New S&M User Profiling Request Application

Introduction

The User Profiling-Request Application is designed to streamline and enhance the user profiling process for Sales & Marketing (S&M) users in the APeC and China regions. This documentation aims to provide comprehensive guidance on the installation, usage, and features of the application.

AS- IS Current Problem

The current user profiling process involves filling out forms or creating tickets via Helix for the required applications. This process is often cumbersome and time-consuming, as it requires routing and approval from various stakeholders. New users face challenges in identifying the necessary applications, understanding their functions, and navigating the data segregation perimeters and approver matrix. Similarly, existing users who need to upgrade their profile status encounter inefficiencies and multiple iterations, leading to prolonged response times.

AS-IS Proposed Solution

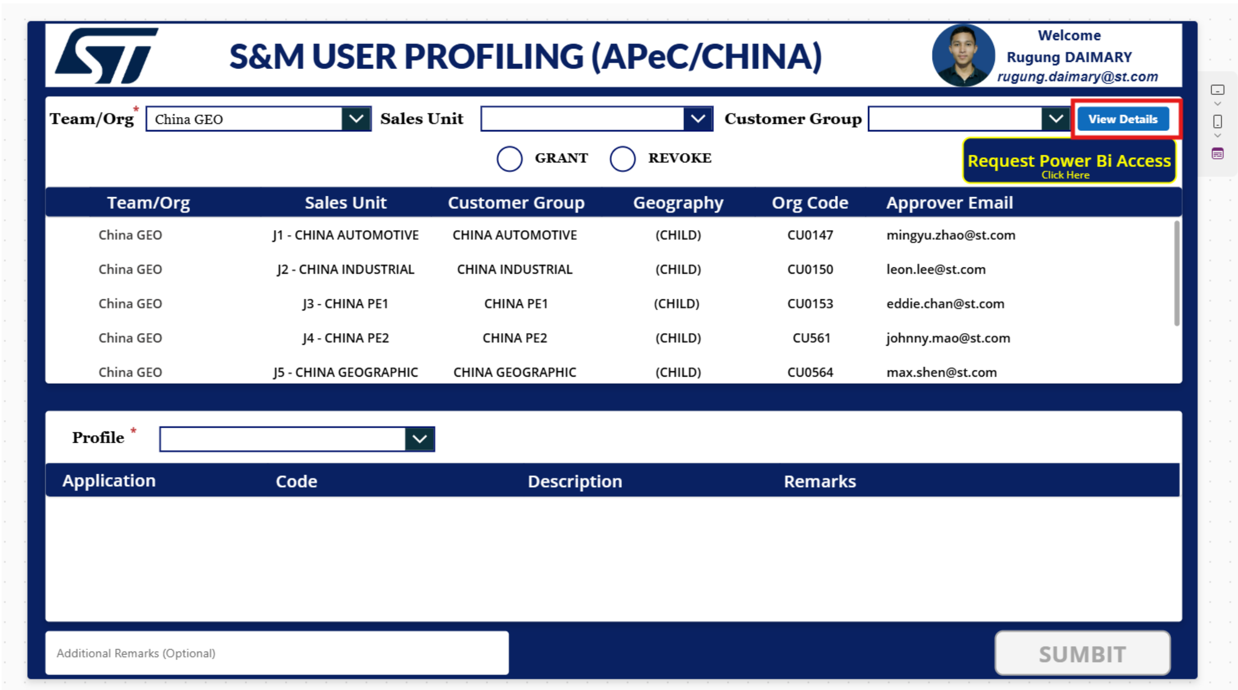
To address these challenges, we propose a streamlined and simplified user profiling request process using the Power Platform. This solution aims to enhance efficiency and user experience by providing quicker access and reducing complexity. By implementing these changes, we aim to create a more user-friendly and efficient system for both new and existing users.

UI

The application screen is divided into two main sections: **User Details** and **Profile.**

User Details Section:

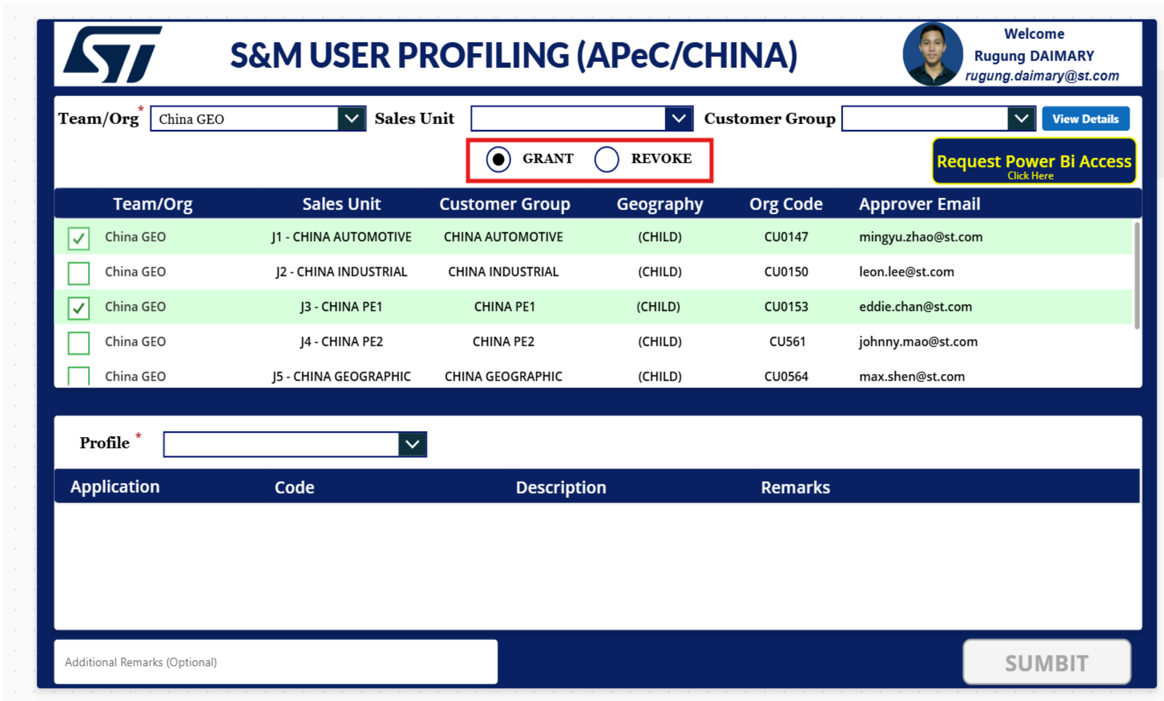
Team/Org, Sales Unit, and Customer Group:



- In this section, you must select your Team/Organization. This selection is mandatory.
- After selecting the team organization, you can further narrow down your choices by selecting additional filters on the sales unit or customer group.
- Once you have made your selections, click on the **View Details** button to view the User Details.

Grant or Revoke Request:

- Decide whether you want a grant or revoke request. You can select only one option at a time.



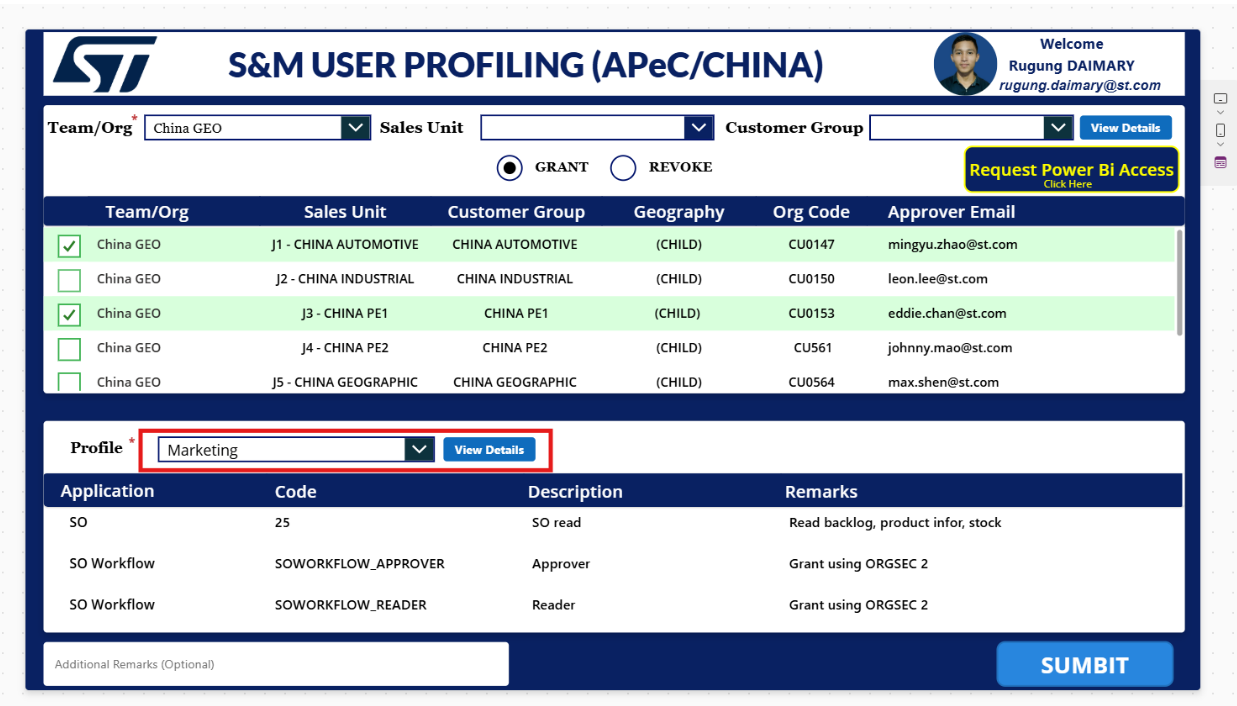
- As soon as the user checks any **grant/revoke** radio button, the checkbox will be enabled for the user to check which row is applicable for them.
- If the approver's email ID is not applicable directly, the system will retrieve the **manager's email ID** as the approver.
- If the user selects **PARENT ACCESS (Sales Org)** as the Profile, then the manager's email ID will be retrieved from Office365 as the approver.

After making your selection, proceed to the Profile section.

Profile Section:

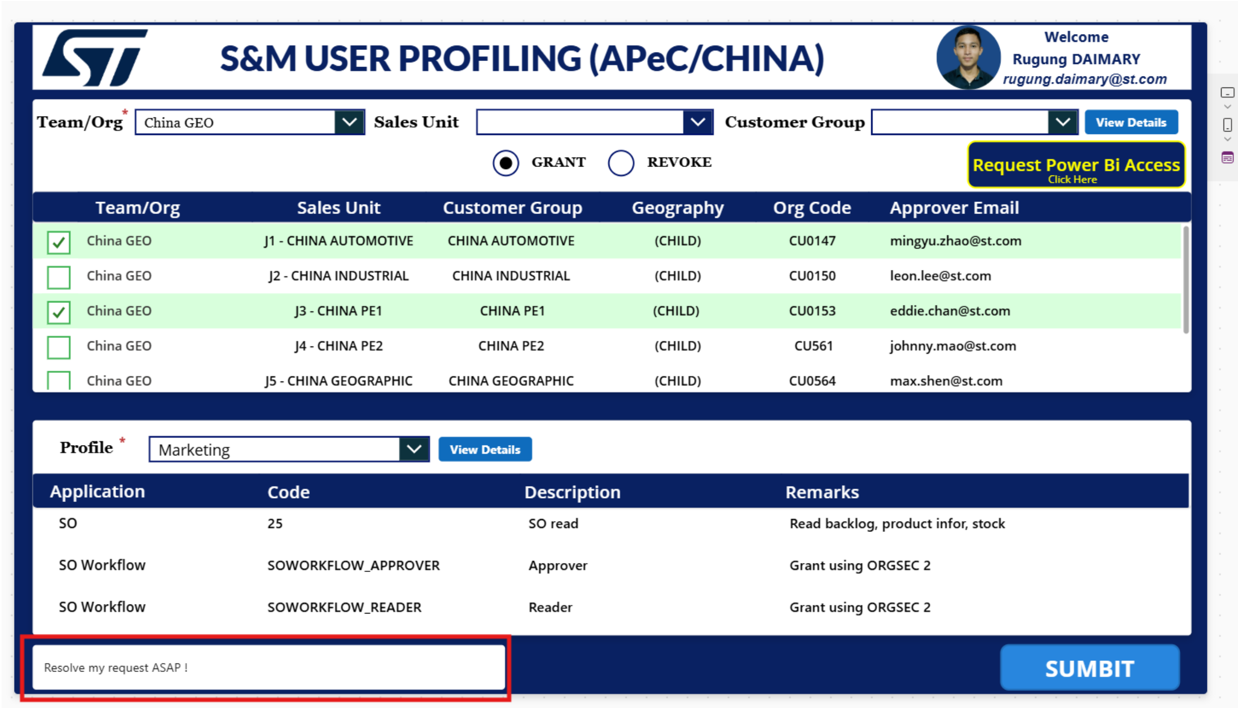
Users need to select the Profile accordingly. As soon as the user selects the Profile and **at least one checkbox** from the above User Details section, the **SUBMIT** button will be enabled.

One specification for selecting a marketing profile is that the approver's email will be updated to the manager's email ID.



Additional Remarks:

- Users can send additional information to the approver to smoothen the request process.



Request Power BI Access Button:

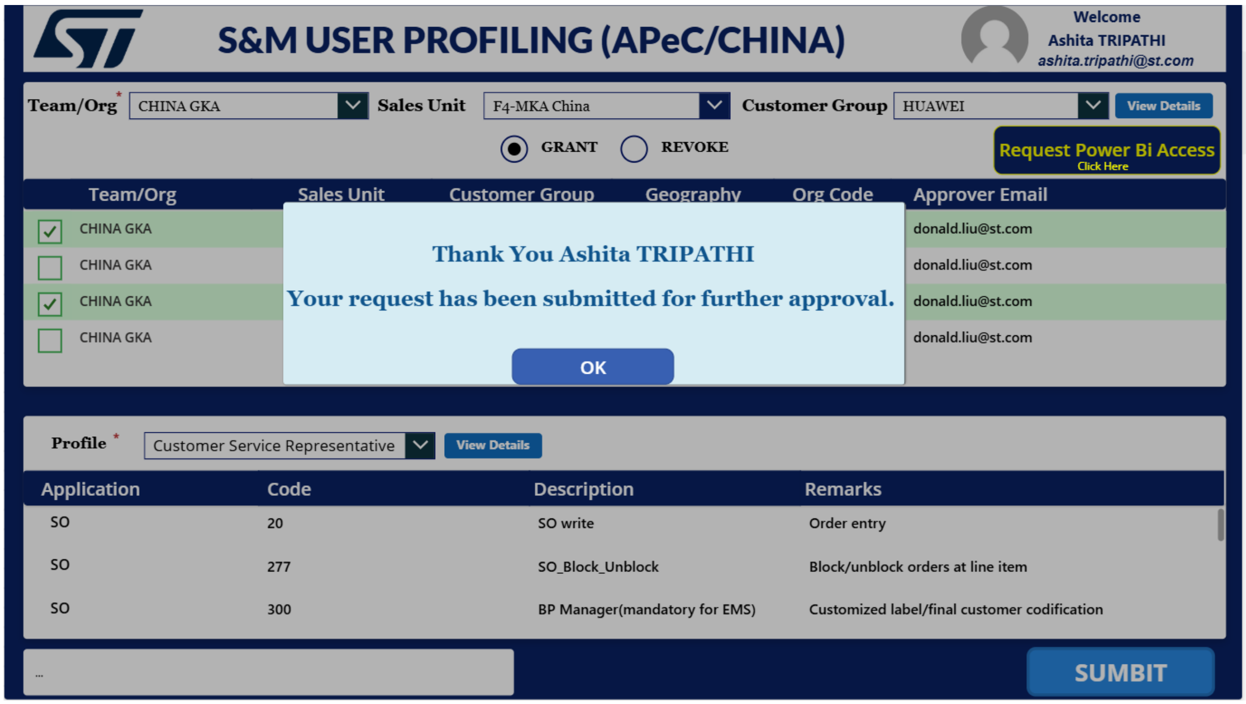
If the user wants to visit the **User Portal**, we have integrated a **Request Power BI Access** button which redirects to a different screen where all the instructions for the User Portal are written down.

Once the user clicks on the **User Profile Portal Button**, it will redirect to the **User Portal**.

- If the user wants to go back to the previous screen, button.
- For **resetting** all details, click on ST Logo

Request Submission:

Once the user clicks on the **SUBMIT** button, a pop-up screen will be shown. Once the user clicks on the **OK** button, all details will be reset, and the user's request will be sent for further processing through Power Automate.



Backend Process

When the user presses the Submit button in the Power Apps interface, the following backend processes are triggered:

1. Power Automate Activation: Power Automate (formerly Microsoft Flow) is activated to handle the submission workflow.

2. Input Collection: The following user inputs are collected:

- User Information: Details such as name, department, and role.
- User Email: The email address of the user submitting the request.
- Profile Information: Specific details about the profile being requested or updated.
- Username: The username of the individual making the request.
- User Comment: Any additional comments or notes provided by the user.

3. Request Formatting: Based on the collected inputs, the request is formatted into a predefined, rigid structure to ensure consistency and clarity.

4. Notification to Approvers:

- The formatted request is then sent to the designated approvers. Notifications are sent via:
- Outlook: An email notification is sent to the approvers' Outlook inbox.
- Teams: A notification is also sent to the approvers' Microsoft Teams account.

5. Approval Workflow:

- Approvers review the request and can either approve or reject it.
- The approval or rejection decision is captured and logged in the system.

6. Notification to User: Once the approver has decided, a notification is sent to the user via email, informing them of the status of their request (approved or rejected).

7. Helix Team Involvement:

- If the request is approved, the information is passed on to the Helix team for further processing.
- The Helix team performs the necessary actions based on the approved request.