

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

STI S&M USER PROFILING (APeC/CHINA)

Welcome
Rugung DAIMARY
rugung.daimary@st.com

Team/Org* Sales Unit Customer Group [View Details](#)

☐ GRANT ☐ REVOKE

[Request Power BI Access](#)
Click Here

Team/Org	Sales Unit	Customer Group	Geography	Org Code	Approver Email
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Profile*

Application	Code	Description	Remarks
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Additional Remarks (Optional)

SUMBIT

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

User Details Section:

Team/Org, Sales Unit, and Customer Group:

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Team/Org	Sales Unit	Customer Group	Geography	Org Code	Approver Email
China GEO	J1 - CHINA AUTOMOTIVE	CHINA AUTOMOTIVE	(CHILD)	CU0147	mingyu.zhao@st.com
China GEO	J2 - CHINA INDUSTRIAL	CHINA INDUSTRIAL	(CHILD)	CU0150	leon.lee@st.com
China GEO	J3 - CHINA PE1	CHINA PE1	(CHILD)	CU0153	eddie.chan@st.com
China GEO	J4 - CHINA PE2	CHINA PE2	(CHILD)	CU561	johnny.mao@st.com
China GEO	J5 - CHINA GEOGRAPHIC	CHINA GEOGRAPHIC	(CHILD)	CU0564	max.shen@st.com

Profile*

Application	Code	Description	Remarks
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Additional Remarks (Optional)

SUMBIT

- 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.

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Team/Org* China GEO Sales Unit Customer Group View Details

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Team/Org	Sales Unit	Customer Group	Geography	Org Code	Approver Email
<input checked="" type="checkbox"/> China GEO	J1 - CHINA AUTOMOTIVE	CHINA AUTOMOTIVE	(CHILD)	CU0147	mingyu.zhao@st.com
<input type="checkbox"/> China GEO	J2 - CHINA INDUSTRIAL	CHINA INDUSTRIAL	(CHILD)	CU0150	leon.lee@st.com
<input checked="" type="checkbox"/> China GEO	J3 - CHINA PE1	CHINA PE1	(CHILD)	CU0153	eddie.chan@st.com
<input type="checkbox"/> China GEO	J4 - CHINA PE2	CHINA PE2	(CHILD)	CU561	johnny.mao@st.com
<input type="checkbox"/> China GEO	J5 - CHINA GEOGRAPHIC	CHINA GEOGRAPHIC	(CHILD)	CU0564	max.shen@st.com

Profile *

Application	Code	Description	Remarks

Additional Remarks (Optional)

SUMBIT

- 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.

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Team/Org* Sales Unit Customer Group [View Details](#)

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Team/Org	Sales Unit	Customer Group	Geography	Org Code	Approver Email
<input checked="" type="checkbox"/> China GEO	J1 - CHINA AUTOMOTIVE	CHINA AUTOMOTIVE	(CHILD)	CU0147	mingyu.zhao@st.com
<input type="checkbox"/> China GEO	J2 - CHINA INDUSTRIAL	CHINA INDUSTRIAL	(CHILD)	CU0150	leon.lee@st.com
<input checked="" type="checkbox"/> China GEO	J3 - CHINA PE1	CHINA PE1	(CHILD)	CU0153	eddie.chan@st.com
<input type="checkbox"/> China GEO	J4 - CHINA PE2	CHINA PE2	(CHILD)	CU561	johnny.mao@st.com
<input type="checkbox"/> China GEO	J5 - CHINA GEOGRAPHIC	CHINA GEOGRAPHIC	(CHILD)	CU0564	max.shen@st.com

Profile* [View Details](#)


Application	Code	Description	Remarks
SO	25	SO read	Read backlog, product infor, stock
SO Workflow	SOWORKFLOW_APPROVER	Approver	Grant using ORGSEC 2
SO Workflow	SOWORKFLOW_READER	Reader	Grant using ORGSEC 2

Additional Remarks (Optional)


SUBMIT

Additional Remarks:

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



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Team/Org * China GEO
Sales Unit
Customer Group
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☐ REVOKE
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Click Here

	Team/Org	Sales Unit	Customer Group	Geography	Org Code	Approver Email
<input checked="" type="checkbox"/>	China GEO	J1 - CHINA AUTOMOTIVE	CHINA AUTOMOTIVE	(CHILD)	CU0147	mingyu.zhao@st.com
<input type="checkbox"/>	China GEO	J2 - CHINA INDUSTRIAL	CHINA INDUSTRIAL	(CHILD)	CU0150	leon.lee@st.com
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<input type="checkbox"/>	China GEO	J4 - CHINA PE2	CHINA PE2	(CHILD)	CU561	johnny.mao@st.com
<input type="checkbox"/>	China GEO	J5 - CHINA GEOGRAPHIC	CHINA GEOGRAPHIC	(CHILD)	CU0564	max.shen@st.com

Profile * Marketing
[View Details](#)

Application	Code	Description	Remarks
SO	25	SO read	Read backlog, product infor, stock
SO Workflow	SOWORKFLOW_APPROVER	Approver	Grant using ORGSEC 2
SO Workflow	SOWORKFLOW_READER	Reader	Grant using ORGSEC 2

[SUMBIT](#)

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.



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How to Access Reports

All the reasons why you could not access your report

Instructions

There are different reasons why you could not access a report:

Case 1: You do not have access to the report itself

It will be proposed to send an access request to the owner of the report with an optional comment.

Case 2: You do not have access to the data model

This often happens when the data comes from a database in the cloud you do not have access to. In this case:

- You should request access on the User Profiling & Data Segregation. You can refer to the App documentation if needed. In order to know which database you should request access to, you can contact the owner of the report.

Case 3: You do not have the RLS rights

Some reports use "Row Level Security". This security is often set locally by the owner of the report itself (to segregate locally imported data). You should then contact him directly and ask to give you some rights in the RLS.

Case 1: You do not have access to the report

Request access to this content

If I like access, because...

[Send request](#) [Cancel](#)

Case 2: You do not have access to the data

Couldn't load the data for this visual

Couldn't retrieve the data for this visual. Please try again later.
Please try again later or contact support. If you contact support, please provide these details.

Hide details

Activity ID: 83ae0797-474f-474f-8309-870296329630
Request ID: 49702077-c556-44a9-b02a-420f5a5a5a5a
Correlation ID: 54623389-9a28-8804-1584-2b49b1c251af
Time: Wed Aug 09 2023 15:29:09 GMT+0800 (China Standard Time)
Service version: 13.0.18716.45
Client version: 2007.4.10.009-1991
Cluster URI: https://vaia-north-europe-c-primary-redshift-analysis.amazonaws.net/

[Copy](#)

[Get help](#) [Close](#)

Case 3: No RLS access

The report can't be viewed because the underlying dataset uses row-level security (RLS). [Show details](#)

[User Profile Portal](#)

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



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User Portal

[Requests](#)

USER PROFILE

[REQUEST FOR AN APPLICATION](#)

[CHANGE SEGREGATION](#)

[SPECIAL GRANTS](#)

[LICENSE MANAGER](#)

[DOCUMENTATION](#)

User profile details:

Name	Manager	Department	Role	Location	Special Grants
Rugung DAIMARY	AMIT MISHRA	APX BZ MGMT	Market Intelligence	Greater Noida	

List of approvers

VIPUL GOYAL, JAMIL ABUSAKAR, SIDDHARTH SINGH

List of app granted & requests status:



Application Type	Application Name	Application Description	Status
Power BI Application	DPA	Demand Planning Analytics	Granted appl
Power BI Application	IBP_SOE_ANALYTICS	IBP SOE Analytics	Granted appl
Power BI Application	LOGISTIC	Logistic Analytics	Granted appl
Power BI Application	SSA_BCA	Backlog Change Analysis model	Granted appl
Power BI Application	SSA_BIBA_EVO	BIBA Evolution Analysis	Granted appl
Power BI Application	SSA_CORP_BIBA	Corporate BiBa Analytics	Granted appl
Power BI Application	SSA_DSR	Corporate Statistics - Daily Statistical Reporting	Granted appl
Power BI Application	SSA_FIINNF	FIINNF Analytics	Granted appl

Current segregation:

ROLE NUMBER	Direct Sales Org
1	04 - APeC (INCLUDE)
2	11 - CHINA (INCLUDE)

ROLE NUMBER	ALL
3	ALL (INCLUDE)

ROLE NUMBER	Direct Region	Direct Sales Org
4		04 - APeC (INCLUDE)

- 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.



S&M USER PROFILING (APeC/CHINA)

Welcome
Ashita TRIPATHI
ashita.tripathi@st.com

Team/Org *
CHINA GKA

Sales Unit
F4-MKA China

Customer Group
HUAWEI

View Details

☒ GRANT ☐ REVOKE

Request Power Bi Access
Click Here

Team/Org	Sales Unit	Customer Group	Geography	Org Code	Approver Email
<input checked="" type="checkbox"/> CHINA GKA					donald.liu@st.com
<input type="checkbox"/> CHINA GKA					donald.liu@st.com
<input checked="" type="checkbox"/> CHINA GKA					donald.liu@st.com
<input type="checkbox"/> CHINA GKA					donald.liu@st.com

Thank You Ashita TRIPATHI

Your request has been submitted for further approval.

OK

Profile *
Customer Service Representative

View Details

...

SUBMIT

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.

