Northwestern

Microsoft Power Automate

Quick Reference Guide

This guide provides an overview of how to get started using Power Automate to create workflows which can be scheduled, triggered manually, or automatically performed based on actions.

Accessing Microsoft Automate

1. Visit the Office 365 portal (https://www.office.com/); login with Northwestern University credentials or go to your Microsoft apps.
2. Select **Power Automate**.

Creation Menu Overview

Navigation Options:

Action Items: View active or completed Power Automate Approvals.

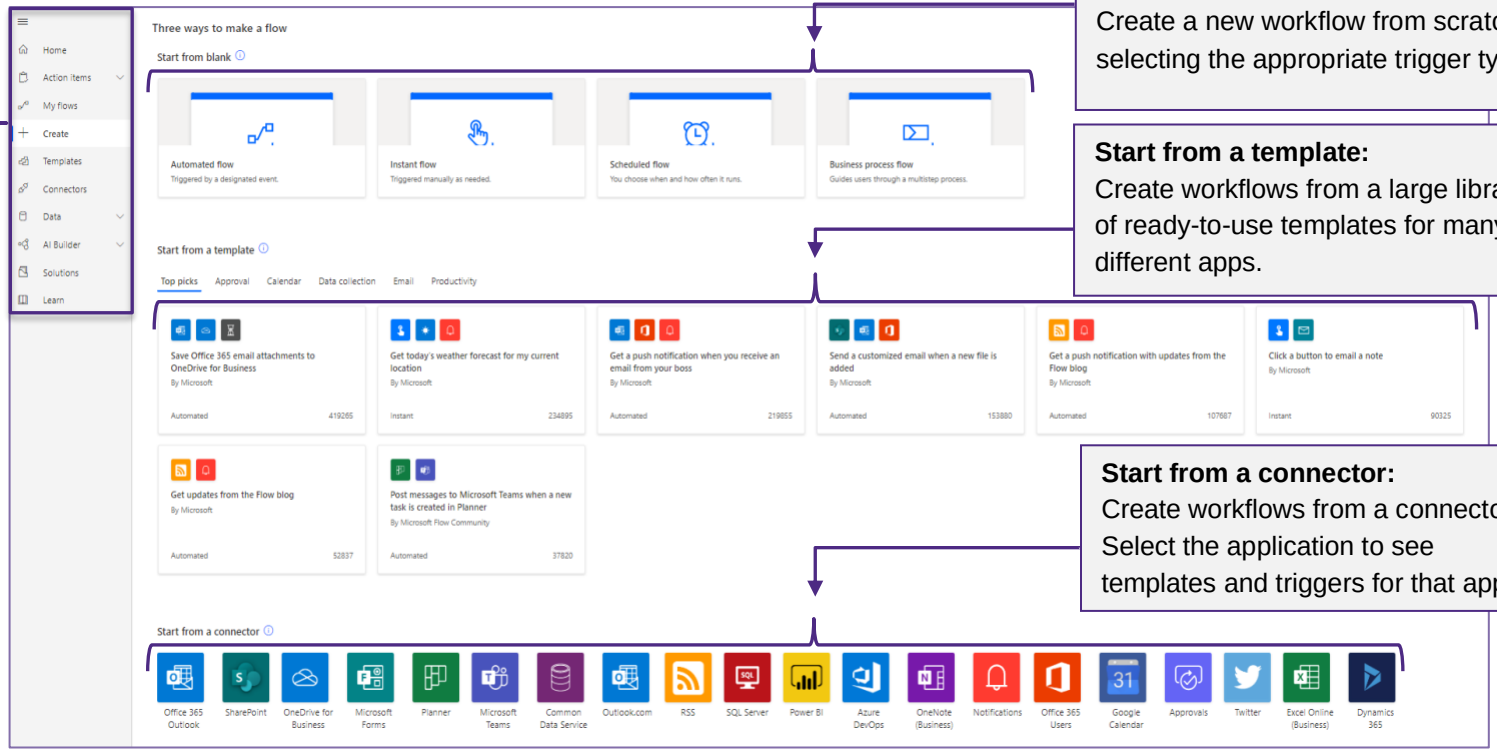
My Flows: View and edit workflows that you have created or thatmjo have been shared with you.

Create: Create a workflow.

Templates: View the full library of template workflows.

Connectors: Manage connections to applications.

Premium Features: Data, AI Builder and Solutions are premium features. Contact IT for more information.



Start from blank:
Create a new workflow from scratch, selecting the appropriate trigger type.

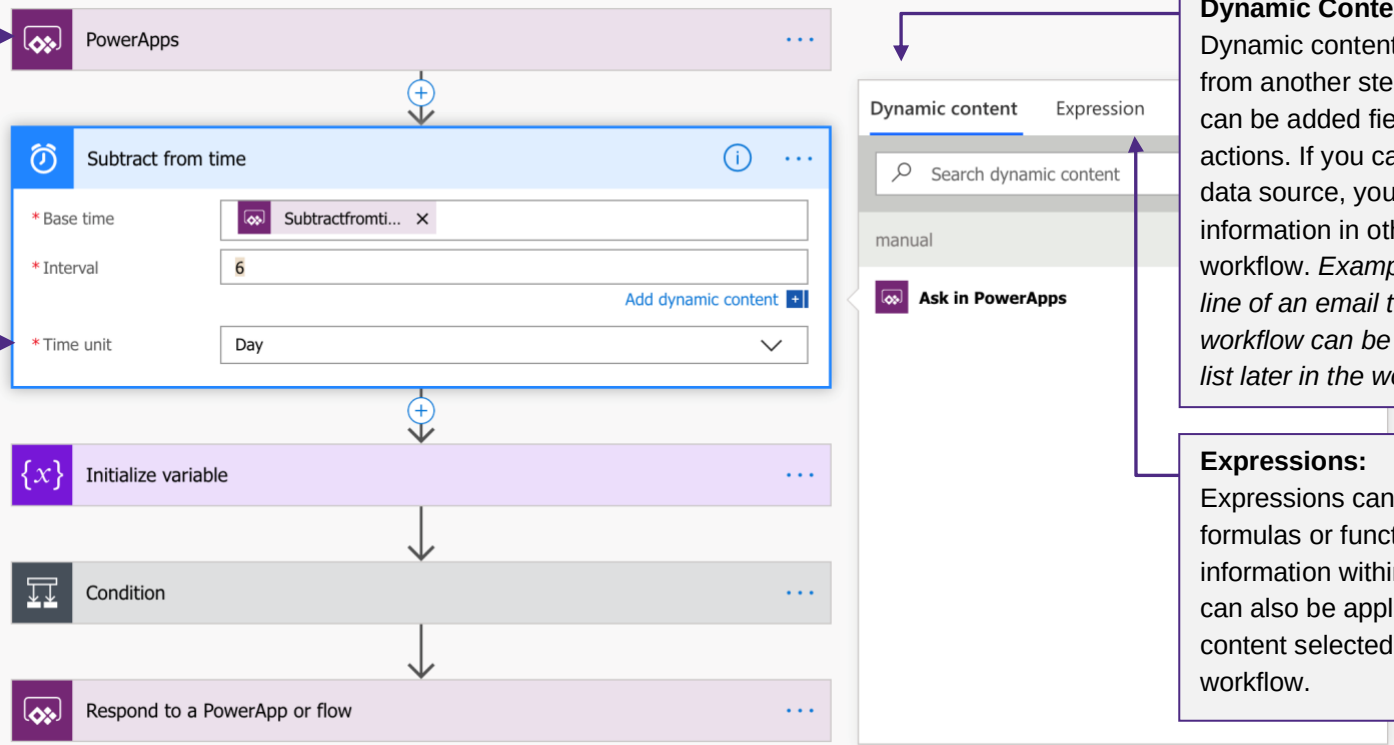
Start from a template:
Create workflows from a large library of ready-to-use templates for many different apps.

Start from a connector:
Create workflows from a connector. Select the application to see templates and triggers for that app.

Designer Overview

Workflow Trigger: Every workflow starts with a trigger action. Triggers can be scheduled, manual, or automatic when a specific event occurs.

Workflow Actions: Actions are the building blocks of workflows. You can choose from hundreds of actions to decide what your workflow does next.



Dynamic Content: Dynamic content, or information from another step in the workflow, can be added fields in other actions. If you can connect to the data source, you can use that information in other steps of workflow. *Example: The subject line of an email that triggered the workflow can be added to an excel list later in the workflow.*

Expressions: Expressions can be used to apply formulas or functions to information within an app. This can also be applied to dynamic content selected throughout the workflow.

Development Reminders:

- Users do not need access to a workflow in order to trigger it through the trigger actions.
- Actions will be performed as the user who created that action *(Example: Send an email will send from the account of the user who created the step).*
- Workflows do not auto save. Workflows must be saved manually.
- When you share a workflow, it will be moved to the “Team flows” tab within “My flows”.

Support

While Northwestern IT supports the installation of Office 365, support is not offered for individual applications. If you do not find resources here directly related to your needs, please visit LinkedIn Learning, or Microsoft support and search for specific information.