

DATA FOR THE HYPERAUTOMATION SERIES

Hi,

This step-by-step manual will show you how to create the data that I will also use throughout the entire Hyperautomation series.

Should anything be unclear, let me know down in the video comments!

Good luck and have fun!

All the best,

Jochen

IMPORTANT DISCLAIMER NOTE:

This manual was created at the end of May 2025.

Microsoft tends to change things from time to time. So depending on when you use this, some things might be called differently or look somewhat different.

As you will understand, this is out of my control. BUT, if that is the case, feel free to leave a comment on the video and I will update this manual if needed. Thank you!

OneDrive

We will be using OneDrive in episode 1 and 5, but no real data preparations have to be made here. We will only be using the CurrencyRates.xlsx file that you can also find in this ZIP-download.

SharePoint

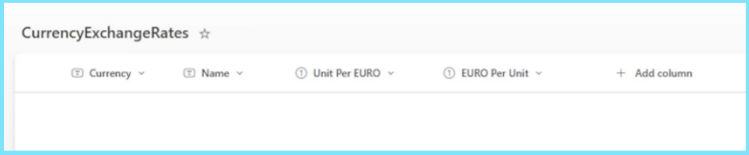
When you have created a Teams like I do in the first video, you will automatically have a SharePoint site that comes along with that.

That is the site that I have used in the videos, but feel free to use any site that your user has access to.

On that site, create these lists:

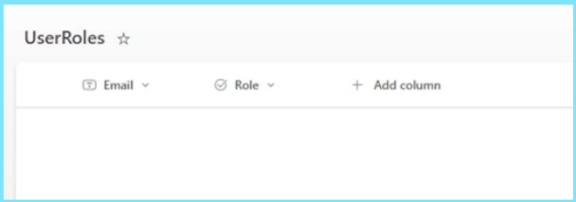
LIST “CurrencyExchangeRates”

- Start from Blank List
  - Default “Title” column on SharePoint → we don’t use it, so maybe just hide it
  - New TEXT type column: “Currency”, all default settings
  - New TEXT type column: “Name”, all default settings
  - New NUMBER type column: “Unit Per EURO”, all default settings, 5 decimals
  - New NUMBER type column: “EURO Per Unit”, all default settings, 5 decimals



LIST “UserRoles”

- Start from Blank List
  - Default “Title” column on SharePoint → we don’t use it, so maybe just hide it
  - New TEXT type column: “Email”, all default settings
  - New CHOICE type column: “Role”, all default settings, with options:
    - CallAgent
    - Engineer
    - Administrator



Dataverse

Make sure you create these tables in a Dataverse-enabled environment that user your user has access to.

Table “HA_Customer” (1/2)

- “HA_Customer” because the default “Customer” table might already exist
- Before creating table → change the Primary column:
  - Rename to “CustomerNumber”
  - Optional requirement
  - Max char count = 10
- After creating table→ edit the Primary column:
  - Set data type to Autonumber instead of Single Line of Text
  - Autonumber type = String prefixed number
  - Prefix = CUST
  - Minimum number of digits = 5
  - Seed value = 1



Table “HA_Customer” (2/2)

- New “Single line of text” column “Firstname”, all default (required = optional)
- New “Single line of text” column “LastName”, all default (required = optional)
- New “Single line of text” column “Address”, all default (required = optional)
- New “Single line of text” column “Phone”, all default (required = optional)
- New “Single line of text” column “NationalRegNumber”, all default (required = optional)
- New “Single line of text” column “Email”, Business Required, Format = Email
- New “Single line of text” column “DesiredCurrency”, Business Required
- New “Choice > Yes/No” column “IsApproved”, Business Required & default choice = No

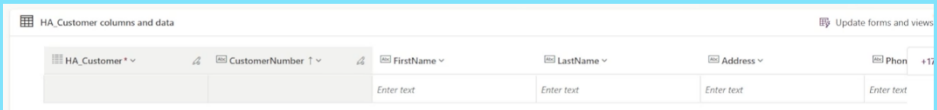


Table “HA_RegionAssignment”

- Before creating table → change the Primary column:
  - Rename to “ResponsiblePersonEmail”
  - Leave at the default settings (so Business Required)
- After creating table→ add a new column “Region”:
  - Type “Choice”
  - Default settings apart from being Business Required
  - Link it to a new Choice you create called “HA_Region” with options:
    - Europe, US & Other
  - Default choice doesn’t matter

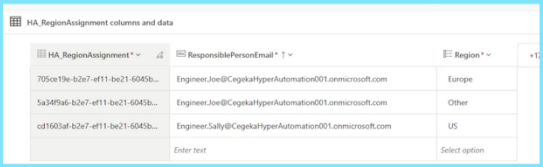


Table “HA_Ticket” (1/3)

- “HA_Ticket” because the default “Ticket” table might already exist
- Before creating table → change the Primary column:
  - Rename to “TicketNumber”
  - Optional requirement
  - Max char count = 12
- After creating table→ edit the Primary column:
  - Set data type to Autonumber instead of Single Line of Text
  - Autonumber type = String prefixed number
  - Prefix = TICKET
  - Minimum number of digits = 5
  - Seed value = 1



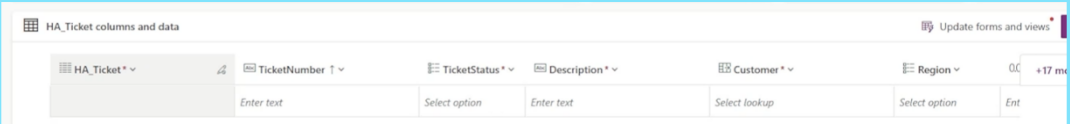
Table “HA_Ticket” (2/3)

- New “Choice > Choice” column “TicketStatus”
  - Default settings apart from being Business Required
  - Link it to a new Choice you create called “HA_TicketStatus” with 5 options:
    - Created, Estimated, Approved, Ongoing & Completed
  - Default choice = Created

- New “Multiple lines of text” column “Description”, all default (required = optional)
- New “Lookup” column “Customer” → linked to the created “HA_Customer” table, Business Required
- New “Choice > Choice” column “Region” → linked to the created “HA_Region” choice, Business required

Table “HA_Ticket” (3/3)

- New “Number > Decimal” column “EstimatedCost”, all default (required = optional)
- New “Number > Decimal” column “EstimatedCostEURO”, all default (required = optional)
- New “Multiple lines of text” column “EngineerComment”, all default (required = optional)
- New “Single line of text” column “EnginerAssignedTo”, format = Email, required = optional



Good job! You have now successfully created the data you need for this series, have fun!