PROJECT 2 SYSTEM DOCUMENTATION

TECHNICAL DOCUMENTATION FOR VERSION

June 2025

Abstract

This technical documentation provides an overview of automated workflows designed to enhance operational efficiency, improve communication, and ensure SLA compliance. It covers the setup, functionality, and maintenance of various processes, including notifications and data updates. The documentation is intended for developers and system administrators to understand and manage these workflows for optimal system performance.

Fatin Nadiah Mat Ali (Dev/Upstream)

Documentation Purpose

This document outlines the objectives of the proposed solution, along with the technological design integrated into the solution stack. It is intended to support future developers by providing clear guidance on the current architecture. Additionally, the document will address the identified limitations and propose potential strategies for enhancing the design to improve overall performance and effectiveness.

Contents

Introduction

This Project was initiated in 2023 as a strategic development aimed at supporting the Data team in capturing requirements that can enhance existing processes and deliver business value. Since its inception, it has been actively utilized to identify opportunities for improvement. Figure 1 illustrates the potential value creation outcomes resulting from its implementation.

Figure 1: Potential Value Creations

The term 'Innovation' refers to the process of generating and developing ideas that address challenges or inefficiencies faced by individuals or groups within a business context. It encompasses creative thinking and problem-solving methodologies that can lead to more efficient processes, enhanced products, or new approaches that ultimately drive business growth.

Innovation provides a platform for employees to present and discuss novel ideas, allowing for the implementation of new methodologies and strategies that have the potential to transform operations. By fostering a culture of innovation, businesses empower their workforce to think outside the box, encouraging the exploration of new technologies, systems, or business models. This proactive approach not only resolves existing issues but also strategically positions the organization to gain a competitive edge in the marketplace, enabling it to adapt to evolving industry trends and consumer demands.

Technology Stack

Microsoft Tools

Microsoft PowerApps, SharePoint, and Power Automate are highly complementary tools that, when integrated, create a powerful, efficient ecosystem for businesses. PowerApps enables users to design custom applications with minimal coding, tailored to specific organizational needs, such as creating mobile apps for field employees or internal tools for managing data. These apps can be directly integrated with SharePoint, which serves as a secure, centralized repository for documents and files. By linking PowerApps with SharePoint, users can build applications that easily access, store, and manage documents in real-time, ensuring streamlined data access and collaboration.

Power Automate ties everything together by automating repetitive tasks and workflows across these tools and other connected services. For example, workflows can be set up to automatically upload form submissions from PowerApps into SharePoint libraries, or trigger notifications when a document is added or updated in SharePoint. Power Automate can also streamline tasks such as data collection, approval processes, and data synchronization, freeing up time for employees to focus on higher-value activities.

When integrated, these tools enable organizations to improve productivity, automate manual processes, enhance collaboration, and ensure that data flows smoothly across applications, making it easier for teams to work together and innovate.
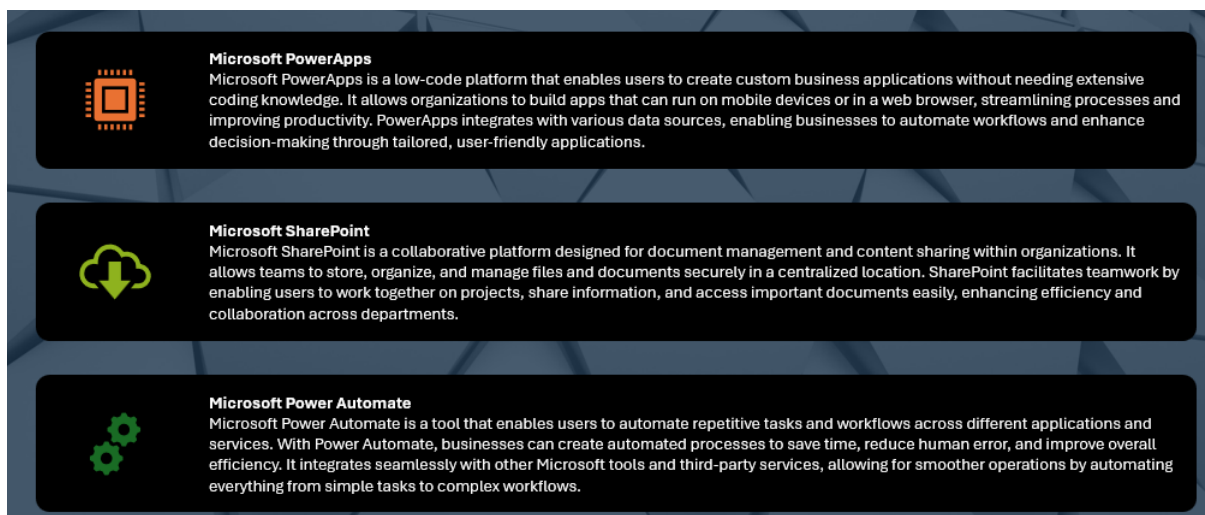
Figure 2 describes the capabilities of the tools:

Microsoft PowerApps
Microsoft PowerApps is a low-code platform that enables users to create custom business applications without needing extensive coding knowledge. It allows organizations to build apps that can run on mobile devices or in a web browser, streamlining processes and improving productivity. PowerApps integrates with various data sources, enabling businesses to automate workflows and enhance decision-making through tailored, user-friendly applications.

Microsoft SharePoint
Microsoft SharePoint is a collaborative platform designed for document management and content sharing within organizations. It allows teams to store, organize, and manage files and documents securely in a centralized location. SharePoint facilitates teamwork by enabling users to work together on projects, share information, and access important documents easily, enhancing efficiency and collaboration across departments.

Microsoft Power Automate
Microsoft Power Automate is a tool that enables users to automate repetitive tasks and workflows across different applications and services. With Power Automate, businesses can create automated processes to save time, reduce human error, and improve overall efficiency. It integrates seamlessly with other Microsoft tools and third-party services, allowing for smoother operations by automating everything from simple tasks to complex workflows.

Figure 2: Microsoft Tool Description

Security Perspective

Microsoft PowerApps, SharePoint, and Power Automate offer integrated security features that help organizations protect data and ensure secure access across their platforms. These tools leverage Azure Active Directory (AAD) for user authentication, ensuring only authorized personnel can access and interact with applications, documents, and workflows. Role-based access control (RBAC) allows administrators to define granular permissions, controlling who can view, edit, or manage content and processes at various levels.

In SharePoint, security is reinforced through fine-grained permissions that can be applied to sites, libraries, or documents, coupled with SSL/TLS encryption to secure data in transit. Additionally, SharePoint's version history and audit logs provide traceability and accountability, enabling organizations to track user activity and prevent unauthorized access.

PowerApps and Power Automate further enhance security by supporting Data Loss Prevention (DLP) policies, which prevent the sharing of sensitive data across unapproved channels. These policies, alongside encryption at rest and in transit, ensure that workflows and data remain protected. Power Automate also supports secure integration across various services, ensuring that data processed through automated workflows complies with organizational security policies.

Together, these tools create a secure, cohesive environment for managing data, automating tasks, and fostering collaboration. By using these security features, organizations can safeguard sensitive information, maintain compliance, and ensure that only authorized users have access to critical business resources.

Tool	Security Features
Microsoft PowerApps	- Leverages **Azure Active Directory (AAD)** for user authentication, ensuring only authorized personnel can access applications. - Supports **Role-Based Access Control (RBAC)** to manage permissions at different levels.
Microsoft SharePoint	- Provides **fine-grained permissions** to control access to sites, libraries, and documents. - Utilizes **SSL/TLS encryption** to secure data in transit. - Maintains **version history** and **audit logs** for traceability and accountability.
Microsoft Power Automate	- Supports **Data Loss Prevention (DLP)** policies to prevent sharing of sensitive data across unapproved channels. - Ensures **encryption at rest and in transit** for data protection. - Enables **secure integration** across services to ensure compliance with security policies.
Integrated Security	- All three tools integrate with Azure Active Directory (AAD) for consistent, secure user authentication. - Combined use of **DLP policies**, **role-based access control**, and **encryption** ensures data security and compliance across platforms.

Table 1: Security Summary of the tools

SharePoint Repositories Design

The creation of a SharePoint site can be requested through ICT Team. To initiate the process, please contact ICT to determine the appropriate form that must be submitted for the creation and hosting of the SharePoint site. Specifically, a SharePoint List is utilized to store the request information submitted by a group of initiators. SharePoint Lists offer several advantages, including easy data organization, real-time collaboration, and seamless integration with other Microsoft 365 tools. They allow for efficient data management with customizable views, filtering, and sorting options, making it easier to track and manage requests. Additionally, SharePoint Lists can be securely shared across teams, ensuring transparency and streamlined communication.

The next section outlines the columns currently in use within the SharePoint sites. It is important to note that there are certain fields within SharePoint that are not being utilized in the current version, primarily due to legacy design considerations. These unused fields are remnants from previous versions and may no longer serve a purpose in the current configuration. To ensure optimal functionality and maintain a streamlined system, these obsolete fields will require cleanup and removal by the developer assigned to manage and update the site. This process will help improve performance and eliminate any unnecessary data clutter.

Active SharePoint Sites, Static Tables and Columns

The following listed the SharePoint sites that are being used to host Platform's data:

i.   Platform (SharePoint) – hosted as a personal list using user's Account. To be migrated to Data Accelerator SharePoint. <Linked Removed>

ii.   DROPPED TICKETS 2 – hosted to keep the dropped tickets entries. <Linked Removed>

iii.   ADMIN Register List (SharePoint)– hosted as a list in Data Accelerator SharePoint. <Linked Removed>

iv.   USER Register List (SharePoint)- hosted as a list in Data Accelerator SharePoint. <Linked Removed>

Below listed the static excel files hosting data that are used for field filters:

i.   Data Group and Data Category Mapping – excel can be found in this link: DataGroup.xlsx

ii.   Division and Department Mapping – excel can be found in this link: DivisionDepartment.xlsx

Below describes the columns that are actively in use with current version of the Platform:

Datasource	Field Name	Description	Value	Power App Column Type	SharePoint Column Type
	Raise Date	Date the form is raised by initiator	Default to current date	Date Field	Date and Time
	Initiator Name	Submitter's Full Name	Auto generated to Microsoft 365 Entry	Text field	Single Line of Text
	Initiator Email	Submitter's Email	Auto generated to Microsoft 365 Entry	Text field	Single Line of Text
	Initiator Position	Submitter's Position	[Executive, Manager, Senior Manager, General Manager, Senior General Manager and above]	Dropdown field	Choice
	Initiator Division	Submitter's Division	[Exploration, Carbon Management, Development, International Assets, Malaysia Assets, Malaysia Petroleum Management, Strategy & Commercial]	Dropdown field	Choice
Platform/DROPPED TICKETS	Initiator Department	Submitter's Department	Refer to Division and Department excel	Dropdown field	Choice
	Location	Submitter's site and physical location	List of countries and states	Dropdown field	Choice
	Type of Request	Main category or focus request	[Data,Digital,Technology,Innovation]	Dropdown field	Choice
	Desired Target Duration	Duration required to deliver the solution	[within 6-12 months, within 12-18 months, within 18-24 months]	Dropdown field	Choice
	Problem Statement	Text entry following SIPOC format	Empty if not entered	Text field	Multiline Text
	Supplementary Information	Additional Details of problem statement	Empty if not entered	Text field	Multiline Text
	Level of Impact to Business	Which section the impact will be important to	[Section Level, Department Level, Division Level, OPU Level , COMPANY Level]	Dropdown field	Choice

Budget Availability	Resources available to address the problem	[Yes,No]	Dropdown field	Choice
Potential Value Creation	Expected outcome from resolving the problem	[Operation Efficiency (PCE), Cost Saving, Cost Avoidance, Data Quality, User Experience, Strategic Alignment]	Dropdown field	Choice
Data Group	COMPANY Data Group Taxonomy	Refer to Data Taxonomy	Dropdown field	Choice
Data Category	COMPANY Data Category Taxonomy	Refer to Data Taxonomy	Dropdown field	Choice
Status Update	Current status of the submitted form	[New,In Progress, Transferred,Dropped, Opportunity]	Dropdown field	Choice
Implementation Start Date	Start date of the proposed solution	Default to empty if not put	Date Field	Date and Time
Opportunity Current Status	SharePoint field to capture list of the current status	DA notes changed directly in sharepoint	Text field	Text Field
Proposed Solution	DA entry of item update as discussed with the team and initiator	Text entry by DA	Text field	Text Field
Data Acceletor Sector	DA sector	Sector of the DA in charge	Dropdown field	Choice
Data Accelerator Name	DA name	Name of the DA in charge	Dropdown field	Choice
Assigned Owner Section	Owner Section	Section of the Owner in charge	Dropdown field	Choice
Assigned Owner Name	Owner Name	Name of the Owner in Charge	Dropdown field	Choice

		Category of Problem Statement	Identified category of the problem	[Capability / Learning Agility, Continuous Improvement, Business Plan, Data Architecture, Data Governance & Assurance, Data Quality & Standard, Data Solution, Digital Solution, Stranded Data, Technology Solution]	Dropdown field	Choice
		Complete Implementation	Status whether the solution has been delivered	[Yes,No]	Dropdown field	Choice

		SLA DA Days	Calculates how many days for DA to assign to owner	=IF(
				  AND(
				    ISBLANK([Assigned Data Accelerator Date]),
				    ISBLANK([Assigned Owner Date])
				  ),
				  -1,
				  IF(
				    OR(
				      ISBLANK([Assigned Data Accelerator Date]),
				      ISBLANK([Assigned Owner Date])
				    ),
				    IF(
				      ISBLANK([Assigned Owner Date]),
				      ABS(TODAY() - [Assigned Data Accelerator Date]),
				      0
				    ),
				    IF(
				      [Assigned Owner Date] - [Assigned Data Accelerator Date] = 0,
				      1,
				      ABS([Assigned Owner Date] - [Assigned Data Accelerator Date])
				    )
				  )
				)
					Calculated column	Auto

		SLA Owner Days	Calculate how many days it takes to	=IF(
				  ISBLANK([Assigned Owner Date]),
				  -1,
				  IF(
					Calculated Column	Auto

		close the AFI with a status	ISBLANK([Status Update Date]), ABS([Assigned Owner Date] - TODAY()), IF([Assigned Owner Date] - [Status Update Date] = 0, 1, ABS([Assigned Owner Date] - [Status Update Date]))))		
	Opportunity Time Lapse	Calculate the actual delivery days taken upon completion	=IF([Status Update] = "Opportunity", ABS((IF(ISBLANK([Status Update Date]), [Raise Date], [Status Update Date])) - (IF(ISBLANK([Assigned Owner Date]), [Raise Date], [Assigned Owner Date]))), 0)	Calculated Column	Auto
	Created	System Generated Date when submission is created	System Date	System	Date and Time
	Modified	System generated date when submission is modified	System Date	System	Date and Time

Table 2: Summary of Active Fields for Platform

Below describes the active fields in ADMIN Register List:

Datasource	Field Name	Description	Value	SharePoint Column Type
ADMIN Register List	ID	Owner's List Entry Number	Number value	Single Line of Text
	Email Address	Owner's Email	Email Address based on Microsoft 365	Single Line of Text

	Email_Address	Owner's Email (used by Power Automate)	Email Address based on Microsoft 365	Single Line of Text
	Assigned Owner Name	Owner's Name	Name Text	Single Line of Text
	Role	Owner's role title	Role Text	Single Line of Text
	Unit	Owner's group title	Group Text	Single Line of Text
	Section	Owner's section	Section Text	Single Line of Text

<div align="center">Table 3: Summary of Active Fields in UTDI Register List</div>

Below describes the active fields in USER Register List

Datasource	Field Name	Description	Value	SharePoint Column Type
User Register List	Title	DA Entry ID	Number Value	Single Line of Text
	Initiator_Division	DA Division Description	Text Value	Single Line of Text
	DA_Sector	DA Sector Description	Text Value	Single Line of Text
	Assigned_Data_Accelerator_Name	DA Name Description	Text Value	Single Line of Text
	Assigned_Data_Accelerator_Email_Address	DA Email Address Description	Text Value	Single Line of Text
	Email_Address_Azure_Format	DA Azure Email Format	Text Value	Single Line of Text

<div align="center">Table 4: Summary of Active Fields for USER Register List</div>

PowerApp Implementation

A total of **seven screens** have been developed in the PowerApp Studio, each designed to streamline user interactions and enhance the management of requests within the application. The following screens have been implemented:

Power App Screen Name | Purpose

1. **Login Screen**: This screen facilitates user authentication by integrating with Microsoft 365, ensuring secure and seamless access to the application for all users. The login process is designed for ease of use while maintaining a high standard of security.

2. **Home Screen**: The Home Screen serves as a central hub where users can view a comprehensive list of all the requests they have raised. This screen is accessible to all users and provides an intuitive interface to quickly navigate and monitor request statuses.

3. **Raise Request Screen**: This screen allows users to initiate a new request by completing a form. The form is user-friendly, enabling quick and accurate submission of requests. It is designed to be accessible to all users, encouraging active participation in the request process.

4. **Progress Form Screen**: This screen provides a detailed view of all requests that are yet to be assigned to a Data Accelerator or an owner. Users can filter the requests based on various criteria, allowing for efficient tracking and assignment. It is specifically tailored for users responsible for managing and assigning requests.

5. **Dashboard Screen**: The Dashboard Screen integrates Power BI to present real-time visualizations and reports on the progress of the requests raised. This screen serves as a key analytical tool, offering insightful data on the work completed on each request. It is designed to help stakeholders make informed decisions and assess overall project performance.

6. **About Screen**: The About Screen provides users with an overview of the **Platform's objectives**, offering insight into the platform's mission, vision, and key functionalities. It serves as an informational resource to help users understand the purpose and benefits of the platform.

7. **View Form Screen**: This screen allows users to view the progress and detailed information about their submitted requests. It provides a clear view of the request's status, updates, and any actions taken, ensuring users remain informed and can track their requests efficiently.

Each of these screens has been designed with the user experience in mind, offering a seamless and intuitive interface that supports users throughout the entire lifecycle of their requests.

Below is the Entity Relationship Diagram (ERD) of each of the screen, whereby it describes the functionalities that is present in the screens. The visibility is described through the arrow description to show to whom the screen will be visible to. Most of the screens and their functions can be utilized by all the users.
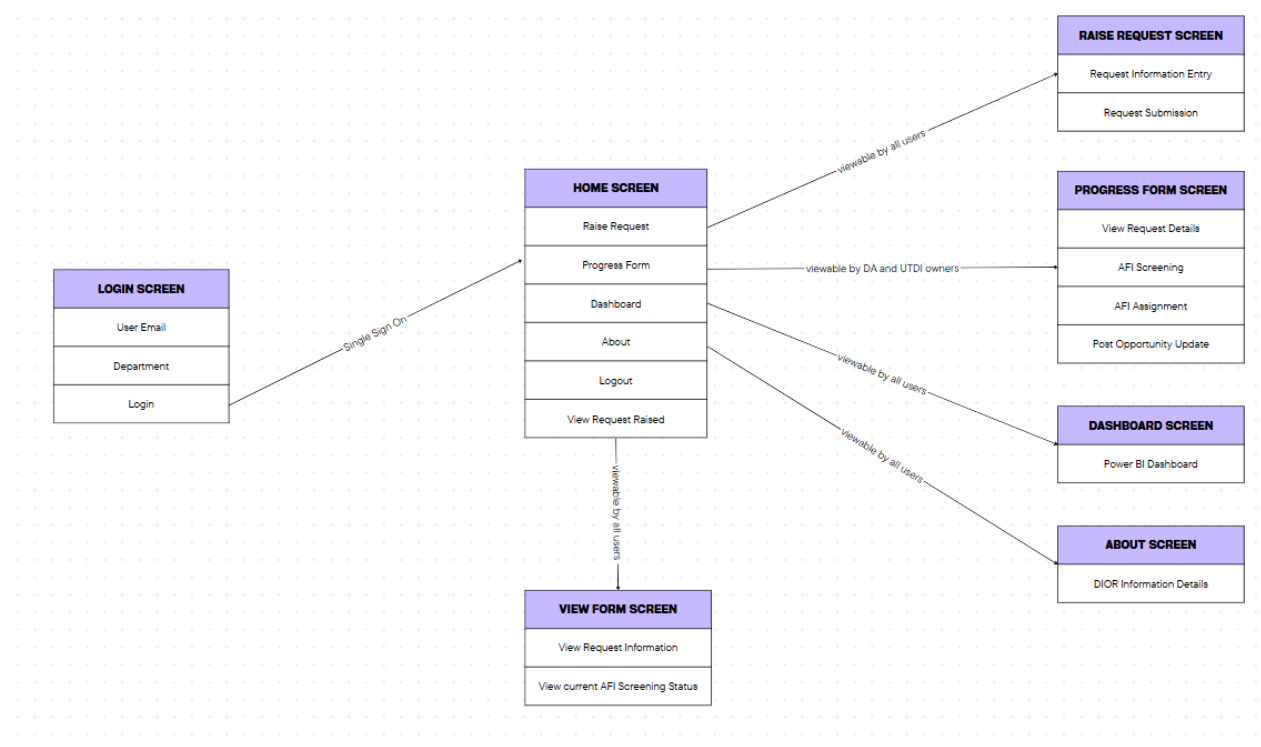

Figure 3: Platform Screens ERD Diagram

PowerApp Studio Screen Configurations

To edit the design in PowerApps Studio, please access the user creator canvas through the following link:<Link Removed>. Within the studio, you will find a list of the screens that have been created, organized in the screen navigation tree.

As a best practice, before making any modifications to an active file, it is highly recommended to create a backup of the screen. When naming the backup, append "--formName_year" to the original screen name. This ensures a clear distinction between the modified and original versions and allows for easy rollback in case any changes need to be undone. This backup strategy contributes to maintaining version control and safeguarding the integrity of the project.

This subsection will focus on the configurations that are universal across the entire screen development process. The aim is to highlight common patterns and provide developers with a clear understanding of these recurring configurations, enabling them

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to easily recognize and apply them when encountered throughout the development process.

Adding a field inside a form

1. In tree view, click on the screen to edit

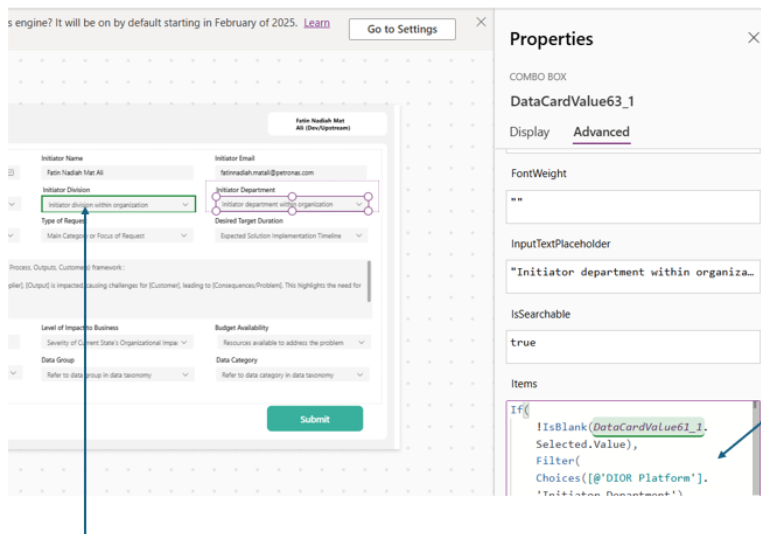2. Select on the form in the screen to configure

3. Click on Edit Fields

4. Click on Add Field

5. Choose the field to add in the card. Usually the input field will be set according to the SharePoint data type.

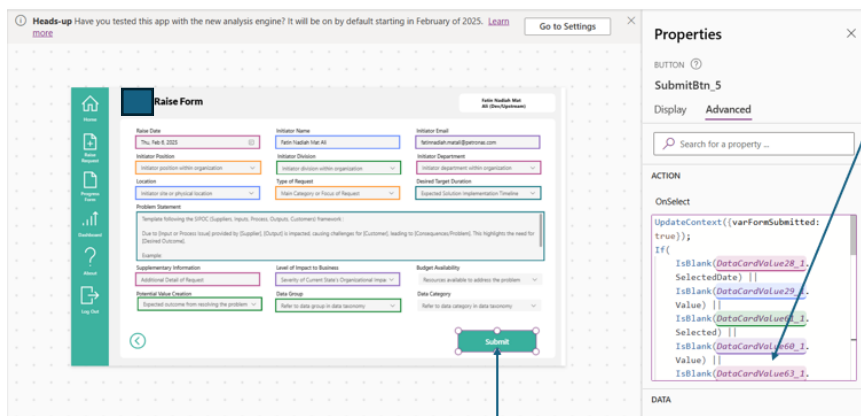6. Click on add to have the card created in the form

Adding filtered dropdown

2. Write in the Items properties for child dropdown box:

```
If(
    !IsBlank(DataCardValue61_1.Selected.Value),
    Filter(
        Choices([@'DIOR Platform'].'Initiator Department'),
        Value in
        Filter(
            'Table1_3',
            'Division' = DataCardValue61_1.Selected.Value
        ).'Department'
    ),[]
)
```

1. This is the parent dropdown box , DataCardValue61_1

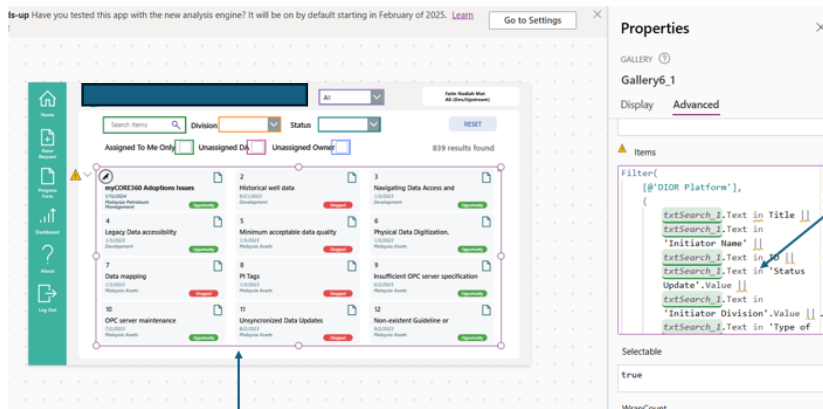## Adding error checks in the submission button

2. Write in the onSelect properties for submit button:

```
UpdateContext({varFormSubmitted: true});
If(
    IsBlank(DataCardValue28_1.SelectedDate) ||
    IsBlank(DataCardValue29_1.Value) ||
    IsBlank(DataCardValue61_1.Selected) ||
    IsBlank(DataCardValue60_1.Value) ||
    IsBlank(DataCardValue63_1.Selected) ||
    IsBlank(DataCardValue55.Selected) ||
    IsBlank(DataCardValue65_1.Selected) ||
    IsBlank(DataCardValue65_2.Selected) ||
    IsBlank(DataCardValue18.Selected) ||
    IsBlank(DataCardValue69_1.Selected) ||
    IsBlank(DataCardValue70_1.Value) ||
    IsBlank(DataCardValue69_3.Selected) ||
    IsBlank(DataCardValue58.Selected) ||
    IsBlank(DataCardValue69_1.Selected) ||
    IsBlank(DataCardValue67_1.Value),
    Notify("Please fill out all required fields",
    NotificationType.Error),
    Set(ShowPopup,true)
)
```

1. Click on the submit button

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Adding filter in Gallery

1. Click on the Gallery

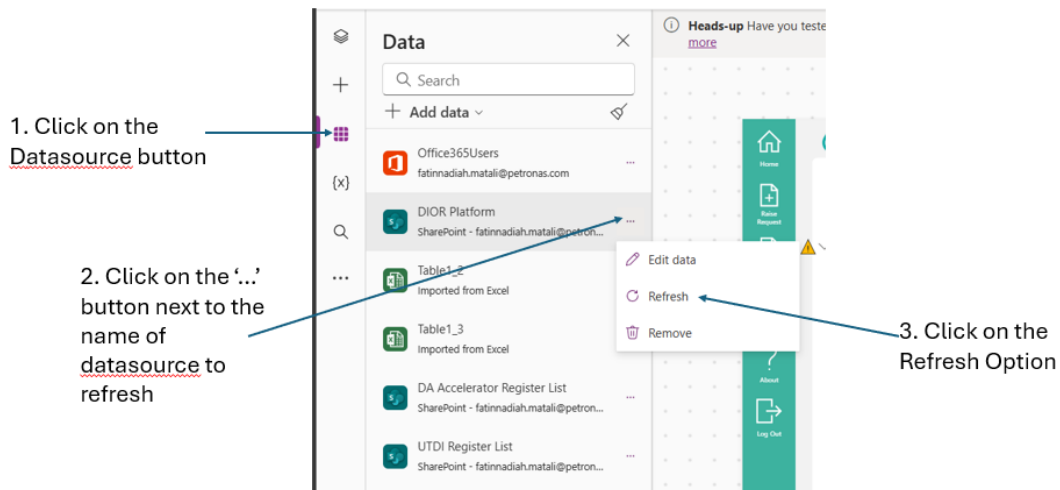2. Write in the Items properties for Gallery, use the following code below

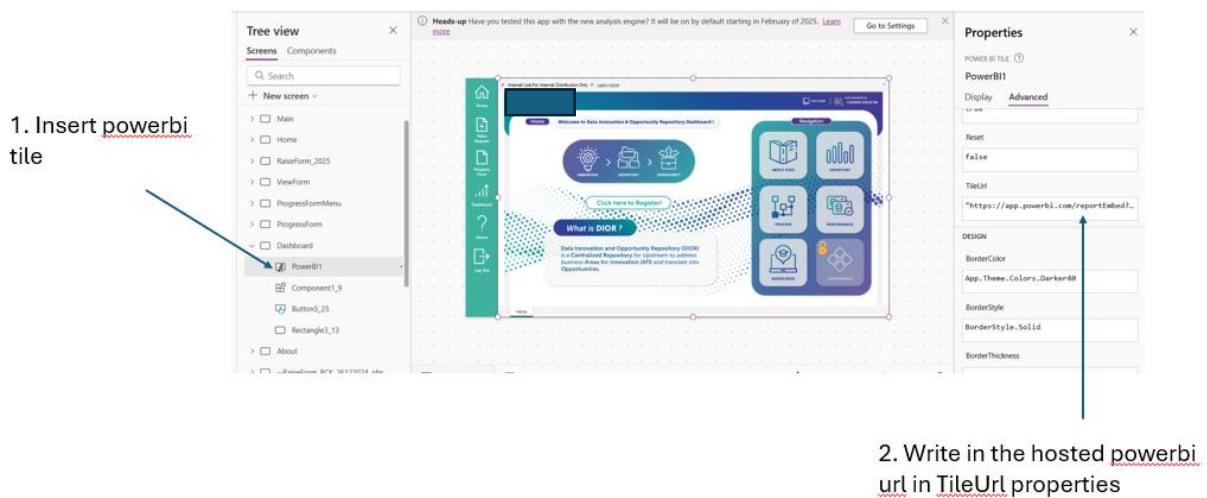| Code |
|---|
| Filter(
  [@'Platform'],
  (
    txtSearch_1.Text in Title ||
    txtSearch_1.Text in 'Initiator Name' ||
    txtSearch_1.Text in ID ||
    txtSearch_1.Text in 'Status Update'.Value ||
    txtSearch_1.Text in 'Initiator Division'.Value ||
    txtSearch_1.Text in 'Type of Request' ||
    txtSearch_1.Text in 'Data Accelerator Name'.Value ||
    txtSearch_1.Text in 'Assigned Owner Name'.Value
) &&
  (
    IsBlank(*Dropdown2*.Selected.Value) || *Dropdown2*.Selected.Value in 'Initiator Division'.Value
) &&
  (
    IsBlank(*Dropdown2_1*.Selected.Value) || *Dropdown2_1*.Selected.Value in 'Status Update'.Value
) &&
  (
    Dropdown3_1.Selected.Value = "All" ||
    Year('Raise Date') = Value(*Dropdown3_1*.Selected.Value)
) &&
  (
    If(
      CheckboxCanvas1.Checked,
      (LookUp([@'ADMIN Register List'], Email_Address = User().Email).Staff_Name in 'Assigned Owner Name'.Value && !IsBlank('Assigned Owner Name'.Value)) || |

```
        (LookUp([@'USER Register List'], Assigned_Data_Accelerator_Email_Address =
User().Email).Assigned_Data_Accelerator_Name in 'Data Accelerator Name'.Value &&
!IsBlank('Data Accelerator Name'.Value)),
        true
    )
  ) &&
  (
    If(
      And(CheckboxCanvas1_1.Checked, CheckboxCanvas1_2.Checked),
      IsBlank('Data Accelerator Name'.Value) ||
      "0" in 'Data Accelerator Name'.Value ||
      IsBlank('Assigned Owner Name'.Value) ||
      "0" in 'Assigned Owner Name'.Value,
      If(
        CheckboxCanvas1_1.Checked,
        IsBlank('Data Accelerator Name'.Value) || "0" in 'Data Accelerator Name'.Value,
        If(
          CheckboxCanvas1_2.Checked,
          IsBlank('Assigned Owner Name'.Value) || "0" in 'Assigned Owner
Name'.Value,
          true
        )
      )
    )
  )
)
```

Refresh Data Source

If newly created fields are not visible, or data is not updating, it is recommended to refresh the data source.

1. Click on the
Datasource button

2. Click on the '...'
button next to the
name of
datasource to
refresh

Edit data

Refresh

Remove

3. Click on the
Refresh Option

Adding in Power BI Dashboard to screen

1. Insert powerbi
tile

2. Write in the hosted powerbi
url in TileUrl properties

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Power Automate Implementation

The following Power Automate flows have been implemented to streamline various processes and enhance efficiency within the SharePoint environment. These flows automate key tasks such as notifications, reminders, and data updates, ensuring smooth communication and timely actions across teams. Each flow is designed to address specific business requirements, from managing the status of items to ensuring adherence to Service Level Agreements (SLAs), ultimately driving improved workflow management and accountability. Below is an overview of the primary flows and their respective purposes.

Power Automate Flow Name | Purpose

Flow Name	Purpose
Initiator Email Flow after AFI submission	Sends an email notification to the initiator once the AFI is submitted.
UTILITY - UPDATE EXCEL (Keep off unless in use)	Utility flow for updating Excel to SharePoint; keep of when not in use.
Owner Assignment Email	Sends an email to the owner when a ticket is assigned to an AFI.
Monthly Export Report	Exports monthly SharePoint list data for use in Power BI dashboards.
Copy over to Dropped Repository	Transfers dropped AFI records to the Dropped Repository.
SLA - Auto Assignment	Automatically assigns new AFI tickets to a Data Accelerator based on current workload (least loaded first).
SLA - Reminder to action on Opportunity Tickets	Sends reminders to owners to act on Opportunity AFI tickets.
SLA - DA Reminder to assign to Owner after 4 days	Reminds the Data Accelerator to assign an owner within the SLA window.
When Item Closed	Updates the ticket's status and logs the status update date upon closure.
SLA - Reminder to owner after 4 days and 5 days	Sends follow-up reminders to the owner after 4 and 5 days of inactivity on AFI tickets.

SLA - DA In Progress Count	Tracks and updates the number of active tickets currently assigned to each Data Accelerator.
Create ADMIN User in List	Utility flow for updating the ADMIN user list from Excel. Keep off when not in use.
When DA is Assigned to an AFI	Automatically updates the "DA Assigned Date" column in SharePoint when a DA is assigned.

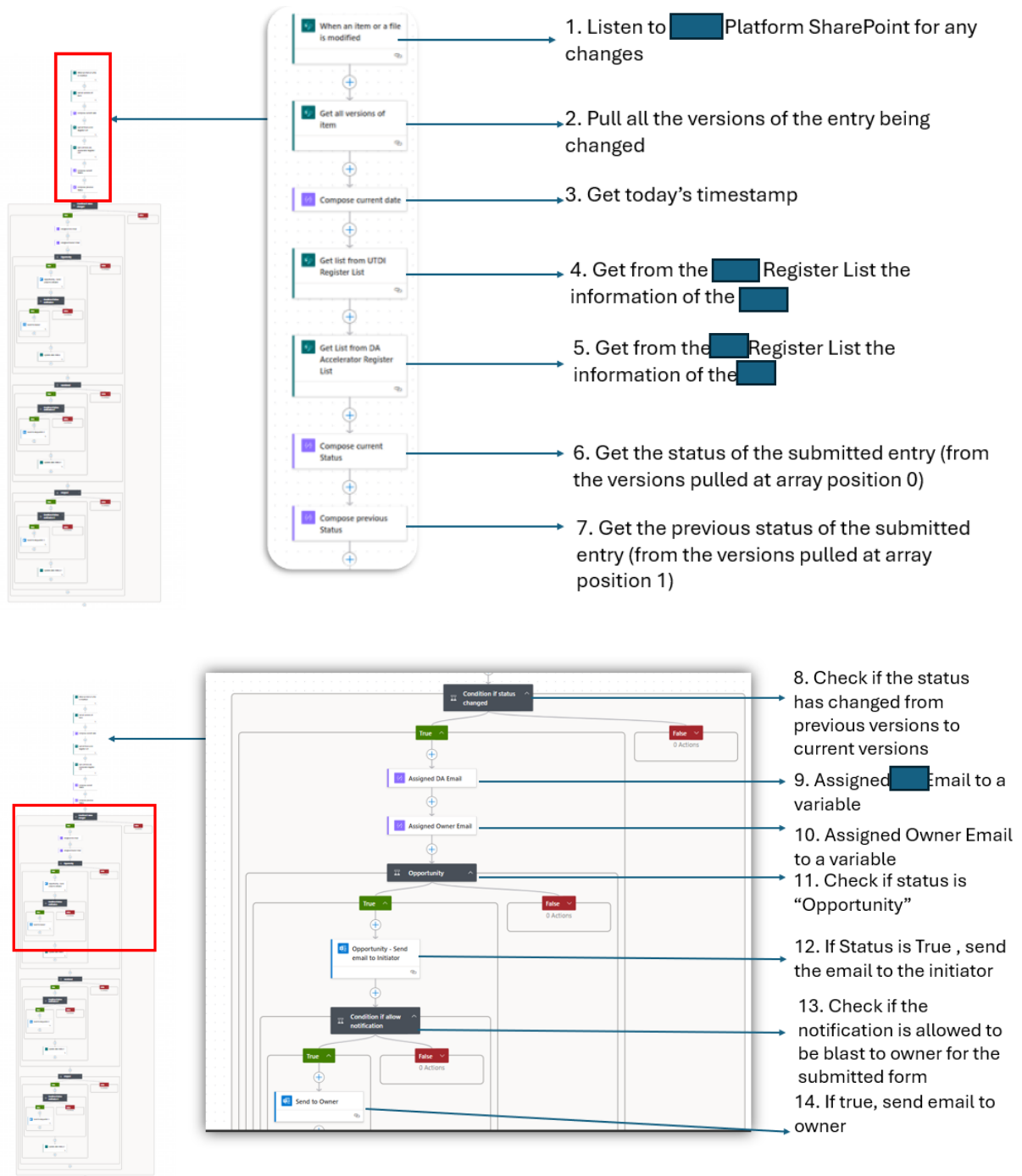## *Power Automate Flow Configurations*

The following subsection provides an in-depth explanation of the key configuration aspects that developers need to understand to effectively work with the system. This includes detailed insights into the structure and setup of various Power Automate flows that are integral to the functionality of the platform. Developers can access the specific Power Automate flows through the following link: <Link Removed>.
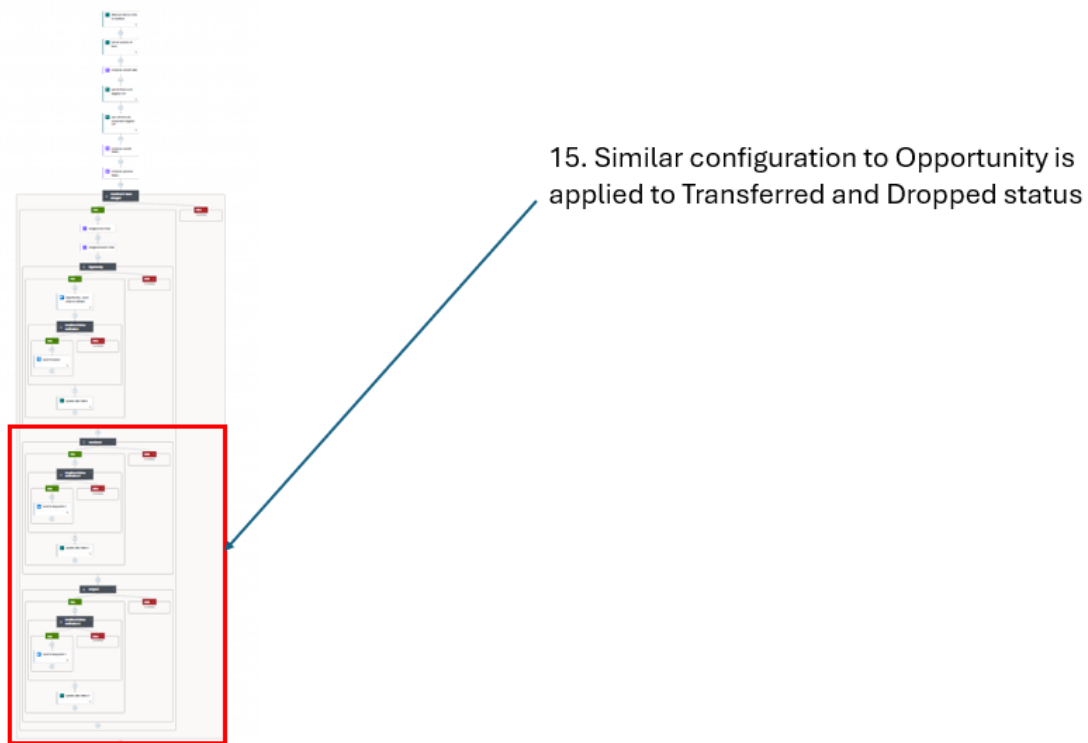
Should a developer encounter any issues accessing the shared flows, it is recommended to contact the system administrator or person in charge to request the necessary authorization. This will ensure that the developer has the appropriate access permissions to view and interact with the required flows, facilitating smooth collaboration and efficient development processes. Note that, developer also will require **send on behalf** rights for shared email, which will require to contact ICT to register the request in the right form. This can be applied from the ICT support portal.

The following section outlines the logical structure and functionality of the main flow which are Workflow – When Item is Closed and Workflow – When Initiator submits AFI. These are the two flows that has been tested during the UAT. The rest of the logic will need to be retested to validate the flows' logic. It is not intended to provide a detailed discussion of the technical configuration; for information regarding the setup of each step within the workflow, please refer to the documentation available in <Link Removed>
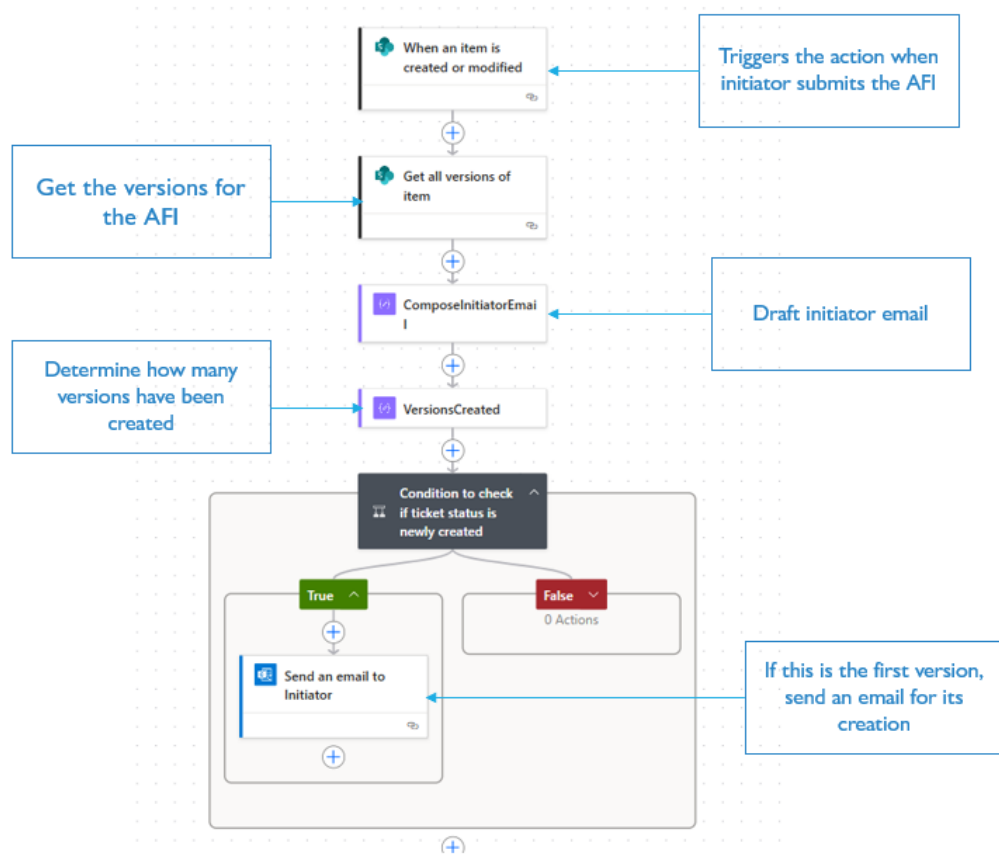
Workflow - When Item is Closed

The primary objective of this workflow is to facilitate automated email notifications to both the owner and the initiator whenever the status of a submission is updated to "Opportunity," "Transferred," or "Dropped." The subsequent section offers a comprehensive breakdown of the specific logic and functionality underlying each step of the workflow, providing clarity on how each action contributes to the overall process.

1. Listen to ▮▮ Platform SharePoint for any changes

2. Pull all the versions of the entry being changed

3. Get today's timestamp

4. Get from the ▮▮ Register List the information of the ▮▮

5. Get from the ▮▮ Register List the information of the ▮▮

6. Get the status of the submitted entry (from the versions pulled at array position 0)

7. Get the previous status of the submitted entry (from the versions pulled at array position 1)

8. Check if the status has changed from previous versions to current versions

9. Assigned ▮▮ Email to a variable

10. Assigned Owner Email to a variable

11. Check if status is "Opportunity"

12. If Status is True , send the email to the initiator

13. Check if the notification is allowed to be blast to owner for the submitted form

14. If true, send email to owner

15. Similar configuration to Opportunity is applied to Transferred and Dropped status

Workflow – Initiator Email Flow after AFI submission

The objective of this workflow is to ensure that the initiator is promptly notified upon the first submission of an AFI (Action for Information). This workflow serves as an automated communication tool, providing immediate confirmation to the initiator that their submission has been successfully received and logged into the system. Unlike the *When Item is Closed* workflow, which involves a more complex set of actions and conditional steps, this workflow is designed to be straightforward and efficient. It focuses exclusively on the initial submission process, making it simpler to implement, manage, and troubleshoot, while still fulfilling its essential role in facilitating seamless communication between the system and the initiator.
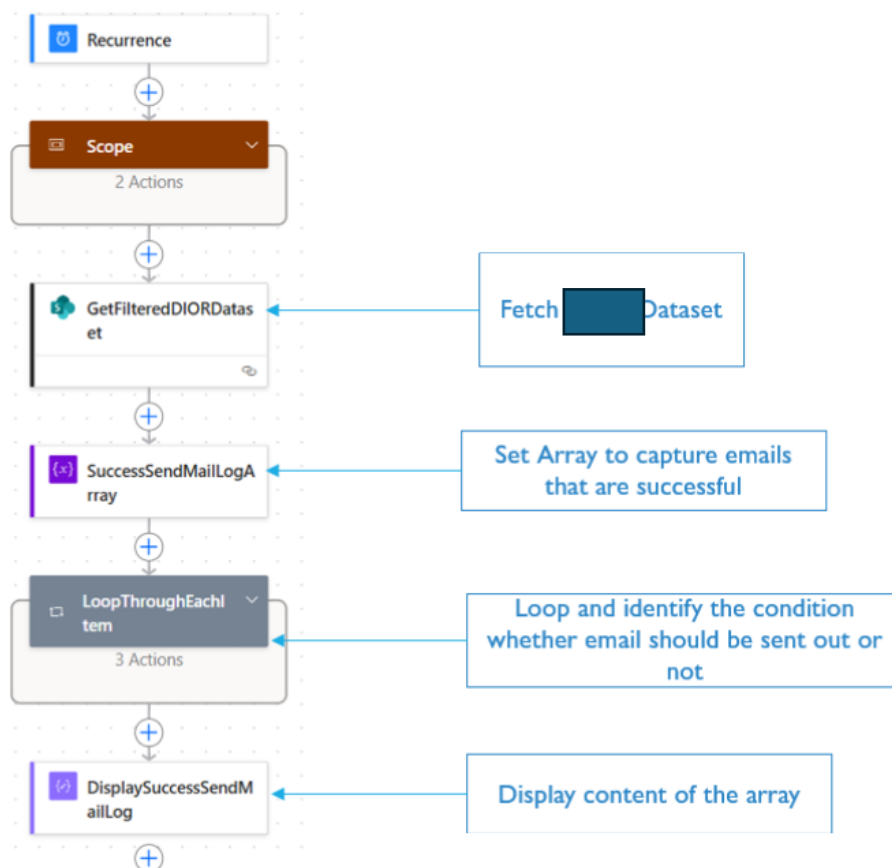
When an item is created or modified — Triggers the action when initiator submits the AFI

Get the versions for the AFI — Get all versions of item

ComposeInitiatorEmail — Draft initiator email

Determine how many versions have been created — VersionsCreated

Condition to check if ticket status is newly created

True — Send an email to Initiator

False — 0 Actions

If this is the first version, send an email for its creation

Workflow - SLA - DA Reminder to assign to Owner after 4 days

This Power Automate flow is designed to support SLA compliance by ensuring that each AFI ticket is assigned an owner in a timely manner. Specifically, it targets tickets that have not yet been assigned to an owner after they have aged for 4 days.

Once a ticket reaches day 4 without an owner assigned, the flow is triggered automatically. It sends a reminder email to the assigned Data Accelerator (DA), instructing them to act and assign an appropriate owner. The flow continues to check the ticket daily and will **repeatedly send reminder emails** to the DA until the owner field is populated.

This automation helps reduce manual follow-up, supports accountability, and ensures tickets progress through the workflow without delay, in alignment with defined SLA policies.

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Fetch ▮▮▮▮ Dataset

Set Array to capture emails that are successful

Loop and identify the condition whether email should be sent out or not
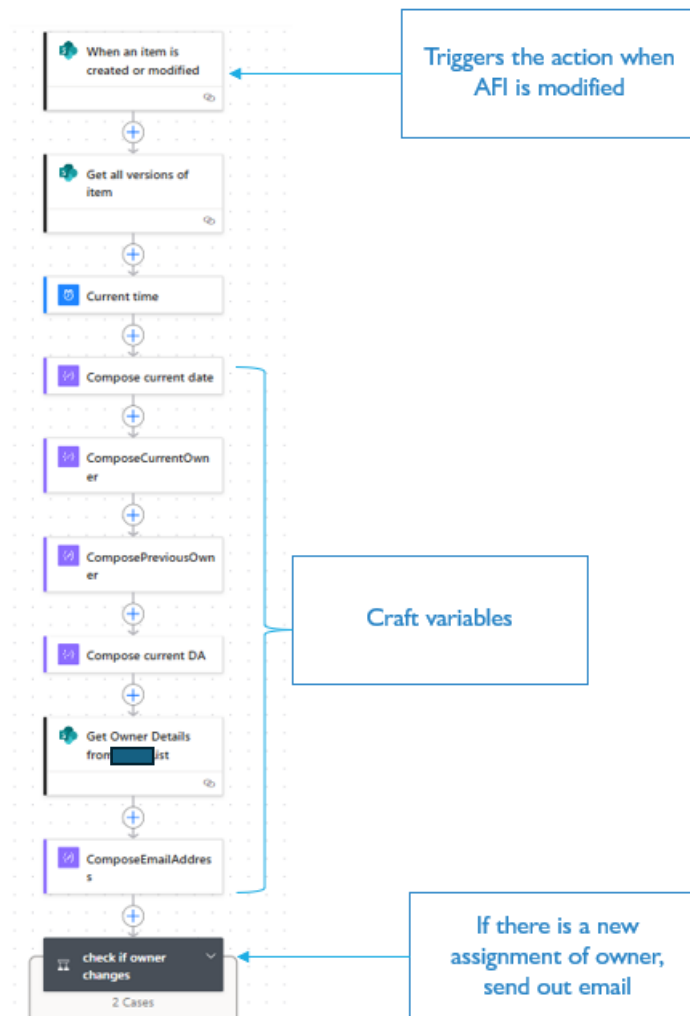
Display content of the array

Workflow - Owner Assignment Email

This Power Automate flow is initiated when a new item is created in a SharePoint list. Upon creation, the flow retrieves all versions of the item using the SharePoint REST API, allowing it to access historical data for comparison. It then uses Compose actions to define key variables such as the current owner, previous owner, and relevant dates for efficient reference throughout the flow.

Following this, the flow queries an external owner repository (typically another SharePoint list) to retrieve detailed information about the currently assigned owner, including their email address and other contact details. The core logic involves comparing the current assigned owner with the one recorded in the previous version of the item. If no change is detected, the flow ends silently. However, if a change in ownership is identified, the flow proceeds to send an automated email notification to the newly assigned owner, informing them of the assignment and any necessary actions.

Additionally, it updates the "Assigned Owner Date" field in the item to reflect the date and time the ownership change occurred. This process ensures timely communication, accurate metadata maintenance, and a reliable audit trail for SLA compliance and
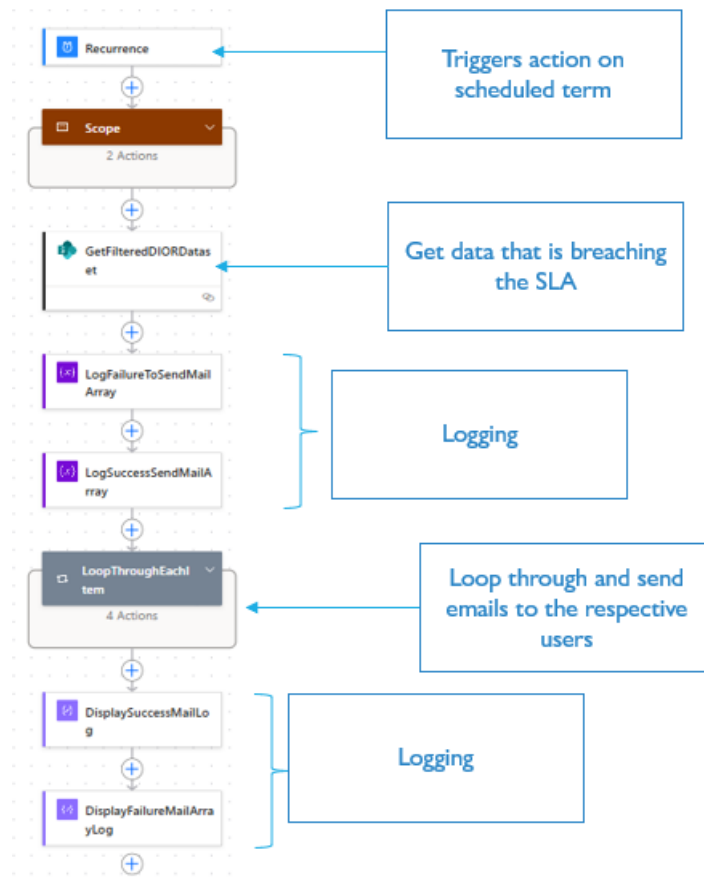
reporting.

Workflow - SLA - Reminder to owner after 4 days and 5 days

This Power Automate flow has been implemented to support proactive project management by ensuring that key timeline information—specifically, the *Implementation Start Date*—is promptly and accurately entered the system.

The primary objective of this flow is to prevent delays in project execution and maintain alignment with internal service level agreements (SLAs). To achieve this, the flow is scheduled to run automatically every day at 5:00 PM and performs a check to identify any records where the Implementation Start Date has not been keyed in.
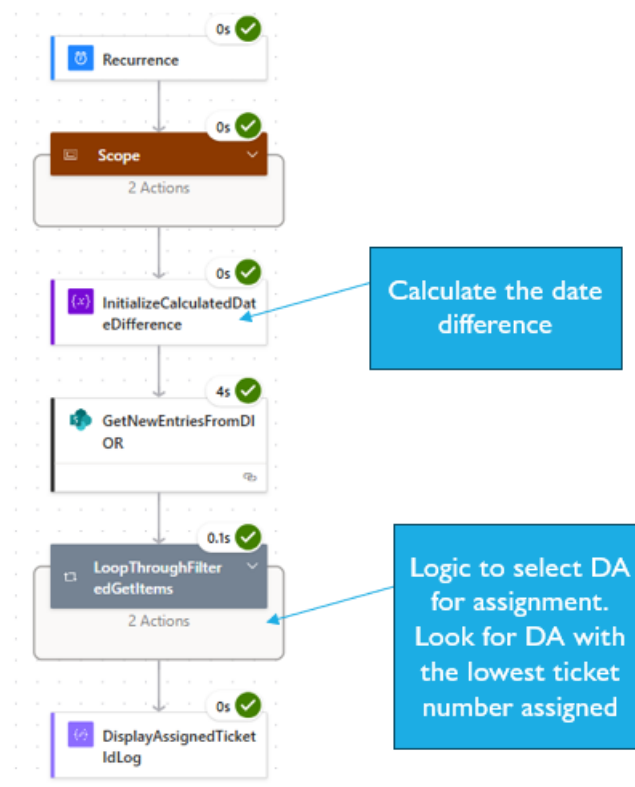
When the SLA reaches Day 4 without the necessary date being entered, the system sends an initial email notification to the designated owner, serving as a gentle reminder to complete the missing information. If no action is taken and the date remains unentered by Day 9, the flow escalates the reminder process by sending automated

emails on a daily basis until the field is updated. This repeated notification strategy helps maintain accountability, encourages timely data entry, and reduces the risk of miscommunication or oversight in the project lifecycle. By automating this reminder process, the organization can ensure better compliance with timelines, improve visibility into project readiness, and ultimately drive more efficient and reliable project delivery.
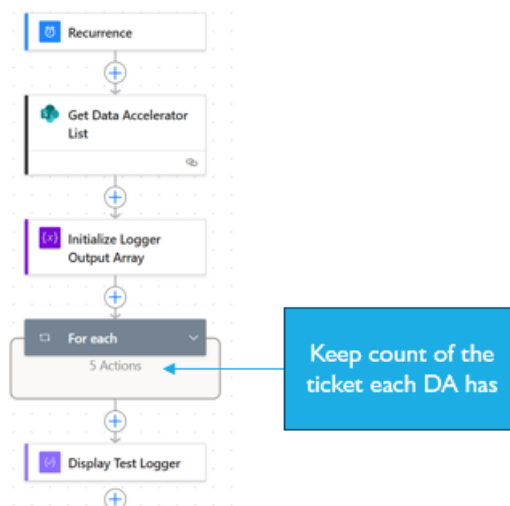

Workflow - SLA - Auto Assignment

This workflow is designed to automatically assign AFI tickets that have been open for more than one day. Once a ticket reaches the one-day threshold, the system triggers an automated process that reassigns the ticket to the team. The purpose of this reassignment is to expedite the resolution process by leveraging the specialized capabilities of the team, ensuring that tickets are handled more efficiently and do not remain unresolved for extended periods.
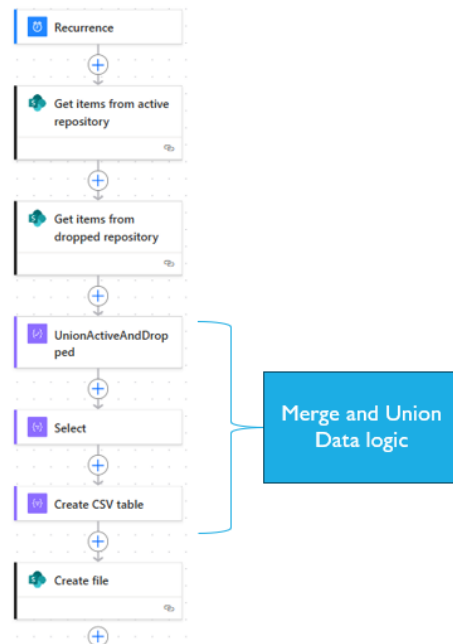
Workflow - SLA - DA In Progress Count

This workflow is responsible for counting and tracking the number of tickets assigned to the user. It provides a clear overview of ticket volume, enabling better monitoring of workload and team activity over time.

Workflow - SLA – Monthly Export Report

The Monthly Report export process consolidates data from two separate repositories, merging the information into a single, comprehensive Excel report. This integration

allows for a unified view of key metrics and activities, streamlining reporting efforts and ensuring consistency across data sources.

Workflow - When DA is Assigned to an AFI

This workflow ensures that the 'Status Update Date' data is consistently and accurately refreshed based on the latest activities recorded in the AFI. By automatically tracking and reflecting changes in real-time or at scheduled intervals, the workflow maintains up-to-date information that supports reliable reporting and operational transparency.

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