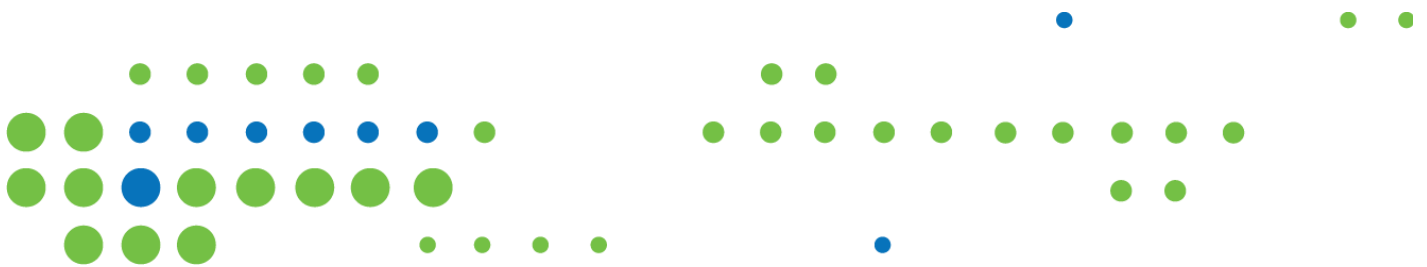# Process Definition Document

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1. Introduction

This Process Definition Document outlines the process to be followed for the Power Platform Solution, which involves creating a Canvas App that will allow a user to efficiently manage their data by integrating the app to SharePoint Online, Cloud Power Automate, and Power BI.

2. Objectives

The objective is to automate the existing manual process of data capture, approval, and reporting, currently managed using Excel spreadsheets.

3. Current Process Overview

The current process involves:

• Capturing Product (Name, Description, Department) and Department (Name, Description, Headquarter Region) data within an Excel document.
• Sending the Excel document via email for approval.

4. Proposed Solution Overview

The proposed solution will utilize SharePoint Online Lists, Canvas Power App, Automatic Power Automate, and Power BI to achieve the following:

• Creation and management of data through SharePoint lists.
• A Canvas Power App for viewing, adding, editing, and deleting products.
• An approval workflow using Automatic Power Automate.
• Reporting using Power BI.

5.   Process Steps

5.1. SharePoint Online Setup

Create Department List.
Fields:
•   Department
•   Description
•   Headquarter Region

Create Products List.
Fields:
•   Product Name
•   Description
•   Department (lookup to Department list)
•   Status

5.2. Power Apps Development

Canvas App Setup:

One Screen showing with 4 sections.
1)   Table view to display all products.
2)   Form to allow user to edit and delete.
3)   Dropdown to filter products by Headquarter Region and Search text field.
4)   Row Counter.

5.3. Power Automate Workflow

Approval Process:
•   Trigger: When an item is created in SharePoint Products List.
•   Action: Send approval request to approvers (Jacqui.muller@dimensiondata.com and tlhogi.molwana@dimensiondata.com) and send a confirmation email to the user that created the new item.

5.4. Power BI Reporting

Create Reports:
- Filter Products by Region
- Filter Products by Approval Status
- Filter Products by Department

6. Constraints and Assumptions

Constraints:
- Licensing considerations for connectors.

Assumptions:
- Users have Microsoft accounts.
- Adequate permissions are granted for creating, editing and deleting products.

7. Conclusion

The defined process aims to automate the existing manual data management, approval, and reporting workflow using Microsoft Power Platform tools, enhancing efficiency and providing real-time reporting capabilities.