Software Lookup Configuration

Data Collaboration

The Software data is stored in a Microsoft List for collaborative purposes. This dataset can be edited or viewed by anyone in the [redacted] *Help Desk team in SharePoint. Please refrain from changing/adding column names; the data source and the reports will then fail to sync. Any changes to the list structure can be made through a change process, and these changes can be made on an ad-hoc basis.*

- To access/edit the Microsoft List, navigate [redacted]. Once viewed, you can add it to your favorites at the [redacted] Help Desk Sharepoint site by using the List option on the left-hand pane. Note that the above-linked view is a sorted view of the current list configuration; any changes made to the list structure may require a new Saved View to be created.
  - List ID: [redacted]`0a513b97cc2d`

> Note: Additions and revisions will trigger an automated notification to alert the team of the change and refresh any published dashboards. Changes to columns (i.e., the structure of the dataset) would require that the Power BI report be refreshed and republished to the workspace. See the documentation `Power BI Report Republishing` for more information.

Dataset Connections and Reporting Services - Power BI

The Microsoft List - SoftwareList - is connected to a Power BI dataset and used to generate a Power BI report (i.e., dashboard). This report is then published to the [redacted] *workspace in the Microsoft 365 cloud, and the credentials of the dataset are authenticated via the SharePoint List.*

Connections

Power BI administrators (currently [redacted]) can access the Power BI dataset and report by logging in at https://app.powerbi.com or https://powerbi.microsoft.com. While all other members of CECAS CORE and CECAS CORE Help Desk have *viewer* rights to the Power BI report in the cloud, all users are recommended to access the dashboard via Microsoft Teams as shown under the next header.

> Viewership rights are provisioned in the Power BI workspace settings using [redacted]@Clemson.onmicrosoft.com and

> [redacted] HelpDesk@Clemson.onmicrosoft.com as the 365 group permission entries. Ownership rights of the dataset itself are singular but can be taken over in the settings at https://app.powerbi.com as shown below.

"MicrosoftTeams-image.png" is not created yet. Click to create.

Reporting Services

After publishing, the Power BI desktop or the cloud workspace is/are typically needed for the following reasons:

Power BI Desktop use:

1. Create new or alter existing dashboards
2. Refresh/sync changes after restructuring the data (e.g., rename, delete, or add a column).

   > Note that this Microsoft released an update which is supposed to enable the same revisions/refreshes to be made from within the Power BI web app - not just the Power BI Desktop version.

*Power BI Cloud workspace use (https://app.powerbi.com):

3. Change the workspace settings or access levels
4. Check the *Refresh History* to see if there has been a failure to authenticate
   - Failure notifications will come by email to those designated in the `Power BI Dataset Refreshes` document

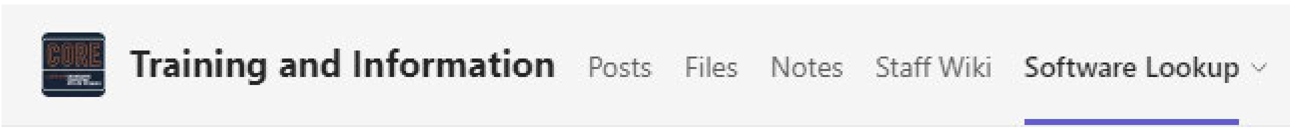
In cases 1 and 2 above, the Power BI Dataset (SoftwareLookup.pbix) - not to be confused with the Power BI report - would need to be Refreshed and Republished to the [redacted] Help Desk workspace in Power BI. Republishing the dataset is what updates the report(s) to the Power BI Service and thus the pages where the dashboard report(s) are embedded. See the documentation `Power BI Report Republishing` for more information

Note that any other change to the connected data - additions or revisions of software to the Microsoft List outlined in the first section - is automatically refreshed to the Power BI report. A scheduled refresh is also configured in the Power BI dataset settings, which runs daily and notifies the dataset owners if the refresh fails. See the documentation `Power BI Dataset Refreshes` for more information.

A Power BI template file (`SoftwareLookup - Template.pbit`) has also been created. This is stored in our SharePoint OneDrive here: [redacted]. This template stores the Data source settings for the SharePoint List, the steps required to manipulate the data ingested from the List, and the settings for the data spliced in the Power BI Dashboard tiles. Assuming there are no issues with the data in Sharepoint, the Power BI dataset could be regenerated with this template, which could also be used to spin up dashboards for similar projects.

Microsoft Teams Lookup

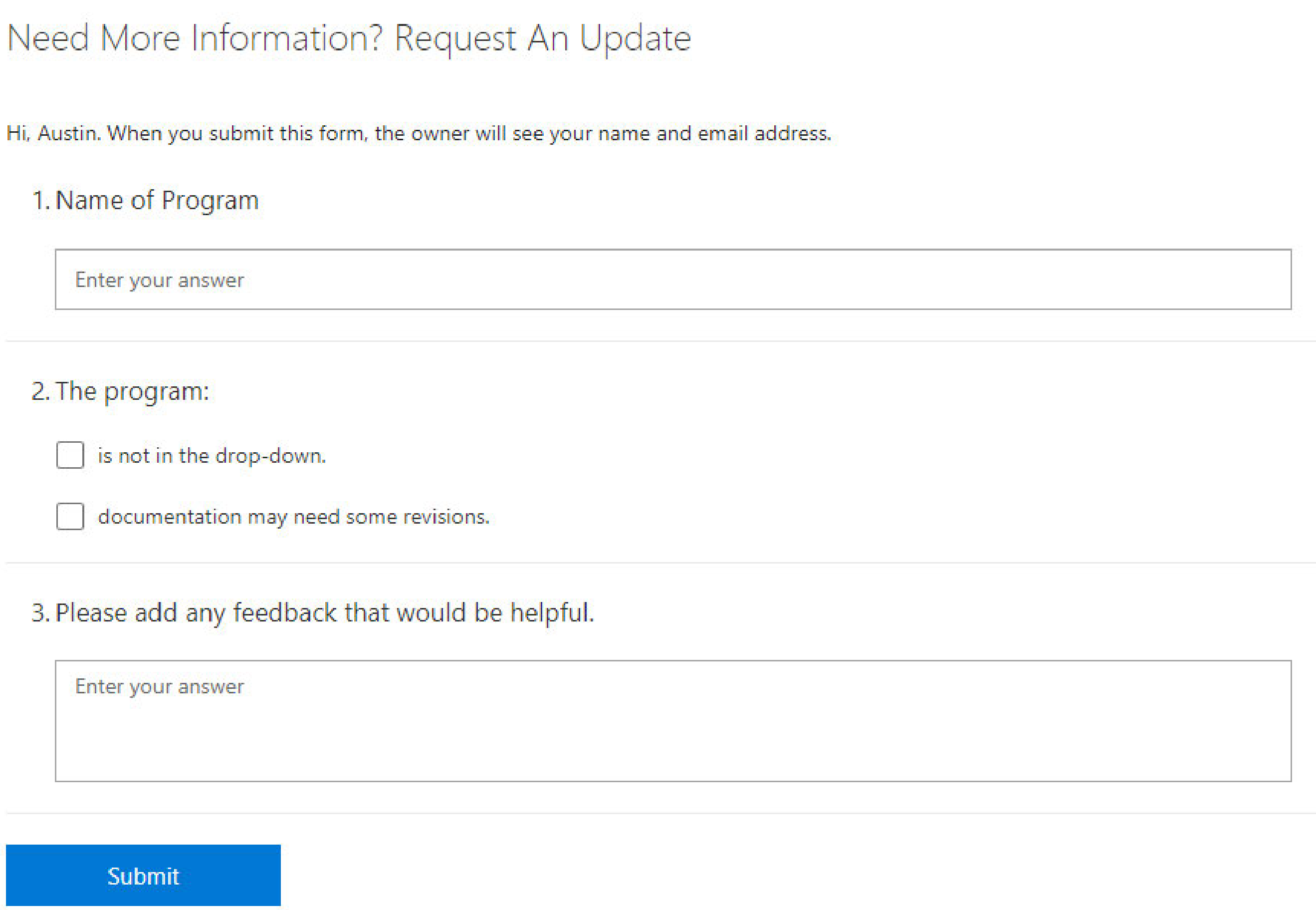
*To increase accessibility and usability of the Power BI dashboard, it has been published in the Training and Information channel in the Software Lookup tab using a [redacted] Site Page



From within the Teams tab, we have included a survey created with Microsoft Forms. Details on form submissions and access is below.

Microsoft Forms Survey

This survey is intended to collect information as a feedback loop for our staff. Any information as to the accuracy of the information included in the dashboard can be collected here. Note that the form responses are automatically sent to team members for transparent collaboration and communication


Need More Information? Request An Update

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

1. Name of Program

Enter your answer

2. The program:

- [ ] is not in the drop-down.
- [ ] documentation may need some revisions.

3. Please add any feedback that would be helpful.

Enter your answer

Submit

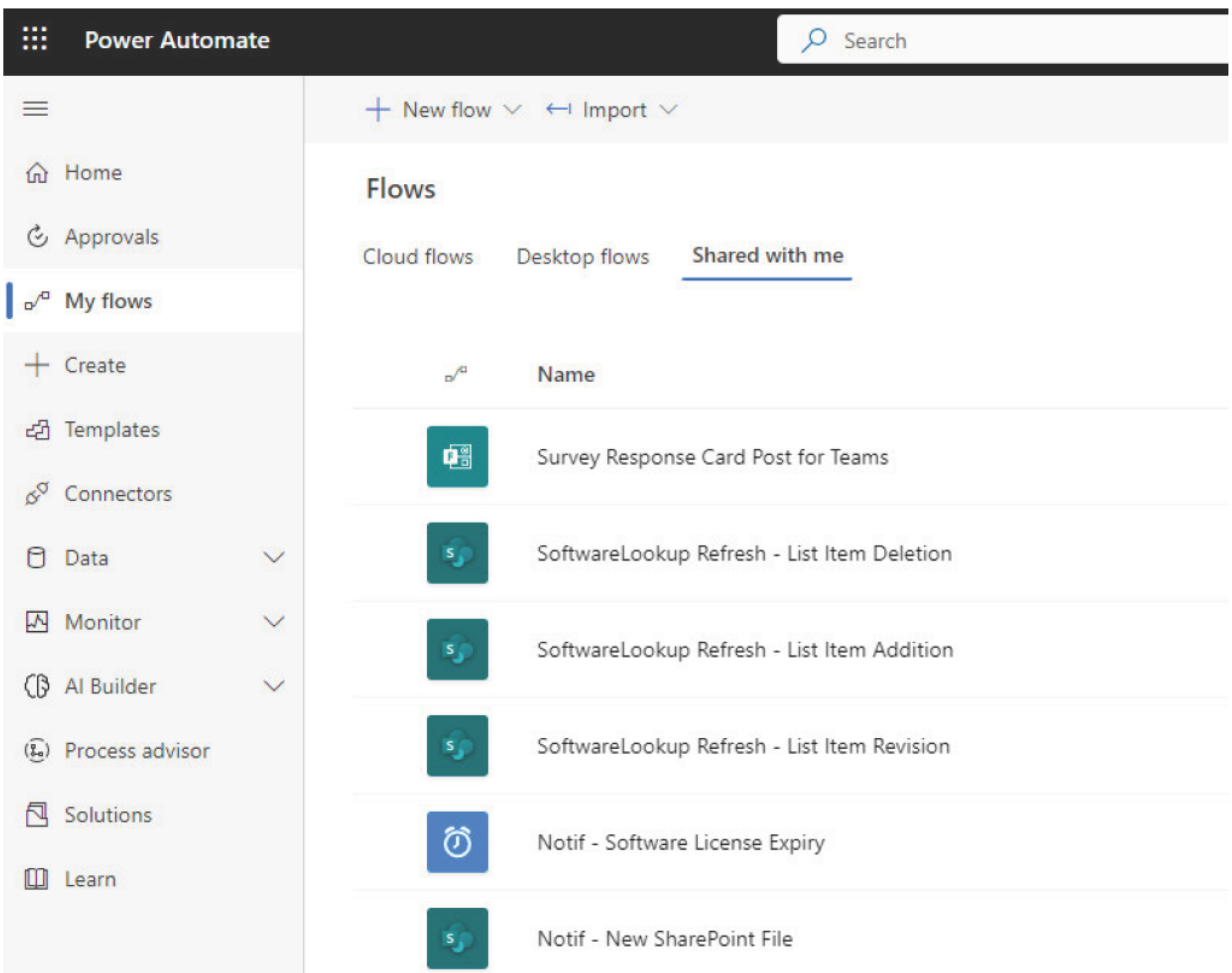
> All members of the [redacted] Help Desk site are owners of this Form.
> To access or edit the form, or view responses, visit https://forms.office.com
> Form ID used in automations: [redacted]GRVVMUUU4SINGVE05OUIEWIQ5RSQIQCN0PWcu

Please train staff to fill out the form should any information be missing or inaccurate.

Automations or Flows

Automations are created using Power Automate in the Microsoft Power Suite. These are low-to-no code "Automated Cloud Flows" or "Instant Cloud Flows" which are triggered by events or recurring schedules as outlined below.

The Power Automate flows are accessible by any member of [redacted] HELP DESK in Microsoft Teams. All flows can be accessed at https://make.powerautomate.com, going to *My Flows* on the left-hand pane, and viewing the *Shared with Me* tab as below.



1. Survey Response Card Post for Teams

- Description: When MS Forms survey is filled out --> Send message to Software Licensing channel
- Connections: Microsoft Forms Survey, Office 365, Microsoft Teams
- Authentications: organizational account

2. SoftwareLookup Refresh
    - Description: When SoftwareLookup list changes --> Refresh PowerBI dataset SoftwareLookup --> Notify Team users of change using Adaptive Card
    - Connections: Power BI Dataset
    - Authentications: organizational account
3. Notif - Software License Expiry
    - Description: For List entries with a license expiration date, this checks daily for any license expiring in 30 days, then sending a 30 day License Expiry notif.
    - Connections: Microsoft Forms Survey, Office 365, Microsoft Teams
    - Authentications: organizational account

> Note: The above-listed flows are owned by [redacted] and [redacted] HelpDesk@Clemson.onmicrosoft.com. The flows are considered non-solution aware flows, meaning they are not org-level Solution flows. Without Flow licenses, Flows can only be created by individuals without the possibility of ownership transfer. However, copies of Flows can be generated which strips the owner and connections. These copies can then be reconnected to the proper microservices and turned on by other members of the organization. Flows can similarly be *Sent as Copies* to others in the organization. Even though owned by [redacted], all above flows are currently accessible by anyone in the [redacted] Help Desk site for revision.