Power Automate for health and care

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Welcome

- this session is 🥕 - for beginners

- we'll get going properly at 13.05

- if you can't access the chat, you might need to join our Teams channel: tinyurl.com/kindnetwork

- you can find session materials at tinyurl.com/kindtrp

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The KIND network

- a social learning space for staff working with **k**nowledge, **i**nformation, and **d**ata across health, social care, and housing in Scotland

- we offer social support, free training, mentoring, community events, …

- Teams channel / mailing list

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KIND training sessions

Session	Date	Area	Level
Power automate for health and care	13:00-14:00 Thu 8th August 2024	Data	🔪 :beginner-level
Relative, absolute, mixed, structured, and R1C1 references in Excel	15:00-16:00 Thu 8th August 2024	Excel	🔪🔪 : intermediate-level
Neural nets made ridiculously simple	13:00-14:00 Mon 12th August 2024	AI/ML	🔪 :beginner-level

Session outline

- a warning

- an introduction

- scope of the possible

- three example tasks

- free play

A word of warning

> ⚠️ **Warning**
>
> Do not use Power Automate for anything unless you're absolutely sure that your organisational policies permit it

Quick introduction to Power Automate

- Power Automate is a set of low-code automation tools

- allows users to automate tasks

- lots of options

  - web and desktop versions

  - several different subscription levels

  - hundreds of add-ons

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Scope of the possible

- Power Automate is an extremely useful tool for H&SC

- but you should be aware of some complicating factors for people like us:

  - massive and confusing range of different templates and use-cases, often with a business-focus

  - a thick layer of promotional AI talk over everything at present (late 2024)

  - unexpected cost/IG barriers to using parts of the platform

  - glitchy, and often requiring more coding skills than you might expect

  - generally shockingly poor documentation

This session = honest, application-focused, introduction

- we'll build three example flows that will:

    1. take an Excel workbook, extract some parts of it, and save as a new Excel file

    2. turn a response to Microsoft Forms into a Teams post

    3. turn an Excel workbook into a simple mailing list

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Subset an Excel file

- you'll need a sample data file - I used this open data about council assets from Falkirk

- I coverted the data to a table, then saved the workbook to OneDrive

- New flow > Instant cloud flow
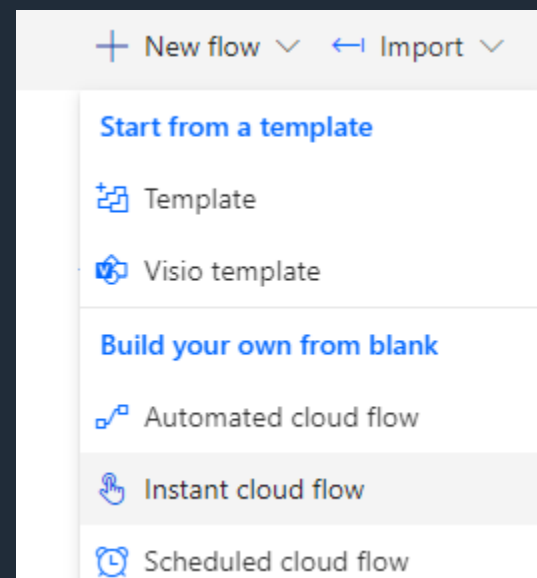
Subset an Excel file

- Manually trigger a flow
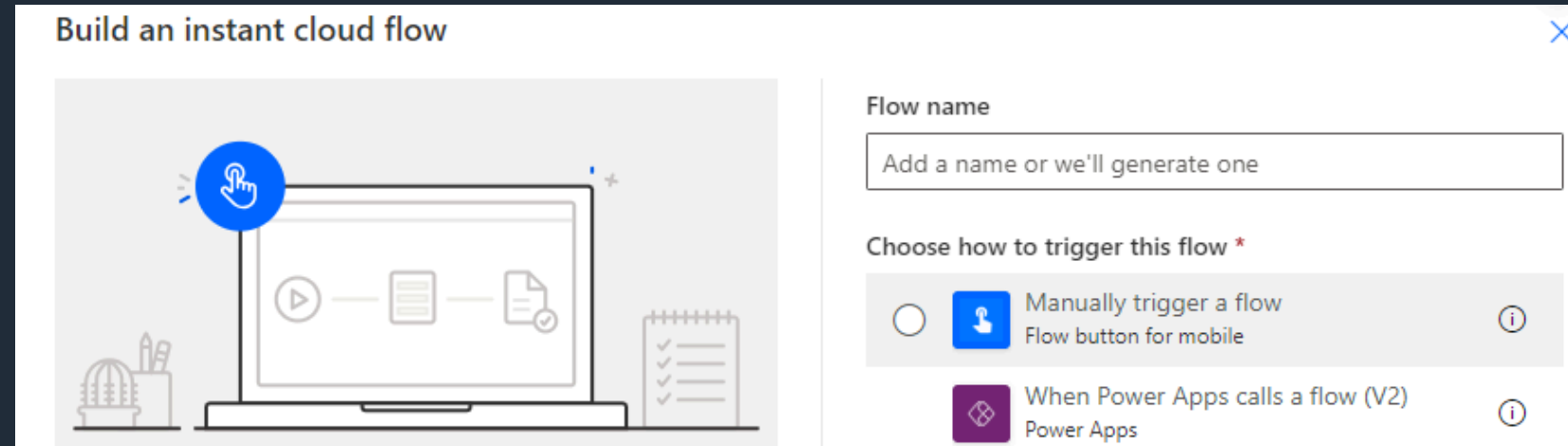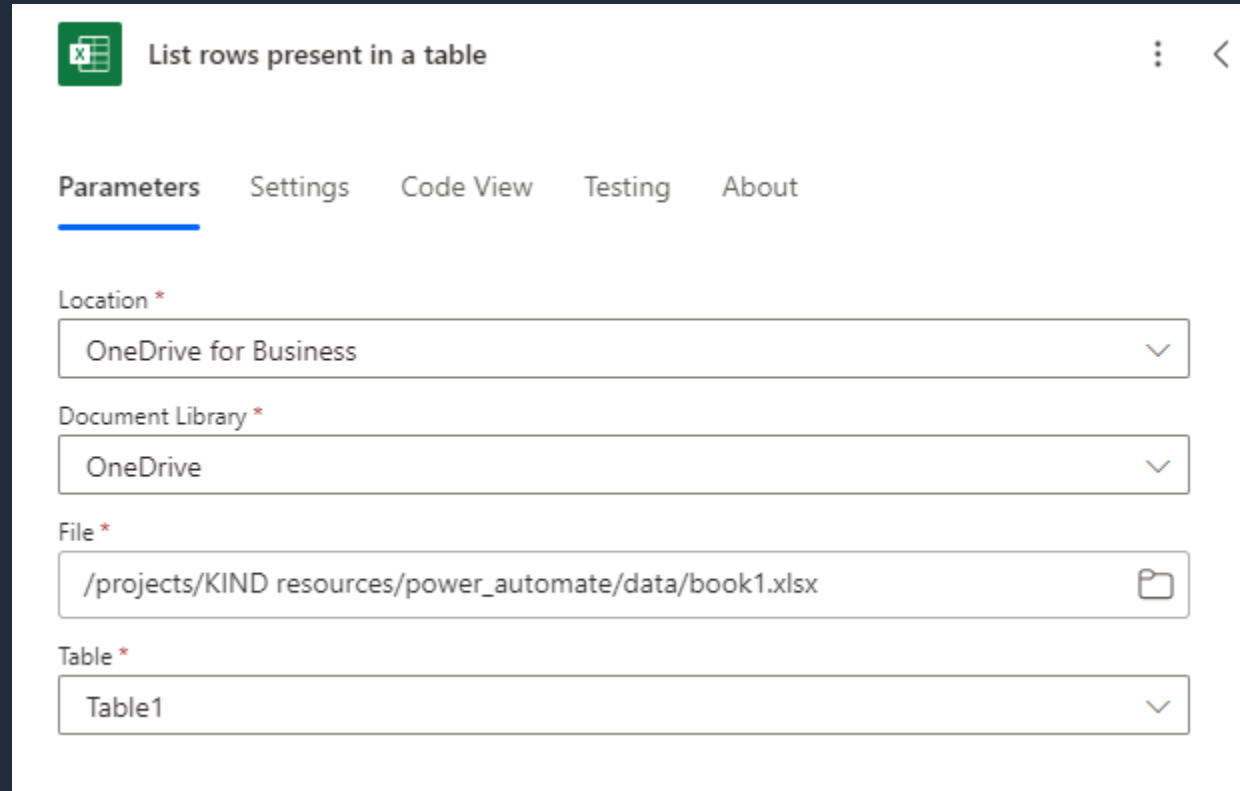
Subset an Excel file

- Add a step
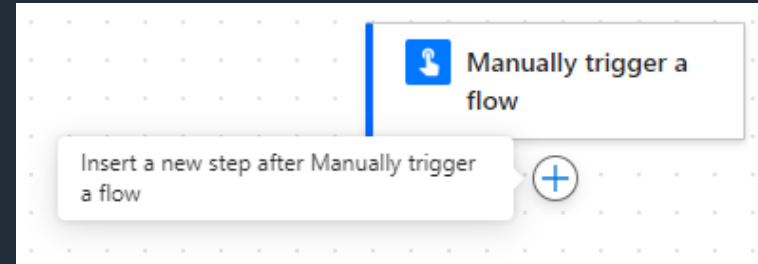
Subset an Excel file

- `Excel online > List rows present in a table` and populate

Subset an Excel file

- there are several ways we could subset the data

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Subset an Excel file

- we'll demonstrate by taking the first 20 rows

Top Count

20 ✕

Subset an Excel file

- Create csv table

Subset an Excel file

- Create file

Microsoft Forms to Teams

- here's an overview

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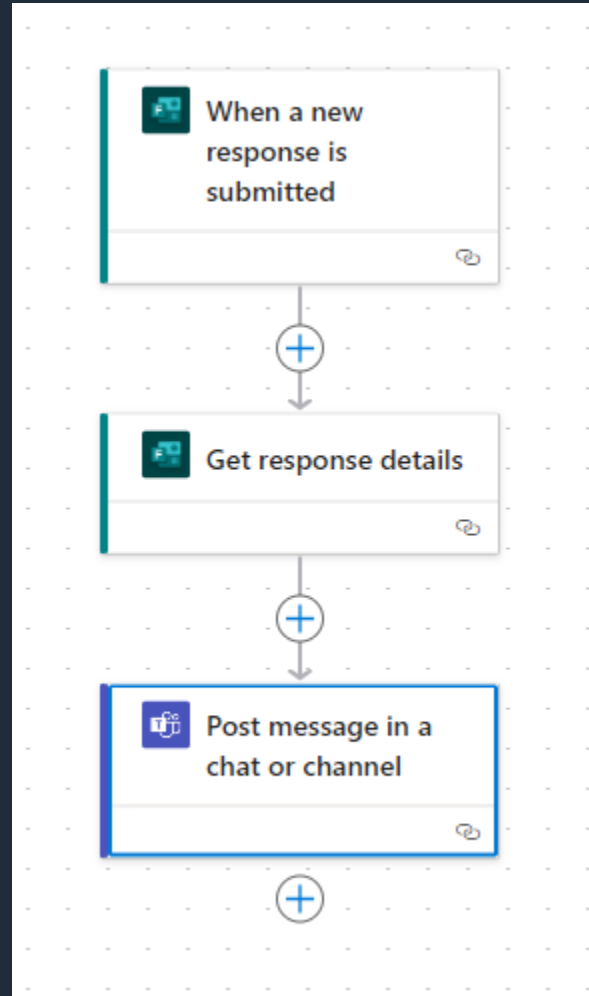
Microsoft Forms to Teams

- create a simple form (ours is at https://forms.office.com/e/8Zds2aTS5c)
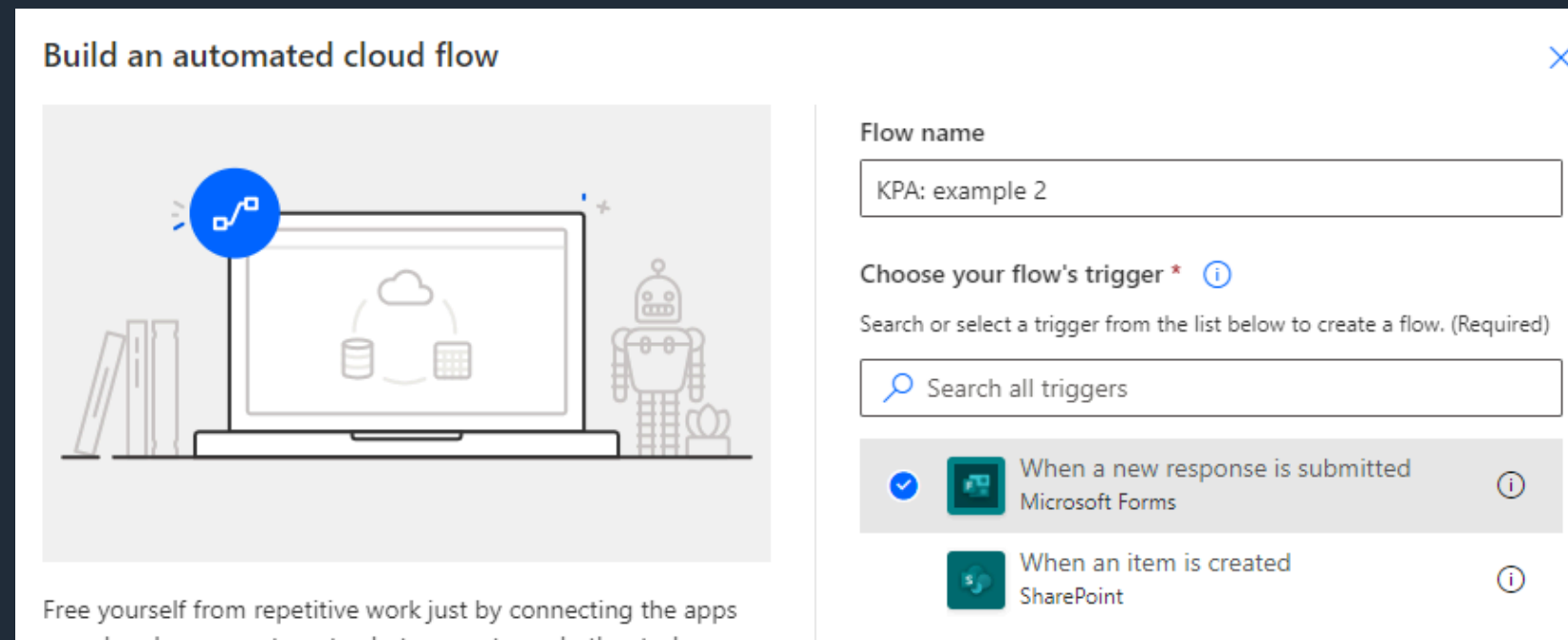
Microsoft Forms to Teams

- grab the form id

  `=design&id=veDvEDCgykuAnLXmdF5Jmn79kl25VpJlq3eErXXCYKBUMU9LWURaUUhUT0xYOUtNQVY1UFpURTQ1Vi4u`

- create an `Build an automated cloud flow` -
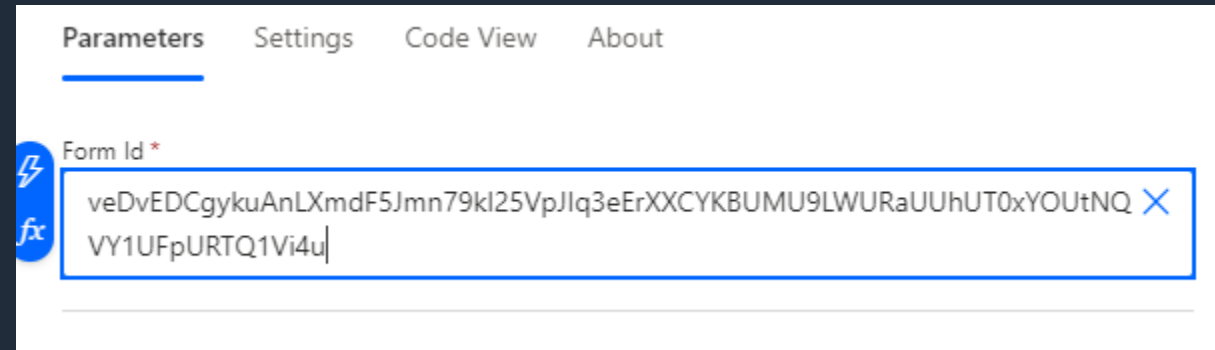
Microsoft Forms to Teams

- Enter your form ID

Parameters Settings Code View About

Form Id *

veDvEDCgykuAnLXmdF5Jmn79kI25VpJIq3eErXXCYKBUMU9LWURaUUhUT0xYOUtNQ
VY1UFpURTQ1Vi4u

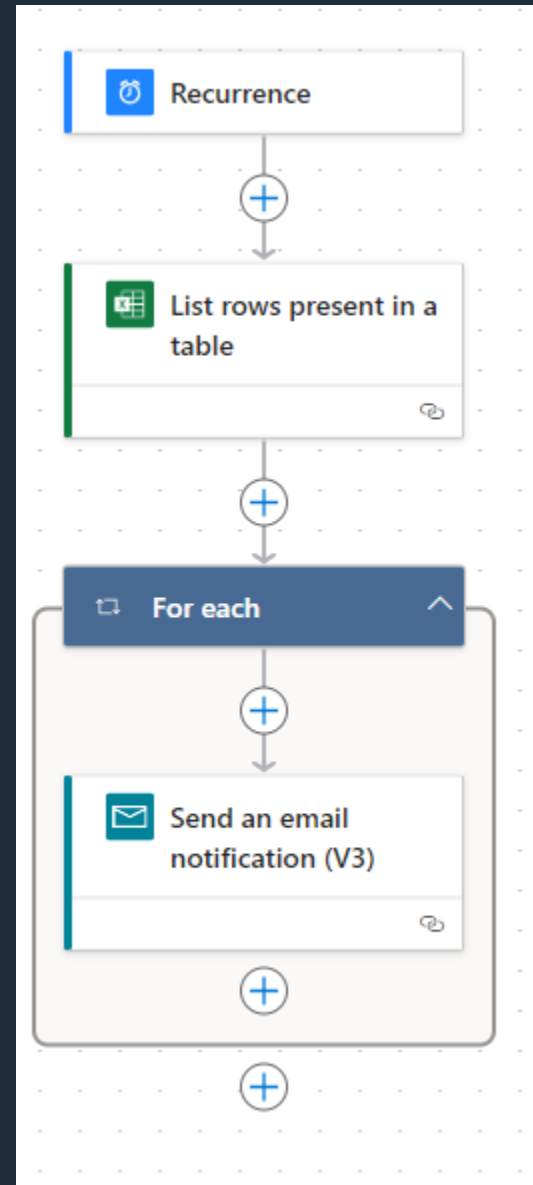(veDvEDCgykuAnLXmdF5Jmn79kl25VpJIq3eErXXCYKBUMU9LWURaUUhUT0xYOUtNQVY1UFpURTQ

Microsoft Forms to Teams

- Get response details
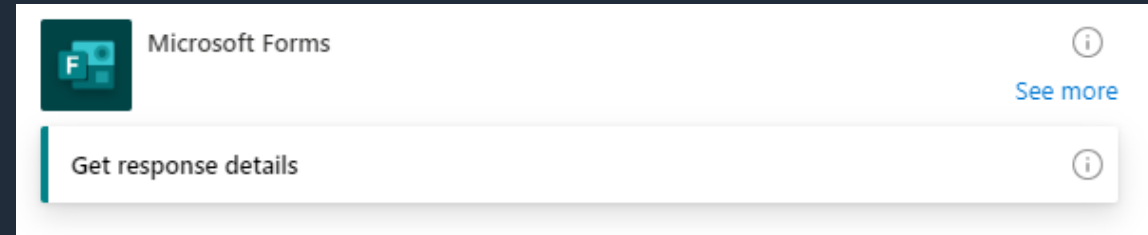
Microsoft Forms to Teams

- Populate with the form and step details
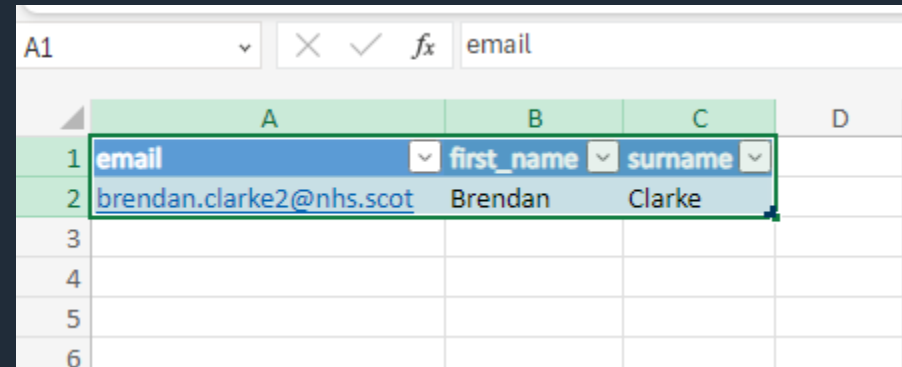
Microsoft Forms to Teams

Excel workbook to mailing list

- here's an overview

Excel workbook to mailing list

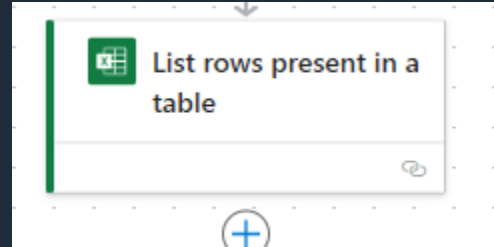- start with a simple .xlsx. Again, that will need to be on Sharepoint or Onedrive
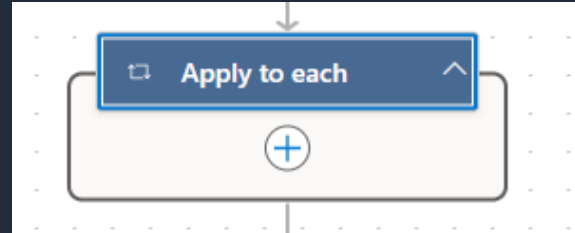
Excel workbook to mailing list
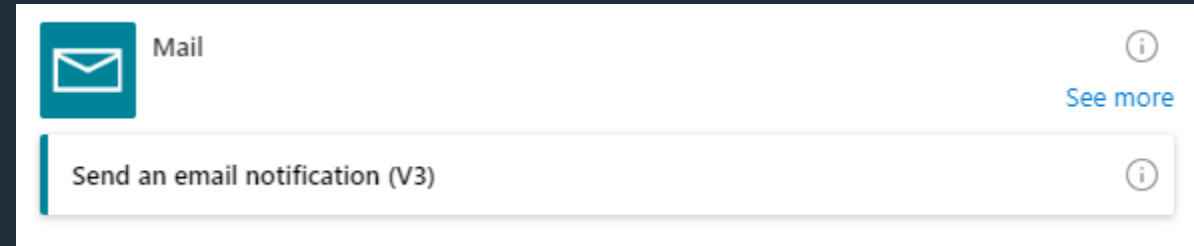
- List rows present in a table

Excel workbook to mailing list
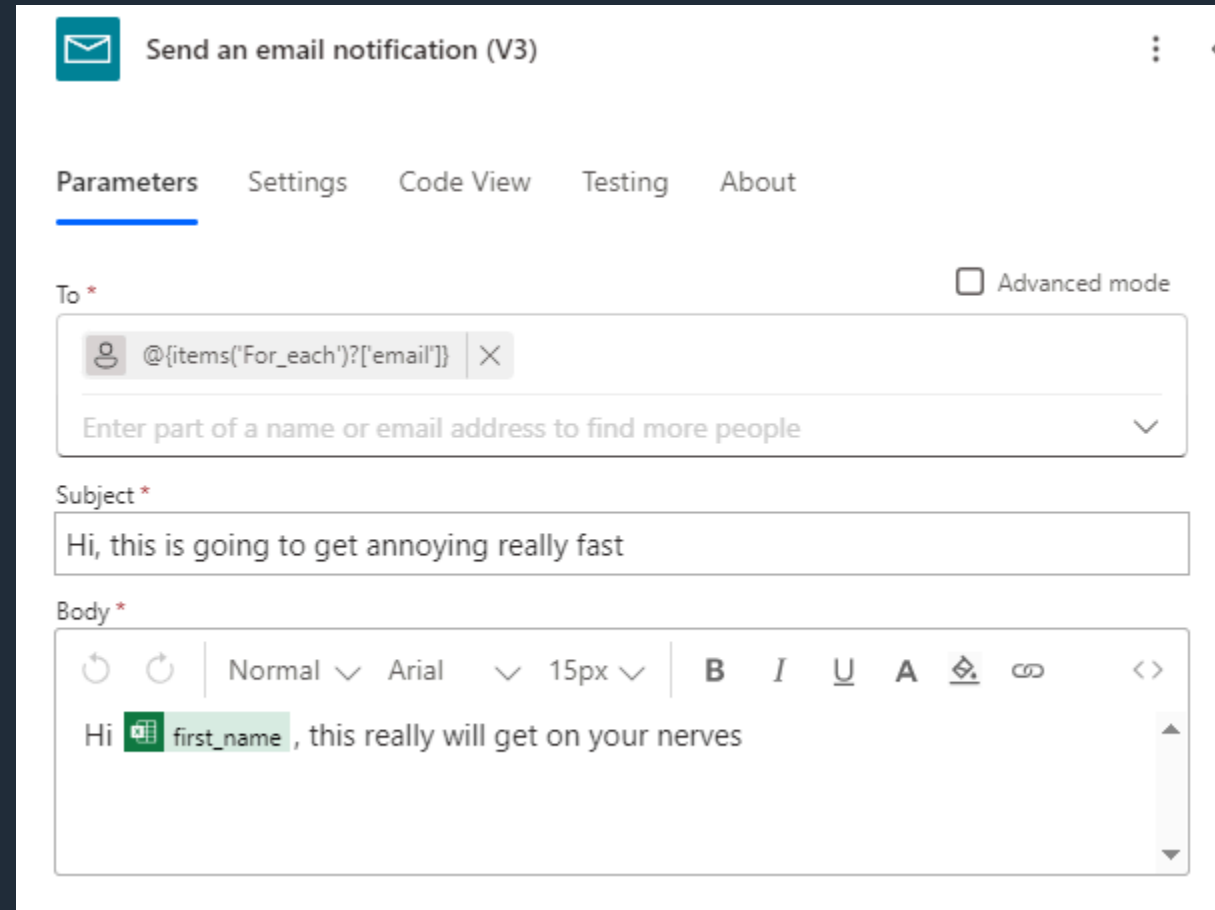
- Apply to each

Excel workbook to mailing list

- Send an email notification (V3) nested inside the Apply to each

Excel workbook to mailing list

- add the expression `items('For_each')?['email']`

Excel workbook to mailing list

- enjoy the result
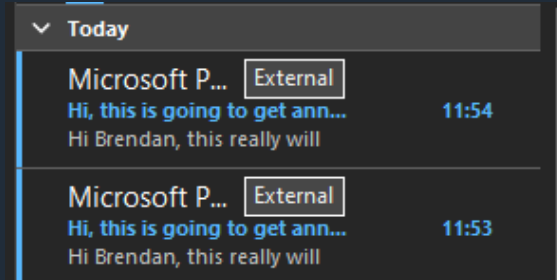
Feedback and resources

- please can I ask for some feedback - takes less than a minute, completely anonymous, helps people like you find the right training for them

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Hacker Stats (AKA Resampling Methods)	14:00-15:00 Wed 14th August 2024	R	🌶️🌶️🌶️ : advanced-level

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