

Copilot in Power Automate

AI-powered experiences that boost
productivity and save time

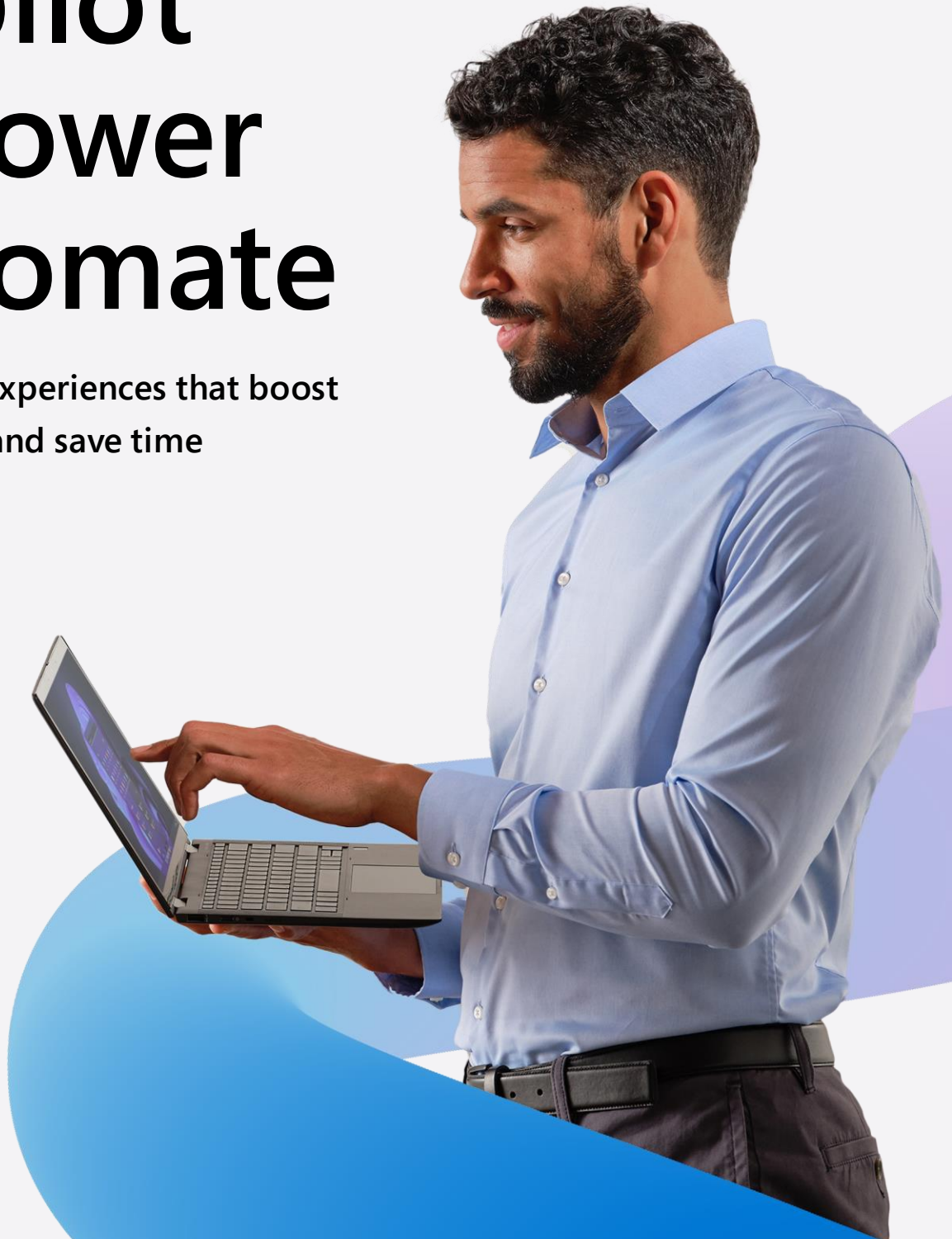


Table of contents

02

Refocus your efforts and get to innovation, faster

04

Work smarter with Copilot in Power Automate

05

Discover and optimize with task and process mining

07

Automate cloud apps, services, and data with cloud flows

10

Automate legacy systems and UI with desktop flows

14

Orchestrate and automate at scale

16

AI isn't taking jobs, it's enhancing them



Refocus your efforts and get to innovation, faster

With the ever-increasing rate of change and businesses incorporating AI across an array of products and services, organizations need to be able to keep pace with—or even get ahead of—their competition. In 2023, Microsoft introduced Copilot, an AI-powered agent, across a range of experiences.

Using generative AI, Copilot empowers its users to accelerate innovation and increase proficiency. While it continues to be integrated across Microsoft 365

products and services, such as Microsoft Teams, SharePoint, Excel, Word, and more, it has also been integrated into business applications like Dynamics 365 and Microsoft Power Platform, a suite of products powered by low code and AI that enable app development, analytics and insights, chatbots, process automation, and more.



With Copilot...

77%

of people don't want to go back to working without it

70%

said they were more productive

22%

of users reported saving more than 30 minutes per day.¹

Microsoft Power Automate—part of Microsoft Power Platform—is the engine that connects processes across multiple systems to streamline operations. Power Automate is your centralized, comprehensive automation platform that allows you to simplify complex processes and tasks with the power of low-code and AI. You and your organization can utilize Power Automate to achieve several core capabilities, including:

Improve processes

By optimizing your processes with Power Automate, you can more easily uncover automation opportunities and more that take your processes to the next level.

Increase efficiency

Both digital process automation (DPA) and robotic process automation (RPA) allow you to streamline productivity across modern and legacy systems.

Integrate seamlessly

Built-in governance and data loss prevention (DLP) ensures your automations run securely and at scale across your organization.

93%

of Fortune 500 companies
use Power Automate.²



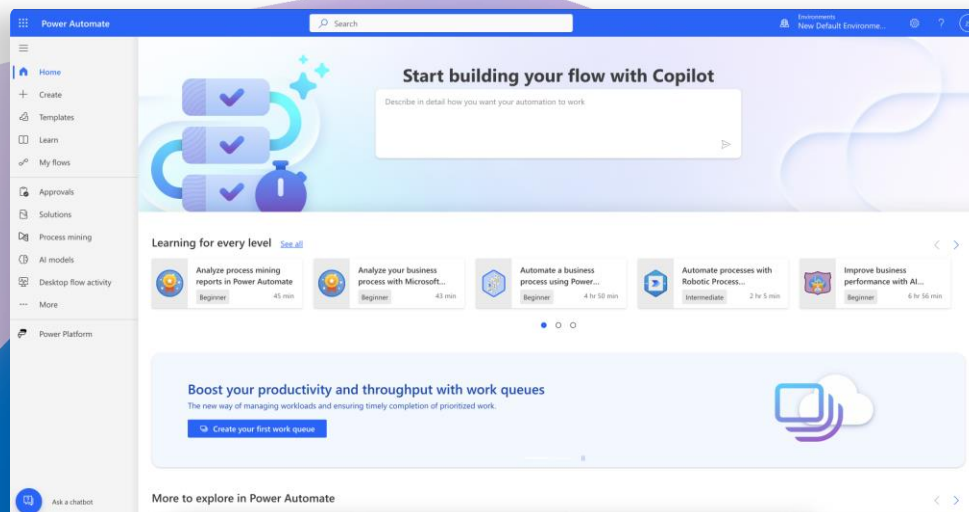
Work smarter with Copilot in Power Automate

Now, Copilot has been weaved into Power Platform, including Power Automate. With this new integration, you can use Copilot to discover, automate, orchestrate, and optimize processes more efficiently and intelligently than before. This empowers users, business analysts, developers, and admins to increase proficiency and have more time to do even greater work.

Copilot in Power Automate allows people and machines to work together by using a language that is naturally understood by both, eliminating the need for special knowledge. This helps make automation more intelligent and reimagines the traditional experience through the broad initiatives of generative

AI. These experiences have been integrated to enable businesses to save even more time, money, and eliminate frustrations on a day-to-day basis.

Users can engage Copilot in Power Automate across multiple experiences. They can use natural language to describe what they want to accomplish and then move on to next steps by leveraging its responses. For instance, Copilot can be utilized when creating automations, known as flows, in Power Automate and even for process optimization with process mining. These are only a couple of examples, as you'll learn more about its extensibility in the rest of this whitepaper.



Discover and optimize with task and process mining

Power Automate Process Mining utilizes data from various sources, such as IT systems and desktop capture, to visualize the actual process, extract insights, and identify inefficiencies and improvement opportunities. It gives the ability to drill down into your data and the processes that it follows, such as the automation you've created. There are two ways to do this: process mining and task mining. The core function of process mining involves extracting data from systems of records (SOR) or other sources. On the other hand, task mining captures user interaction or desktop data, enabling businesses to analyze and enhance their work processes. Users initiate the recording of small processes or tasks, often in conjunction with process mining for a comprehensive perspective.

By gaining what you could call an x-ray of your business, you gain insights into what those processes look like and most importantly, where bottlenecks exist and where rework is happening. Once bottlenecks and inefficiencies are identified, a plan can be prepared to address and alleviate these issues. However, the process of data analysis and reporting can be lengthy—often a period of three-to-four

months—to understand what's happening in the existing processes using traditional techniques. By leveraging Copilot in Power Automate Process Mining, you can achieve the same results in just three-to-four clicks.

Looking at a standard scenario, we can outline it this way:

- Organization A opens a purchase order within their system of 30,000 chairs. This order needs to be approved.
- Once this order is approved, the supplier will need to receive the approved purchase recognition.
- When the supplier receives this, an invoice will be generated and sent back to Organization A for another approval process.

Yet, within this process there are several pieces that need to be tailored, dependent on factors like varying tax codes in different areas that may create the need for the process to deviate. This is just one example of process mining and the types of details that need to be identified and drilled down into.

Use Copilot in Power Automate Process Mining

Identifying opportunities in your business to optimize your automation and workflows is crucial to gaining efficiency and driving higher results. We can look at an accounting department as an example. Being able to find out how much time is being spent on and the dollar amount of invoices that get stuck—or bottlenecked—at certain times or steps, helps you learn where you may be losing money and increasing work.

You can quickly and easily identify opportunities such as this simply by selecting the provided prompt, “Top insights,” or type it in on your own in the chat box. Examples of top insights Copilot can provide are:

- The longest running activity or bottleneck in the process
- The activities with the most repetitions
- And the mean, median, and max duration of cases.

The overarching benefits of leveraging Copilot in process mining can be explained as follows:

Expedite your process mining time or experience.

The average length of time it takes to perform process mining—without the help of AI tools like Copilot—can be anywhere between three-to-four months. However, when you prompt Copilot within your process mining actions, you gain a significant amount of time.

Seamless solutioning against bottlenecks.

By leveraging Copilot, process mining data analyses can not only identify broken processes easier and

faster, but also create solutions to those bottlenecks at an even an even faster rate than ever. When prompted to identify the inefficient processes, Copilot will then automatically offer an app or flow to be implemented via Microsoft Power Apps or Power Automate (these will be discussed later).

Being able to effectively measure ROI of automation or process changes.

Going back to our accounting example, being able to quickly identify where bottlenecks are happening allows businesses to identify opportunities to make alterations to their existing processes. They can take what they’ve found and implement the suggested flow from Copilot, and handle invoices at a faster rate.

Process mining is just the tip of the spear though, making way for you to better identify how to leverage the rest of the Power Platform to optimize the way you work.

Learn more about using [Copilot in Power Automate process mining](#).



Automate cloud apps, services, and data with cloud flows

Cloud flows, powered by digital process automation (DPA), is a core automation capability of Power Automate. With cloud flows, users can leverage over 1,000 API connectors or even create their own API connector to automate with logic-based automation. And with built-in integration across the Microsoft ecosystem, like in SharePoint, Microsoft Teams, OneDrive, and even Dynamics 365, automation is available in the flow of work.

There are almost limitless ways to use cloud flows—it just depends on the need and your imagination. However, there are some common use cases and groupings that we can consider, especially if you're just getting started with cloud flows and need some inspiration.





Personal productivity

Most employees spend a large portion of their day just communicating, whether it's through chat or email. Cloud flows can help unburden some of the more repetitive and perfunctory communication. For instance, you can use cloud flows to automatically respond to any calendar invite that doesn't have an agenda and request an agenda for the meeting. You can also automate sign-off requests such as needed approvals for vacation requests or expense reports. This allows you to spend less time doing the repetitive and more time focused on essential work and tasks.



Business approvals

Within SharePoint, you can create cloud flows that allow for automated document approval. You can easily create a cloud flow that establishes a process for when either any document or a certain document type is uploaded to SharePoint, it is sent for approval to the appropriate recipients.



Back-office automation

Organizations often need to manage a large volume of clerical but essential documents, such as invoices and claims. The process of managing these essential documents can often be both overwhelming and disorganized. Cloud flows eliminate the complexity, allowing the automated processing of any document type. Besides over 1,000 different connectors, including Adobe, Google Drive, Salesforce and SAP, cloud flows also include AI Builder, which allows you to embed AI directly within the automation. This means, regardless of where your document types need to go or be processed through, cloud flows can help assist and automate this process.

Use Copilot in cloud flows

By utilizing Copilot in cloud flows, users can use natural language to describe what automation they want to create, and Copilot will build it for them. Additionally, once an automation is built, users can continue engaging Copilot to refine what they've created and gain insights into their automation. Regardless if you are a professional developer or non-coder, using Copilot simplifies the experience and helps you focus on building solutions faster.

There are a few ways you can engage Copilot in cloud flows:

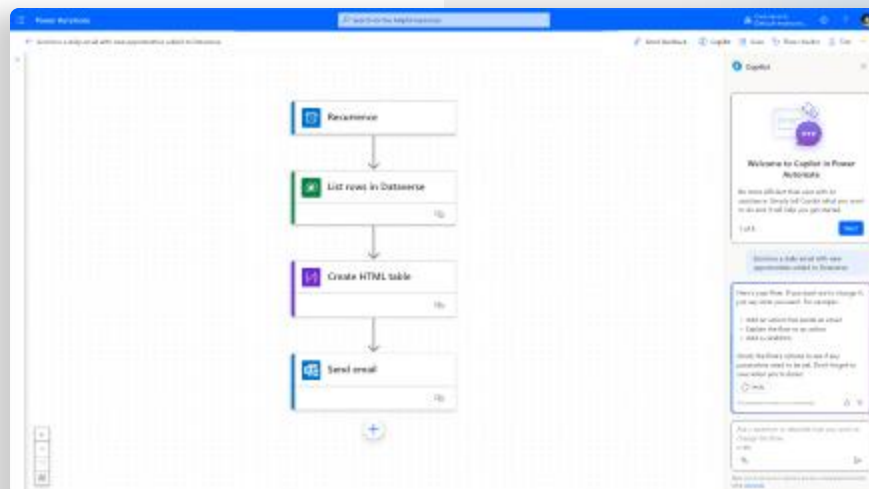
- **Create a flow:** Relay what you'd like to accomplish with your flow or describe a scenario and a flow will be created. If you're unsure of how to engage Copilot in this way, check out these best practices on "How to write a good prompt."
- **Modify a flow:** Update flows based on what you tell Copilot you'd like to see change about the flow.
- **Understand a flow:** Dig deeper into the flow by asking Copilot questions about the flow itself, like what the flow accomplishes.

Extend your cloud flow automation with custom agents

The new Microsoft Copilot Studio lets makers create custom agents that can trigger cloud flows to run, enabling extensions of your workflows and automations—without even writing any code. To learn more, [visit Microsoft Copilot Studio](#).

Overall, Copilot in cloud flows is designed so you can start automating faster and easier and ensure you're receiving value from the automations that Copilot assists in building.

Learn more about [how to get started with Copilot in cloud flows](#).



Automate legacy systems and UI with desktop flows

Desktop flows—powered by robotic process automation (RPA)—are another essential part of the core automation capabilities of Power Automate. With desktop flows, users can automate the UI of a desktop by acting as if an actual human user was interacting with it. Users create and refine desktop flows in Power Automate for desktop, which is available in the Microsoft Store for Windows 10 and comes out-of-the-box in Windows 11. Desktop flows are ideal for systems that are not reinvesting in a re-architecture effort to modernize, or if there is too much difficulty to lift and shift for a migration to the cloud.

Desktop flows can be run in either attended or unattended mode. Attended mode executes the automation when manually triggered, while unattended mode executes when a certain event or time takes place. Users can even choose to run a desktop flow from within a cloud flow, enabling greater synergy between API and UI-based automation (we'll share some more later in this white paper).

There are some standard use cases when it would be good to bring desktop flows into play. For instance,

the use of a web form in which data is being manipulated. Desktop flows can assist with data:

- Entry
- Extraction
- Migration
- Synchronization
- Backup and restore
- Cleansing
- Analysis

When considering attended versus unattended desktop flows, a clear example of attended automation would be a receptionist wanting to automate the process of checking in for a client or customer. They can offload this task to a bot, having the bot collect credit card information, see if they are enrolled in a loyalty program, etc. This collection of important data is easily taken over by the bot, allowing the receptionist to expedite the process and gain valuable time back.

T-Mobile™

Process in real time and focus on the strategic

A prime example of the power of desktop flows is when United States telecommunications company T-Mobile needed to integrate a key application with Sprint's back-end system, following a merger of the two companies.

T-Mobile had already been using Power Automate cloud flows, but they wanted to use Power Automate for desktop to roll out a solution, which they were able to do in just weeks. This resulted in quickly eliminating data lags and moving the integration of T-Mobile and Sprint forward. As a result, they were able to improve processing time and data accuracy. Some key numbers from the update include:

11x more requests processed in real time

12x improvement of the averaging processing time

0% human data entry errors

All of this meant that data analysts now had more time to focus on strategic projects, ultimately improving their job satisfaction.

Read the full [Power Platform customer story](#).

Use Copilot in Power Automate for desktop

Copilot functionality is also available for desktop flows in Power Automate for desktop, enabling natural language capabilities so makers can more proficiently build desktop flows.

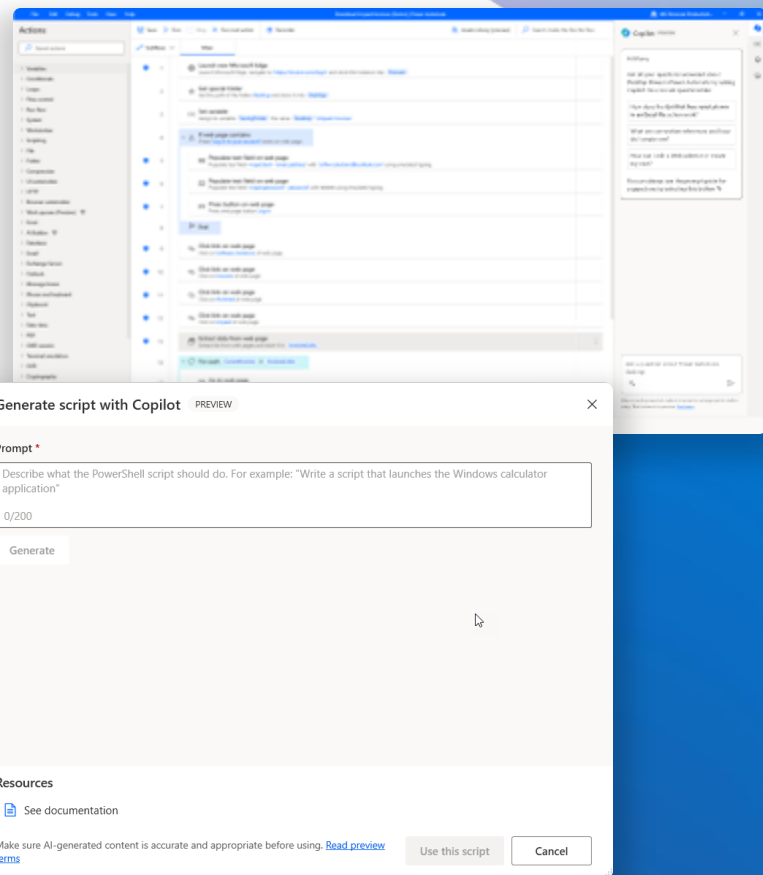
There are two important elements to Copilot in Power Automate for desktop:

Generative answers

In both the console and designer, users can [ask Copilot product-related questions](#) right from within the product, so they do not need to switch context. This puts the question-and-answer functionality right in front of the user and helps streamline the creation and updating of flows.

Natural language to code in scripting and database actions

[Copilot is included in five of the scripting actions](#)—Run PowerShell, Run VBScript, Run JavaScript, Run DOS command, Run Python, and Execute SQL statement—meaning that natural language prompts can be used to generate code in each one of these scripts. While not all languages are supported currently by Copilot, more are being continuously introduced.



Automation is not an island

Using cloud flows and desktop flows together

While the distinction has been made between cloud flows and desktop flows, the goal for both is the same—automation and efficiency. And of course, the real elevated automation happens when the two forms of automation are combined, creating hyperautomation, ensuring that processes are as automated and orchestrated as much as possible.

For automation to be truly beneficial, it needs to not exist in a bubble but connect to the data that informs what it does, as well as connect to the processes that need updating and efficiency. Ultimately, it's important to bring automation to where the user is operating and working. That's why we have integrated automation experiences into Microsoft Teams, SharePoint, Excel, and even third-party services like Adobe Acrobat Sign, so that users can set up workflows right in the context of their work.

Let's look at an example of extensibility in action.

KOMATSU

Komatsu Australia, an Australian subsidiary of Komatsu, an industry-leading manufacturer of construction, forestry, and mining equipment, needed to streamline manual processes involving almost **52,000 invoices annually**. The manual process required review by one of three team members, manual entry into Excel, validation against other Excel spreadsheets, uploading into a web portal, and then finally entered once more into a mainframe system. If there were any hiccups along this process, it would cause a ripple effect that ultimately impacted the customer experience.

Fortunately, cloud flows were able to take the process off the employee's hands, moving the necessary documents from Outlook to a SQL database, and even connect to desktop flows. This resulted in approximately 1,100 invoices processed in just 3 weeks and an estimated **300 work hours saved per year**.

Read the full Power Platform customer story [here](#).

Orchestrate and automate at scale

As you scale adoption of the platform, you'll need to ensure your system is managed and governed according to your organization's priorities. This is where an [Automation Center of Excellence \(CoE\)](#) comes in.

The Automation CoE is dedicated to overseeing, enabling, managing, and optimizing the deployment of automation technologies and processes, so that automations can be run safely and efficiently. It's able to accomplish this by employing:

Governance

Security, data integrity, auditing. This ensures that only the right people have access to specific data that's governed in a specific way to avoid unnecessary risk to the organization.

Repeatable patterns and templates

Error-handling, instrumentation, components. This helps to avoid duplication and rework and enables everyone to reap the benefits of automation with the least amount of effort.

Consistent benefits realization

KPIs/tracking/metrics, process rationalization. These define strategic benefit indicators, track and measure return on investment, and ensure processes being

automated are optimized.

Within the Power Automate portal, there is a specific desktop flow activity section where you can view and manage dashboards, tables, and graphs to monitor your desktop flows, see how effective they are, and identify any potential issues. Ultimately, desktop flow activity allows you to dig deeper into your data, including last runs, where you can see the number of runs, the percentage of errors, and the run modes.

There are several scenarios we can look at to help best understand how orchestration and automation within the organization works. These include:

- Desktop flow run queues
- Work queues
- Hosted machines

Desktop flow run queue orchestration is a process that manages the execution of multiple desktop flows in a coordinated manner, resulting in increased efficiency and productivity. Orchestrating multiple desktop flows can help increase efficiency of resource allocation. Users also will experience reduced wait times of critical tasks, increased scalability for large volumes of desktop flows, and enhanced visibility with real-time monitoring of the desktop flows that are running for immediate action if needed.

Work queues help to improve efficiency, scalability, and resiliency of automations. These benefits are accomplished by decoupling different areas of a process, prioritizing work, and allowing asynchronous communication between digital workers, human workers, and integrations.

With *hosted machines*, developers are provided with a way for quick and simple builds, testing, and the ability to run desktop flows without physical machines. You can connect or link work or school accounts that are set up with Microsoft 365, SharePoint, or Azure; your own virtual network to communicate with each other, the internet, or on-premises networks; or personalize your hosted machines with vanilla or custom virtual machine images.

This all stacks up and lends to application lifecycle management (ALM). ALM can be supported through the entire suite of Power Platform solutions, as proper ALM requires many moving parts and a great deal of synchronicity. Power Platform solutions are what drive ALM and what allow you to effectively implement ALM. Power Automate flows, like desktop flows, are a component of the Power Automate solution that you can customize, and also a component that can be managed by ALM by having it reviewed and then pushed to production.

Learn more about [ALM with Power Platform](#).

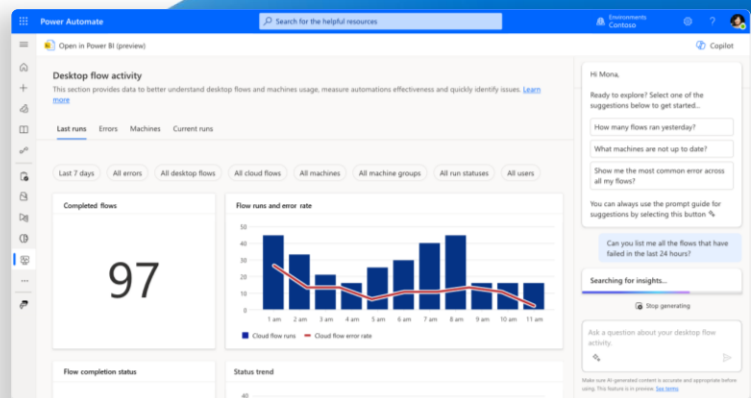
Use Copilot for orchestration

Copilot helps Automation CoEs and individuals on their journey to operational excellence by securely and responsibly democratizing access to automation insights. Users can ask Copilot about desktop flow activity-specific questions in natural language, potentially uncovering bottlenecks, trends, and opportunities for improvement that might otherwise have gone unnoticed.

With Copilot in Power Automate, Automation CoEs are experiencing the above benefits, while capabilities are heightened for ultimate efficiency and experience by:

- Democratized access to insights at scale
- Improved troubleshooting experience and time to fix
- Reduced ad-hoc user inquiries and custom report requests
- Accelerated time to insights
- Driven innovation and improvement

Learn more about [analyzing desktop flows](#).



AI isn't taking jobs, it's enhancing them

Across each of these experiences of Copilot in Power Automate, it may feel like AI is eliminating essential work previously done by humans. However, utilizing these incredible technologies to run more efficient processes doesn't mean computers are taking over the world. Rather, the world of AI and Copilot empowers users to do more with the time their getting back.

Copilot isn't just a fast way to get technical answers to your most pressing questions, but it's also a learning tool. For example, someone working within Power Automate Process Mining may want to pull a summary report, but they may also want to understand how that summary report was generated. Utilizing natural language, the user can ask Copilot how to achieve something, and the produced response will be a step-by-step guide on how that person can manually achieve the same results.

Overall, using Copilot in Power Automate can help you discover and optimize your processes with process mining, create automation across API connectors and your desktop's UI, and orchestrate and manage those automations faster than before with insightful analytics. This is just the start of what Copilot can do. Microsoft continues to innovate and improve Copilot to ensure your organization is equipped with the latest capabilities.

Visit make.powerautomate.com to get started with Copilot in Power Automate today! To learn more, visit the resources on the next page.

Learn more

Watch these videos:

[Copilot in Power Automate](#)

[Microsoft Copilot](#)

Check out this documentation:

[Copilot in cloud flows](#)

[Copilot in Power Automate for desktop](#)

[Copilot in Power Automate Process Mining](#)

[Copilot in orchestration](#)



Citations

- 1 2023 Work Trend Index Special Report
<https://www.microsoft.com/en-us/worklab/work-trend-index/copilots-earliest-users-teach-us-about-generative-ai-at-work>
- 2 Microsoft research, September 2023

