - Mx1	Release Purchase Requisition after approval	Active	3	2	1	4	3	Wesley McCay
Vendor Invoice Processing	Process vendor invoice after term extraction	Active	0	—	—	—	—	Brian Cooper
Fiscal month AP Closing	Create ending and opening balance for groups	Active	1	4	0	1	0	Ardenly Webb
Expense Claim Payment	—	Pause	1000	700	10	10	0	John Howard
Supplier Product Code Changes	—	Active	0	20	0	0	0	Courtney Henry
Custom work queues 2	—	Active	1000	700	10	10	0	Jack Jones





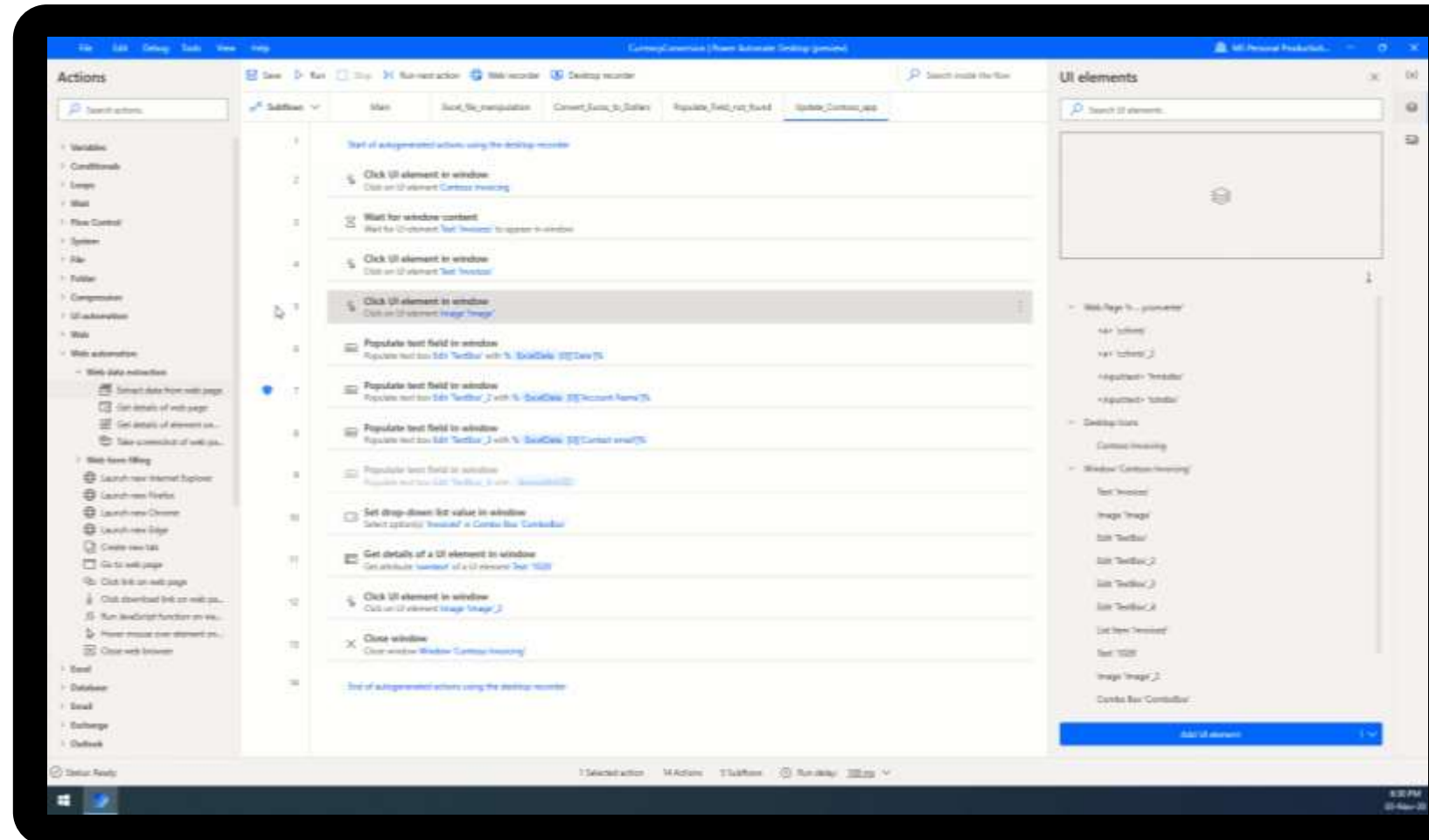
# Test, debug, monitor, and manage

Ensure flows continue to run with rich **error handling** settings

Use **debugging and testing tools** to troubleshoot as you build

Stay informed with flow **tracking, management, reporting**

**Prioritize** based on rules, or promote critical workloads to the front of the line





# Multi-level exception handling

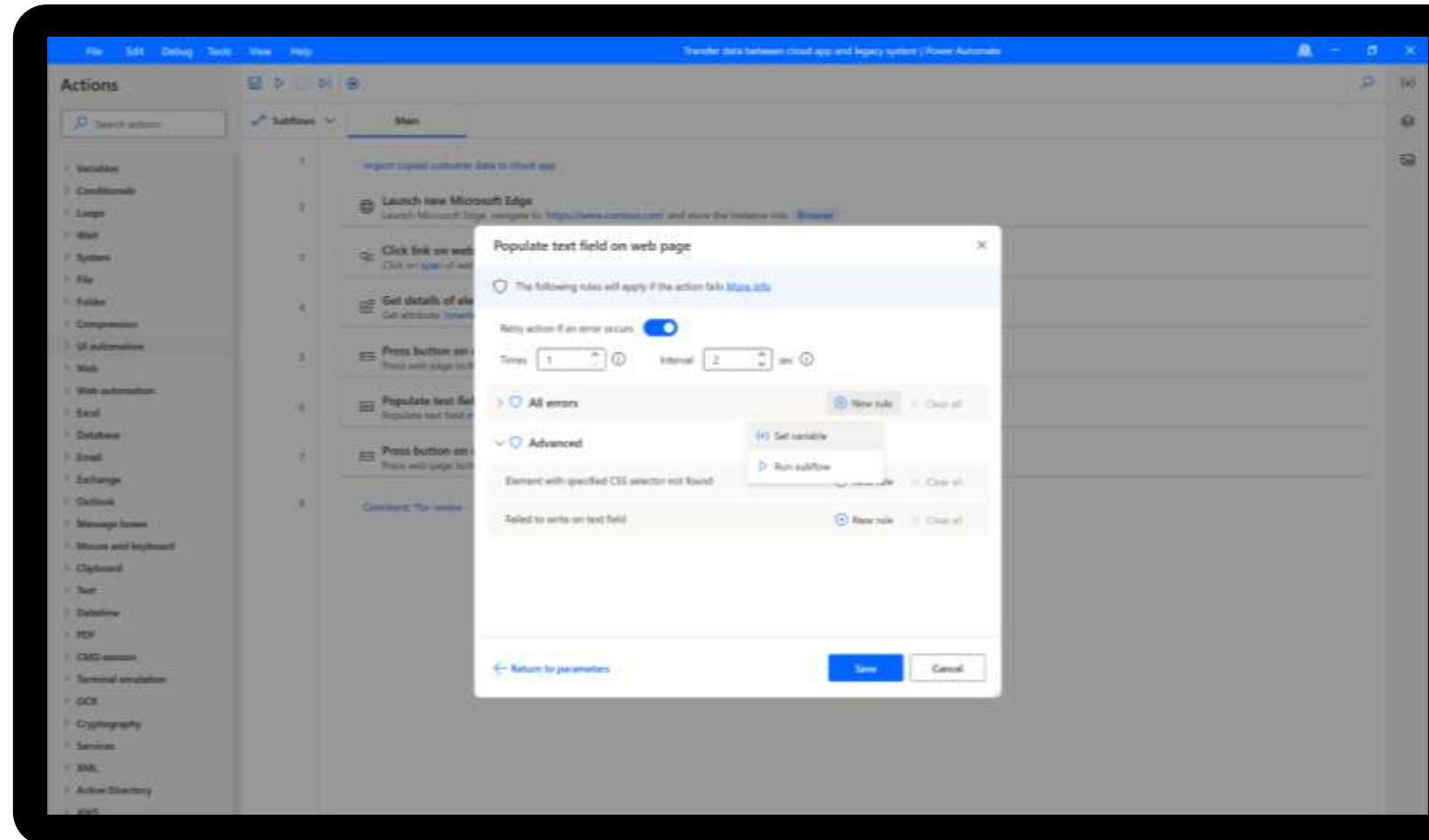
## Level 1

Use the “**On-error**” functionality to configure exception handling behavior

- Retry in certain time intervals
- Capture all error or specific ones
- Set flag variables
- Run error handling subflows

## Level 2

Use the “**On block error**” block to configure exception handling rules for any number of actions within the flow.





# Automate with flexibility to maximize ROI

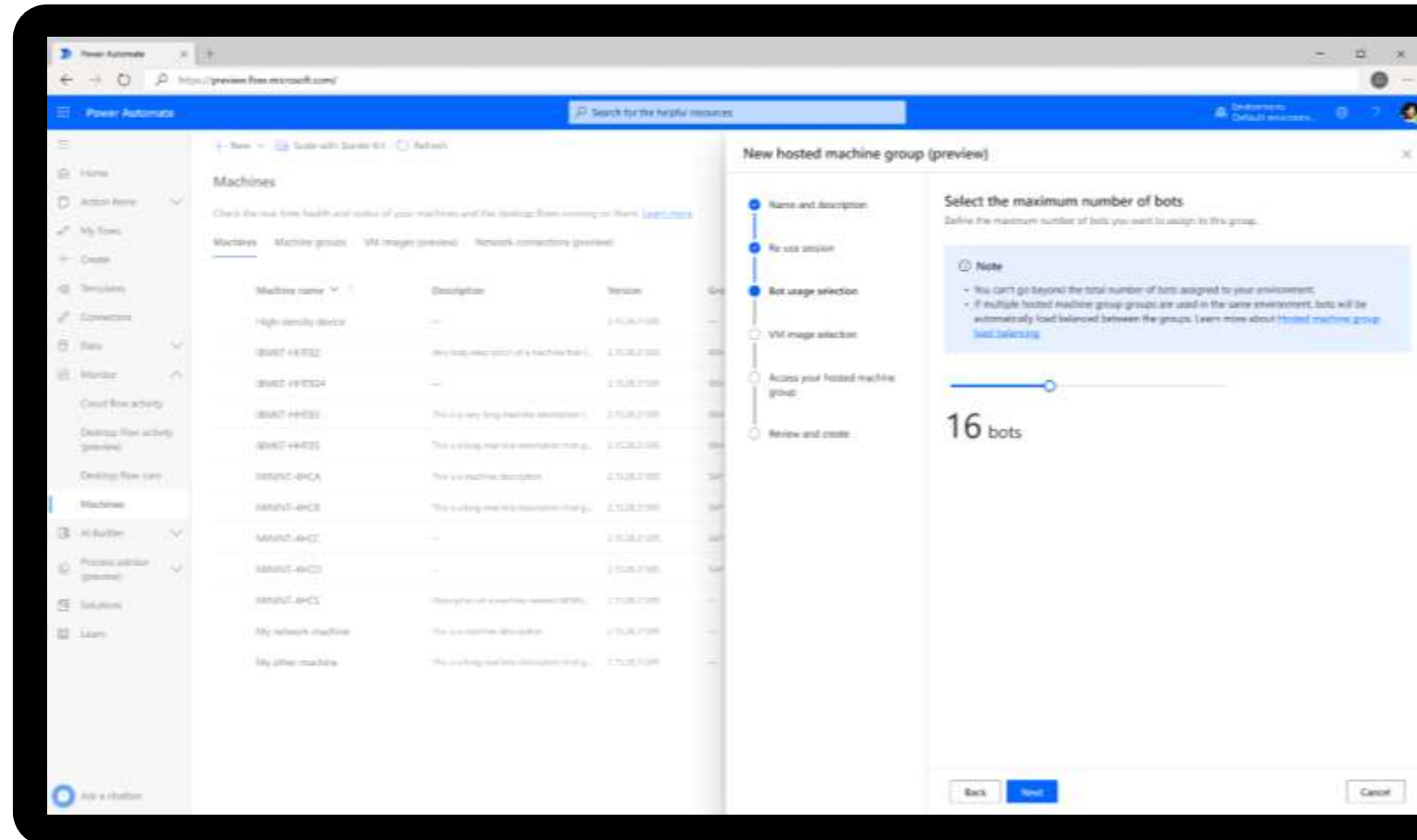
Build, test, and run automation with a platform that allows you to automate any desktop-based task covering the broadest range of use cases.

## Single machines

For pro and citizen developers to build or test automation, and for business users to run automation on dedicated machines

## Machine groups

For unattended automation in production to distribute your automation workload and optimize productivity.



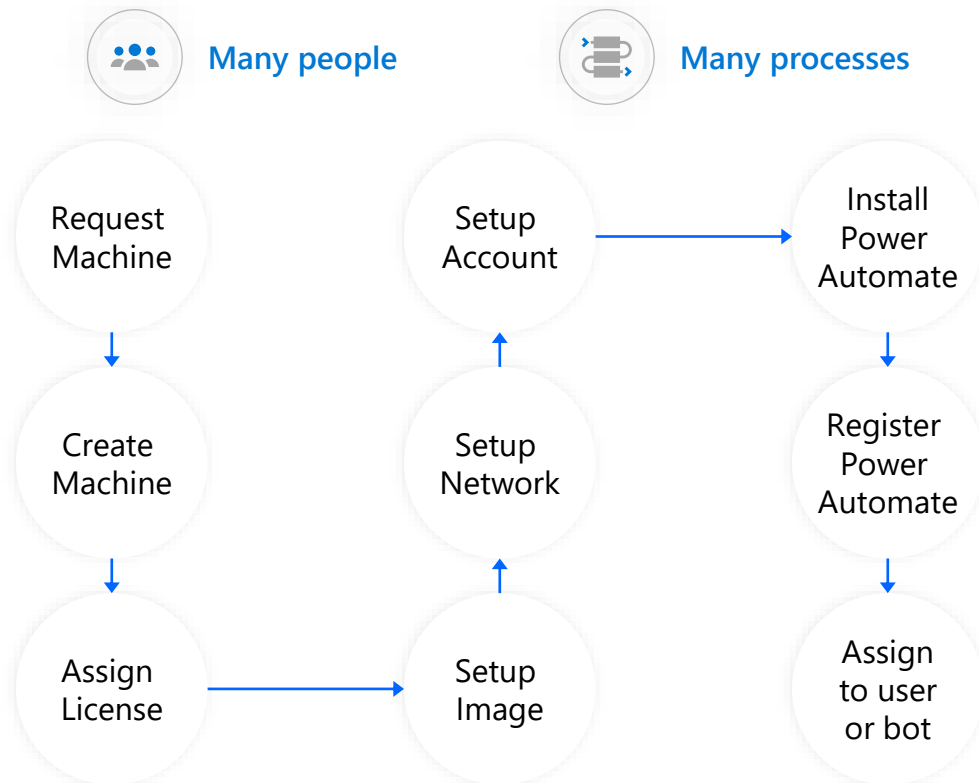




# Simplify and accelerate RPA machine deployment

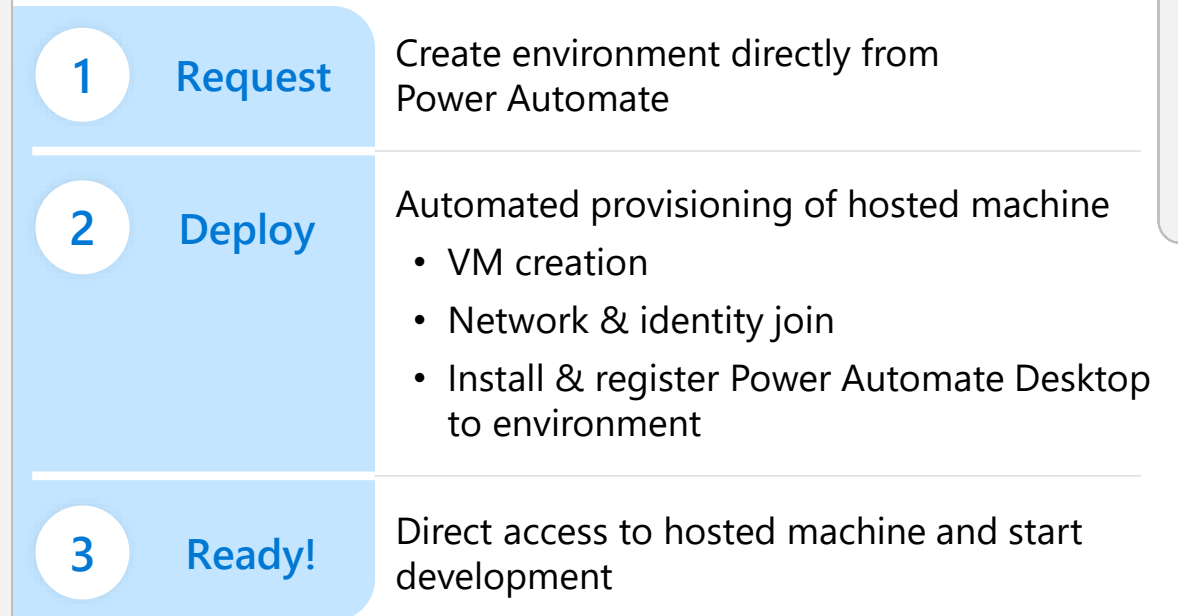
## Why make it hard?

### Bring your own machine



## When it can be easy!

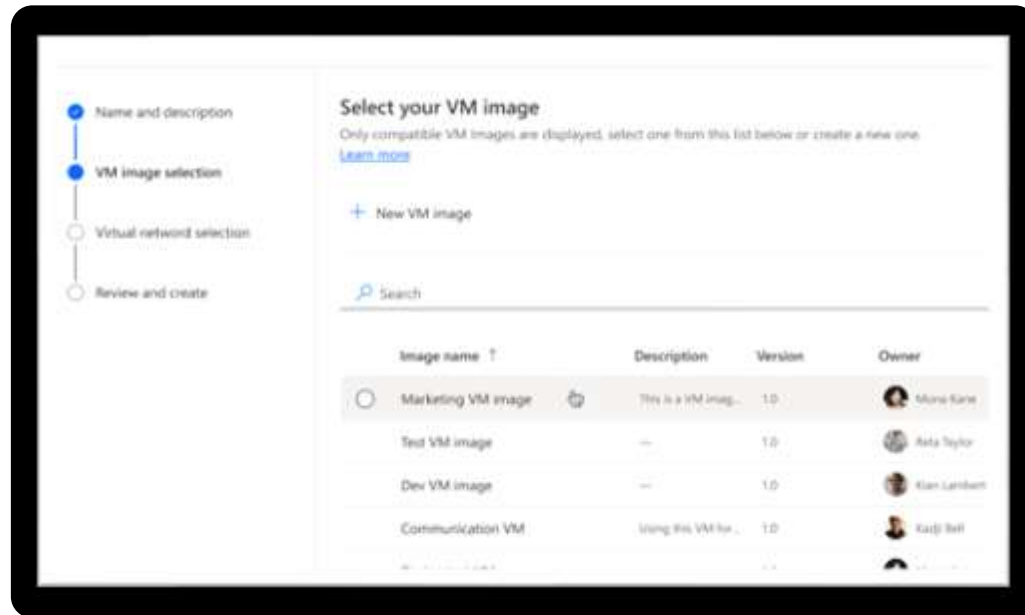
### With Power Automate hosted RPA



Dedicated machines available **within minutes** for development, testing and automation

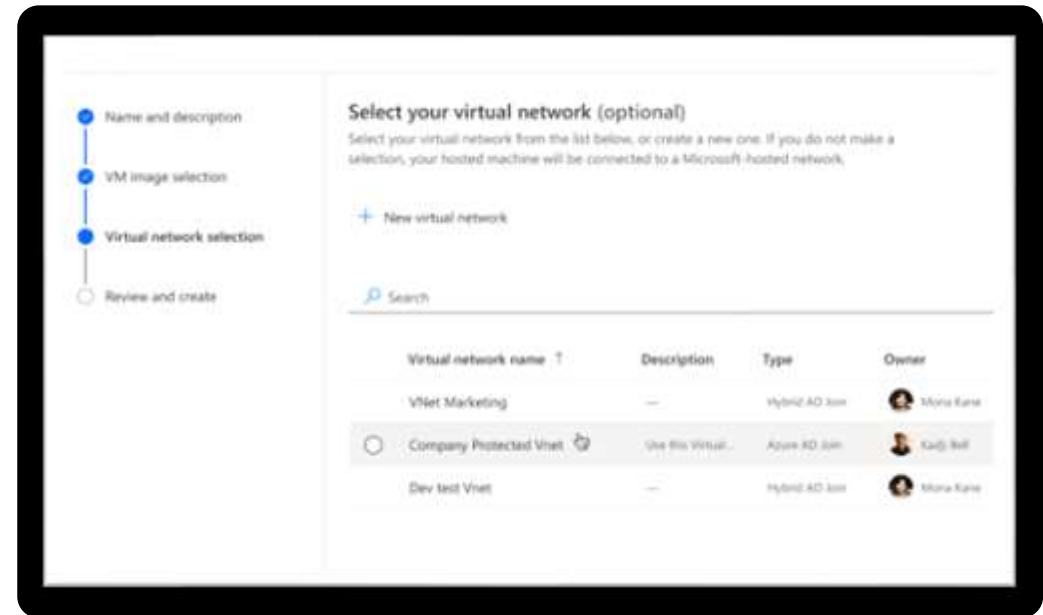


# Hosted machine setup



## Two virtual machine (VM) options

**Default Windows image** provided by Power Automate  
**Bring your own** custom VM image through native integration with Azure Compute Gallery



## Virtual network selection (optional)

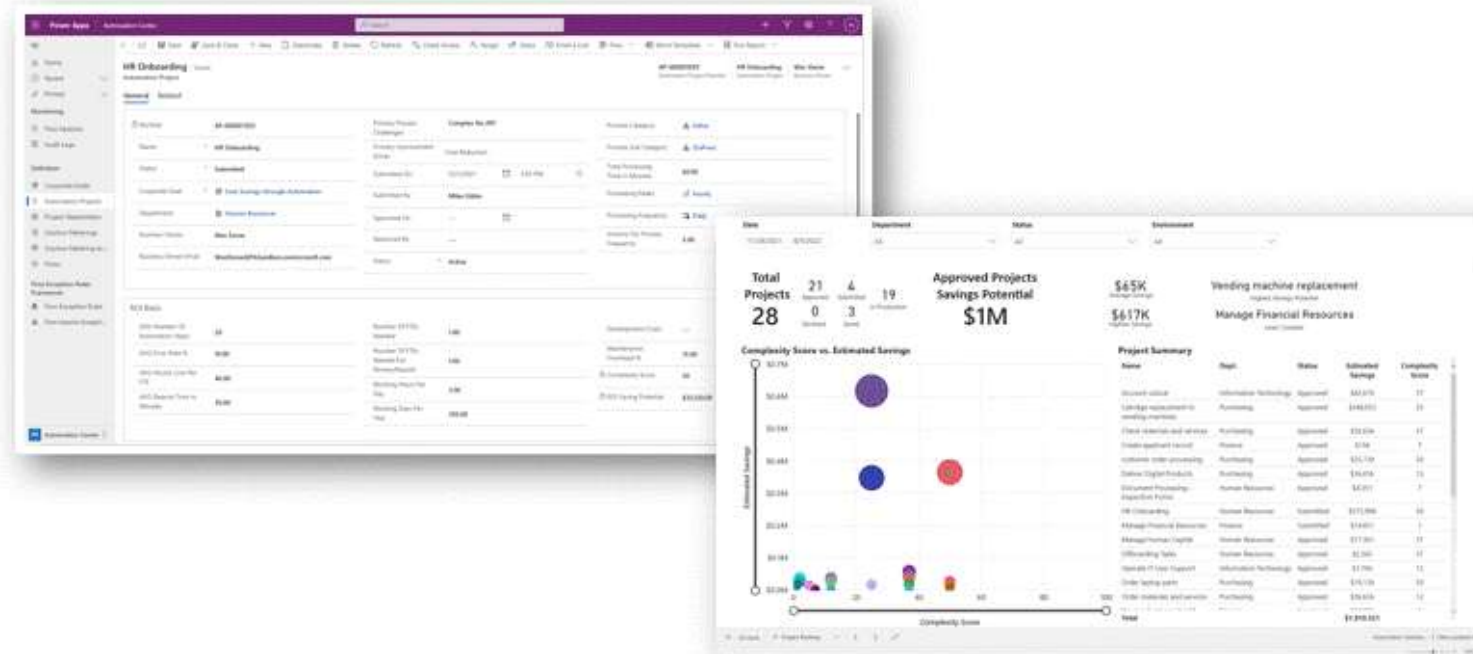


# Accelerate scaling of an Automation CoE



Automation Kit

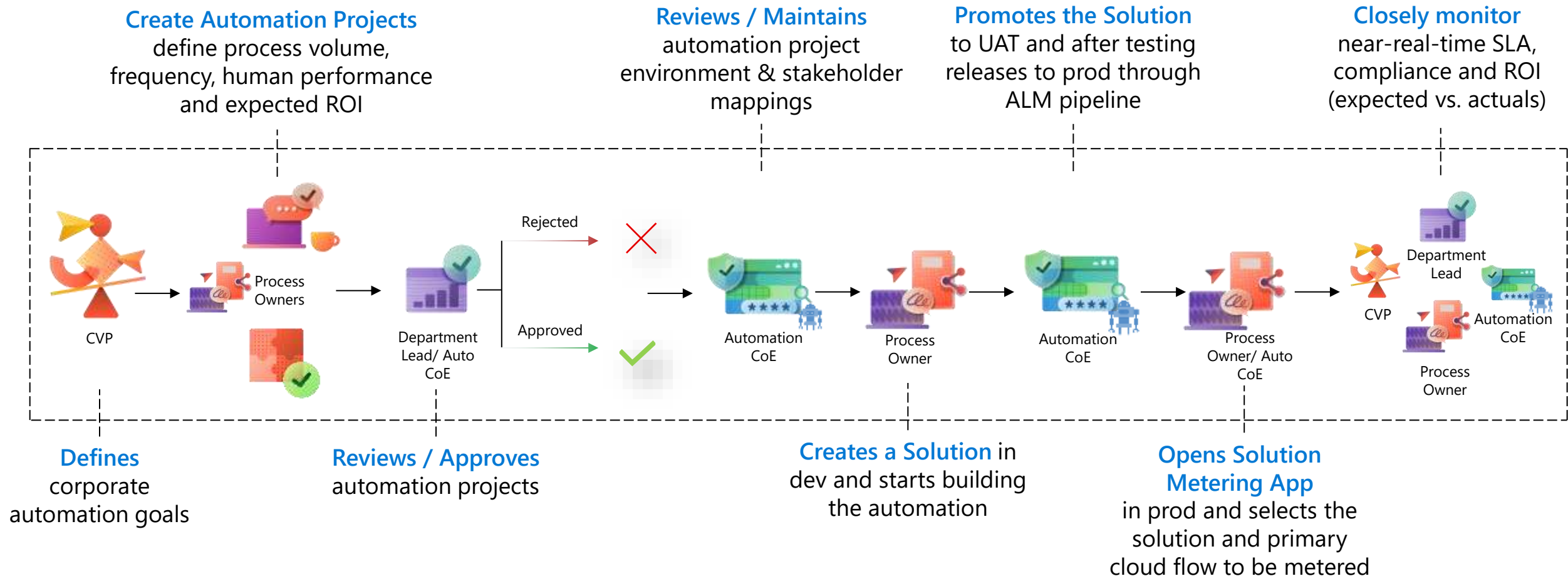
Collect, Triage, Approve and Monitor Expected vs Actual Return on Investment





# What you can achieve with Automation Kit

Journey from Project Definition to SLA & ROI based near-real-time reporting



# Take the guesswork out of automation



I don't know  
what to  
automate



Use **process mining** to record steps in your process



Review the **visual process map** to identify bottlenecks and opportunities for automation



Based on what you learned, start automating your process with **flows**

# Understand how you work to optimize you work



Digital transformation  
can be overwhelming



Processes are complex  
or unknown



Finding new ways to  
work is hard

## PROCESS MINING

# Use cases

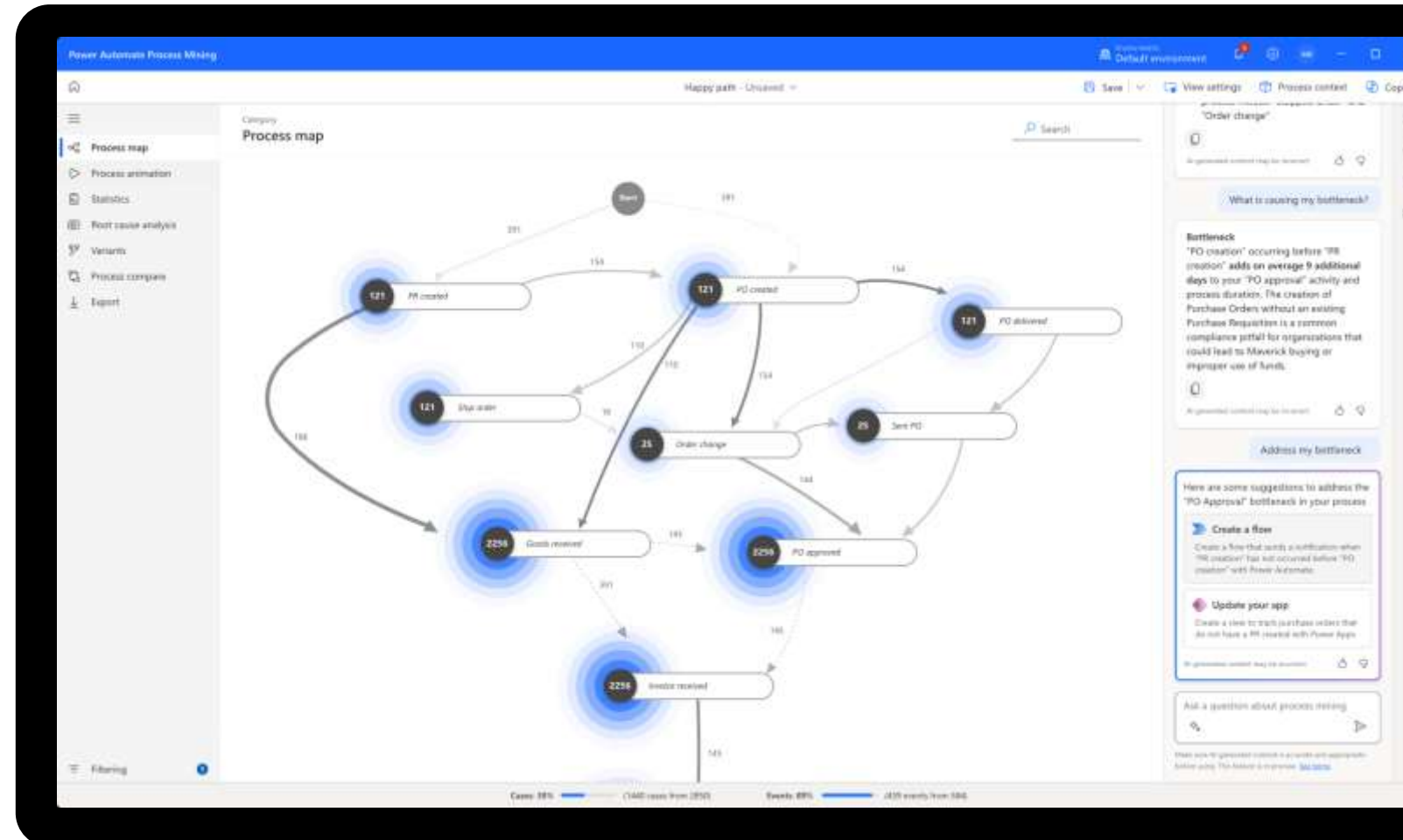
**Accelerate your digital transformation efforts** with a blueprint for building automation and more

**Visualize and analyze your Order to Cash Process (O2C)** to see how effectively you convert your products or services into cash.

**Avoid automating inefficient processes** and continuously monitor to identify process inefficiencies.

**Achieve full visibility of your Order to Activation (O2A) process** and identify process inefficiencies.

**Decrease regulatory compliance risks,** improve response time to regulatory questions, spot and fix potential problems.



# Deep analytics

Power your analysts with data on your processes



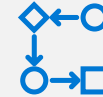
## Process Compare

Visualize and analyze processes to find best performers by comparing them against real-life or simulated versions, as well as their BPMN model



## Rework Detector

Find unnecessary rework and eliminate it by analyzing the frequency and scale of rework, and investigate which activities trigger and end it



## AI-powered Root-Cause Analysis

Compute attributes and the root causes of problems your process experiences to uncover hidden connections and causalities



## Business alerts & Rules monitoring

Score process performance and be alerted if operational KPIs and standard are met, by setting up pre-set rules



## PROCESS MINING

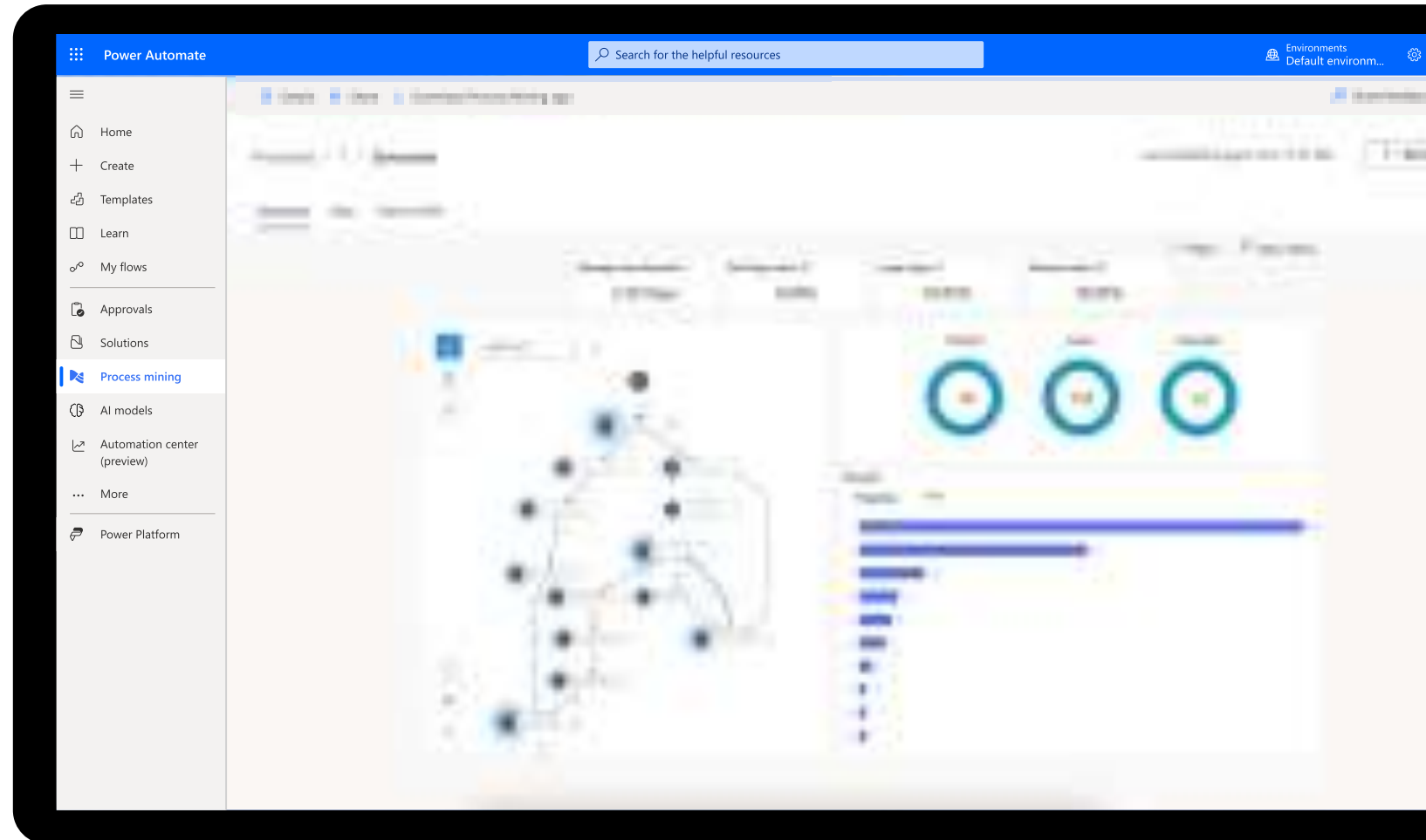
# Process insights

Quickly identify what needs attentions with filterable **KPIs** and **visual process maps**

Create **custom filters** to target the information most relevant for you

Use **time analysis** to drill down into bottlenecks by cases, variants, and activity

Use **variant DNA** to identify noncompliant processes, loops, and self-loops quickly



## PROCESS MINING

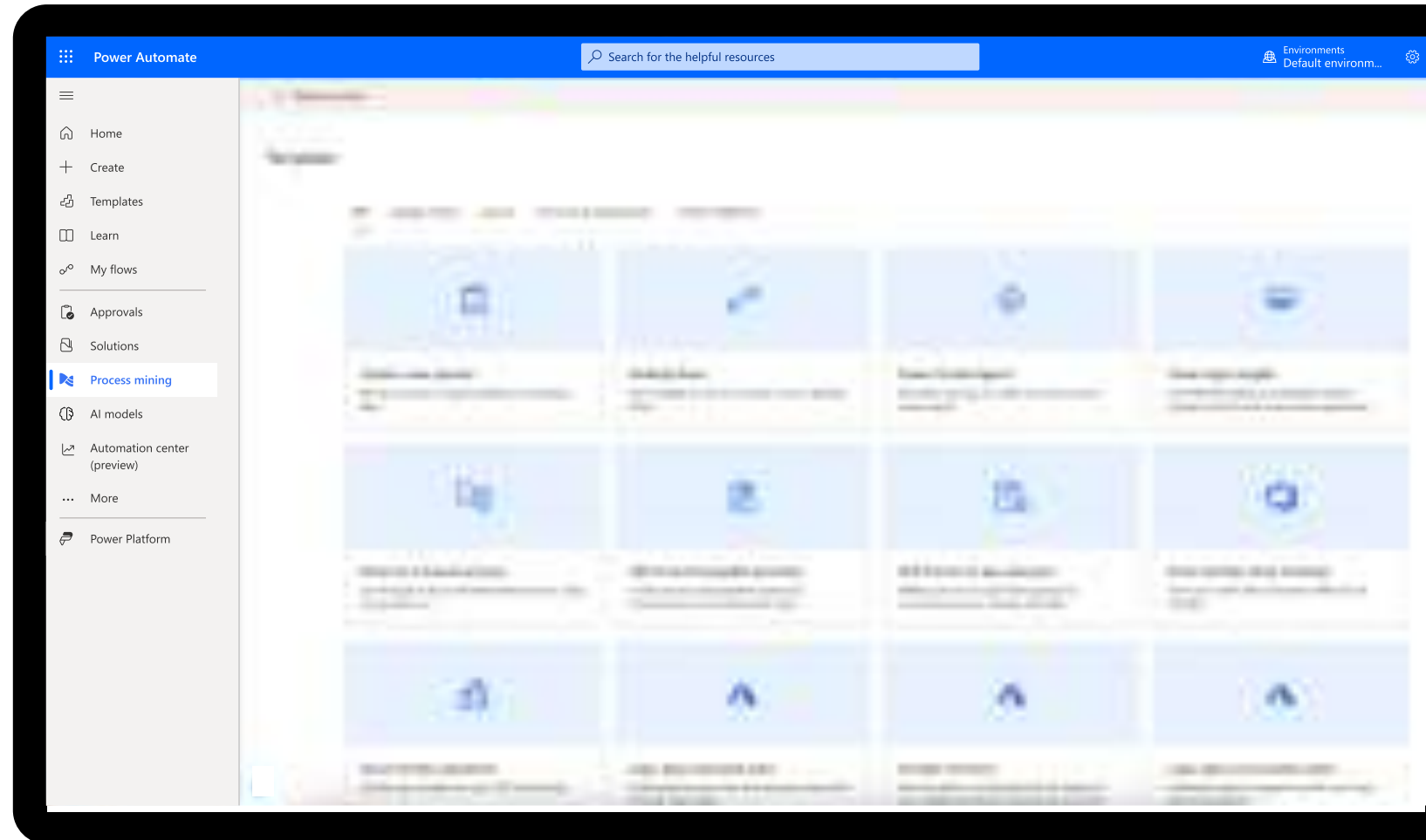
# Prebuilt templates

**Supply Chain** | Material movement  
D365 SCM, guided order to cash (O2C)

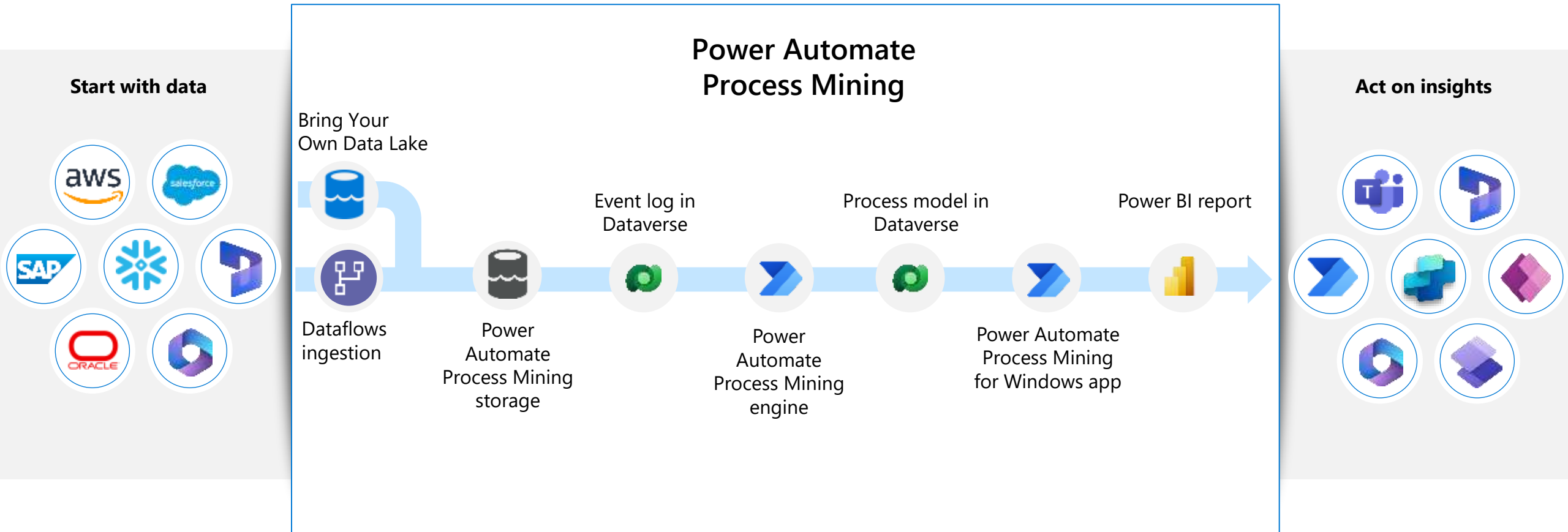
**Azure** | Azure DevOps, Logic Apps,  
Durable Functions

**Finance & Operations** | accounts  
payable, procure to pay (P2P),  
visualizations and KPIs

**Power Platform** | desktop flows, Copilot  
Studio, Power Apps



# Architecture



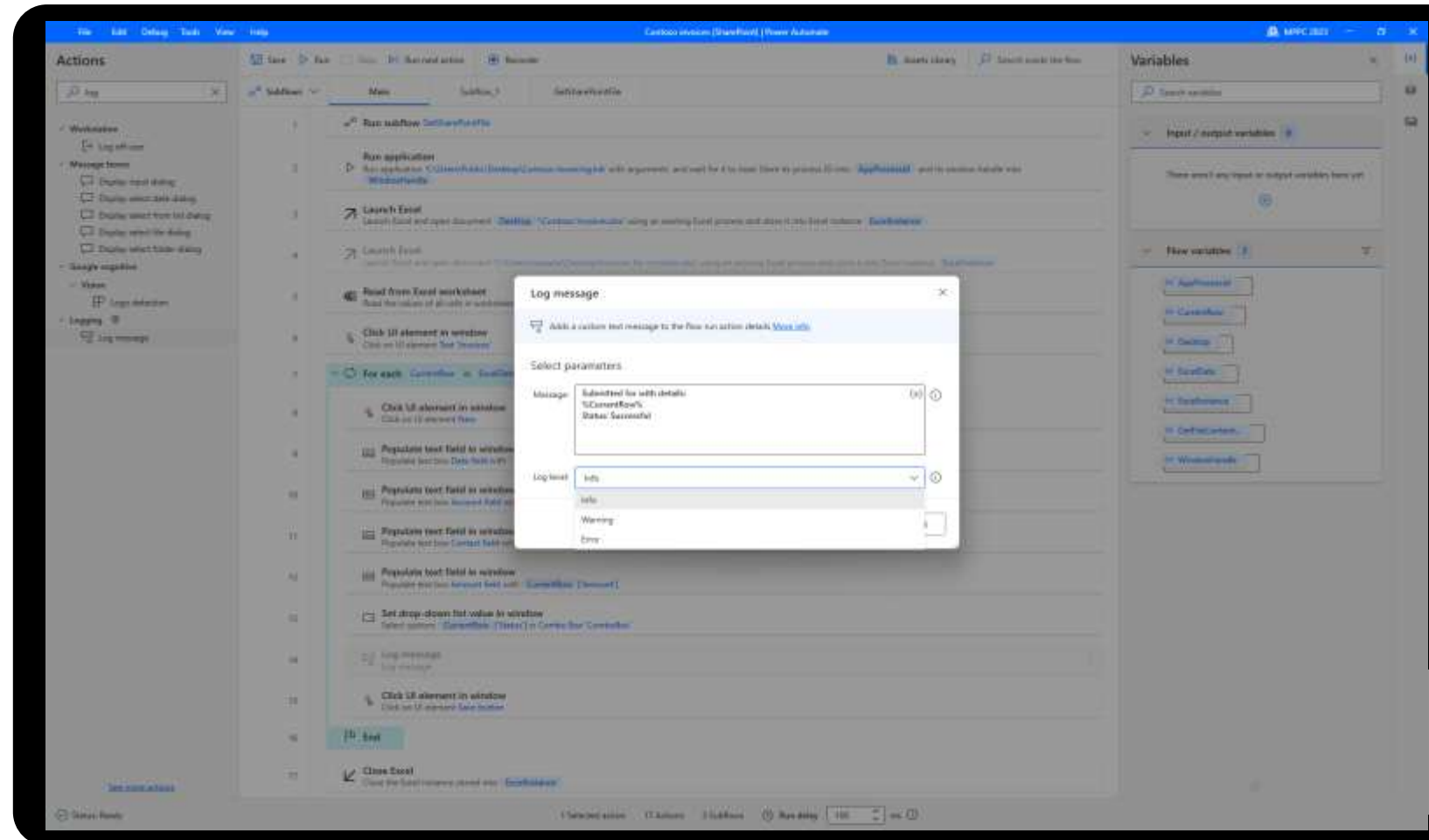
# Centralized Logging & custom analytics

Log message action

Centralized logs across the environment

Create custom reports **with Power BI based on** Dataverse APIs, TDS endpoints or Azure Synapse

Plug in **Microsoft Purview** for additional insights



# One unified admin center

The most comprehensive governance and security features **out-of-the-box**

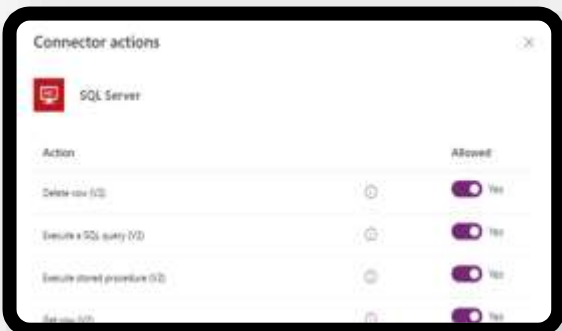
## Tenant isolation



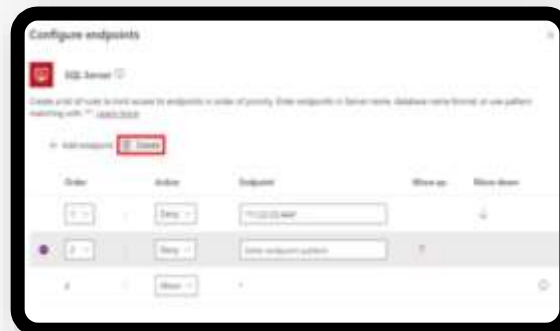
## Data Policies



## Control actions



## Configure endpoints



## Center of Excellence starter kit

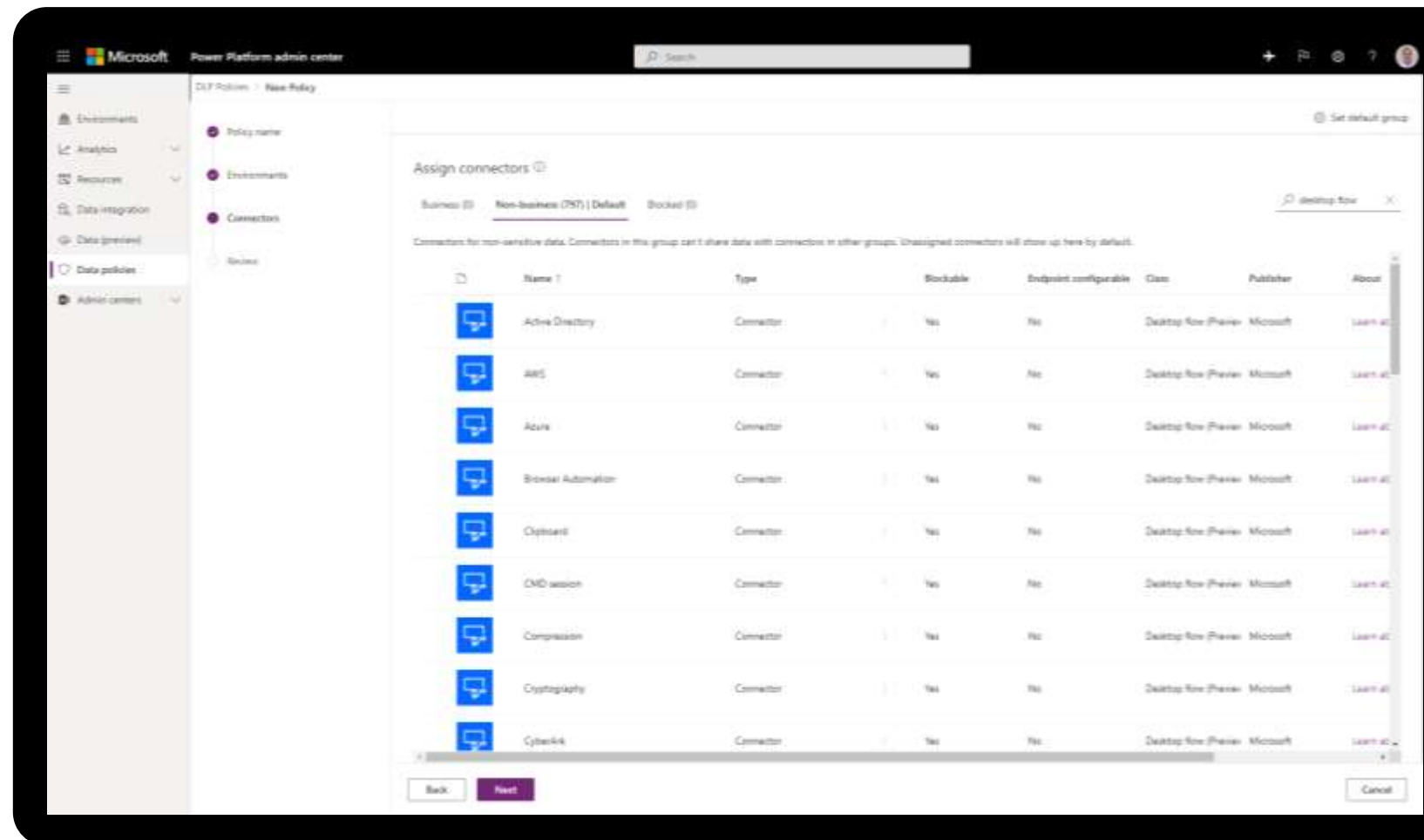
The starter toolkit you need to **drive innovation** and **improvement faster**

Multiply the effectiveness of IT admins



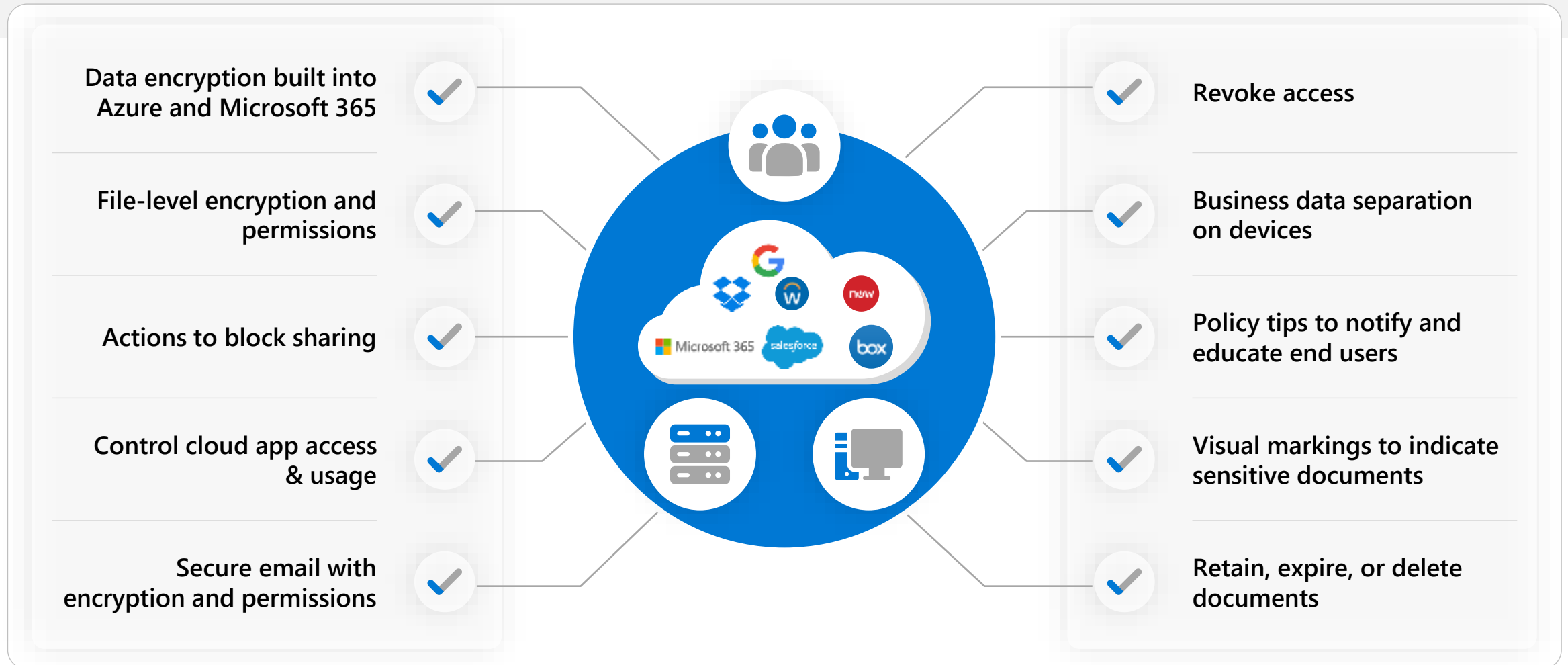
# Data Loss Prevention (DLP)

Specify which applications and services can be automated



# Data loss prevention (DLP)

Protect sensitive information across devices, cloud services, and on-premises





# Document Automation

## Level up your document processing capabilities

# Increase efficiency through intelligent automated workflows powered with AI

Choose document type

Structure and semi-structured documents

Choose information to extract

Add collections of documents

Tag documents

Model summary

Select the type of documents your model will process

Structured documents

Unstructured documents

Structured documents are those where for a given layout, the fields, tables, checkboxes, and other items can be found in similar places. You can teach this model to extract data from structured documents that have different layouts. Examples of structured documents are invoices, purchase orders, delivery orders, tax documents, etc.

Here you can see some examples of structured documents:

1 of 1

Document Processing 1/24/2021 1:09:42 PM | Save and Close

Quick tips

Unstructured documents limitations

Only unstructured documents in English are supported.

Still unsure?

See our [documentation page](#) to help you choose between structured and unstructured documents.

# Document Automation

Level up your document processing capabilities

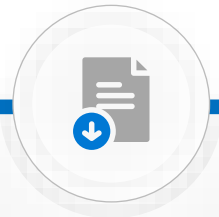
## How it works

Power Automate and the Power Platform provide a complete solution for processing documents at scale that includes AI powered data extraction, manual validation, process orchestration, pipeline monitoring, and more.



### Receive documents

Receive documents from your customers



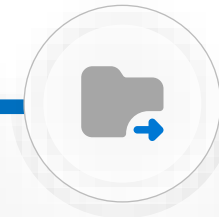
### Extract

Extract information from the documents



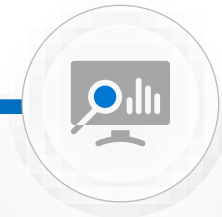
### Validate

If needed, a human can confirm or correct the extracted data



### Export

Export the extracted data to your ERP or to any other data storage of your choice



### Monitor

Supervise your end-to-end process with the provided monitoring application