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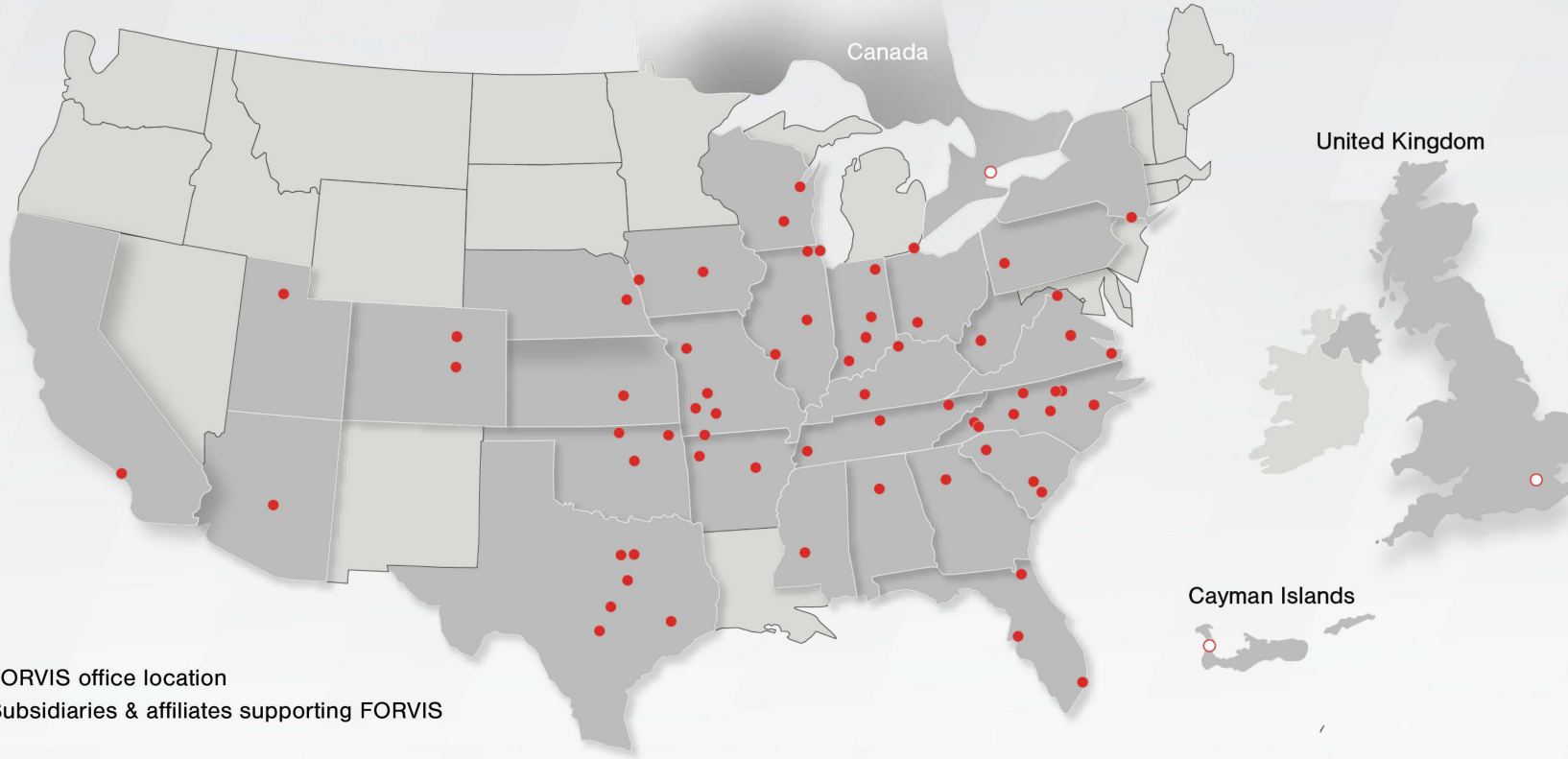
Using Power Automate to Provide More "Power" to Power BI

May 9, 2024

Global Presence & Reach

- ● FORVIS office location
- ○ Subsidiaries & affiliates supporting FORVIS

Subsidiaries & Affiliates Supporting FORVIS

- ▪ FORVIS Capital Advisors, LLC
- ▪ FORVIS Wealth Advisors, LLC
- ▪ FORVIS Global Advisory Canada ULC**
- ▪ FORVIS Global Advisory Ltd. UK**
- ▪ TALENT SHIFT, LLC

By the Numbers

Top 10
U.S. Public Accounting Firm *

27
States + Canada, U.K., & **
Cayman Islands

10+
Industries

68
Markets

500+
Partners & Principals

6,000+
Team Members

FORV/S

PRAXITY™
Empowering Business Globally

FORVIS is a member of Praxity™, an international alliance of independent accounting firms that offers multinational clients access to resources around the world.

Business Technology Solutions

FORVIS provides enterprise resource planning (ERP) and customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, and support services.

Microsoft Partner

In addition, our Insights & Automation team provides business intelligence (BI) and robotic process automation (RPA) services. Our Marketing Consulting team provides marketing automation platform and marketing campaign support services.
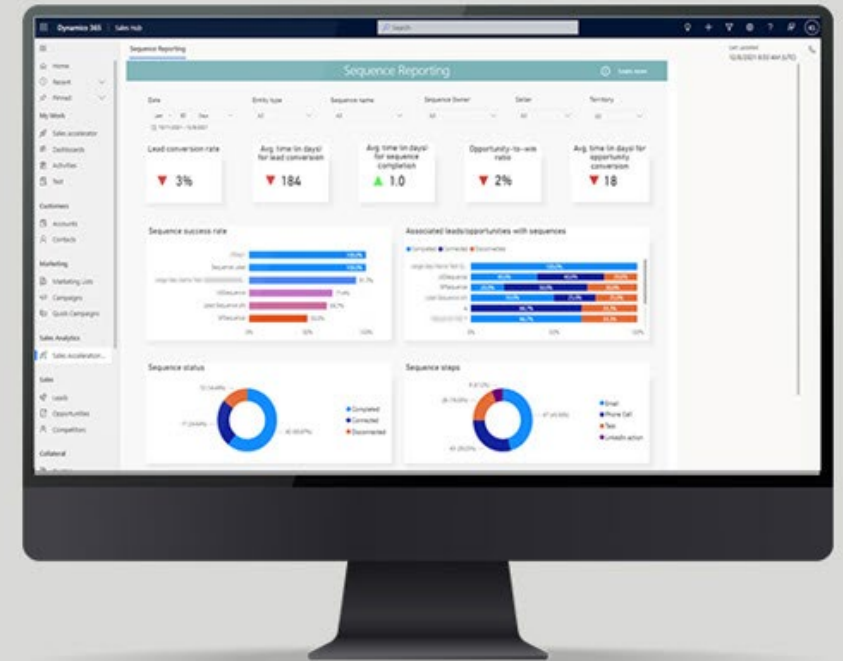
FORV/S

From sales forecasting to financial reporting, learn what CRM and ERP technologies can do.

Presenter

Charles Allen
Senior Managing Consultant

713.499.4629
charles.allen@forvis.com

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Business Technology Solutions

Using Power Automate to Provide More "Power" to Power BI

May 9, 2024

Objectives

- Define how to connect Power BI & Power Automate to build automated workflows

- Describe best practices for triggering reports & distributing insights with Power Automate

- Identify common reporting scenarios that can be enhanced & streamlined using Power BI & Power Automate

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Agenda

Time		Topic
9 a.m. CT	●	What Is Power Automate?
9:15	●	Power BI Without Power Automate
9:30	●	Creating Automations for Power BI

What Is Power Automate?

What Is Power Automate?

- Microsoft platform

- Automate processes

- Low code & AI

- Integration with Microsoft 365

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Benefits of Business Process Automation

Time savings

Higher productivity

Greater efficiency
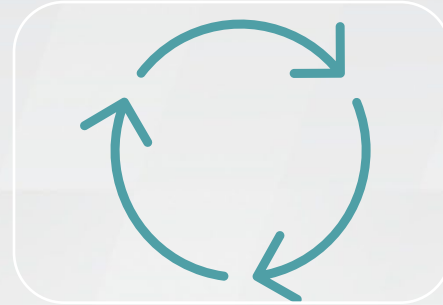
Standardized processes

Reduced errors

Auditable records

Streamlined compliance

Enhanced scalability

Improved morale

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Power Automate Uses

- Data integration

- Robotic process automation

- Approvals

- Document routing

- Sending messages

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Getting Started With Power Automate

- [Power Platform—Free Trials | Microsoft Power Platform](#)

- Free 90-day trial

- Utilize online training

- Use templates

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Power Automate

Power BI Without Power Automate

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Exporting Power BI Reports

- Analyze in Excel

- PowerPoint

- PDF
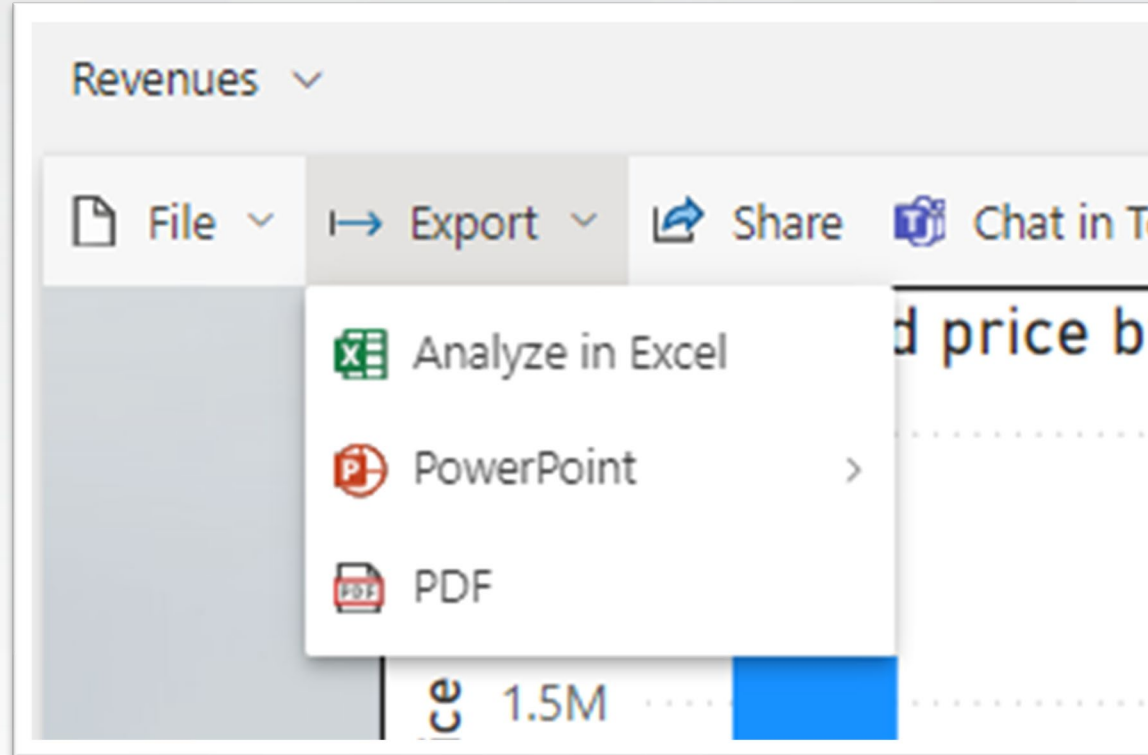
Share

- Send link

- Mail

- Teams

- PowerPoint

Chat in Teams

- Share the report with others
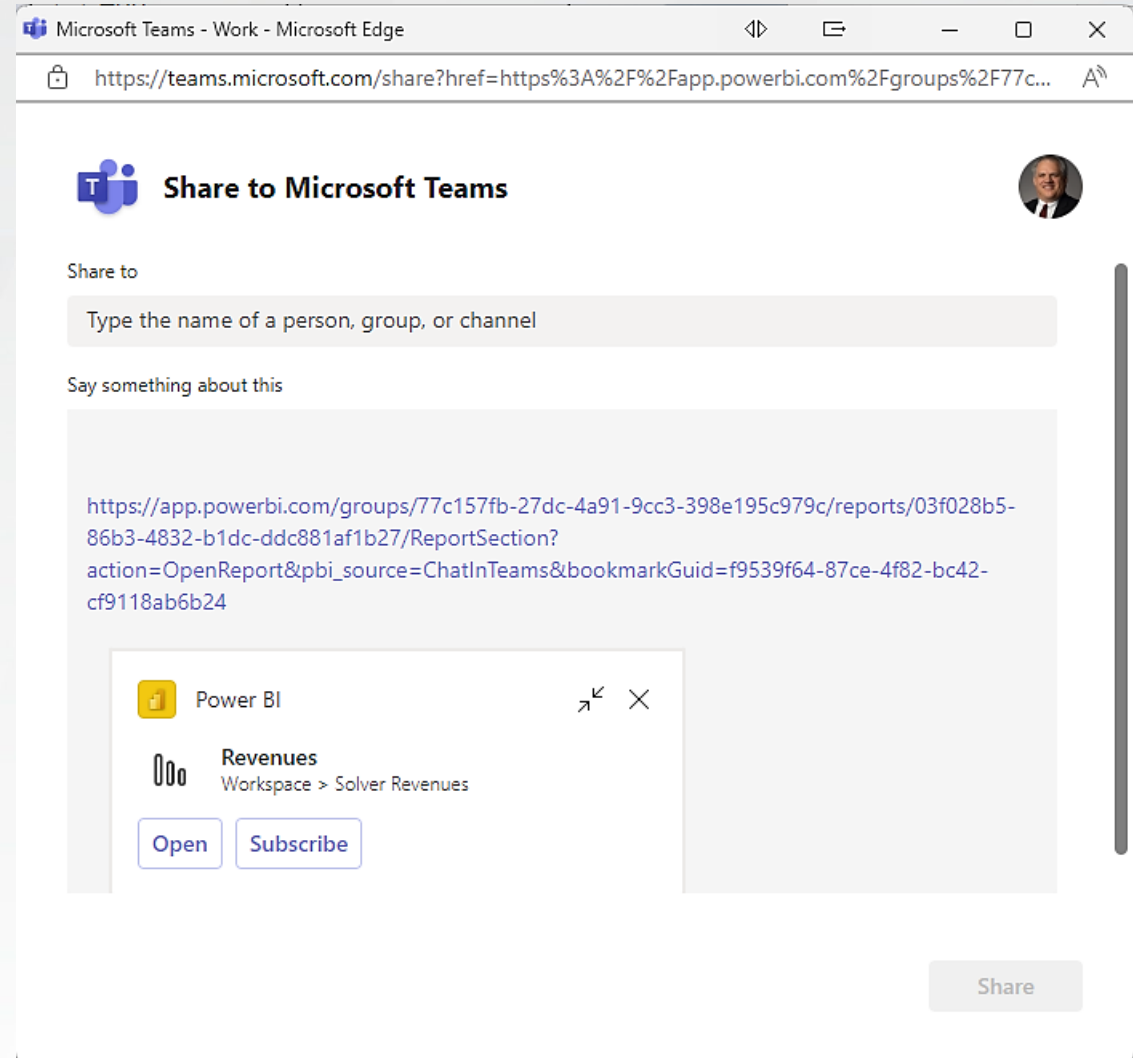
Other Options

- User Subscriptions

- Alerts
  - Teams
  - Email

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Creating Automations for Power BI

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Power Automate

- Creates automated flows in Power BI reports

- Contextual flow based on filters

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Power Automate Options for Power BI

Update an Excel table

Send an email message

& more!

Create a task

Create an item for a SharePoint list

Send a Teams message

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Power Automate in Power BI

What's Next

Thursday, May 16

WEBINAR

See What's New in Dynamics 365 Business Central 2024 Wave 1

Thursday, May 16 • 2–3 p.m. ET

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Questions?

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Thank you!

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Assurance / Tax / Consulting