

WHITE PAPER

# How to use Microsoft Power Automate to optimize your signature process



Your business runs many document workflows. It might be as simple as having a paper form that gets faxed, scanned, emailed and then sent to the right person for approval. Or it could be more complex like using an order management system that tracks all of your inventory and then generates purchase orders when you need them.

Regardless of how simple or complicated your workflow is, there are many ways to optimize it with Microsoft Power Automate. In this article we will show you how easy it is to use Power Automate for optimizing your signature process.



## What is Microsoft Power Automate

Microsoft Power Automate is a workflow automation tool that helps you bring your IT and business processes under control. It's part of the Microsoft 365 suite, which means you can use it to automate tasks across your devices in a secure and scalable way.

There's no need to memorize any commands or write code; just drag and drop actions onto a canvas, then connect them together with logic flow lines to create powerful workflows that can be executed against cloud services like SharePoint Online, Azure SQL Database, Office 365 Exchange Online/Exchange Online Protection (EOP), Microsoft Dynamics 365 Customer Engagement and Microsoft Operations Management Suite (OMS).

Power Automate has been developed over many years by people who understand how businesses work from top to bottom—and what they need from an enterprise-class service management platform for managing their software development lifecycle (SDLC) processes effectively. The result is an end-to-end solution that covers everything from planning through execution of every IT process within your business.

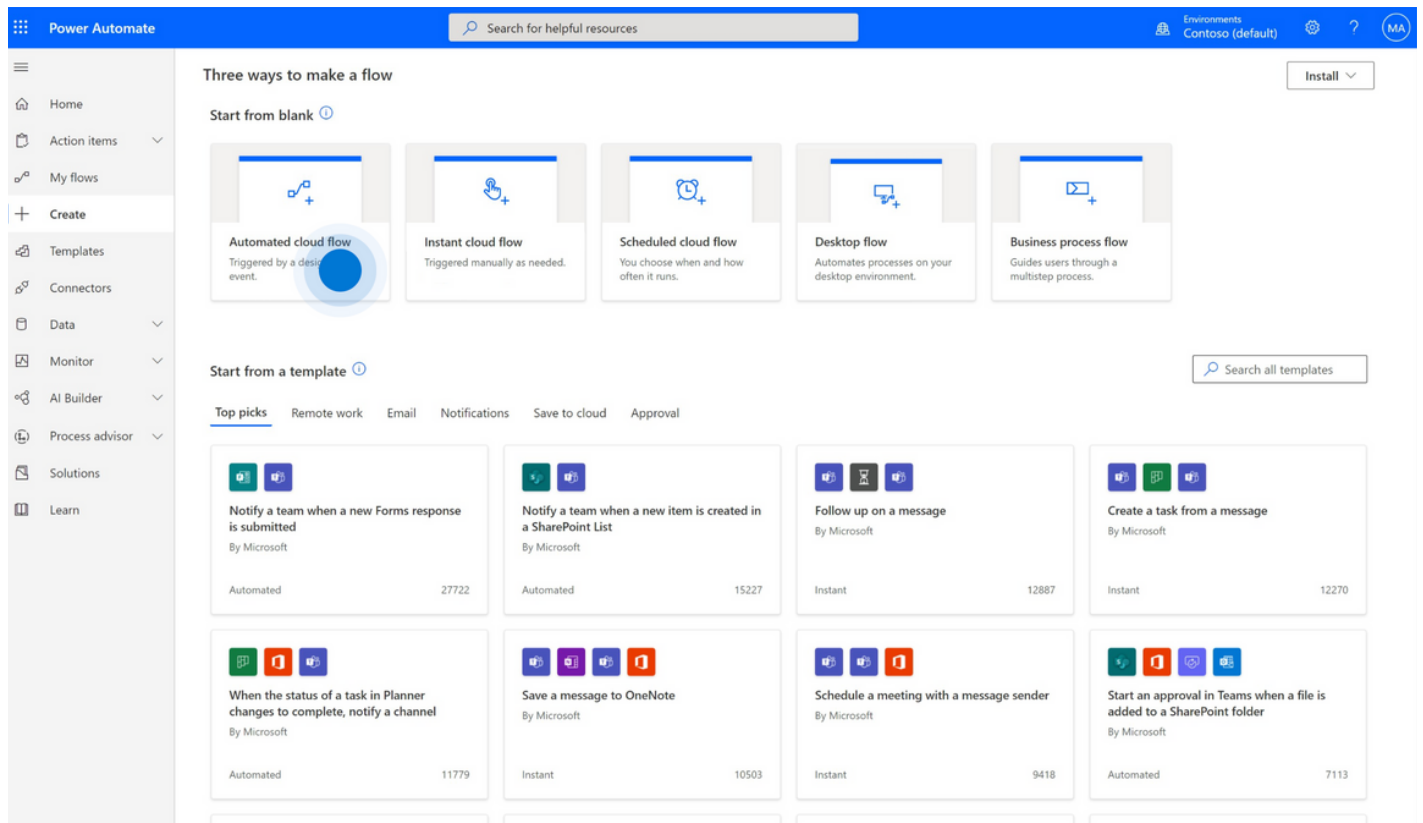


## How to optimize your signature process using Microsoft Power Automate

So you've got the green light, but this time around, you're going to do things differently. Instead of diving straight into Microsoft Power Automate like your coworkers did last year (and the year before), let's take a step back and discuss what exactly you should be doing with these tools.

First off: define the problem before starting on a solution. If your boss says they need documents signed faster than ever before and they want it yesterday, that might not actually be true. The first step in any business process optimization is understanding where there are opportunities for improvement—which can often mean looking at old processes with fresh eyes and asking questions about why things were done in certain ways in the first place.

### Power Automate User Interface

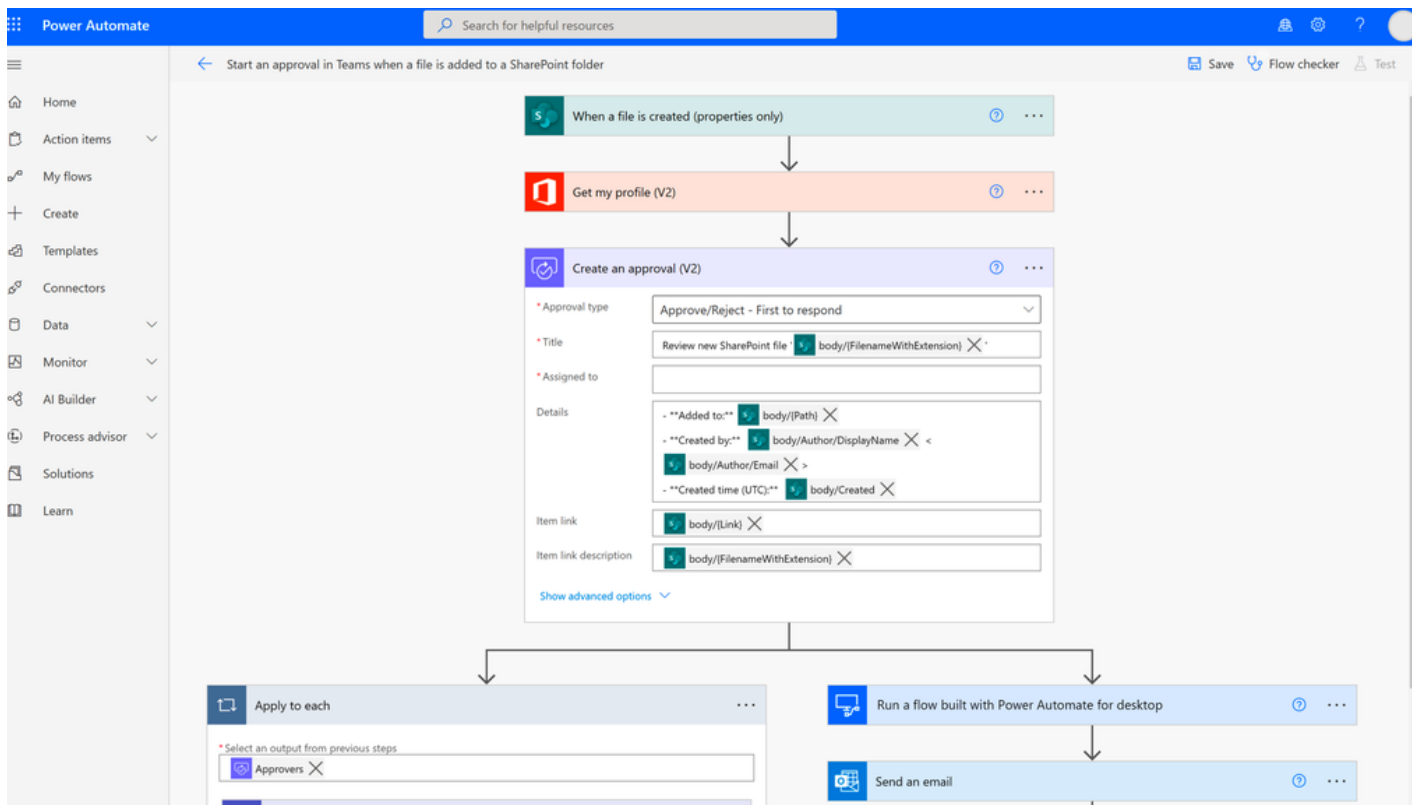


The screenshot displays the Microsoft Power Automate user interface. At the top, there is a search bar for helpful resources and a navigation bar with 'Environments' set to 'Contoso (default)'. The left sidebar contains navigation options: Home, Action items, My flows, Create, Templates, Connectors, Data, Monitor, AI Builder, Process advisor, Solutions, and Learn. The main content area is titled 'Three ways to make a flow' and includes an 'Install' button. Under 'Start from blank', there are five options: Automated cloud flow (highlighted with a blue circle), Instant cloud flow, Scheduled cloud flow, Desktop flow, and Business process flow. Below this, the 'Start from a template' section features a search bar and tabs for 'Top picks', 'Remote work', 'Email', 'Notifications', 'Save to cloud', and 'Approval'. The 'Top picks' tab is active, showing a grid of templates such as 'Notify a team when a new Forms response is submitted', 'Notify a team when a new item is created in a SharePoint List', 'Follow up on a message', 'Create a task from a message', 'When the status of a task in Planner changes to complete, notify a channel', 'Save a message to OneNote', 'Schedule a meeting with a message sender', and 'Start an approval in Teams when a file is added to a SharePoint folder'. Each template card includes a title, description, creator, and a usage count.

## Here are some useful questions to ask yourself when looking at how things are done today:

- What information is required? Could it be simplified or streamlined? Is there anything we could do without?
- How much time does each part of this process take from start to finish? Are we spending too much time waiting for approvals or struggling through manual workflows for administrative tasks? Can we streamline these areas so that everyone gets their projects completed faster without sacrificing quality or security integrity?
- Who does each part of this task require approval from? Do all those people always need access to all parts of our processes (like signing off on invoices)? Can we create more granular permissions so only certain people have access to certain pieces of data throughout our entire workflow instead

### Automated Cloud Flow



The screenshot displays a Microsoft Power Automate flow with the following steps:

- When a file is created (properties only)**: The trigger step.
- Get my profile (V2)**: A connector step to retrieve the user's profile.
- Create an approval (V2)**: An approval connector step with the following configuration:
  - Approval type: Approve/Reject - First to respond
  - Title: Review new SharePoint file `body/(FilenameWithExtension)`
  - Assigned to: (empty)
  - Details:
    - Added to: `body/(Path)`
    - Created by: `body/Author/DisplayName`
    - Created by (Email): `body/Author/Email`
    - Created time (UTC): `body/Created`
  - Item link: `body/(Link)`
  - Item link description: `body/(FilenameWithExtension)`
- Apply to each**: A loop connector step with the following configuration:
  - Select an output from previous steps: `Approvers`
- Run a flow built with Power Automate for desktop**: A connector step.
- Send an email**: An email connector step.

## Some examples of how you can use Microsoft Power Automate for your signature process

You can use Microsoft Power Automate to create a flow that automates your signature process.

### The following options are available:

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- Microsoft Power Automate workflow builder;
- Get started with the workflow builder by selecting “Create a new flow” from the File menu. You will then be prompted to select a template. Select the Microsoft Office 365 Signature Flow template, and click OK to continue.
- Microsoft Power Automate flow designer ;
- Create new flows using the Flow Designer in System Center Configuration Manager (SCCM). It provides an interface for designing and editing operations in a sequential order that describe how you want to automate your business processes through IT solutions as well as creating loops or branches based on conditions defined earlier within operations within your flow graphically represented in terms of resources involved such as sites/locations etc which might not exist yet when designing flows but still need them available during execution time of workflows created using these toolsets like SCCM solution deployment manager among others.







**Every organization runs document workflows, and there are many ways to improve them with Power Automate.**

**We at IseoSolutions are experts in creating digital workflows , so contact us if you want to improve your business processes.**

For every organization, workflows are an integral part of its operations. There are many ways you can improve your business processes by automating them with Power Automate.

At IseoSolutions our experts have created dozens of digital workflows for clients in different industries. If you want to improve your business process, contact us and we will try to help you find a solution that fits your needs!

We hope this article has shown you how Microsoft Power Automate can be used to improve your business processes. If you want to learn more about our solutions or contact us, please visit the IseoSolutions website or get in touch with us by email at [contact@iseosolutions.ch](mailto:contact@iseosolutions.ch).



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We specialize in Enterprise Information Management solutions for collaboration, document management, archiving and the optimization of document-centric business processes from the first idea to the replacement / migration of an application.

We focus on customers and prospects in Switzerland and abroad targeting small, medium and large companies with SAP®, OpenText® and Microsoft® as strategic IT suppliers.

## CONTACT US



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