

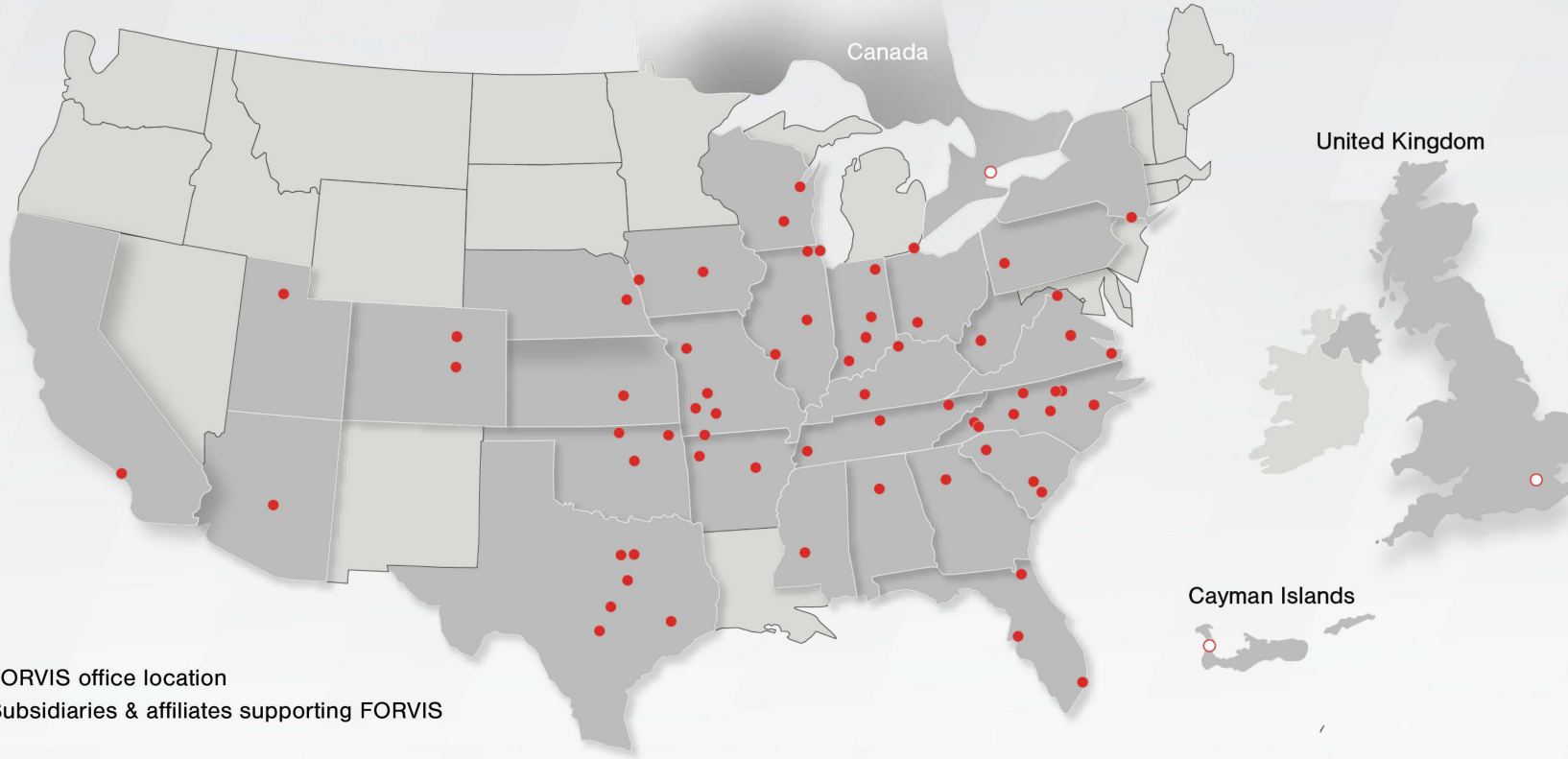
FORVIS[®]

Business Technology Solutions

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

FORVIS

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



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.

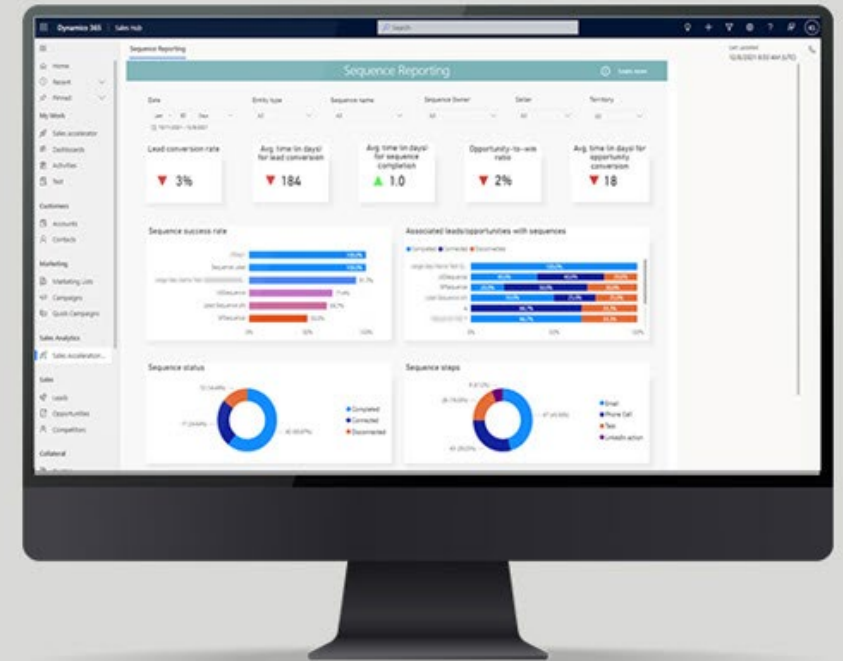
FORVIS

Microsoft
Partner

Sage Partner

ORACLE
NETSUITE
Solution Provider

salesforce
PARTNER



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

Presenter



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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

Agenda

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?

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What Is Power Automate?

- Microsoft platform
- Automate processes
- Low code & AI
- Integration with Microsoft 365

Benefits of Business Process Automation



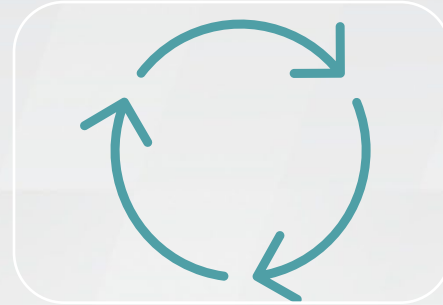
Time savings



Higher productivity



Greater efficiency



Standardized processes



Reduced errors



Auditable records



Streamlined compliance



Enhanced scalability



Improved morale

Power Automate Uses

- Data integration
- Robotic process automation
- Approvals
- Document routing
- Sending messages

Getting Started With Power Automate

- [Power Platform—Free Trials | Microsoft Power Platform](#)
- Free 90-day trial
- Utilize online training
- Use templates

Power Automate

The screenshot shows the Power Automate user interface. At the top, the header includes the FORVIS logo, the text "Power Automate", a search bar, and user information for "Allen, Charles". A left-hand navigation menu lists options such as Home, Create, Templates, Learn, My flows, Approvals, Solutions, Process mining, AI hub, Desktop flow activity, More, and Power Platform. The main content area features a "Hello, Charles" greeting with a "Create" button and a "Learning for every level" section containing six educational cards. Below this is a "Boost your productivity and throughput with work queues" banner with a "Create your first work queue" button. The bottom section is titled "More to explore in Power Automate".

FORVIS Power Automate

Search

Environments
BKD (default)

Allen, Charles

Home

Create

Templates

Learn

My flows

Approvals

Solutions

Process mining

AI hub

Desktop flow activity

More

Power Platform

Ask a chatbot

Hello, Charles

Create a flow to automate a repetitive business task end to end.

+ Create

Learning for every level [See all](#)

- Analyze process mining reports in Power Automate (Beginner, 45 min)
- Analyze your business process with Microsoft... (Beginner, 43 min)
- Register for free 1-day automation workshop (Beginner, 8 hr)
- Automate processes with Robotic Process... (Intermediate, 2 hr 5 min)
- Improve business performance with AI... (Beginner, 6 hr 56 min)
- Automate process u... (Beginner)

Boost your productivity and throughput with work queues

The new way of managing workloads and ensuring timely completion of prioritized work.

Create your first work queue

More to explore in Power Automate

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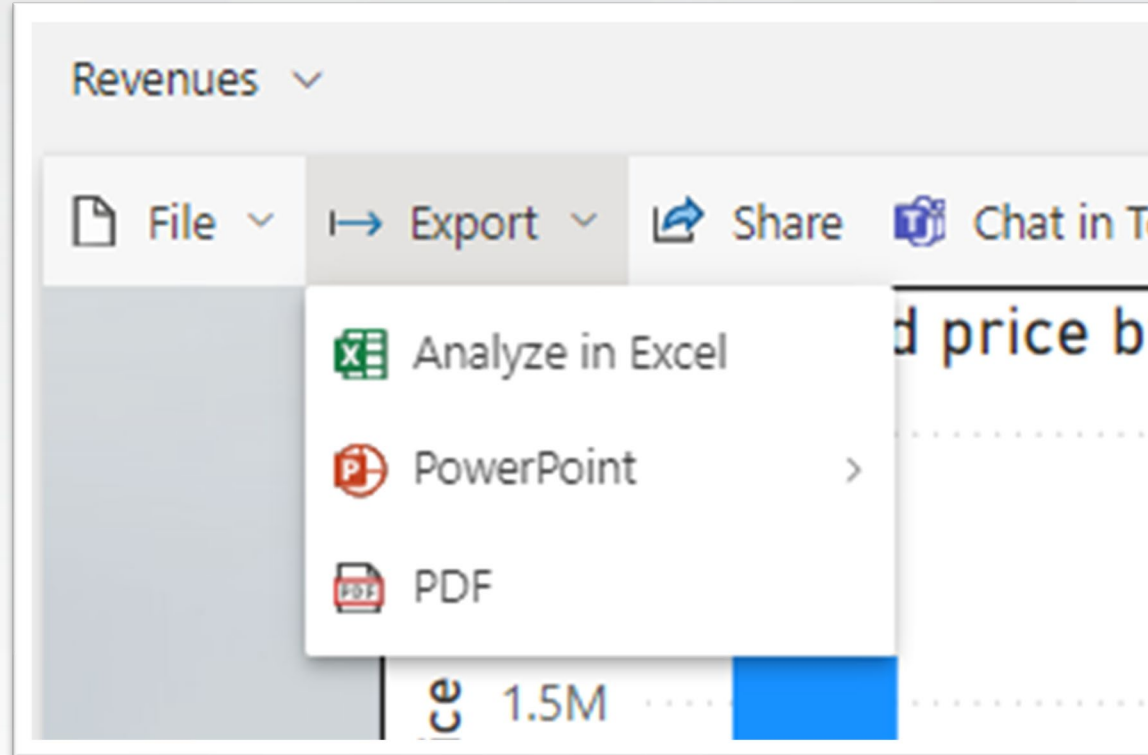
Power BI Without Power Automate

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Exporting Power BI Reports

- Analyze in Excel
- PowerPoint
- PDF



Share

- Send link
- Mail
- Teams
- PowerPoint

Send link
Revenues

People in your organization with the link
can view and share

Enter a name or email address

Add a message (optional)

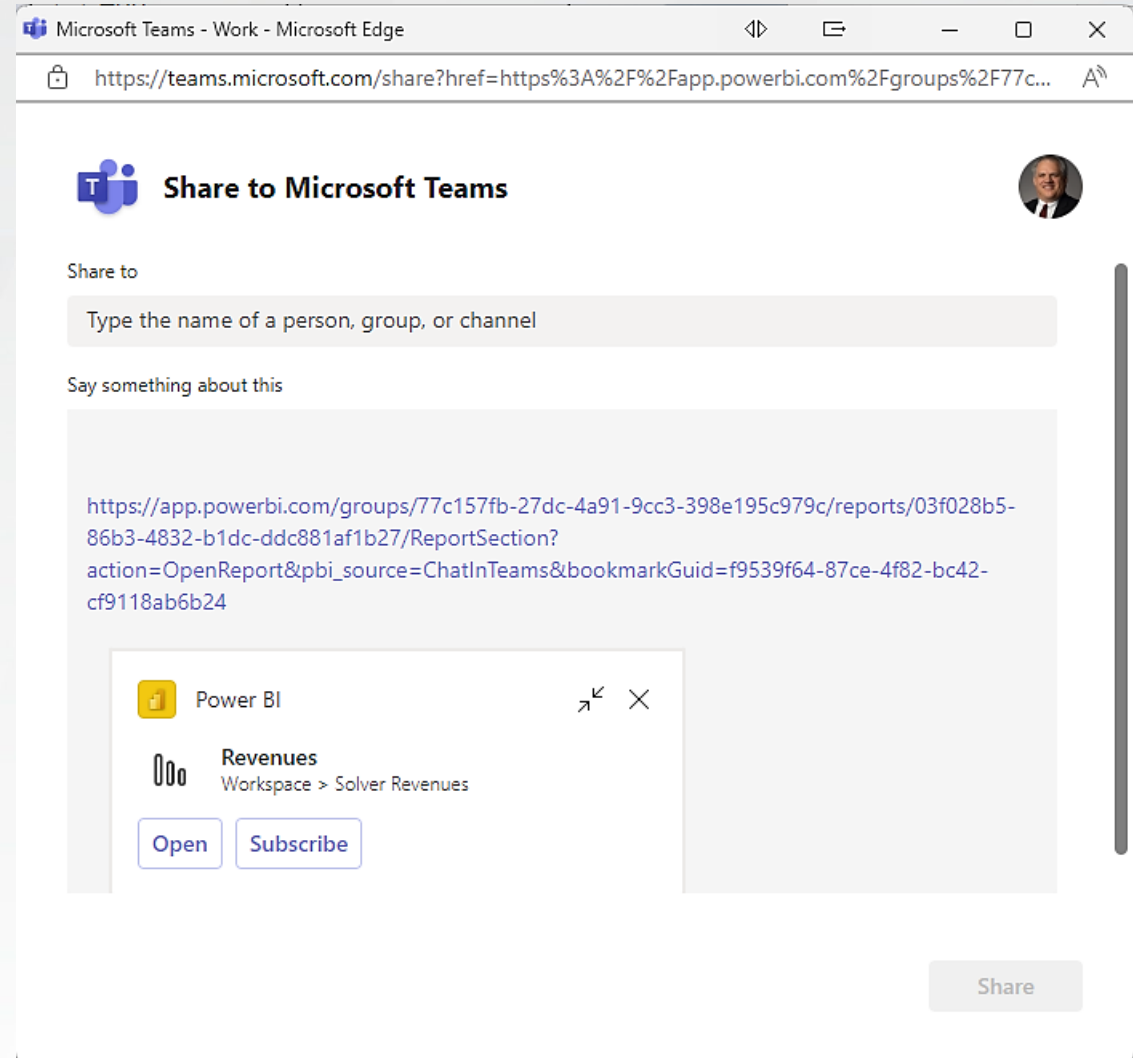
Include my changes ⓘ

Send

Copy link Mail Teams PowerPoint

Chat in Teams

- Share the report with others



Other Options

- User Subscriptions
- Alerts
 - Teams
 - Email

Creating Automations for Power BI

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Power Automate

- Creates automated flows in Power BI reports
- Contextual flow based on filters

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

The screenshot displays the Power BI interface for a report named "Revenues". The main content area features a bar chart titled "Sum of extended price by product" and a table titled "Sales Person Fiscal Year Sales Amount".

Sum of extended price by product

product	Sum of extended price
REP001	1.5M
BUD001	1.0M
DAS001	1.0M
SER002	0.4M
SER001	0.4M
SER003	0.4M
DWA001	0.3M
MAI001	0.2M
OTH001	0.1M
CUS001	0.1M

Sales Person Fiscal Year Sales Amount

Sales Person	Fiscal Year	Sales Amount
Charles	2021	5,494,050.37
Total		5,494,050.37

Filters

- Entity: ABC, ACME, BB008, BELKINV, BELKWGHC
- Product: Select all, BEER_P, BUD001, CUS001, DAS001
- Department: 000, 100, 200, 300, 400
- Sales person: Charles, Fred, Mary, Susan
- Year: 2029, 2028, 2027, 2026

Copilot Chat

What products were sold in 2021

Showing results for *What products were in 2021 (transactiondate)*

product	description	active	account
BUD001	Planning	True	40010
CUS001	Customizations	True	40020

Buttons: Run flow, Send Sales Results

What's Next

Thursday, May 16



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A promotional graphic for a webinar. It features a woman with dark curly hair and glasses, wearing a grey blazer over a patterned top, looking at a tablet. The background is a blurred office setting. The text is overlaid on a dark, semi-transparent background.

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