

Setup and drive your routine business task with Power automate

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Agenda



Power automate – Introduction



Setup and Drive Project



Authentication and Security



Basic flow example



Use Case Scenario



Clinical applications



Limitations



Summary



Q&A

What We Assume Is not always True.....



Why Automation...

To save time.

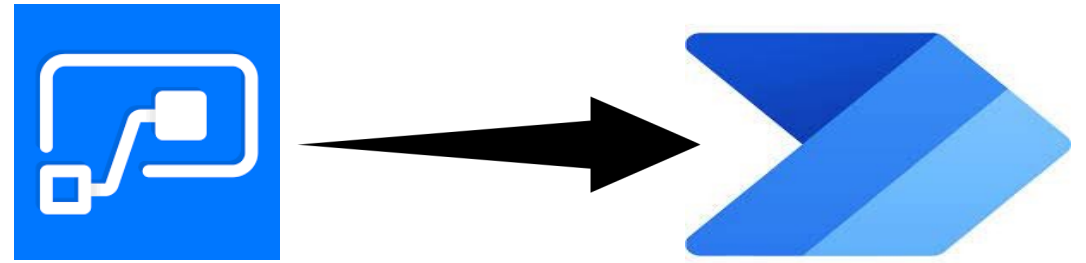
Reduce manual intervention (human error).

To bring productivity

To bring efficiency

To focus on real time high priority tasks.

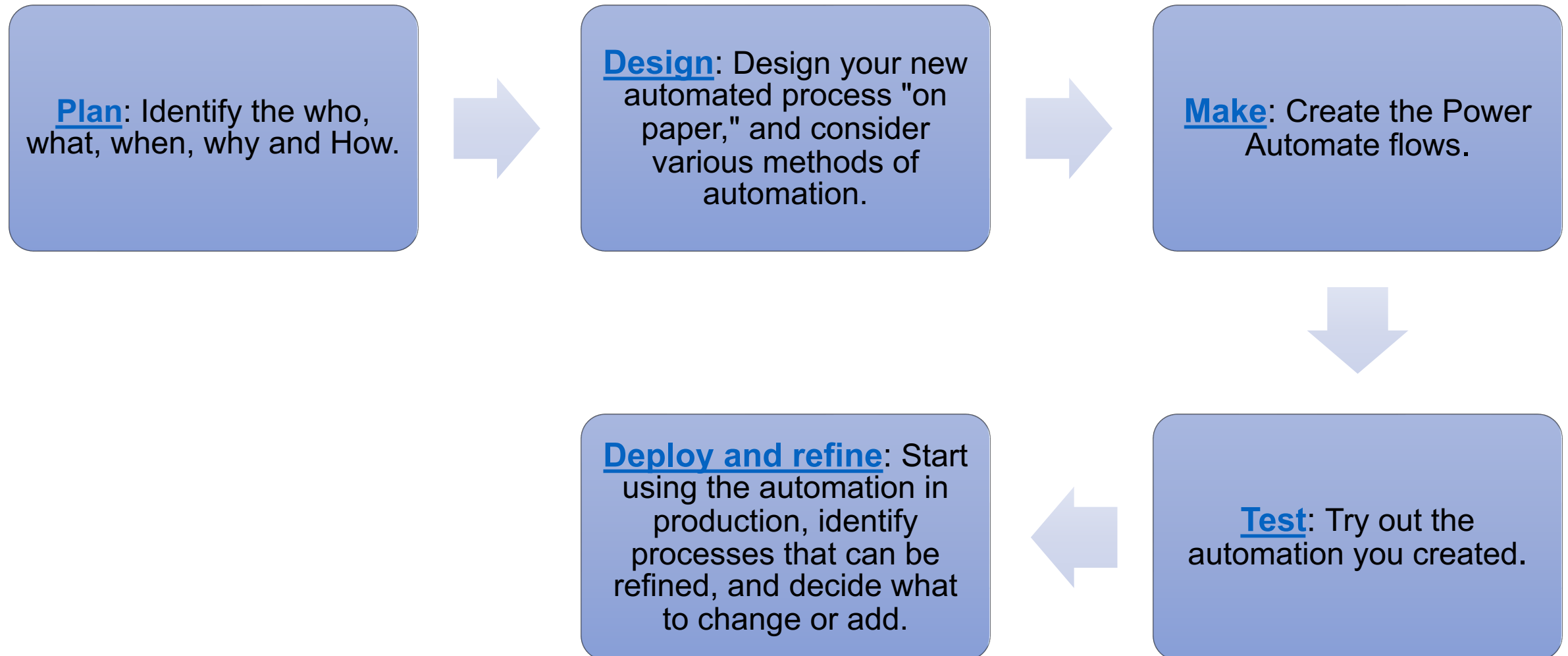
Power Automate



Power Automate is a low-code/no code platform that enables users to optimize workflows and automate repetitive and time-consuming tasks.

A collection of more than 400 pre-made actions and a recorder that captures mouse and keyboard functions make RPA intuitive for both regular and immediate use.

Setup and Drive Project



Setup and Drive Project

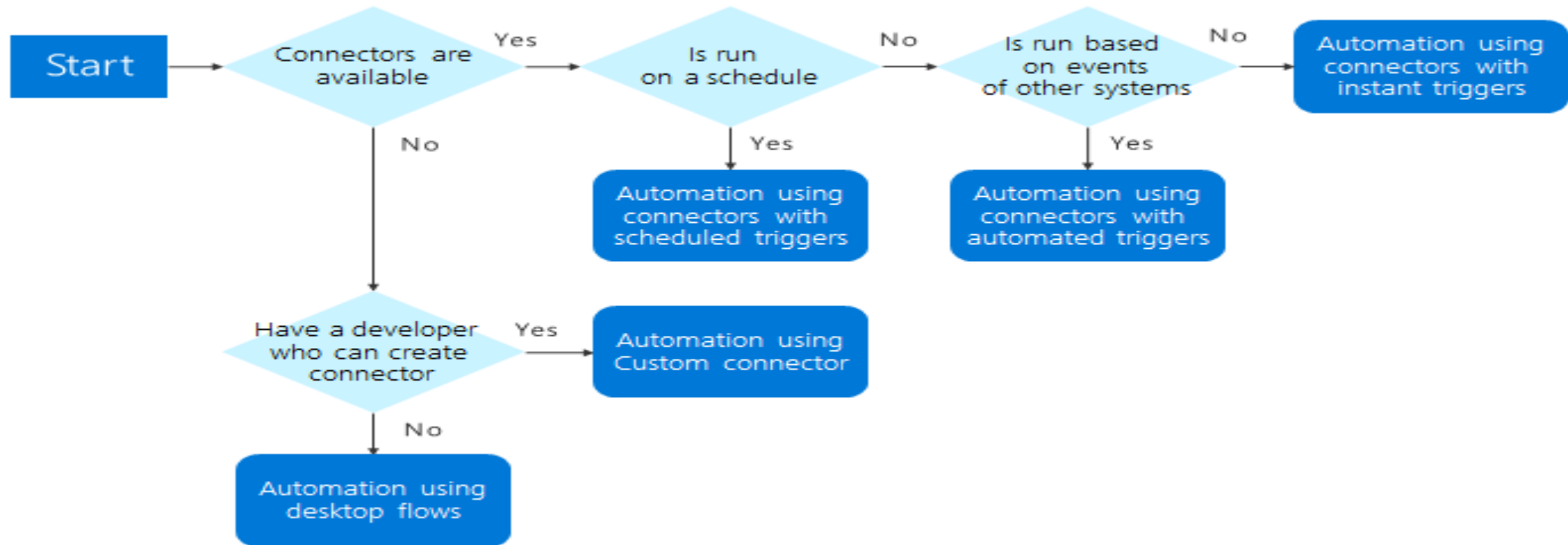
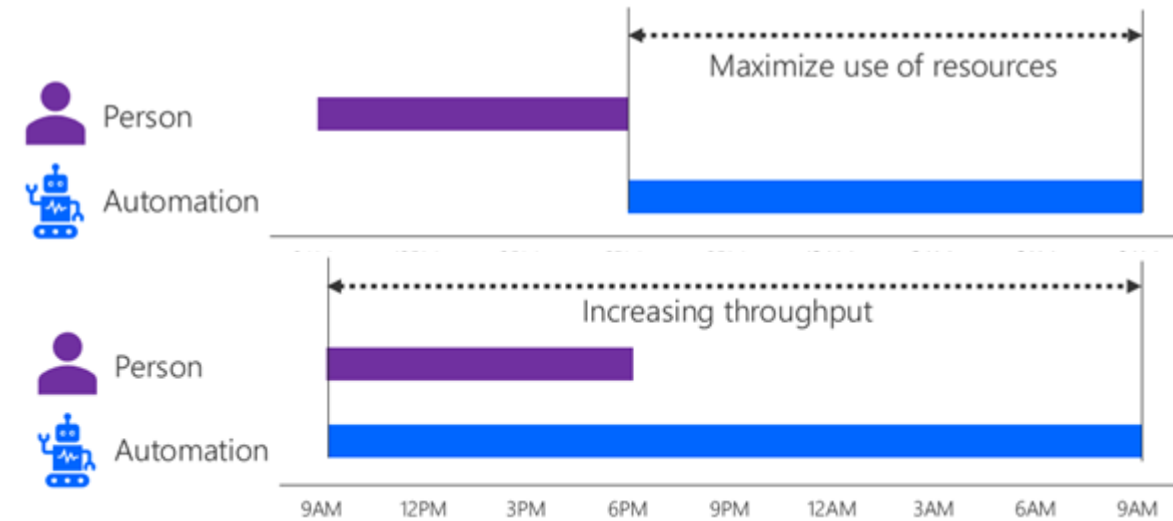
PLAN

Planning is the most important part in automating your process or task. When planning, you should consider the following:

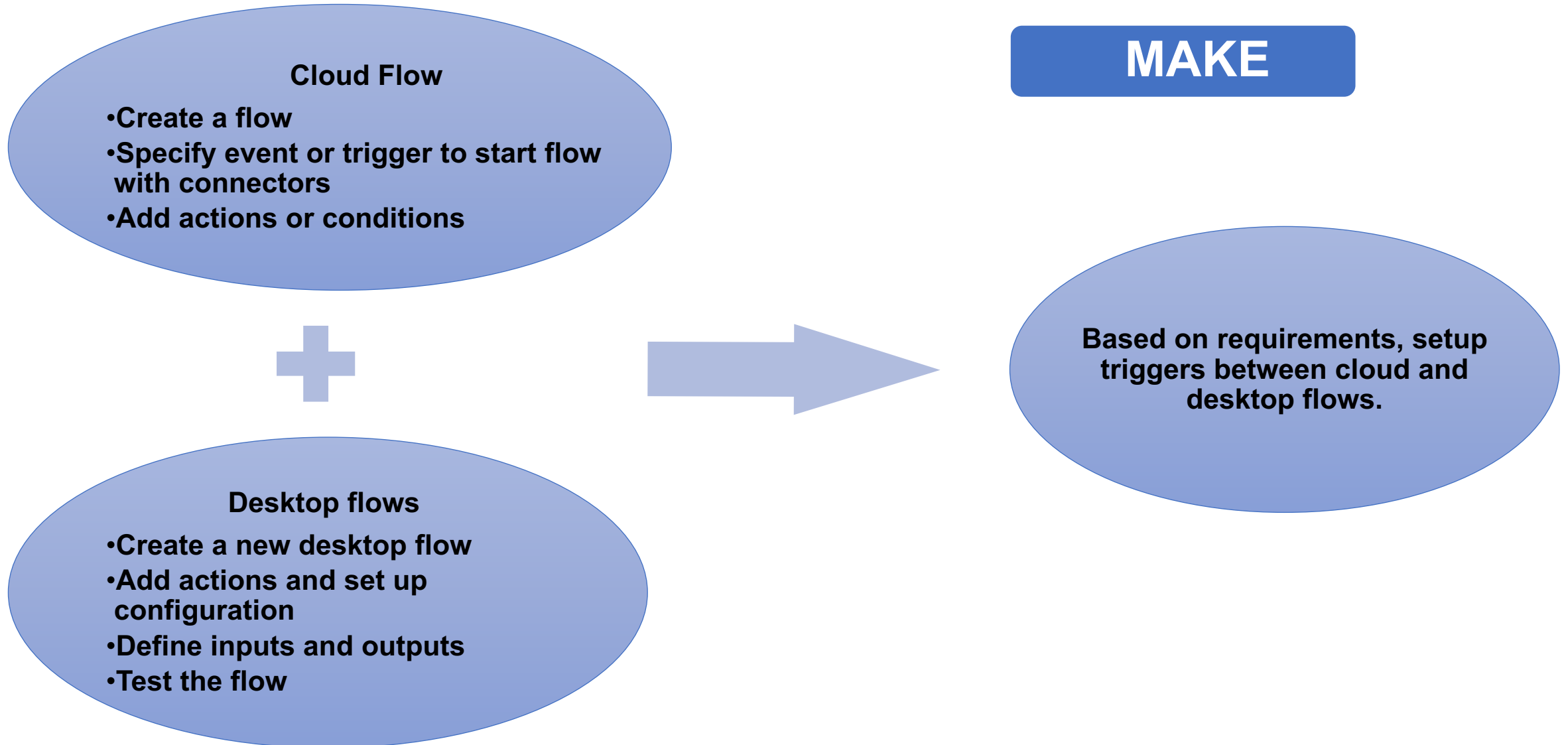
- **What problem** will it solve, **What goals/objectives** will it meet for users?
- **Who** will use the process automation?
- **When** will it be use?
- **Why** it is beneficial to use power automate?
- **How** User can implement it in routine tasks.

Setup and Drive Project

DESIGN



Setup and Drive Project



Setup and Drive Project

TEST

Testing in "live only"
environments

Testing with users

Tools to test your automation

Flow Checker

Repair tips

Custom error
notifications

Setup and Drive Your Project

DEPLOY AND REFINE

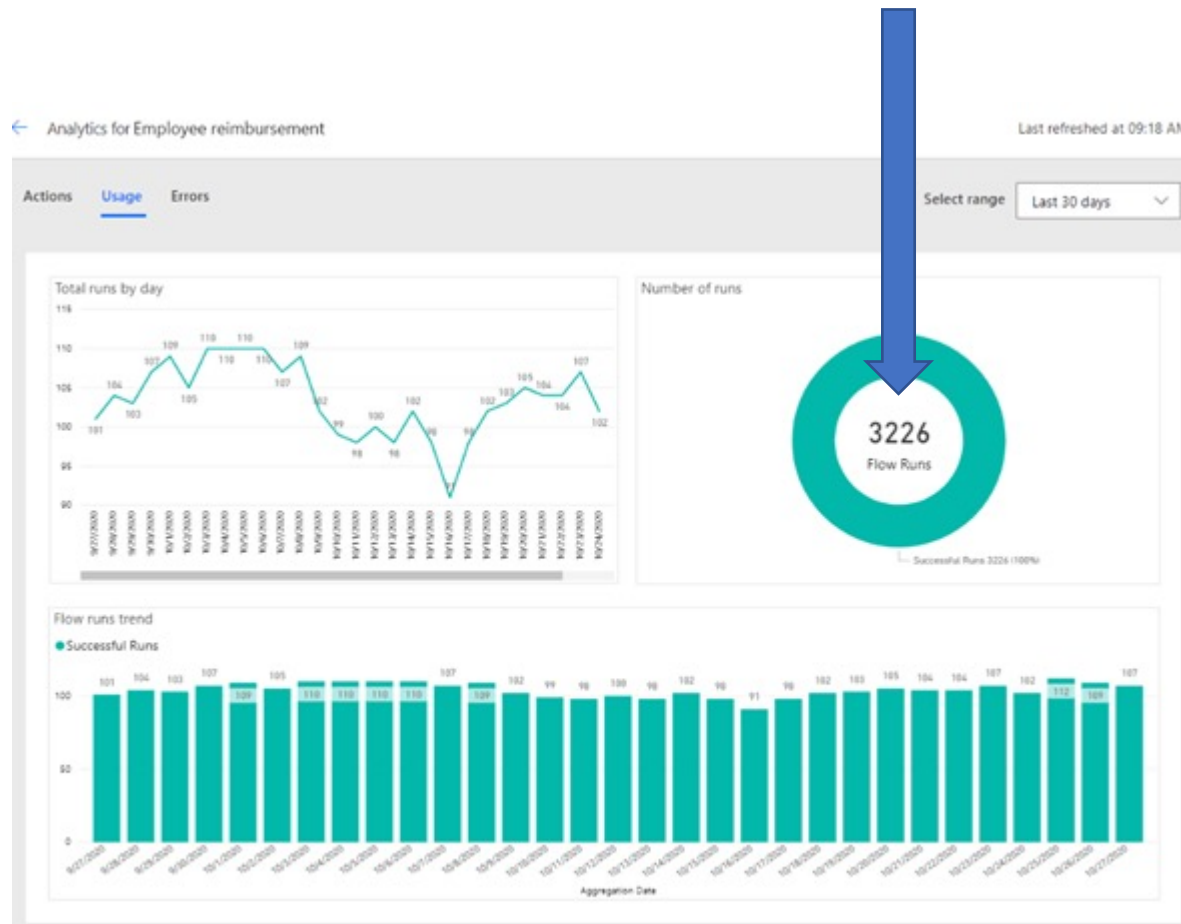
1. Use the automation with a small number of people.

2. Check that there are no issues for those people.

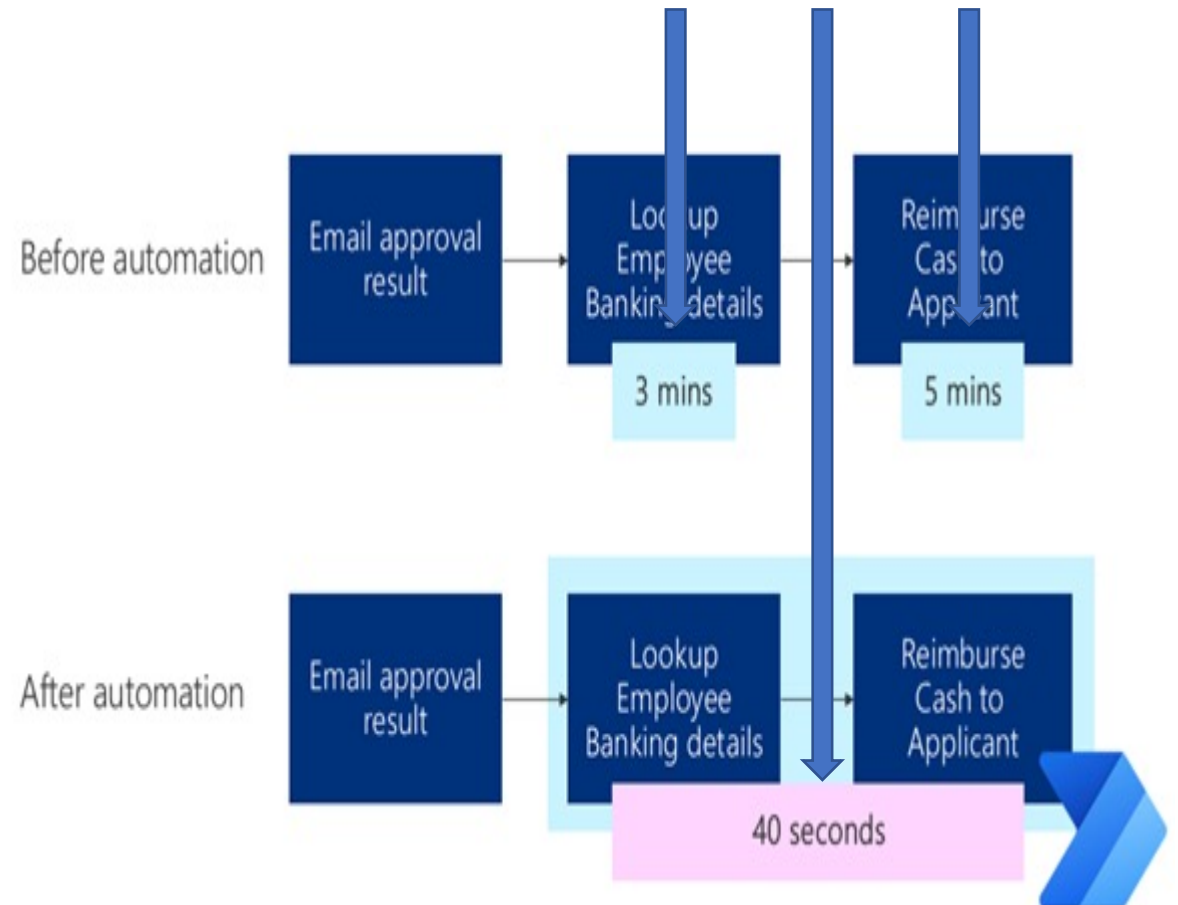
3. Have the remaining people start using the automation.

Assessing the business impact of the automation

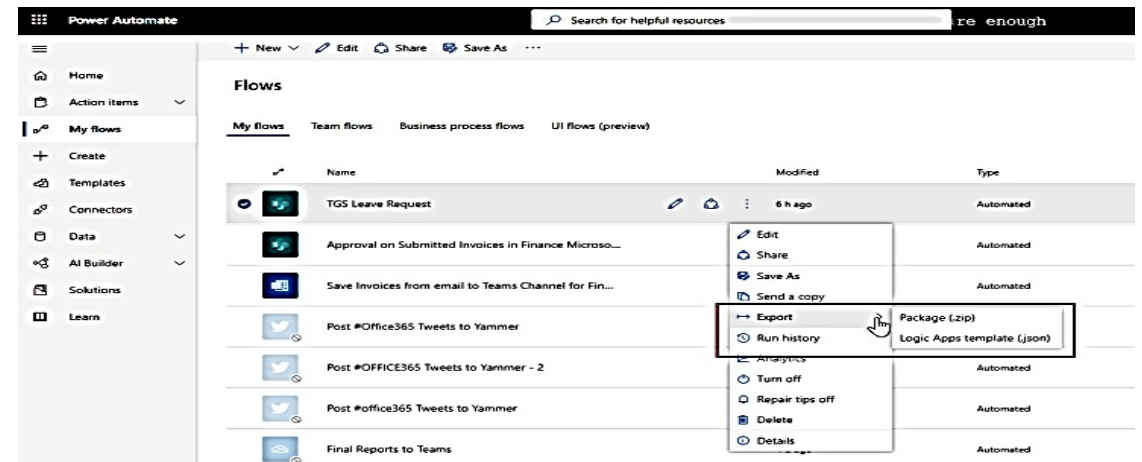
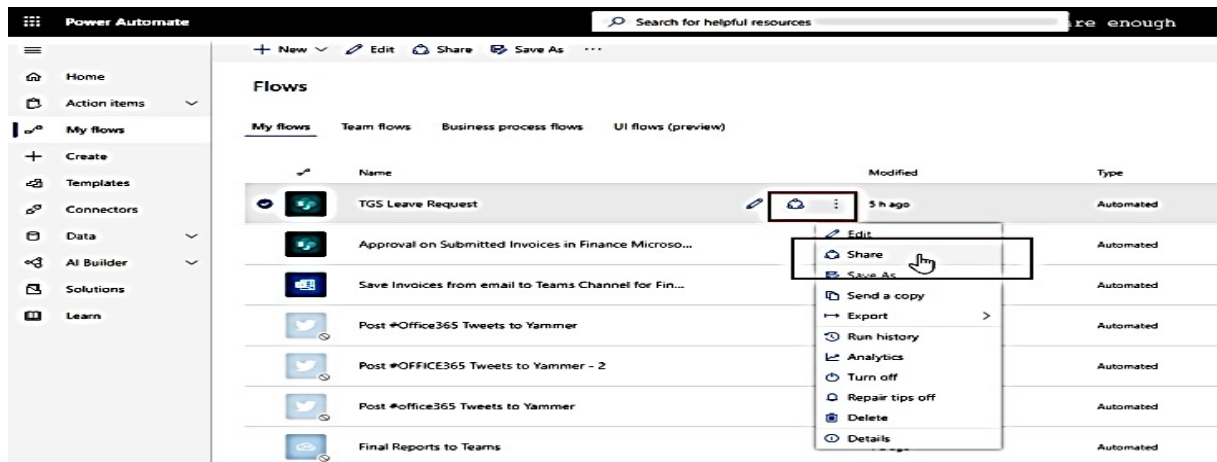
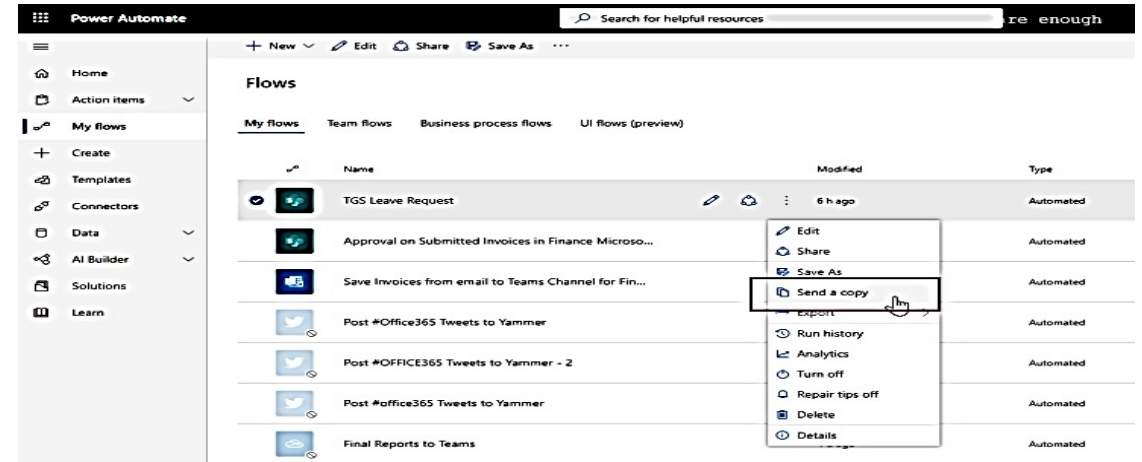
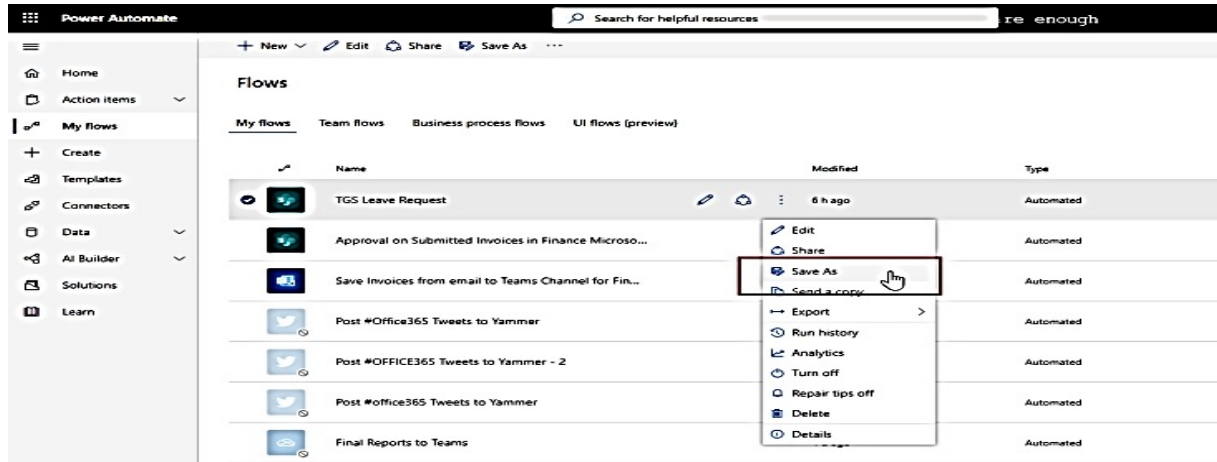
Check the number of flow runs



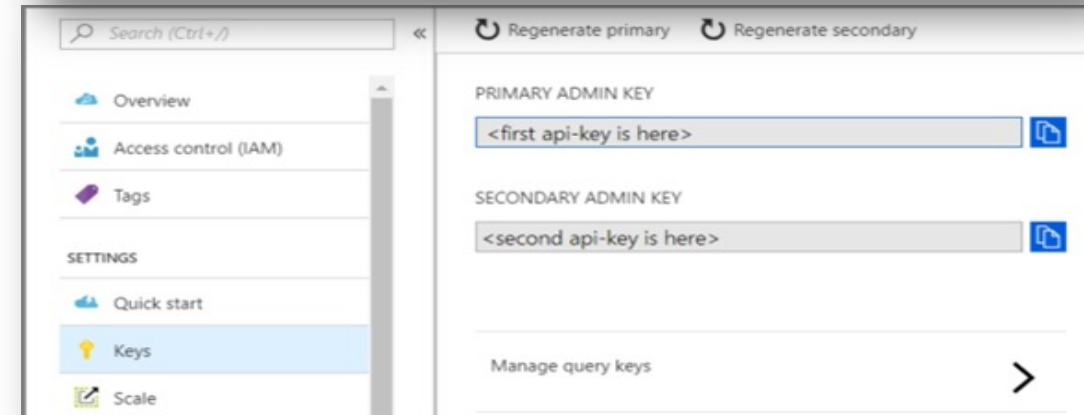
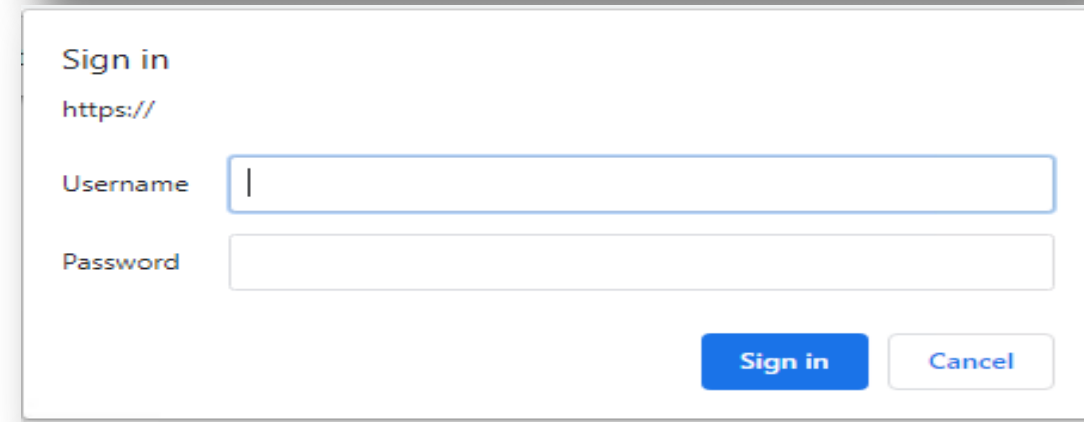
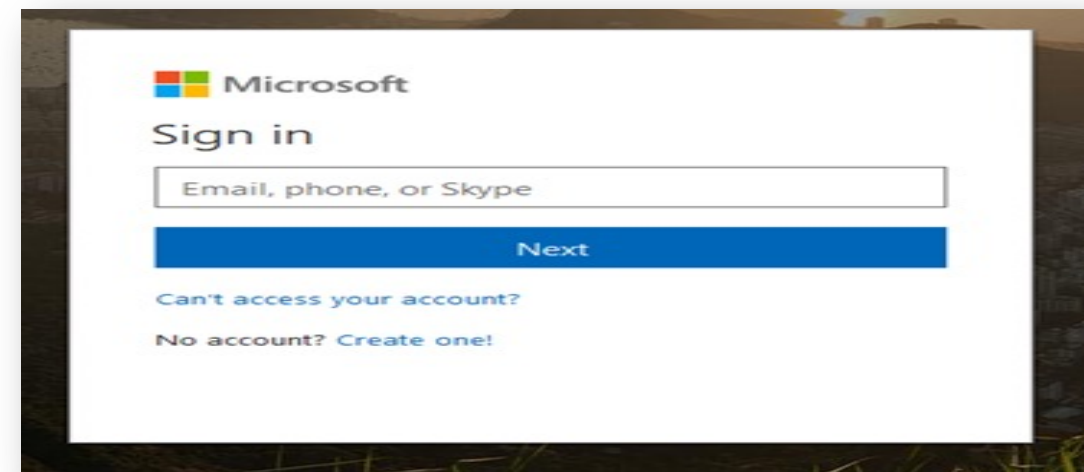
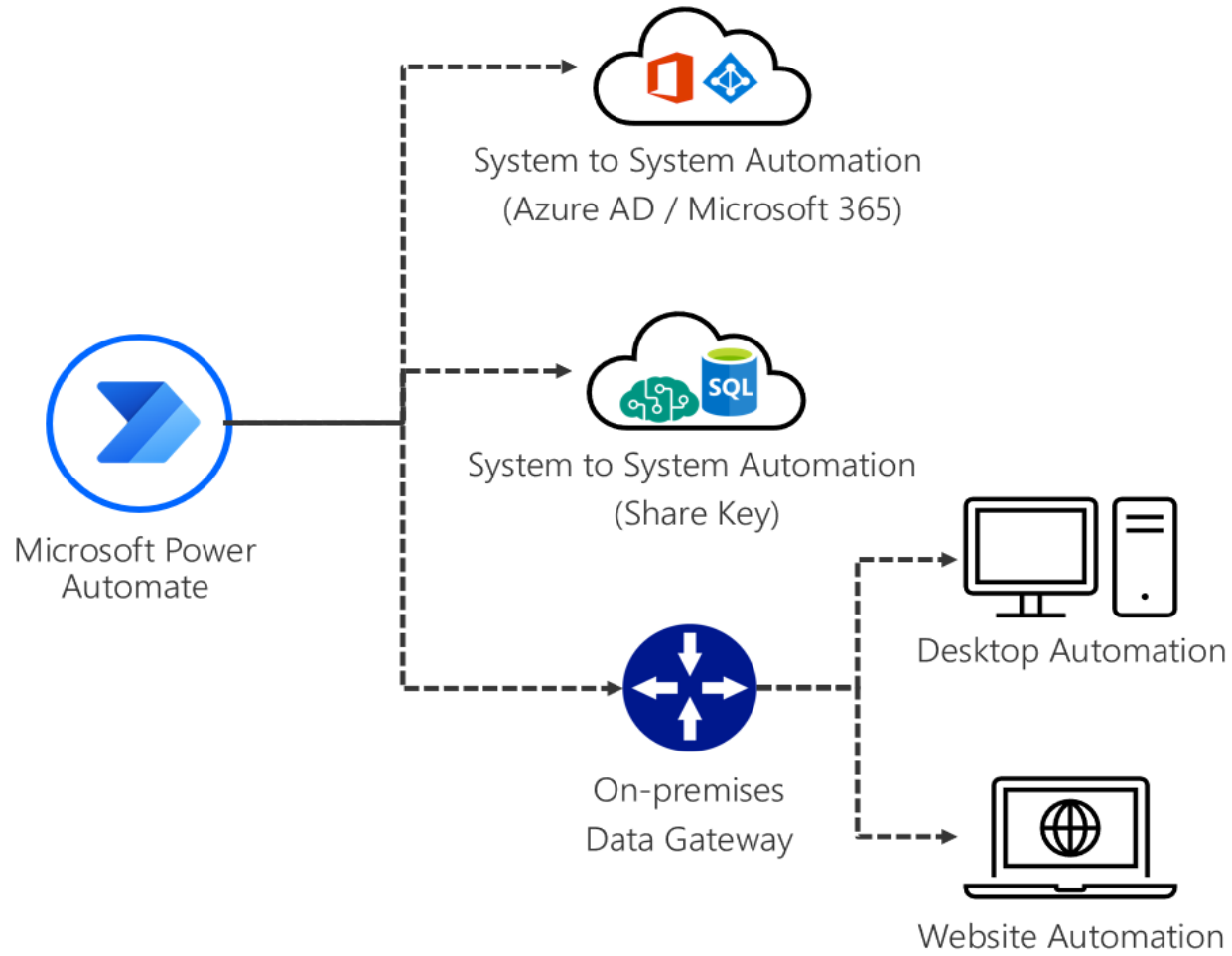
Get the flow run duration



SAVE, SHARE, SEND, EXPORT YOUR FLOW



Authentication and Security



Basic flow Example

The screenshot displays the Power Automate web application interface. The browser address bar shows the URL: `make.powerautomate.com/environments/Default-fcb2b37b-5da0-466b-9b83-0014b67a7c78/home`. The top navigation bar includes the Bayer logo, the text "Power Automate", a search bar, and a dropdown menu for "Environments" currently set to "Bayer: Personal Product...".

On the left side, a sidebar menu is visible, containing the following items: Home, Approvals, My flows, **Create**, Templates, Connectors, Data, Monitor, AI Builder, Process advisor, and a chatbot icon labeled "Ask a chatbot". The "Create" button is highlighted with a red box, and a red arrow points to it from the main content area.

The main content area features a greeting "Hi Satish Patil" and the heading "What would you like to automate?". Below this, it says "Choose a task to quickly automate with a prebuilt template." and lists three categories: Emails, Files and documents, and Notifications and reminders.

Three prebuilt templates are displayed as cards:

- Save Outlook.com email attachments to your OneDrive** (By Microsoft Power Automate Community, 176906 uses)
- Save Gmail attachments to your Google Drive** (By Microsoft, 39635 uses)
- Analyze incoming email them to the right person** (By Microsoft, Automated)

Three ways to create flow

Start from blank ⓘ



Automated cloud flow

Triggered by a designated event.



Instant cloud flow

Triggered manually as needed.



Scheduled cloud flow

You choose when and how often it runs.



Desktop flow

Automates processes on your desktop environment.



Process advisor

Evaluate and optimize your existing processes and tasks.

Start from a template ⓘ

Search all templates

Top picks

Remote work

Email

Notifications

Save to cloud

Approval



Follow up on a message
By Microsoft

Instant

195748



Schedule a reply
By Microsoft

Instant

89948



Start an approval when a file is added to Sharepoint
By Microsoft

Automated

73009



Save a message to OneNote
By Microsoft

Instant

55345

Start from a connector ⓘ



Office 365
Outlook



SharePoint



Microsoft
Dataverse



OneDrive for
Business



Microsoft
Forms



Planner



Microsoft
Teams



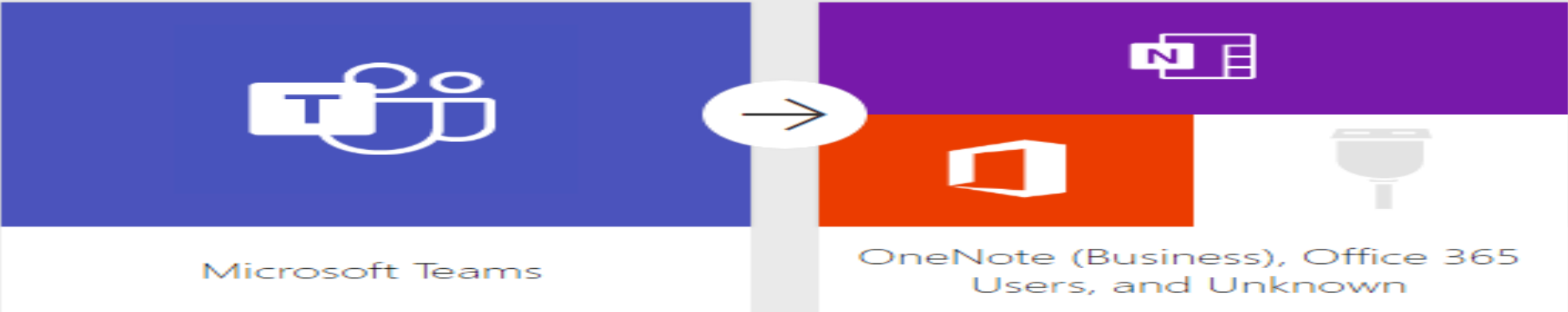
Outlook.com



RSS

Select the Template

Save a message to OneNote



The diagram illustrates a data flow process. On the left, a blue box contains the Microsoft Teams icon. An arrow points from this box to a larger box on the right. This right box is divided into two sections: a purple top section with the OneNote icon and an orange bottom section with the Office 365 Users icon.

Microsoft Teams

OneNote (Business), Office 365 Users, and Unknown

Insert the content of a message into a new note.

This flow will connect to:

	Microsoft Teams	satish.patil2@bayer.com	✓	...
	OneNote (Business)	satish.patil2@bayer.com	✓	...
	Office 365 Users Permissions	satish.patil2@bayer.com	✓	...

Continue

Initiate the flow

 Save a message to OneNote

Undo Redo Comments Save Flow checker Test

 For a selected message



 Create page in a section



 Get my profile (V2)



 Post adaptive card in a chat or channel

+ New step

Save

Edit flow

 For a selected message ? ...

Edit Adaptive Card

Dialog width (px)

Dialog height (px)

[Hide advanced options](#) ^

 Create page in a section ? ...

* Notebook Key

Satish @ Bayer ▼

* Notebook section

Quick Notes ▼

* Page Content

</>

<html> <head> <title> Message from  Sender User Display Name x </title> </head> <body>
<p> Message from  Sender User Display Name x saved from Teams

 Message details:

  Plain Text Message Content x

 Notes:
  myNote x

<a
href="  Link to message x ">Link to message </p> </body> </html>

 Get my profile (V2) ? ...

Select fields

[Hide advanced options](#) ^

 Post adaptive card in a chat or channel ? ...

* Post as

Flow bot ▼

* Post in

Chat with Flow bot ▼

* Recipient

 Id x ;

* Adaptive Card

```
{
  "type": "AdaptiveCard",
  "version": "1.0",
  "body": [
    {
      "type": "TextBlock",
      "text": "Message saved to OneNote",
      "size": "Large",
      "weight": "Bolder"
    },
    {
      "type": "TextBlock",
      "text": "Message from  Sender User Display Name x was successfully saved to OneNote.",
      "wrap": true
    }
  ],
  "actions": [
    {
      "type": "Action.OpenUrl",
      "title": "View note",
      "url": "  OneNote web ... x "
    }
  ],
  "$schema": "http://adaptivecards.io/schemas/adaptive-card.json"
}
```

Card Type ID

Should match with corresponding When someone responds to an adaptive card

IsAlert

If the message will be shown in the activity feed ▼

[Hide advanced options](#) ^

Check your flow



Jennifer Gilbride Yesterday 12:20 Edited

I spotted this in Allstat that may be of interest (the fact it is only an hour and combining RCT and observational data is an interesting topic):

Date: Tue, 11 Oct 2022 09:20:22 +0000

From: Richard Grieve <Richard.Grieve@LSHTM.AC.UK>

Subject: Centre for Statistical Methodology, Virtual seminar tomorrow, October 12, 17.15 UK time and subsequent events

Dear All,

Please see our event listings below, and in particular (12) at 17.15 UK time, on statistical approaches for incoherent data.

Best Wishes, Richard Grieve

Centre for Statistical Methodology, London School of Hygiene & Tropical Medicine
Autumn events 2022

Date



Save a message to OneNote



Math Editor



Create task



Create a new poll



Create work item



Create issue in Jira



Comment in Jira



Reply



Pin



Save this message



Mark as unread



Share to Outlook



Translate



Immersive Reader

More actions



Save a message to OneNote

Workflows via Power Automate



Add a note

Provide more context when saving this message to OneNote by adding an optional note

Note (optional)

To test the flow |

Submit

Message from Jennifer

Message from Jennifer saved from Teams

Message details:
I spotted this in Allstat that may be of interest (the fact it is only an hour and combining RCT and observational data is an interesting topic): Date: Tue, 11 Oct 2022 09:20:22 +0000 From: Richard Grieve <Richard.Grieve@LSHTM.AC.UK> Subject: Centre for Statistical Methodology, Virtual seminar tomorrow, October 12, 17.15 UK time and subsequent events Dear All, Please see our event listings below, and in particular our on-line seminar tomorrow (Oct 12) at 17.15 UK time, on statistical approaches for integrating RCTs and observational data. Best Wishes, Richard Grieve Centre for Statistical Methodology, London School of Hygiene and Tropical Medicine Autumn events 2022 Date Event Location Speaker(s) Registration 12 October 17:15 - 18:15 Integration of observational and randomised controlled trial data Virtual Dr Lauren Eyler Dang<<https://eur03.safelinks.protection.outlook.com/?url=https%3A%2F%2Fctml.berkeley.edu%2Fpeople%2Fflauren-eyler-dang&data=05%7C01%7C%7C6619592015414262677208daabdd10fb%7Cfcb2b37b5da0466b9b830014b67a7c78%7C0%7C0%7C638011263224024529%7CUnknown%7CTWFpbGZsb3d8eyJWljojMC4wLjAwMDAiLCJQIjoiV2luMzliLCJBTiI6IjEhaWwiLCJXVCi6Mn0%3D%7C3000%7C%7C%7C&data=EAT9niGvm0I0uDSQD045DqeB0Cuws6M6n4NEKinZyOs%3D&reserved=0>>, University of California, Berkeley No registration required. Visit the event page<<https://eur03.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.lshtm.ac.uk%2Fnewsevents%2Fevents%2Fintegration-observational-and-randomised-controlled-trial-data&data=05%7C01%7C%7C6619592015414262677208daabdd10fb%7Cfcb2b37b5da0466b9b830014b67a7c78%7C0%7C0%7C638011263224024529%7CUnknown%7CTWFpbGZsb3d8eyJWljojMC4wLjAwMDAiLCJQIjoiV2luMzliLCJBTiI6IjEhaWwiLCJXVCi6Mn0%3D%7C3000%7C%7C%7C&data=vhX6uXAoj5xxMw8br6ISvtqZil%2B4duGqjPdVZbYFTY4%3D&reserved=0>> to join.

Notes:
To test the flow

Add Page

To do list

QDOC : Access permission

Useful Notes

MACROS

MOSTO

CARS

Message from Abraham Ye

To test

Message from Jennifer

Use case: Tracking of statistical document filing

**To track and ensure timely filing of statistical documents in
the eTMF**

Power Tools for Tracking of document filing

Welcome Bhavin

(docuMents filIng aNd completIon cOmpliaNce)

green

BAYER

Add New Deliverable

Deliverable		Overall Status	Signed SAP Approval Form	Upload SAP & Approval Form	Signed TLF Approval Form	Upload TLF Specs & Approval Form	Signed ADS Specs	Upload ADS Specs	Quality Checked ADS	Quality Checked TLF	Signed IVD & PIV	Upload IVD & PIV
37 - Clean Database Statistical Analyst: Abrah Statistician: ellor												
21 - IB update or regulatory update - IB update Aug2022 Statistical Analyst: Zhao Statistician: Natas illot												
- Clean Database Statistical Analyst: Y Statistician: Anjun C												
- Primary completion - 2019 Statistical Analyst: Theoran Statistician: Udo M												
- Clean Database Statistical Analyst: Patil Statistician: Yushan												
- IB update or regulatory update - IB 2022 after DBL Statistical Analyst: Xiao Statistician: Nadees chhige												
- IB update or regulatory update - IB Update 2022 Statistical Analyst: an												

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7 record(s) found!

Study, Deliverable, Study Team and action buttons to see study details and complete tasks for one deliverable

Study details

 Welcome Bhavin

(docuMents fling aNd completIon cOmpliaNce)



data for 7 (Clean Database)

Study Number	19	Deliverable Status	Ongoing
BAY No.	BAY73	Statistical Analyst	Abr
Deliverable	Clean Database	Statistician	Uc
Study Description	BAY73, phase I, 1st line combination	First Patient First Visit	18-Jun-2018
Project Description		Last Patient Last Visit	06-Sep-2022
Open Label/Blinded	Open Label	Primary Completion Date	17-Dec-2020
Phase	I	Database Cleaned Date	04-Oct-2022
		Last Update	14-Oct-2022 07:50

Close

Note: NA denotes Not Available. If the 'Type of Clinical Trial' is 'NA', then trigger calculation assumes the trial to be 'Open Label'

Statistician: Nadeesha Arachchige

18789 - IB update or regulatory update - IB Update 2022

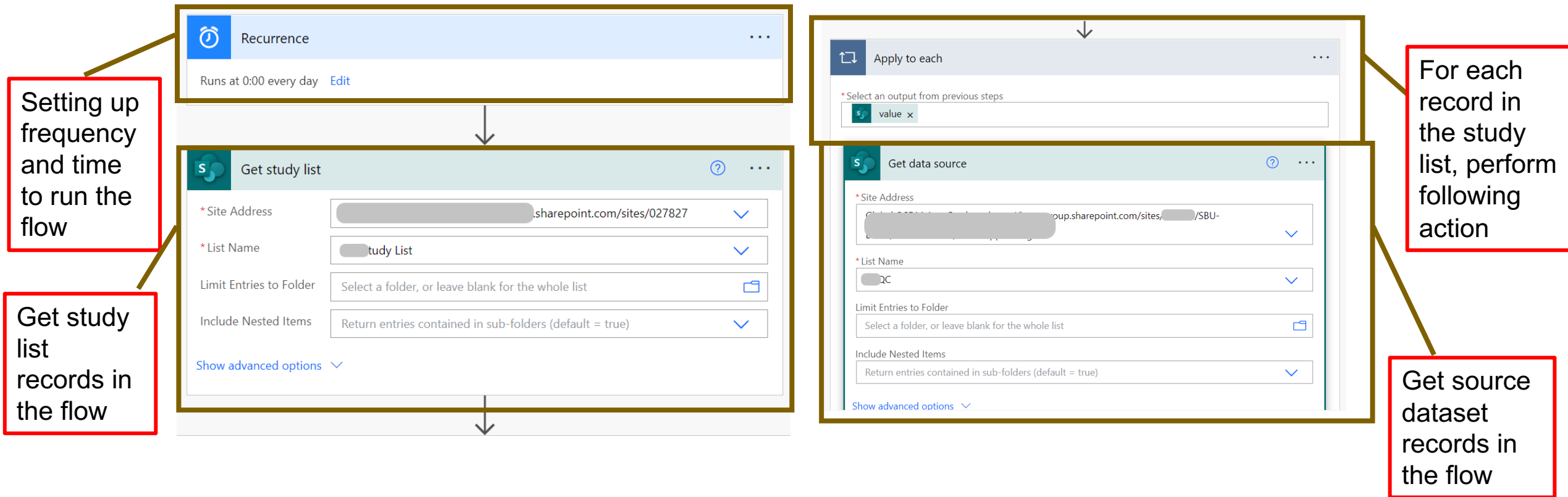
Statistical Analyst: Anupama Sheoran



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7 record(s) found!

Automate 1.1 – Adding relevant records from one SP List to another



Automate 1.2 – Adding relevant records from one SP List to another

The screenshot shows a 'Condition' step in an automation workflow. The condition is set to 'length(...)' is not equal to '0'. Below the condition, there is a green 'If yes' branch. Under the 'If yes' branch, there is an 'Apply to each 2' step, which is followed by an 'Update item' step. The 'Update item' step is highlighted with a red box and a callout.

Condition

length(...) is not equal to 0

+ Add

If yes

Apply to each 2

*Select an output from previous steps

value

Update item

Check in the source dataset if a specific study record exists

If the record exists, update selected columns in the source dataset

The screenshot shows a 'Create item' step in an automation workflow. The step is highlighted with a red box and a callout. The fields are filled with values from previous steps: 'Site Address' is a SharePoint URL, 'List Name' is 'C', 'Study' is 'Study_No', 'Study Modus Value' is 'Study_Modus', and 'Structure' is 'Random_Blind_...'. The 'FPFV_Act_str' field is also visible at the bottom.

Create item

* Site Address

...sharepoint.com/sites/...SBU-

* List Name

C

* Study

Study_No

Study Modus Value

Study_Modus

Structure

Random_Blind_...

FPFV_Act_str

If the record doesn't exist, create a new record in the source dataset

Few other tasks automated through PA functionalities

Sending an email with attached excel report to management

Sending a notification to Owner about due date

Sending a notification to Team members about Pending tasks

Clinical Applications

Automation through RPA can help streamline data transfer processes and ensure their quality by having an auditable trail.

Automation could help to improvise traditional clinical trial reporting activities by setting and driving activities in scheduled manner with defined triggers and events. E.g. PSUR, DSUR, DMCs activities driven by data.

It can also improve patient experience by minimising the variability in clinical trial processes and allowing remote data reporting. This can result in costs benefits as participants are less likely to drop out of a clinical trial.

Limitations

Complex workflows affect the performance of the program considerably.

Time out period up to 30 days for flow execution/retention.

It allows only 250 actions in a single workflow.

Allows only Sequential flow

Etc....

Summary

Effective implementation of PA functionality would -

- Boost productivity and accuracy
- Free-up time to focus on strategic opportunities
- Achieve more with reduced efforts
- Streamline business processes
- Add intelligence to your automated processes through AI builder
- Predict outcomes to improve performance

References

<https://learn.microsoft.com/en-us/power-automate/>

<https://www.labiotech.eu/partner/clinical-trial-execution-robotic-process-automation/>

<https://www.linkedin.com/pulse/securing-http-triggered-flow-power-automate-abd-elmonem-elsherbeny/>

<https://teamshub.io/the-benefits-and-limitations-of-power-automate/>

Additional Microsoft trainings –

<https://learn.microsoft.com/en-us/training/>



KEEP LEARNING...KEEP EXPLORING... AS “Learning never exhausts the mind – LDV”