POWER BI USER GROUP SESSION 7

DEC 15, 2022

Facilitated by:

Steve Dunlop

Angus McLeod

Roy Vasher

PURDUE UNIVERSITY®

Agenda

- Opening Remarks

- Introductions (new attendees)

- Recap of 1st Six Meetings' Presentations

- Multi-Level Approval Flows using Power Automate – Roxana Mack, Wabash

- 7 Tips & Tricks for Power BI– Roy Vasher

- Closing

Introductions – New Members

- Name, company, position

- Power BI knowledge and experience

No.	Type of User	Description
1	New	Never used, interested in learning how to use
2	Novice	Started to use but not created any business reports yet
3	Experienced User	Used for some time and developed business reports/dashboards
4	Power User	Expert user and/or IT Developer
5	Senior Manager	Interested in Capabilities for Business Reporting/Dashboards

Recap of Presentations To-Date

- **Session # 1: June 10, 2021**
  - Power BI Capabilities and Cost – Tom Cunningham - Evonik
  - Evonik Corporation Power BI Visual Management Solutions – Tom Cunningham - Evonik
  - New Users: How to get started – Roy Vasher – Purdue/DCMME
- **Session # 2: September 16, 2021**
  - Super User Development Cycle - Thomas Heltzel – Wabash National
  - Getting Data to the People That Need it Most– Bob Bierwagen – MPI
  - Import Analytics/EV Analytics – Steve Dunlop – Purdue/DCMME

Recap of Presentations To-Date

- **Session # 3: December 9, 2021**
  - Date Dimensions in Power BI- Vienna Kraay– Oscar Winski
  - Predictive Analytics and Power BI– John Dill– Wabash
- **Session # 4: March 24, 2022**
  - Enterprise Data Sources - Dennis Rausch, VP Information Technology, Rea Magnet Wire Company
  - Connection to real-time data to display up-to-date information - Kyle Smith, IT Supervisor, Nucor
  - Building Power BI Dashboard from a sketch - Student Project Team

Recap of Presentations To-Date

- **Session # 5: June 23, 2022**
  - Power BI Drill Through Features - Kyle Smith, Nucor
  - Demand/Supply Dashboard - Bob Bierwagen, Acuity Capital Group/ABC Metals
  - Hierarchy in Power BI for Mapping - Steve Dunlop, DCMME
- **Session # 6: Sep 16, 2022**
  - Power BI Mapping Objects, by Dennis Rausch, Rea Wire
  - Creating Predictions with What Ifs, Hannah George,
  - Power App Introduction, Roy Vasher

Link to Power BI Resources:
https://www.purdue.edu/whin/education/powerbi/index.php

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Excess & Obsolete Process

Power BI Meeting

December 15, 2022

Presented by: Roxana Mack, C. P.M.

Regional Materials Manager

Digital Transformation

Multi-Level Approval Flows using Power Automate

A Special Thank you

To Landan Perry & John Dill

For helping make this project successful.

Excess & Obsolete Process-Before

- Finance provided the list of Material to Review

- Inventory Analyst kept track in an excel spreadsheet on each departments approval or rejection.

Material	Material Description	Available stock	Total Valuated Stock	Total Value	RESULT	Sales	Aftermarket	Engineering	Purchasing	Warranty
14A00386						No current need (MW)		No Known use, SW		No warranty needs at this time....EJ
11200631						Check with transportation or materials to see if any Wabash		No Known use, SW	I think we should hold onto these due to current tire situation	No warranty needs at this time....EJ
09201263GAL						Engineering, any sub? MW				No warranty needs at this time....EJ
31200078						No current need (MW)	Do they take a charge? Sale Lot?	No Known use, SW		No warranty needs at this time....EJ
11200730						no current need (MW)			I think we should hold onto these due to current tire situation	No warranty needs at this time....EJ
06402447-08						no current need (MW)			Transglobal will not accept this return	No warranty needs at this time....EJ
9302457						no current need (MW)			Customer cancellation need to use on future builds	No warranty needs at this time....EJ
01110626						no current need (MW)		No Known use, SW		No warranty needs at this time....EJ
BK08086150						no current need (MW)	Sale Lot?	No Known use, SW		No warranty needs at this time....EJ
FF125624						no current need (MW)	Sale Lot?	No Known use, SW		No warranty needs at this time....EJ
21501365						No current need (MW)	No Need at this time - TB	Sell back to Thermo King at Reduced price	Waiting for Materials Team to verify condition of parts.	No warranty needs at this time....EJ
A1S04376						no current need (MW)		No Known use, SW		No warranty needs at this time....EJ
A1S04377						no current need (MW)		No Known use, SW		No warranty needs at this time....EJ
FN806232						no current need (MW)		Buy 10 EA23618A CTR boards & convert into ten(10) FH97618A Kits.		No warranty needs at this time....EJ
01P03962						no current need (MW)				No warranty needs at this time....EJ
09301976						sub MW		Match-up with up to 197 of the 09301977 CS for remaining trailers on New Prime, SO 43487. Will not work-No known use. SW	Requested return to Holland	No warranty needs at this time....EJ
FL150000-18						no current need (MW)		No Known use, SW	purchased as P-pap for Hydro - approved sale lot - DMC	No warranty needs at this time....EJ
FN78439C						no current need (MW)	Sale Lot?	No Known use, SW	purchased as P-pap for Hydro - approved sale lot - DMC	No warranty needs at this time....EJ
EC392794						no current need (MW)		No Known use, SW	Sale lot or scrap approved - DMC	No warranty needs at this time....EJ

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Excess & Obsolete Process-Before

Manual Tracking & Emails between multiple departments for each item.

Good afternoon everyone,

Just a friendly reminder that we have two E&O list that need completed. Please find the links to the E&O lists at the bottom of this email. Please provide feedback and write your initials so we know who to ask if there are any questions. The files can be found in the Excess and Obsolete group in teams, let me know if you have any issues opening the links or finding the files. Also, please forward this email so anyone who I might of missed.

Thank you all.

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Excess & Obsolete Process-Before

- After departmental approval a Docu-Sign document was sent out for sign-off to the same individuals.

- If over Wabash designated threshold, additional Management and Finance approval required with an additional document for them to sign-off on.

Enter items in SharePoint online site

Enter items in SharePoint online site

💾 Save   ✕ Cancel   🔗 Copy link   📝 ⌄   ✕

New item

🖼 Part Number *

> Enter value here

You can't leave this blank.

🖼 Description

> Enter value here

① On Hand *

> Enter a number

$€ Unit Price

> Enter a number

📅 Last Receipt Date

> Enter a date

📅 Last Consumption Date

> Enter a date

$€ Freight Costs

> Enter a number

$€ Total P & L Charge

> Enter a number

① Current Reserve %

> Enter a number

⊘ Plant

> —

👤 Approver ($500.01 - $1000.00)

> Enter a name or email address

👤 Approver ($1000.01 - $5000.00)

> Enter a name or email address

👤 Approver ($5000.01 - $15000.00)

> Enter a name or email address

👤 Approver ($15000.01 - $50000)

> Enter a name or email address

👤 Approver ($50000.01 - $249999.99)

> Enter a name or email address

👤 Approver >$250,000

> Enter a name or email address

📎 Attachments

> Add attachments

⇄ Apply label

> None   ⌄

Save   Cancel

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Enter items in SharePoint online site

Drop down box for Plant selection

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Enter items in SharePoint online site

Automated selection for approver email.

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Description Test

Part Number *

abc123-test

Description

Description Test

On Hand *

70

Unit Price

3.600

Last Receipt Date

12/2/2020

Last Consumption Date

11/30/2021

Total Price

$252,000.00

Freight Costs

500

Total P & L Charge

38,000

Current Reserve %

100

Plant

Goshen-WH01

Approver ($500.01 - $1000.00)

MR Mack, Roxana ✕   Enter a name or email address

Approver ($1000.01 - $5000.00)

MR Mack, Roxana ✕   Enter a name or email address

Approver ($5000.01 - $15000.00)

MR Mack, Roxana ✕   Enter a name or email address

Approver ($15000.01 - $50000)

MR Mack, Roxana ✕   Enter a name or email address

Approver ($50000.01 - $249999.99)

MR Mack, Roxana ✕   Enter a name or email address

Approver >$250,000

MR Mack, Roxana ✕   Enter a name or email address

Attachments

Add attachments

Apply label

None ⌄

Save   Cancel

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Sample Outlook email

Mon 12/5/2022 8:47 AM

Microsoft Flow <maccount@microsoft.com>

Approval Requested (If rejected please leave comment)

To   Mack, Roxana

Requested by Mack, Roxana <roxana.mack@onewabash.com>

Approval Requested (If rejected please leave comment)

Link: https://wabashnational.sharepoint.com/teams/ExcessandObsolete/_layouts/15/listform.aspx?PageType=4&ListId=2c926f90%2D3e52%2D460b%2Db67d%2Da7ef50d16a53&ID=37&ContentTypeID=0x010094AF68E0F4B2FB4CA67722D0A3B2E0E900B20F7302BDCE8B4A9E8B2F73266E07E6

Date Created: Monday, December 5, 2022 1:47 PM GMT

[Approve]   [Reject]

Expecting an actionable email? Learn more

Get the Flow app to receive push notifications and grant approvals from anywhere. Learn more

This message was created by an automated workflow in Microsoft Flow. Do not reply.
Microsoft Corporation 2022.

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Sample Teams Activity Request

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First level of approvals shows final status approved.
Note: only 1st level.

Approvals
Approval request details

Approved

Approval Requested (If rejected please leave comment)

▾ Attachments

https://wabashnational.sharepoint.c...

▾ Final status: Approved

Approved by
Mack, Roxana   12/5/2022 8:57:11 AM

Requested by
Mack, Roxana   12/5/2022 8:47:17 AM

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Next level of approval

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Activity Log in Teams

Approvals

Priority	Request title	Status	Source	Created	Sent by	Sent to
	Approval Requested (If rejected please leave comment)	Requested		12/5/2022 9:03:26 AM	Perry, Landan	Mack, Roxana
	Approval Requested (If rejected please leave comment)	Approved		12/5/2022 9:01:37 AM	Perry, Landan	Mack, Roxana
	Approval Requested (If rejected please leave comment)	Approved		12/5/2022 9:01:16 AM	Perry, Landan	Mack, Roxana
	Approval Requested (If rejected please leave comment)	Approved		12/5/2022 9:00:51 AM	Perry, Landan	Mack, Roxana
	Approval Requested (If rejected please leave comment)	Approved		12/5/2022 8:57:19 AM	Perry, Landan	Mack, Roxana
	Approval Requested (If rejected please leave comment)	Approved		12/5/2022 8:47:17 AM	Mack, Roxana	Mack, Roxana

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Outlook emails for multiple requests

Today

Microsoft Flow
Approval Requested (If rejected please leave comm...   9:04 AM
Requested by Perry, Landan

Microsoft Flow
Approval Requested (If rejected please leave comm...   9:02 AM
Requested by Perry, Landan

Microsoft Flow
Approval Requested (If rejected please leave comm...   9:02 AM
Requested by Perry, Landan

Microsoft Flow
Approval Requested (If rejected please leave comm...   9:01 AM
Requested by Perry, Landan

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Reviewing the Log

Excess and Obsolete List ★ ⊘

Part Number	Description	On Hand	Unit Price	Total Price	Freight Costs	Current Reserve %	Total P & L Char...	Last Receipt Date	Last Consumpti...	Plant
EO123456	E & O Test after Landon fixed You can appr...	10,000	$1,000.00	$10,000,000.00	$1,600.00	100%	$198.00	11/01/2020	11/02/2021	NL-3920
HDS000305	66.06ID 10GA F&D 4.00KR 2B PSIN S3	15	$609.00	$9,135.00		100%		12/13/2019		SJI-5000
1234586	testing 12-1-22	10	$500.00	$5,000.00	$0.00	100%	$0.00	12/01/2021	12/02/2021	SJI-5000
123456	TEST 2 12-1-2022	100	$2,000.00	$200,000.00	$0.00	100%	$0.00	12/01/2022	12/02/2022	SJI-5000
abc123-test	Description Test	70	$3,600.00	$252,000.00	$500.00	100%	$38,000.00	12/02/2020	11/30/2021	Goshen-WH01

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Review log for approval checkmarks

Review log for approval checkmarks

Excess and Obsolete List ★ ⊘

...	Approver ($5000.01 - $15000.00)	Approval ($5000.01 - $15...	Rejected ($5000.01 - $15000.00)	Comments ($5000.01 - $15000.00)
		✓		
Mack, Roxana		✓		

Excess and Obsolete List ★ ⊘

Approver ($15000.01 - $50000)	Approval ($15000.01 - $50000)	Comments ($15000.01 - $50000)	Rejected ($15000.01 - $50000)
	˅		
	˅		
	˅		

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Review log for approval checkmarks

Excess and Obsolete List ★ ⊘

Approver ($50000.01 - $249999.99)	Approval ($500...	Rejected ($500...	Comments ($50...
	✓		
Mack, Roxana	✓		

Excess and Obsolete List ★ ⊘

0...	Approver >$250,000	Approval >$250,000	Rejected >$250...	Comments >$250,000	Sign-off status	Created By	Created
		✓				Mack, Roxana	November 01
						Mack, Roxana	November 28
						Mack, Roxana	4 days ago
						Mack, Roxana	4 days ago
	Mack, Roxana	✓			Approved	Mack, Roxana	19 minutes ago

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Edit or Format Current View or Create New View

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Flow set-up

Flows

Cloud flows　　　Desktop flows　　　Business process flows　　　**Shared with me**

	Name		Modified	Type
	Approval-Excess & Obsolete		3 d ago	Automated

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Flow set-up

Flow set-up

If yes

Approval 500

*Approval type	Approve/Reject - Everyone must approve
*Title	Approval Requested (If rejected please leave comment)
*Assigned to	{x} Approvers 500.... × ;
Details	Markdown supported (see https://aka.ms/approvaldetails)
Item link	Link to item ×
Item link description	Plant Value × Part Number × Total Price ×

Show advanced options ⌄

Condition

Respond: Reject ✕

Overview

Approval
Approval Requested (If rejected please leave comment)

Requester
Mack, Roxana

Received
Dec 6, 06:28 AM (2 min ago)

Link
Griffin-WH31ABCTEST 12-6-22502.000000000000

Choose your response *
Reject

Add a comment
Add space between link description

Confirm   Cancel

Approval 500

*Approval type	Approve/Reject - Everyone must approve
*Title	Approval Requested (If rejected please leave comment)
*Assigned to	{x} Approvers 500.... × ;
Details	Markdown supported (see https://aka.ms/approvaldetails)
Item link	Link to item ×
Item link description	Plant Value × , Part Number × , {x} intTotalPrice ×

Show advanced options ⌄

WABASH

Rejected with comments

Approval Requested (If rejected please leave comment)

Link: Griffin-WH31ABCTEST 12-6-22502.000000000000

Rejected ($500.01 - $1000.00) ▾	Comments ($500.01 - ... ▾

Approval Requested (If rejected please leave comment)

Link: Cleburne-WH36;123-test;505

Date Created: Tuesday, December 6, 2022 12:13 PM GMT

| Approve | Reject |

Everything ran together. Needed to add   ";" between each field

Below updated and changed dollar amount to calculated integer.

Updated and added "$"

✓   Mack, Roxana:Add space between link description

Approval Requested (If rejected please leave comment)

Link: Moreno-WH41;1234-test;$505

Date Created: Tuesday, December 6, 2022 12:22 PM GMT
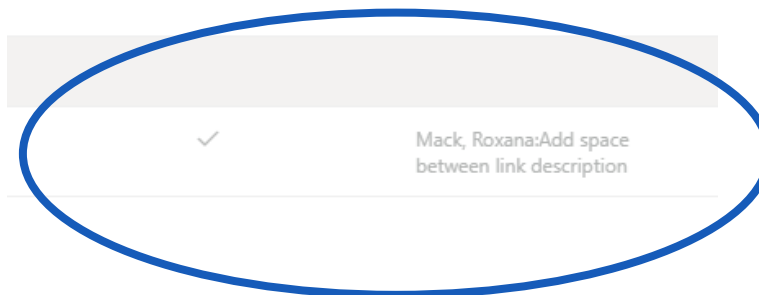
| Approve | Reject |

Respond: Approve   ✕

✓ Response successfully recorded

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Flow Set-up and run history

Flows > **Approval-Excess & Obsolete**

Details   Edit

Flow   **Status**
Approval-Excess & Obsolete   On

Owner   **Created**
Mack, Roxana   Oct 13, 03:25 PM

                                          Modified
                                          Dec 1, 10:47 AM

                                          Type
                                          Automated

                                          Plan
                                          This flow runs on owner's plan

Connections   Edit

	Approvals	Approvals	⊘
	Approvals	Approvals	⊘
	SharePoint Permissions	roxana.mack@onewabash.com	⊘
+1	Connections Multiple permissions		

Owners   Edit

28-day run history ⓘ   ↻ All runs

Start	Duration	Status
Dec 5, 08:46 AM (32 min ago)	00:17:46	Succeeded
Dec 1, 10:29 AM (3 d ago)	00:02:59	Succeeded
Dec 1, 10:23 AM (3 d ago)	00:00:03	Failed
Dec 1, 10:12 AM (3 d ago)	2d 00:26:37	Succeeded
Nov 28, 05:06 PM (6 d ago)	19:57:34	Failed

Process insights (preview) ⓘ   ↻ Refresh   ♀ Improve your flow

Average duration of your flow

04:58:10

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New Emails with description of item along with the link

Approvals
Approval request details

Requested

Approval Requested (If rejected please leave comment)

▾ Attachments

Goshen-WH01;;12345-ABC;25...
https://wabashnational.sharepoint.c...

▾ Status: Requested

Pending response
Mack, Roxana

Requested by
Mack, Roxana   12/6/2022 6:59:37 AM

Comments

Add your comments here

More actions ▾   Reject   Approve

Approval Requested (If rejected please leave comment)

Link: Goshen-WH01;;12345-ABC;252000.000000000

Date Created: Tuesday, December 6, 2022 11:59 AM GMT

[Approve]   [Reject]

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Rejected-shows in summary

Flow set-up

When an item is created	? •••
{x} 500 var	? •••
{x} 1000 var	? •••
{x} 5000 var	? •••
{x} 15000 var	? •••
{x} 50000 var	? •••
{x} 250000 var	? •••
{x} Comments var500	? •••
{x} Comments var1000	? •••
{x} Comments var5000	? •••

{x} Comments var15000	? •••
{x} Comments var50000	? •••
{x} Comments var250000	? •••
500	•••
1000	•••
5000	•••
15000	•••
50000	•••
250000	•••

{x} Initialize variable	? •••
Always	•••
greater than 1000	•••
greater than 5000	•••
greater than 15000	•••
greater than 50000	•••
Greater than or equal to 250000	•••
Final Approve Statement	•••

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Detail on Flow set-up

When an item is created

* Site Address
  Excess Obsolete -
  https://wabashnational.sharepoint.com/teams/ExcessandObsolete ▾

* List Name
  Excess and Obsolete List ▾

Show advanced options ▾

---

500 var

* Name   Approvers 500.01
* Type   String ▾
  Value   Enter initial value

1000 var

* Name   Approvers 1000.01
* Type   String ▾
  Value   Enter initial value

5000 var

* Name   Approvers 5000.01
* Type   String ▾
  Value   Enter initial value

Comments var500

* Name   Comments500
* Type   String ▾
  Value   Enter initial value

Comments var1000

* Name   Comments1000
* Type   String ▾
  Value   Enter initial value

Comments var5000

* Name   Comments5000
* Type   String ▾
  Value   Enter initial value

1000

* Select an output from previous steps
  Approver ($10... ✕

Append to string variable 4

Add an action

5000

* Select an output from previous steps
  Approver ($50... ✕

Append to string variable 5

Add an action

15000

* Select an output from previous steps
  Approver ($15... ✕

Append to string variable 7

1000

* Select an output from previous steps
  Approver ($10... ✕

Append to string variable 4

* Name   Approvers 1000.01 ▾
* Value   Approver ($10... ✕ ;

Add an action

5000

* Select an output from previous steps
  Approver ($50... ✕

Append to string variable 5

* Name   Approvers 5000.01 ▾
* Value   Approver ($50... ✕ ;

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Detail on Flow set-up

Update item 500

*Site Address	Excess Obsolete - https://wabashnational.sharepoint.com/teams/ExcessandObsolete
*List Name	Excess and Obsolete List
*Id	ID ×
*Title	Title ×
*Part Number	Part Number ×
*On Hand	On Hand ×
Unit Price	
Freight Costs	
Current Reserve %	
Total P & L Charge	
Last Receipt Date	
Last Consumption Date	
Plant Value	

Approver ($500.01 - $1000.00) Claims - 1

+ Add new item

Approval ($500.01 - $1000.00)	Yes
Rejected ($500.01 - $1000.00)	
Comments ($500.01 - $1000.00)	

Apply to each 2

*Select an output from previous steps

Responses ×

{x} COM500

*Name	Comments500
*Value	Responses App... × ; Responses Co... ×

Add an action

Update item 2

*Site Address	Excess Obsolete - https://wabashnational.sharepoint.com/teams/ExcessandObsolete
*List Name	Excess and Obsolete List
*Id	ID ×
*Title	Title ×
*Part Number	Part Number ×
*On Hand	On Hand ×
Unit Price	
Freight Costs	

Approval ($500.01 - $1000.00)	No
Rejected ($500.01 - $1000.00)	Yes
Comments ($500.01 - $1000.00)	{x} Comments500 ×

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Detail on Flow set-up

Detail on Flow set-up

If no

Apply to each 2

* Select an output from previous steps

Responses ×

{x} COM500

* Name   Comments500

* Value   Responses App... × ; Responses Co... ×

Add an action

Update item 2

* Site Address   Excess Obsolete -
                      https://wabashnational.sharepoint.com/teams/ExcessandObsolete

* List Name   Excess and Obsolete List

* Id   ID ×

* Title   Title ×

* Part Number   Part Number ×

* On Hand   On Hand ×

Unit Price

Freight Costs

Current Reserve %

Total P & L Charge

Last Receipt Date

Last Consumption Date

Plant Value

Approver ($500.01 -
$1000.00) Claims   1

Add new item

Approval ($500.01 -   No
$1000.00)

Rejected ($500.01 -   Yes
$1000.00)

Comments ($500.01 -   {x} Comments500 ×
$1000.00)

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Detail on Flow set-up- After final approval the file is updated with approved

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Training

https://learn.microsoft.com/en-us/training/modules/pad-first-steps/

Take your first steps with Power Automate for desktop 37 min Module 7 Units

https://learn.microsoft.com/en-us/training/modules/introduction-power-automate/

https://learn.microsoft.com/en-us/training/modules/get-started-flows/

https://learn.microsoft.com/en-us/training/modules/build-approval-flows/

https://learn.microsoft.com/en-us/training/modules/manage-user-information/

https://learn.microsoft.com/en-us/training/modules/multiple-data-sources/

https://learn.microsoft.com/en-us/training/modules/approvals-power-automate/

Achievements

Have an achievement code? Redeem your code now.

LEVEL 3 ▬▬▬▬▬▬▬▬ 7,000/7,999 XP

Learning Paths   **Modules, Courses & More**

BADGE
Automate an approval process in Power Automate
Completed on 6/14/2022

BADGE
Power Automate's deep integration across multiple data sources
Completed on 6/13/2022

BADGE
Build flows to manage user information
Completed on 6/13/2022

BADGE
Build approval flows with Power Automate
Completed on 5/23/2022

BADGE
Get started with Power Automate
Completed on 5/23/2022

BADGE
Introduction to Power Automate
Completed on 5/20/2022

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Questions?

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7 Tips & Tricks

1. Bookmarks
2. Drill Through
3. Date Hierarchy
4. Dynamic and Multiple Metrics
5. Forecasting
6. Roles
7. Subscriptions

https://www.bing.com/videos/search?q=%ef%83%98+7+Tips+%26+Tricks+for+Power+BI&docid=607993908794700300&mid=C0C140AEA406CB250E84C0C140AEA406CB250E84&view=detail&FORM=VIRE

Wrap Up

- Open Discussion

- Volunteers for Presenting at next meeting

- Next Meeting – March 16 at 3:00-4:00