



Power Up: Maximize New Technology

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TU-L3

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26th California Unified Program
Annual Training Conference
February 26-29, 2024

Disclaimer

The following presentation is based on my personal experience and usage of Microsoft Power Products, including Power Automate, Power Query, and others. While I have found these tools to be valuable and beneficial in my professional endeavors, I want to make it clear that I am not a certified expert or representative of Microsoft Corporation. The insights, tips, and recommendations shared in this presentation are solely based on my own experimentation, exploration, and learning.

As such, I encourage all participants to approach the information presented with a critical mindset and to conduct their own research and exploration of these tools. While I will do my best to provide accurate and helpful guidance, it's important to acknowledge that technology and software applications evolve rapidly, and my knowledge may not encompass the latest updates or best practices.

Furthermore, the usage of Microsoft Power Products may vary depending on individual preferences, organizational requirements, and specific use cases. What works well for me may not necessarily align with everyone's needs or circumstances.

Lastly, I recommend consulting with your organizational internal support or seeking official documentation and support from Microsoft or authorized partners for in-depth guidance, troubleshooting, and training on the utilization of Microsoft Power Products.

Thank you for your understanding, and I hope you find value in the insights shared during this presentation.

Visualization Exercise



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Introduction

- Brief Overview of Microsoft Power Products
 - Power Automate
 - Forms
 - Power Query
 - SharePoint
- Test Case
- Introduction to OneDrive and its benefits for field inspections

Power Automate

- Power Automate, formerly known as Microsoft Flow, is a cloud-based service that allows users to create automated workflows between their favorite apps and services to synchronize files, get notifications, collect data, and more.
- With Power Automate, users can automate repetitive tasks and business processes without the need for coding knowledge.
- It integrates seamlessly with various Microsoft and third-party applications, enabling cross-platform automation.
- Examples of workflows include sending automatic email notifications, updating spreadsheets based on specific triggers, and syncing data between different systems.

Power Automate



Power Automate-Home Screen

Power Automate Search for helpful resources

Home

Action items

My flows

Create

Templates

Connectors

Data

AI Builder

Solutions

Learn

Take care of what's important. Automate the rest.

Create automated workflows with Microsoft Power Automate.

Watch a quick video

Search for a template by app, task, or industry

Start from a template

Search all templates

Top picks Remote work Email Notifications Save to cloud Approval

- Save Office 365 email attachments to OneDrive for Business By Microsoft Automated 631731
- Get a push notification when you receive an email from your boss By Microsoft Automated 353263
- Get today's weather forecast for my current location By Microsoft Instant 287011
- Send a customized email when a new file is added By Microsoft Automated 207408

All templates →

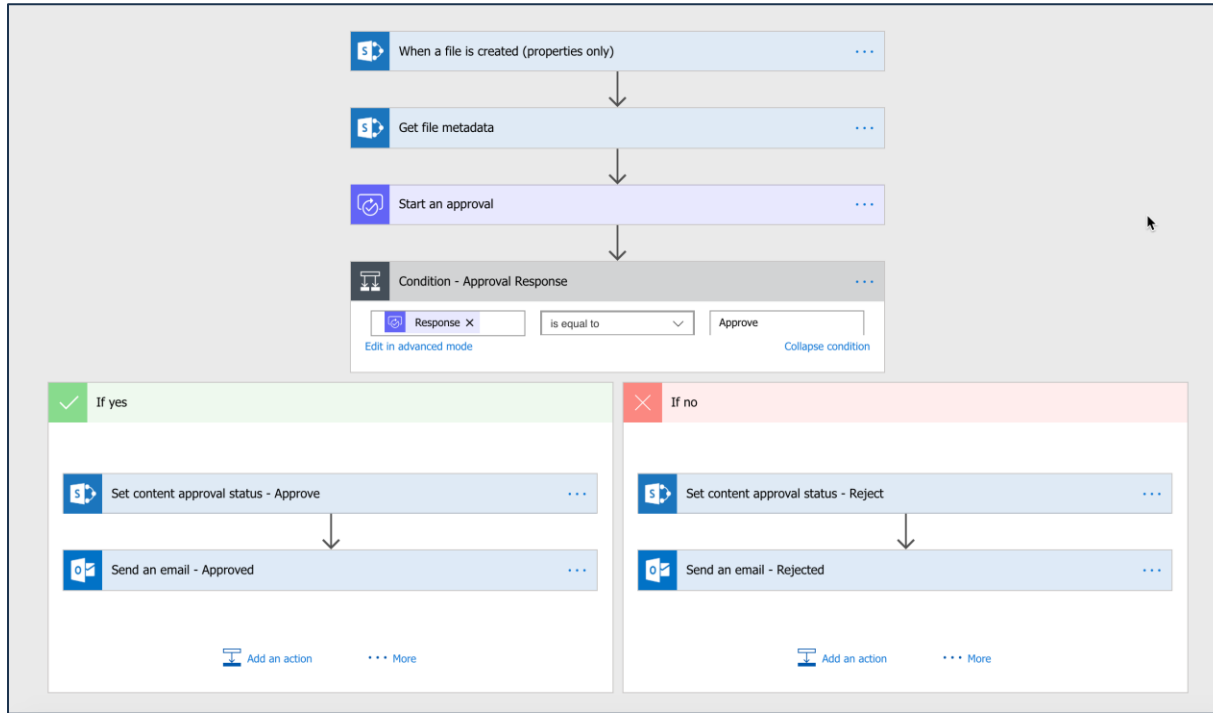
Popular services See all 415 →

- SharePoint
- Office 365 Outlook
- OneDrive
- Twitter
- Dropbox
- Outlook.com
- Dynamics 365 (deprecated)
- Yammer
- Excel Online (Business)
- Google Calendar

[Multistep flows](#) Approve requests Adding conditions Using on-premises data Working securely

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Power Automate-Sample Workflow



Forms

Inspection Time Tracker

Use this form to track your time when conducting inspections

Hi, Richard. When you submit this form, the owner will see your name and email address.

* Required

1. Business Name *

Enter your answer

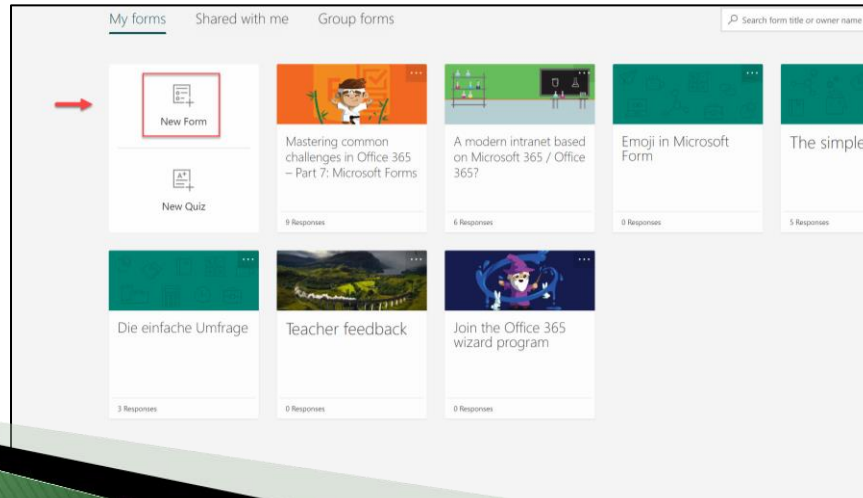
2. Date *

Please input date (M/d/yyyy)

3. Pre-Inspection Time

.25 = 15 minutes
.50 = 30 minutes

- Microsoft Forms is a user-friendly survey and form tool that is part of the Microsoft 365 suite. It allows users to create various types of forms, quizzes, and surveys quickly and easily. Forms is a simple yet powerful platform to collect and analyze data.
- Mobile Accessible to complete Inspection Data in the Field



SharePoint

- SharePoint is a web-based collaborative platform that serves as a centralized hub for document management, content collaboration, intranet development, and workflow automation.
- It allows users to store, organize, share, and collaborate on documents and files securely within team sites or communication sites.
- SharePoint offers built-in workflow capabilities, integration with other Microsoft 365 applications, powerful search functionality, and robust security features.
- Organizations can use SharePoint to build corporate intranet portals, manage projects, automate business processes, and facilitate internal communication.



Power Query

- Power Query is a data connection technology that enables users to discover, connect, combine, and refine data across a wide variety of sources.
- It is integrated into various Microsoft products such as Excel, Power BI, and more recently, Power Apps.
- Power Query simplifies data preparation and transformation tasks, allowing users to cleanse, reshape, and merge data from different sources.
- Users can access and analyze data from databases, spreadsheets, web services, and other sources directly within their preferred Microsoft applications.
- Power Query's intuitive interface and powerful data manipulation capabilities make it a valuable tool for data analysts, business users, and developers alike.



Test Case

- Q: How do I keep track of my inspection time?
 - Condition (1) Mobile first solution
 - Condition (2) Collaborative with Team
 - Condition (3) Secure & Centralized Storage
 - Condition (4) Automated Notification System
 - Condition (5) Exportable Data for Reporting
 - Condition (6) Easy Setup & No-Cost



**Power
Automate**



Microsoft Lists



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Answer:

- Power Automate will use triggers to perform an action
- Forms to collect the responses;
 - Get Data Response Details.
 - Then use a Trigger to perform an action....
 - In our example we will use the “ Send an Email (V2)”& Condition trigger.
- The Data will be collected and placed on a SharePoint List (online).
 - PowerQuery will access the online List and transform the data.
 - Send email notifications (1) as soon as the initial data is entered and again (2) after “5 Days” if no change in inspection status.



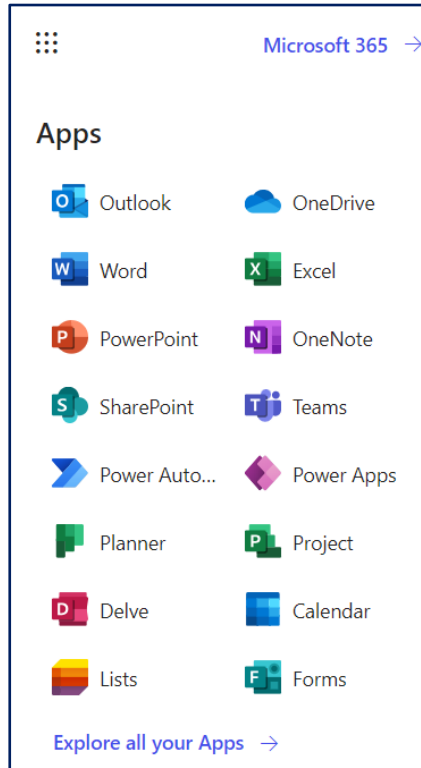
Microsoft Lists



Where do I find the Apps



- Click on the waffle button to see available Apps



Power Automate



Microsoft Lists

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Build your Form

1. **Multiple Choice:**
2. **Text:** fill in the blank, limited word count.
3. **Rating:** on a scale from 1 to 5 stars.
4. **Date:** select a date from a calendar picker.
5. **Ranking:** rank items in order of preference.
6. **Likert Scale:** strongly disagree to strongly agree.
7. **Net Promoter Score (NPS):** rate on a scale from 0 to 10.
8. **Dropdown:** select from a dropdown list.
9. **File Upload:** upload files or images.
10. **Matrix:** multiple answers in a grid format.
11. **Textbox:** typically not limited by character count.
12. **Picture Choice:** select one option from a list of images.

Inspection Time Tracker

Use this form to track your time when conducting inspections

Hi, Richard. When you submit this form, the owner will see your name and email address.

* Required

1. Business Name *

Enter your answer

2. Date *

Please input date (M/d/yyyy)

3. Pre-Inspection Time

.25 = 15 minutes
.50 = 30 minutes
.75 = 45 minutes
1 = 1 hour/60 minutes
1.25 = 1 hour 15 minutes

The value must be a number

4. Travel

.25 = 15 minutes
.50 = 30 minutes
.75 = 45 minutes
1 = 1 hour/60 minutes
1.25 = 1 hour 15 minutes

The value must be a number

5. Onsite Inspection Time

.25 = 15 minutes
.50 = 30 minutes
.75 = 45 minutes
1 = 1 hour/60 minutes
1.25 = 1 hour 15 minutes

The value must be a number

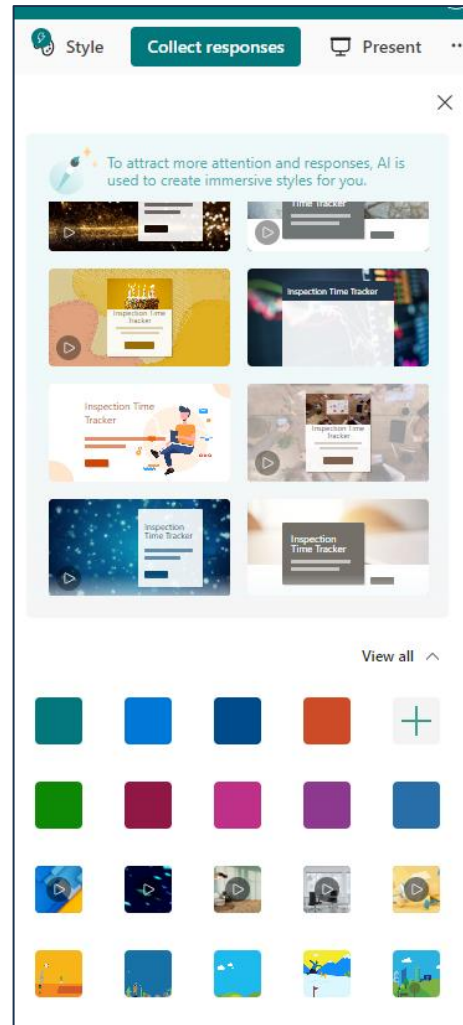


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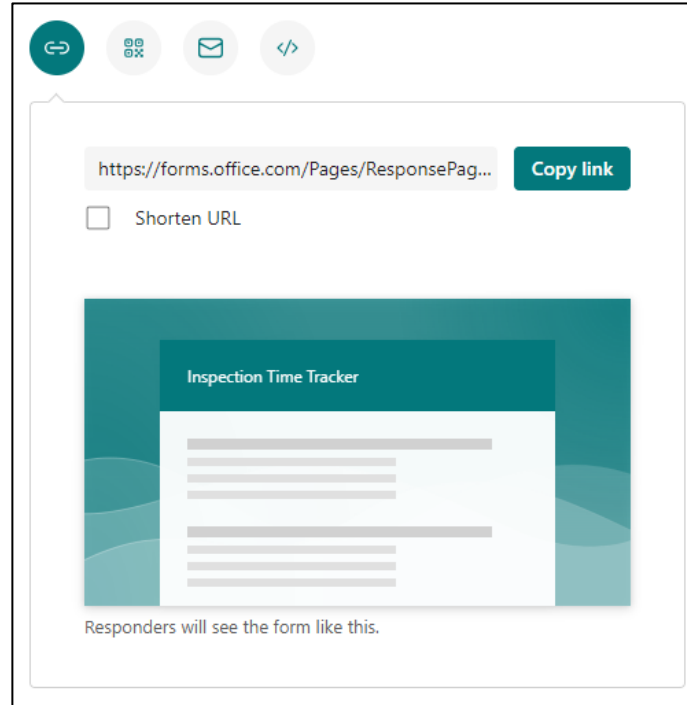
Style your Form

- Change the Style of your Form for a better engagement experience.
 - CAUTION be aware of accessibility issues and visual disabilities



Share your Form

- Click on the ellipsis button to share.
 - Use the Link, QR Code, send in an email or embed the form on a SharePoint or Teams page.
 - Share setting allows for everyone in your organization to access the form or you may access to specific people.



Create a List

Post-Inspection... ▾ Type of Inspecti... ▾ + Add column

Create a column

Offer a set of choices

- Text
- Choice
- Date and time
- Multiple lines of text
- Person
- Number
- Yes/No

Show or hide columns

Next **Cancel**

Edit column

[Learn more about column types and options.](#)

Name *
Status

Description
This column is the status of the inspection

Type
Choice ▾

Choices *

- In-Progress
- Complete
- Late

+ Add Choice

Can add values manually ⓘ

Default value
In-Progress ▾

Use calculated value ⓘ

More options ▾

Save **Cancel** **Delete**



Microsoft Lists



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Create a List



Microsoft Lists interface showing a list titled "Inspection Time Tracker". The list contains 5 items with columns for Form completion, Email, Name, Business Name, Inspection date, Pre-Inspection, Travel, Onsite Inspection, and Return Travel.

Form completi...	Email	Name	Business Name	Inspection date	Pre-Inspection ...	Travel	Onsite Inspecti...	Return Travel
08/16/2023	rmedina@inyocounty.us	Richard Medina	Chevron	8/16/2023	1.5	0.5	3	0.5
8/16/2023 5:32:50 PM	rmedina@inyocounty.us	Richard Medina	Mobil Gas	2023-08-16	0.5	1	4	0.5
8/16/2023 6:12:11 PM	rmedina@inyocounty.us	Richard Medina	K&S Automotive	2023-08-16	0.5	0.25	1	0.25
8/16/2023 6:21:20 PM	rmedina@inyocounty.us	Richard Medina	Main Street waste	2023-08-09	0.75	0.5	1.25	
2/26/2024 6:48:52 AM	rmedina@inyocounty.us	Richard Medina	CUPA Conference	2024-02-26	0.5	0.5	2	1



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Test Case

- Q: How do I keep track of my inspection time?
 - ~~Condition (1) Mobile first solution~~
 - ~~Condition (2) Collaborative with Team~~
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**Power
Automate**



Microsoft Lists



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- Outlook.com
- Dynamics 365 (deprecated)
- Yammer
- Excel Online (Business)
- Google Calendar

[Multistep flows](#) Approve requests Adding conditions Using on-premises data Working securely

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Power Automate

When a new response is submitted (When a Form is Submitted) ? ...

* Form Id Inspection Time Tracker ✓

+ ↓

Get response details (From Inspection Time Tracker Form) ? ...

* Form Id Inspection Time Tracker ✓

* Response Id Response Id ×

↓

Send an email (V2) (Manually inputted or use dynamic field) ? ...



- Click on the ellipsis button to rename



**Power
Automate**

Power Automate & Forms

Send an email (V2)

To: rmedina@inyocounty.us

Subject: A [Type of Inspection] inspection at [Business Name] has occurred on [Date]

Body: Hello, [Responders' Email] performed a [Type of Inspection] inspection at [Business Name] on [Date]. The pre-inspection time took [Pre-Inspection Time] hour(s) and the travel time to [Business Name] took [Travel] hour(s). The duration of the inspection was [Onsite Inspection Time] hours(s) and the return travel time was [Return Travel] hour(s). Based on the findings of the inspection, [Responders' Email] took approximately [Post-Inspection Time] hour(s) to complete the post inspection report. Thank you. [Responders' Email]

Show advanced options

Add dynamic content from the apps and connectors used in this flow. Hide

Dynamic content Expression

Search dynamic content

Get response details

- Pre-Inspection Time
Answer to the question above
- Date
Answer to the question above
- Return Travel
Answer to the question above
- Business Name
Answer to the question above
- Onsite Inspection Time
Answer to the question above
- Travel
Answer to the question above
- Post-Inspection Time
Answer to the question above
- Type of Inspection
Answer to the question above

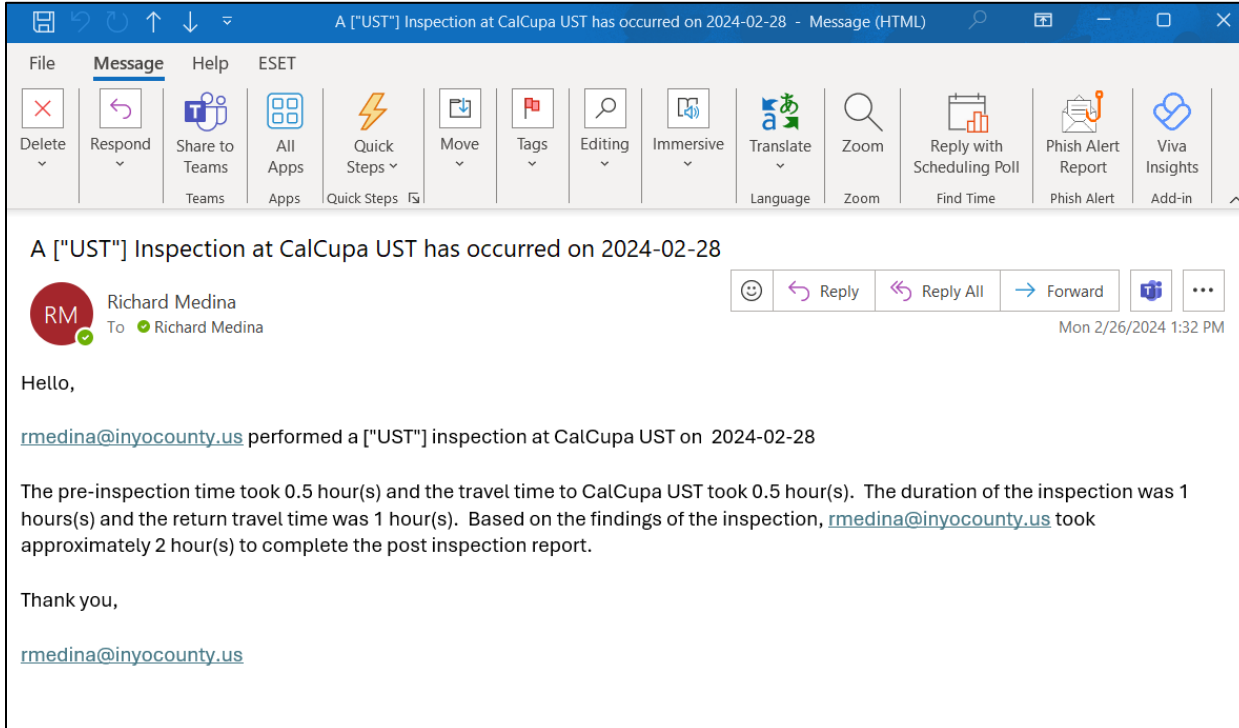


Power Automate



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Email Generated



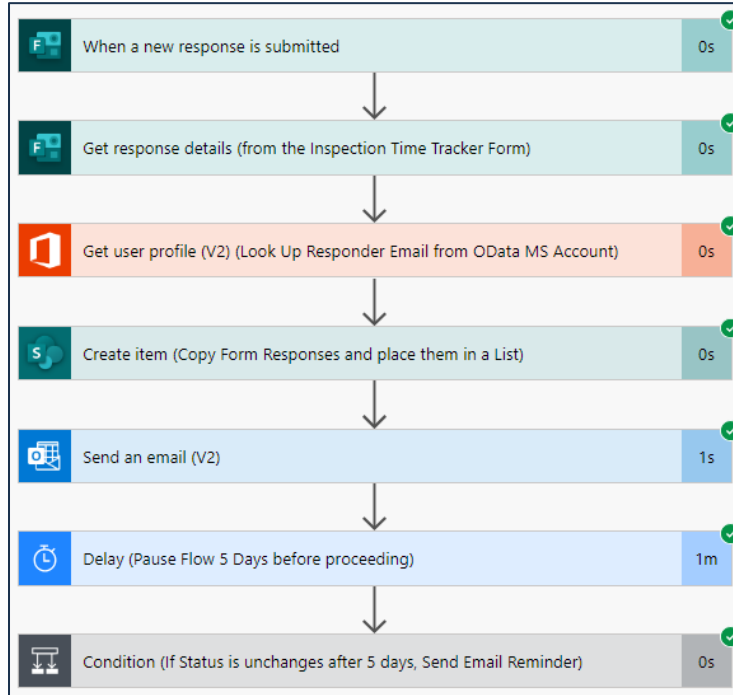
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Power Automate

← Inspection Time Tracker

✓ Your flow ran successfully.

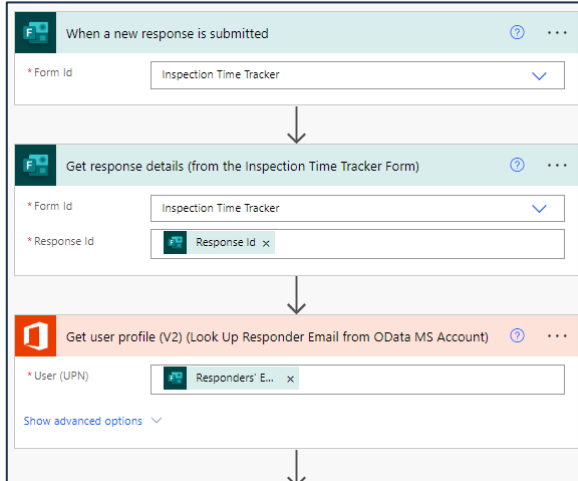


Power Automate

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Power Automate



Create item (Copy Form Responses and place them in a List)

Site Address: [Redacted]

List Name: Inspection Time Tracker

Start time: [Empty]

Form completion time: Submission time x

Email: Responders' E... x

Name: Display Name x

Business Name: Business Name x

Inspection date: Date x

Pre-Inspection Time: Pre-Inspection ... x

Travel: Travel x

Onsite Inspection Time: Onsite Inspectio... x

Return Travel: Return Travel x

Post-Inspection Time: Post-Inspectio... x

Type of Inspection: Type of Inspect... x

Status Value: In-Progress

Supervisor: Default Column with Supervisor email

Show advanced options v

Send an email (V2)

To: Responders' E... x

Subject: Business Name x, Type of Inspect... x, conducted by, Display Name x

Body: This is an email notification. Display Name x has conducted an inspection on Inspection date x at Business Name x. The type of inspection was Type of Inspection x.

Inspector email: Email x

Pre-Inspection Time: Pre-inspection Time x

Travel to Time: Travel x

Onsite Inspection Time: Onsite Inspection Time x

Return Travel Time: Return Travel x

Post-Inspection Time: Post-Inspection Time x

Status Value: Status Value x

A link to the list: [Redacted]

Show advanced options v



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Power Automate

The screenshot displays a Power Automate flow with two steps:

- Delay (Pause Flow 5 Days before proceeding)**: A step with a clock icon. The configuration shows a count of 5 and a unit of Day.
- Condition (If Status is unchanged after 5 days, Send Email Reminder)**: A step with a computer monitor icon. The configuration shows a variable named "Status Va..." is equal to "In-Progress".

Below the condition step, there are two paths:

- If yes**: A green path with a checkmark icon.
- If no**: A red path with an X icon.

Power Automate

This screenshot shows a Power Automate flow step titled "Update item (Automatically Update Status to LATE)". The step is part of a flow that has a green "If yes" branch. The step configuration includes the following fields:

- Site Address: [Dropdown menu]
- List Name: Inspection Time Tracker
- Id: [ID field]
- Start time: [Text box]
- Form completion time: [Text box]
- Email: [Text box]
- Name: [Text box]
- Business Name: [Text box]
- Inspection date: [Text box]
- Pre-Inspection Time: [Text box]
- Travel: [Text box]
- Onsite Inspection Time: [Text box]
- Return Travel: [Text box]
- Post-Inspection Time: [Text box]
- Type of Inspection: [Text box]
- Status Value: Late
- Supervisor: rmedina@inyncounty.us

At the bottom of the step configuration, there is a "Show advanced options" link. Below the step configuration, a downward arrow points to a condition box: "Condition 2 (If Status is = to LATE, send reminder Email)".

This screenshot shows a Power Automate flow step titled "Send an email (V2) 2". The step is part of a flow that has a green "If yes" branch and a red "If no" branch. The step configuration includes the following fields:

- Condition 2 (If Status is = to LATE, send reminder Email): [Condition box]
- Send an email (V2) 2: [Send email action]

The "If no" branch is currently empty and contains an "Add an action" button.



Power Automate

✓ If yes

Send an email (V2) 2

*To: rmedina@inyocounty.us

*Subject: Your Inspection Report for Business Name x is OVERDUE

*Body:

Font 12 B I U [Icons]

Hello Responders' Email x

Your inspection at Business Name x was conducted on Inspection date x and 5 Days has passed. The status of your inspection is now LATE.

Please close out this inspection at as soon as possible.

Thank you,

Show advanced options

Add an action

✗ If no

Add an action

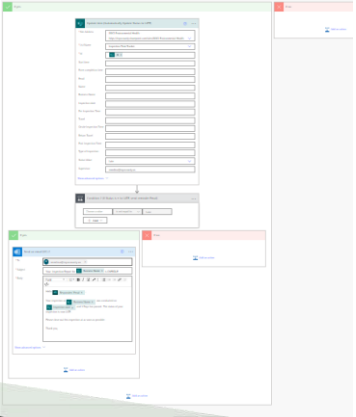
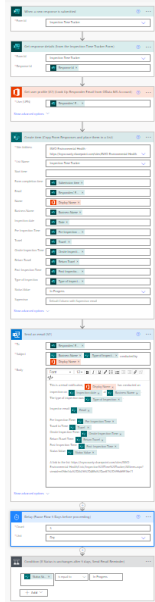


Power Automate

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Network Map

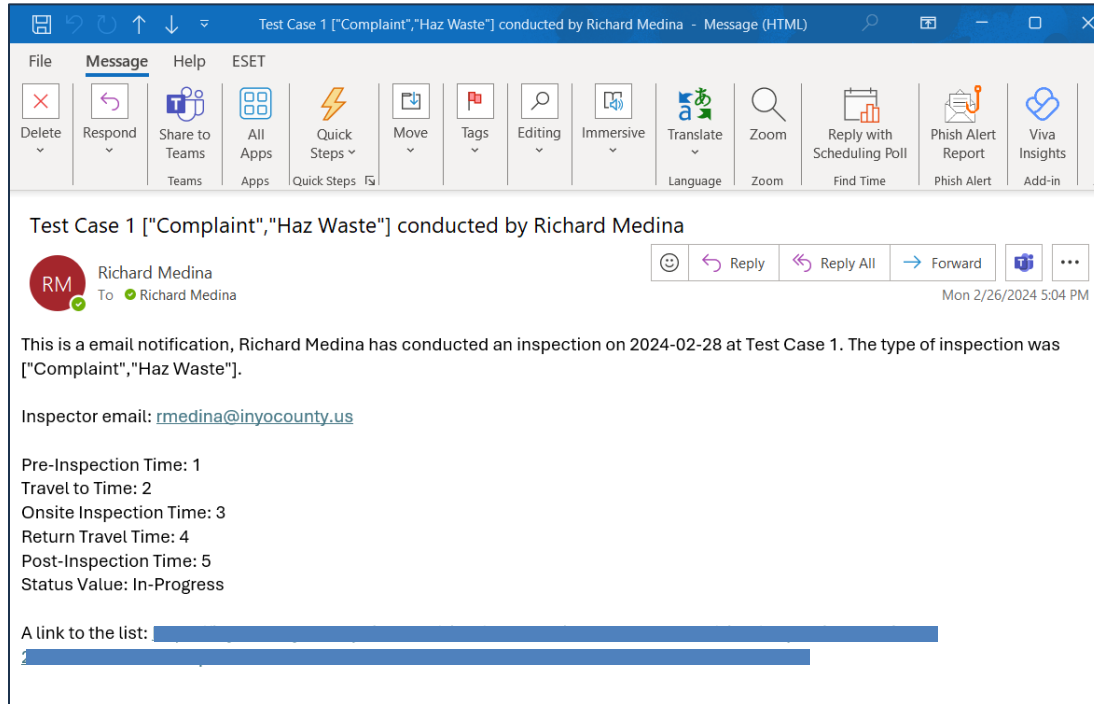


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Email Generated



Power
Automate

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Transferred Data



Microsoft Lists

Inspection Time Tracker ☆ ☾

Email	Name	Business Name	Inspection date	Pre-Inspection ...	Travel	Onsite Inspecti...	Return Travel	Post-Inspection...	Type of Inspecti...	Status	Supervisor
rmedina@inyocounty.us	Richard Medina	CalCupa UST	2024-02-28	0.5	0.5	1	1	2	["UST"]	Complete	rmedina@inyocounty.us
rmedina@inyocounty.us	Richard Medina	CalCupa UST	2024-02-28	0.5	0.5	1	1	2	["UST"]	Complete	rmedina@inyocounty.us
rmedina@inyocounty.us	Richard Medina	CalCupa UST	2024-02-28	0.5	0.5	1	1	2	["UST"]	Late	rmedina@inyocounty.us
rmedina@inyocounty.us	Richard Medina	CalCupa UST	2024-02-28	0.5	0.5	1	1	2	["UST"]	Complete	rmedina@inyocounty.us
rmedina@inyocounty.us	Richard Medina	CalCupa UST	2024-02-28	0.5	0.5	1	1	2	["UST"]	Complete	rmedina@inyocounty.us
rmedina@inyocounty.us	Richard Medina	Test Case 1	2024-02-28	1	2	3	4	5	["Complaint","Haz Waste"]	In-Progress	rmedina@inyocounty.us



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Add Column Choice Field



Microsoft Lists

Post-Inspection... ▾ Type of Inspecti... ▾ + Add column

Create a column

Offer a set of choices

- Text
- Choice
- Date and time
- Multiple lines of text
- Person
- Number
- Yes/No

Show or hide columns

Next Cancel

Edit column

[Learn more about column types and options.](#)

Name *
Status

Description
This column is the status of the inspection

Type
Choice ▾

Choices *

- In-Progress
- Complete
- Late

+ Add Choice

Can add values manually ⓘ

Default value
In-Progress ▾

Use calculated value ⓘ

More options ▾

Save Cancel Delete



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Test Case-Progress Report

- Q: How do I keep track of my inspection time?
 - ~~Condition (1) Mobile first solution~~
 - ~~Condition (2) Collaborative with Team~~
 - ~~Condition (3) Secure & Centralized Storage~~
 - ~~Condition (4) Automated Notification System~~
 - Condition (5) Exportable Data for Reporting
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**Power
Automate**



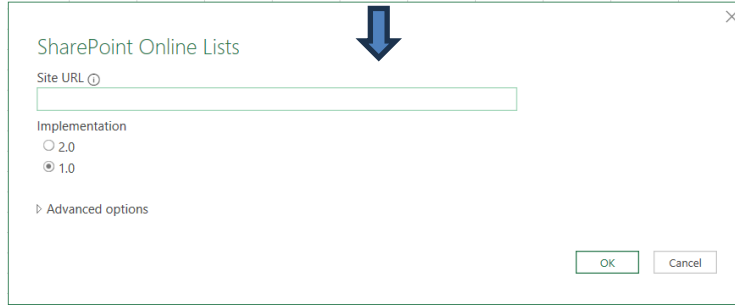
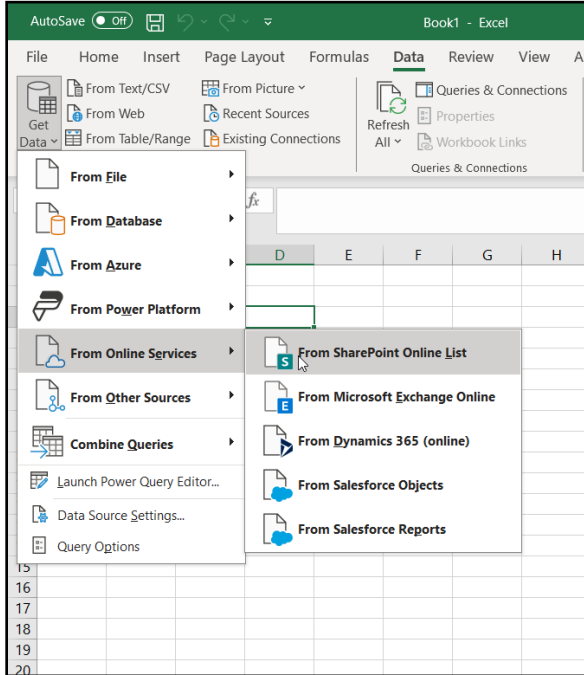
Microsoft Lists



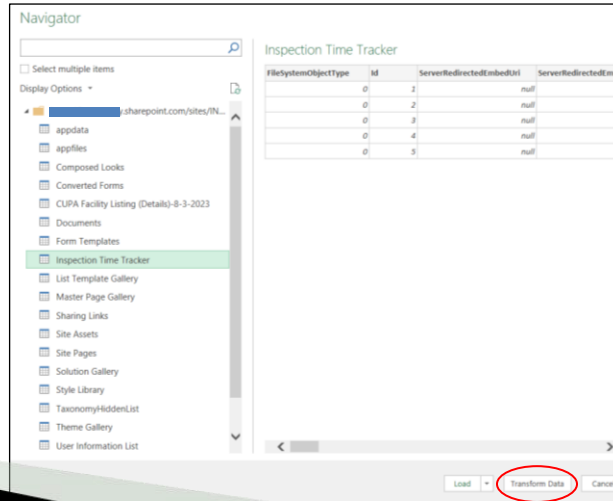
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Power Query

Type SharePoint Web Root Address



*Authenticate with Microsoft Account



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Power Query

The screenshot shows the Power Query interface with a data table and a dialog box. The table has columns: OData_ColorTag, ComplianceAssetId, field_2, field_3, field_4, field_5, and field_6. The dialog box is titled "Text Before Delimiter" and contains the text "Enter the delimiter that marks the end of what you would like to extract." and a text input field containing "@".

	OData_ColorTag	ComplianceAssetId	field_2	field_3	field_4	field_5	field_6
1	null		08/16/2023	rmedina@inyocounty.us	Richard Medina	Chevron	8/16/2023
2	null		8/16/2023 5:32:50 PM	rmedina@inyocounty.us	Richard Medina	Mobil Gas	2023-08-16
3	null		8/16/2023 6:12:11 PM	rmedina@inyocounty.us	Richard Medina	K&S Automotive	2023-08-16
4	null		8/16/2023 6:21:20 PM	rmedina@inyocounty.us	Richard Medina	Main Street waste	2023-08-09
5	null						2024-02-26

The result = rmedina

You can copy the original data then transform the copied data. Delete unnecessary data.

Power Query

= Table.TransformColumnTypes(#"Split Column by Delimiter",{{"field_3.1", type text}, {"field_3.2", type text}})

g	ABC 123 ComplianceAssetId	ABC 123 field_2	ABC field_3.1	ABC field_3.2	ABC 123 field_4	ABC 123
	null	08/16/2023	rmedina	inyocounty.us	Richard Medina	Che
	null	8/16/2023 5:32:50 PM	rmedina	inyocounty.us	Richard Medina	Mob
	null	8/16/2023 6:12:11 PM	rmedina	inyocounty.us	Richard Medina	K&S
	null	8/16/2023 6:12:11 PM	rmedina	inyocounty.us	Richard Medina	K&S
	null	8/16/2023 6:12:11 PM	rmedina	inyocounty.us	Richard Medina	K&S

Split Column by Delimiter

Specify the delimiter used to split the text column.

Select or enter delimiter

--Custom--

@

Split at

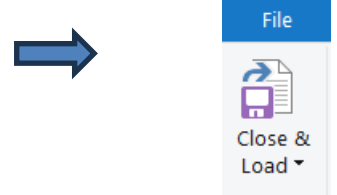
Left-most delimiter

Right-most delimiter

Each occurrence of the delimiter

The result is two columns split by the “@” delimiter

When done with transforming data, click



Power Query



The screenshot shows the Microsoft Excel interface with a Power Query query named "Inspection Time Tracker" loaded into a worksheet. The query results are displayed in a table with the following columns: FileSystemObjectType, Id, ServerRedirectedEmbedUrl, ContentTypeId, and Title. The data rows are as follows:

FileSystemObjectType	Id	ServerRedirectedEmbedUrl	ContentTypeId	Title
0	1	null	0x01008A7DE3B5	
0	2	null	0x01008A7DE3B5	
0	3	null	0x01008A7DE3B5	
0	4	null	0x01008A7DE3B5	
0	5	null	0x01008A7DE3B5	

The worksheet also shows a table with columns labeled field_2, field_3.1, field_3.2, field_4, and field_5. The data rows include dates and times, and names like rmedina, inyocounty.us, and Richard Medina.

Your data is now retrieved from an online service locally saved to your machine which can be refreshed and reloaded retaining your transformations



Power Query



The screenshot shows the Microsoft Excel interface with a Power Query connection. The main window displays a table with the following data:

FileSystemObjectType	Id	ServerRedirectedEmbedUri	ServerRedirectedEmbedUri	ContentTypeId
0	1	null		0x01008A7DE
0	2	null		0x01008A7DE
0	3	null		0x01008A7DE
0	4	null		0x01008A7DE
0	5	null		0x01008A7DE
0	6	null		0x01008A7DE
0	7	null		0x01008A7DE
0	8	null		0x01008A7DE
0	9	null		0x01008A7DE

The 'Queries & Connections' pane on the right shows a single query named 'Inspection Time Tracker' with 21 rows loaded. The status bar at the bottom indicates 'Average: 12958.3799 Count: 570 Sum: 1904891.846'.



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Test Case-Progress Report

- Q: How do I keep track of my inspection time?
 - ~~Condition (1) Mobile first solution~~
 - ~~Condition (2) Collaborative with Team~~
 - ~~Condition (3) Secure & Centralized Storage~~
 - ~~Condition (4) Automated Notification System~~
 - ~~Condition (5) Exportable Data for Reporting~~
 - ~~Condition (6) Easy Setup & No Cost~~



**Power
Automate**



Microsoft Lists



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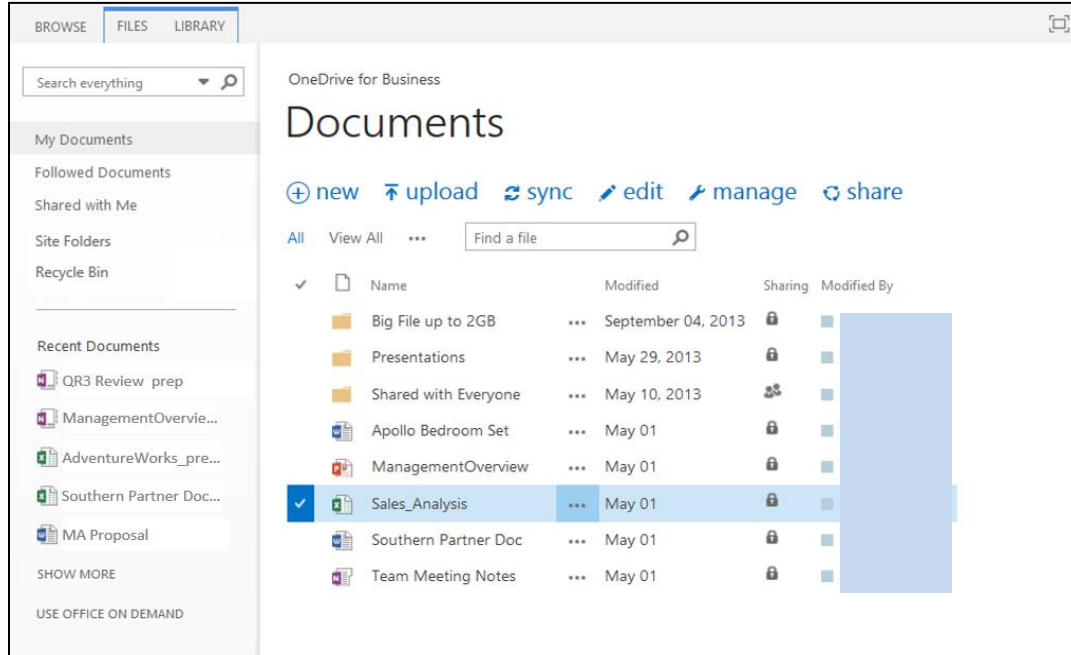
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One Drive

- One Drive is really your desktop in the cloud.
- You can easily access any document from multiple devices.
- The days of carrying binders of owner's manuals and regulations are over. Use your mobile device to access your important documents.
- Easily share documents.
- Allows you to work on the same document simultaneously.
- Documents backed up in case you lose your device, or it gets damaged.



One Drive



The screenshot displays the OneDrive for Business interface. The left sidebar shows navigation options: My Documents, Followed Documents, Shared with Me, Site Folders, Recycle Bin, Recent Documents, and a list of recent files including 'QR3 Review prep', 'ManagementOverview...', 'AdventureWorks_pre...', 'Southern Partner Doc...', and 'MA Proposal'. The main area is titled 'Documents' and contains a table of files. The 'Sales_Analysis' file is selected.

✓	📁	Name	Modified	Sharing	Modified By
	📁	Big File up to 2GB	... September 04, 2013	🔒	█
	📁	Presentations	... May 29, 2013	🔒	█
	📁	Shared with Everyone	... May 10, 2013	👥	█
	📄	Apollo Bedroom Set	... May 01	🔒	█
	📄	ManagementOverview	... May 01	🔒	█
✓	📄	Sales_Analysis	... May 01	🔒	█
	📄	Southern Partner Doc	... May 01	🔒	█
	📄	Team Meeting Notes	... May 01	🔒	█



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Conclusion

- Brief Overview of Microsoft Power Products
 - Power Automate
 - Forms
 - Power Query
 - SharePoint
- Field Inspection Time Test Case
- Introduction to OneDrive and its benefits for field inspections



Let's Build Something Great!



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Any Questions?

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