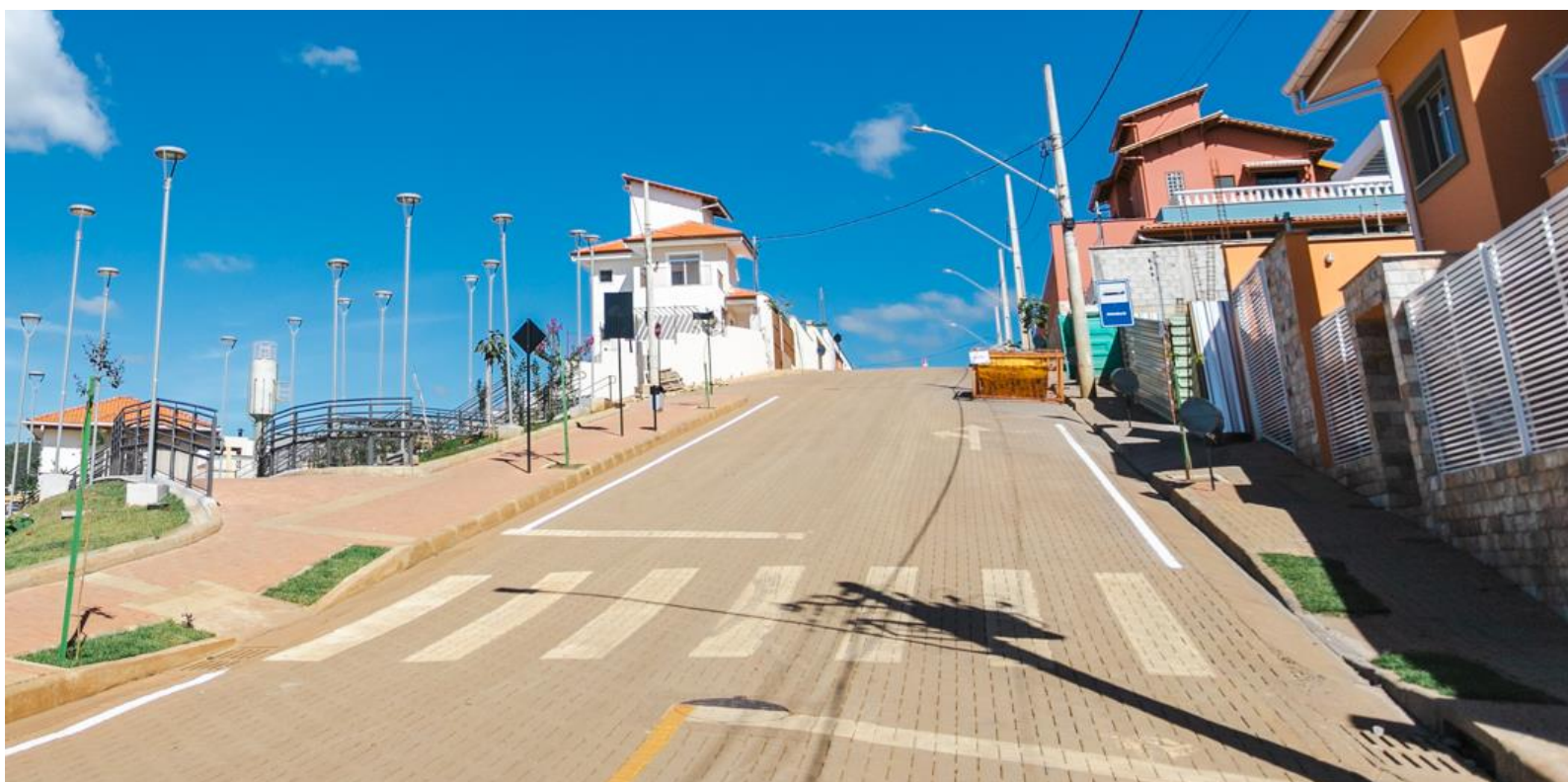




Participation Analyzer User's manual

6 December 2024



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Introduction

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1 Justification

During ES's EPS review performed in April 2024, as a team, we identified improvements point and assigned some actions to work around.

Particularly, we focused on the topic “My team’s processes enable me to effectively meet my customers' needs” and we discovered that we unknown the collaboration engagement from our customers and in consequence, their specific needs.

Considering current company north star, we decided to generate a tool and process that gave us through real data, the ability to measure the attendance to the communications that we have to our customers, take early actions improving the effectiveness of our relationship with them, refine how to approach to them more effectively and hence, improve in the understanding of their needs.

2 What is Participation Analyzer?

Participation Analyzer is a Microsoft Power Automate custom flow implementation that allow to the user generate a simple report with insights related to the participation stats of a working group through the analyze of their interactions using emails.

Getting Started

To use this implementation, we encourage you to follow the next step-by-step guideline described below.

1 Activate your Microsoft Power Automate account

1. **Access Power Automate:** Open your browser and go to [Microsoft Power Automate webpage](#).
2. **Sign In:** Use your BHP corporate account. Power Automate is available to all users in the organisation, you just need to activate your access.

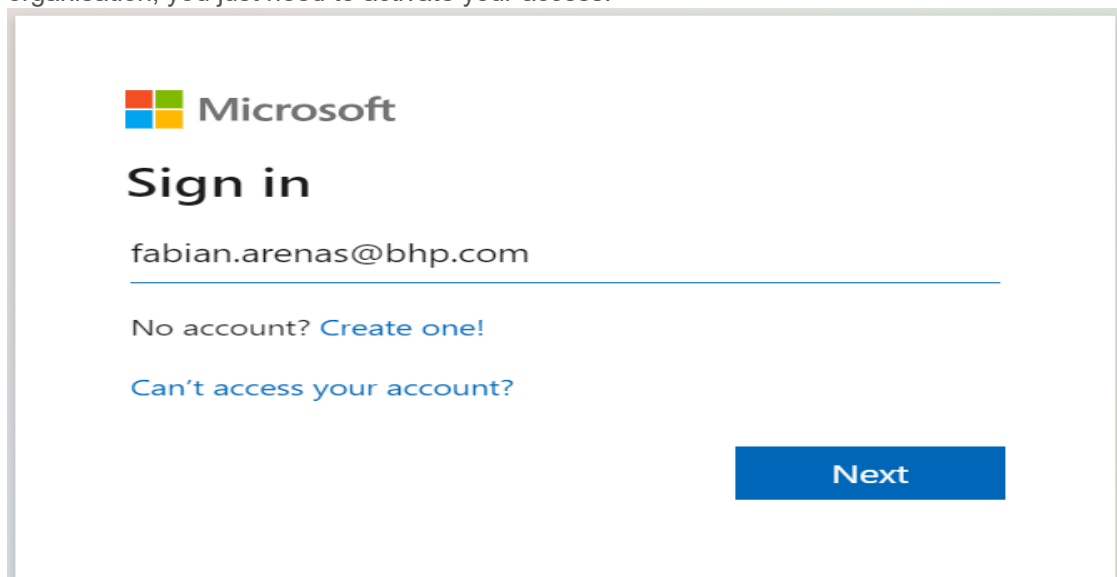
The image shows the Microsoft Sign in interface. At the top is the Microsoft logo. Below it, the text "Sign in" is displayed in a large, bold font. Underneath, the email address "fabian.arenas@bhp.com" is entered into a text field. Below the text field, there are two links: "No account? Create one!" and "Can't access your account?". At the bottom right, there is a blue button labeled "Next".

Figure 1 - Microsoft Sign In form

3. **Activation:** Follow the on-screen instructions to complete the activation of your account.



Once active (because you completed the steps or because you had already activated your Microsoft Power Automate account in the past), you will see Power Automate home page.

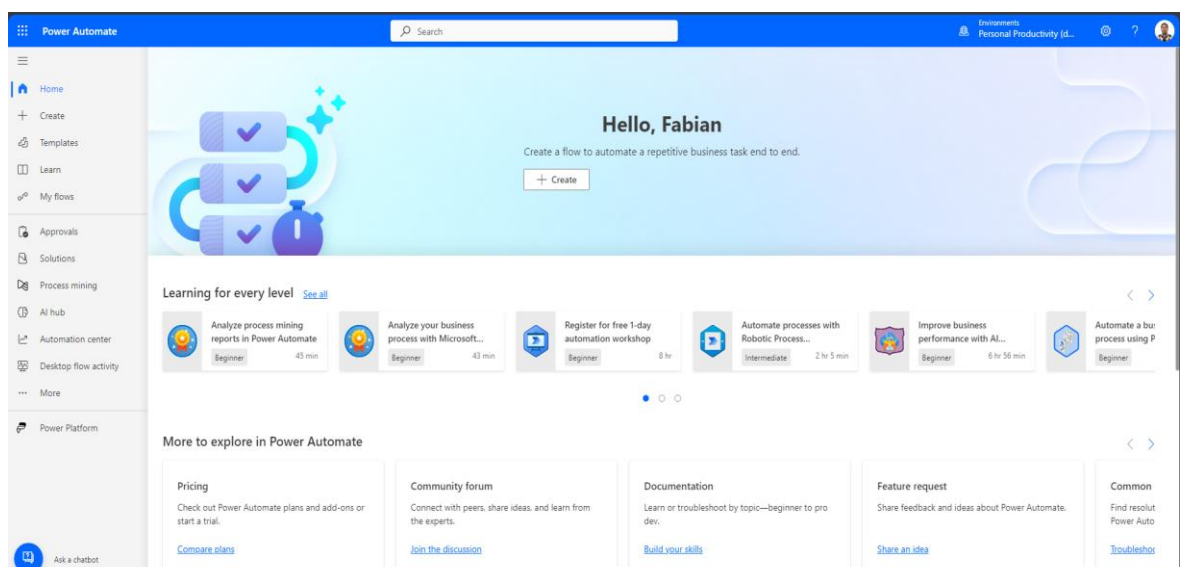


Figure 2 - Microsoft Power Automate home page

2 Import a Microsoft Power Automate flow

1. **Download the zipped custom flow:** Download the ZIP file of the flow from [this link](#).

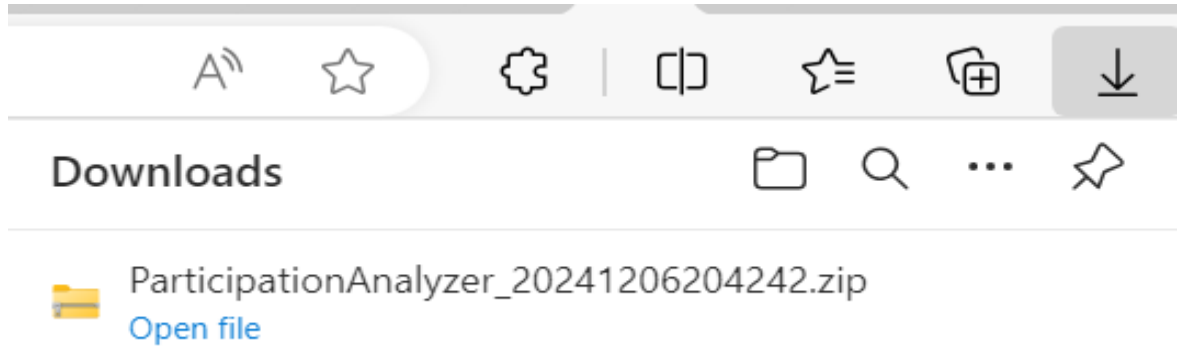


Figure 3 - ZIP file downloaded

2. **Go to My Flows page:** In the left navigation panel of the Microsoft Power Platform home page, select "My flows".

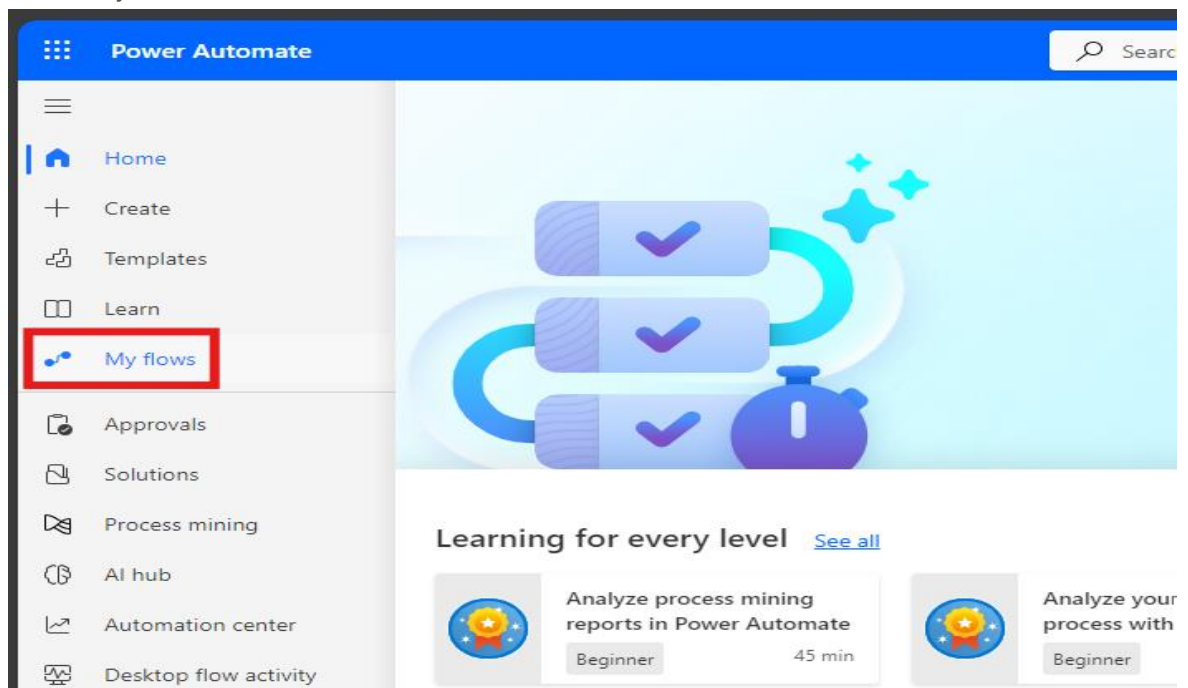


Figure 4 - "My flows" menu option

3. **Import the new flow:** Click on "Import" at the top horizontal menu, and then click over "Import Package (Legacy)".

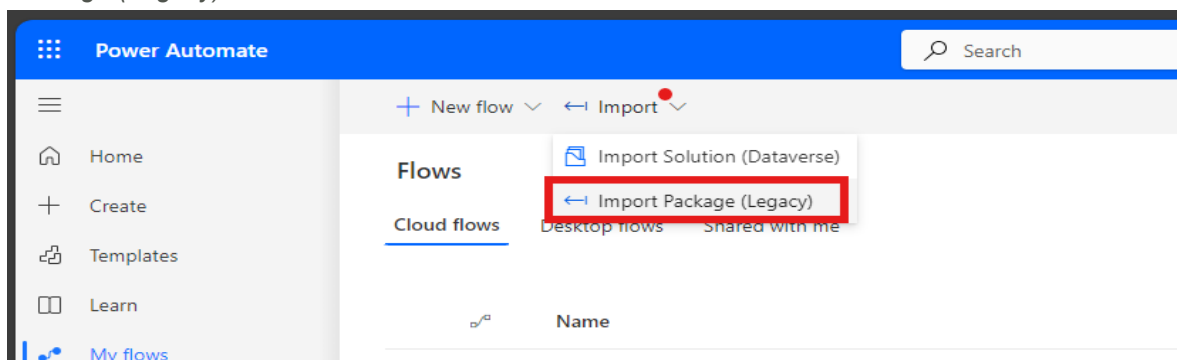


Figure 5 - Import Package menu option

4. **Upload the ZIP file:** Select the ZIP file you downloaded and follow the instructions to import it.



In the **Import package** page, make sure **Import Setup** option is set as **Create as new** for the flow.

Package details
Created by N/A on 12/06/2024

Name
ParticipationAnalyzer

Environment
N/A

Description
Participation Analyzer is a Microsoft Power Automate custom flow implementation that allow to the user generate a simple report with insights related to the participation

Review Package Content
Choose your import options.


NAME	RESOURCE TYPE	IMPORT SETUP
 Participation Analyzer	Flow	Create as new


Figure 6 - Import package page after file upload

5. **Configure connectors:** During the import process, you will be asked to configure the necessary connectors, so, please click over “*Select during import*” link.



Pay special attention to the **Office 365 Outlook** connector, which will be detailed in the next section.

Review Package Content
Choose your import options.

NAME	RESOURCE TYPE	IMPORT SETUP
 Participation Analyzer	Flow	Create as new

Related resources


NAME	RESOURCE TYPE	IMPORT SETUP
 fabian.arenas@bhp.com	Office 365 Outlook Connection	Select during import

Figure 7 - Select during import option described in next section

3 Create the “Office 365 Outlook” connector

1. **Create the connector:** In the “Import setup” modal, click over “+ Create new” button.

Import setup

Setup
Select during import

The package creator chose this setup. You can make changes to the i mport here.

The connection or custom API already exists in the environment and must be selected when this package is imported.

[+ Create new](#) [Refresh list](#)

NAME	RESOURCE TYPE
------	---------------

Figure 8 - Import setup modal

2. **Connections page:** Click in the button “+ New connection”.

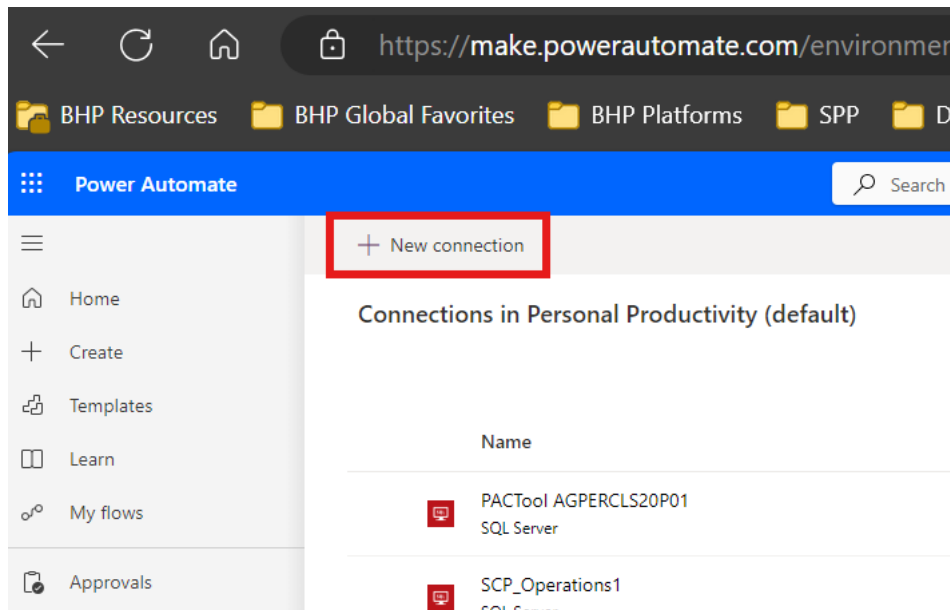


Figure 9 - Connections page

3. **Finding the right connector:** In the “New connection” page, use the “Search” box at the top-right corner and write “Office” to filter the list. You will see **Office 365 Outlook** connector, click over it.

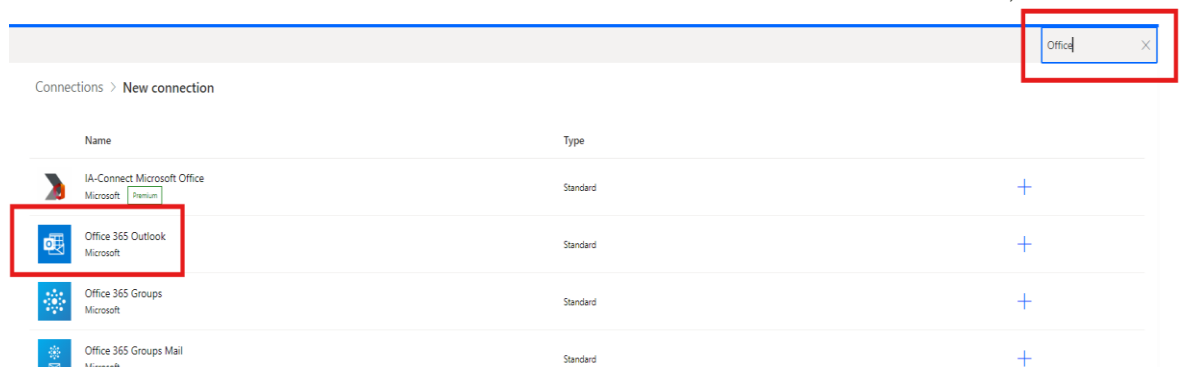


Figure 10 - Connections page displaying Office 365 Outlook connector

4. **Creating the connector:** In the modal window, press over “Create” to generate the connector.

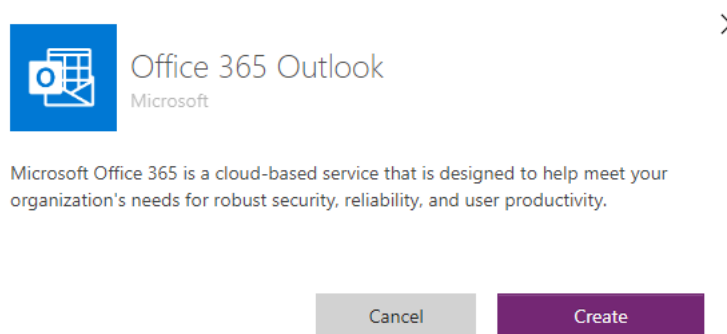


Figure 11 - Connector creation modal

5. **Sign In:** You will be asked to enter your Office 365 credentials, so, please do it, to allow the new flow to connect with your Outlook account.
6. **Save and Continue:** Once completed, you can close the Connections page and return to the Import setup modal. Then click the "Refresh list" button and the new connection to your corporative email account should be shown. Click over this (check mark at right will appear) and then save the form.

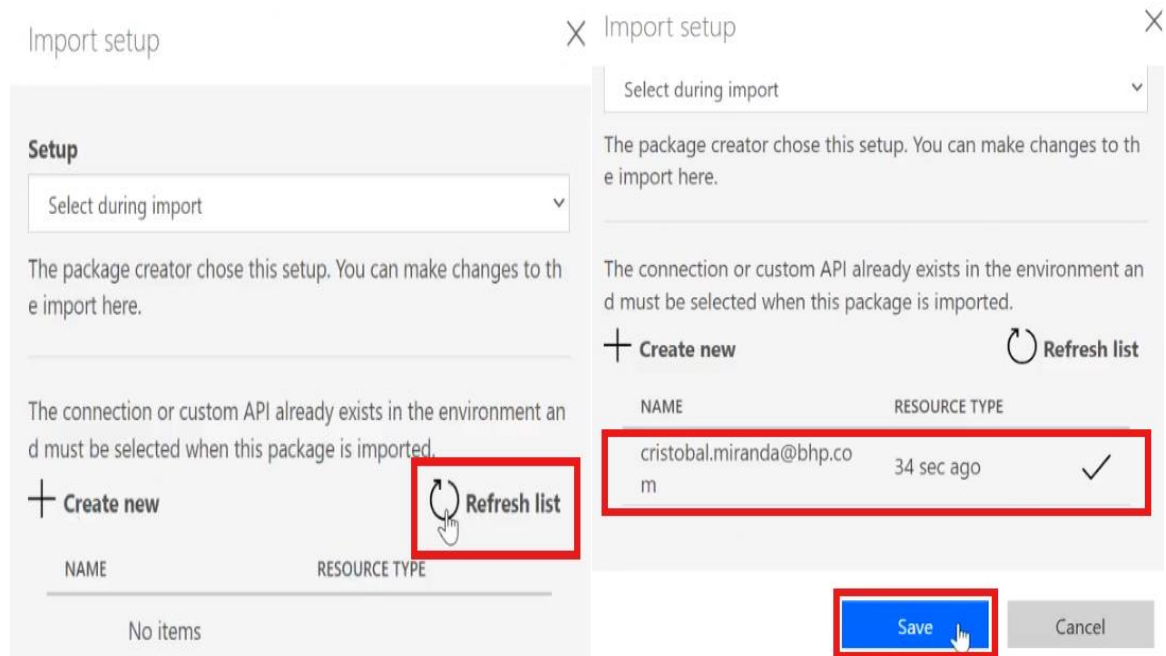


Figure 12 - Import setup modal with new connector

7. **Finishing the importing:** Now that you have configured your own connection, press button "Import" in the Import package page.

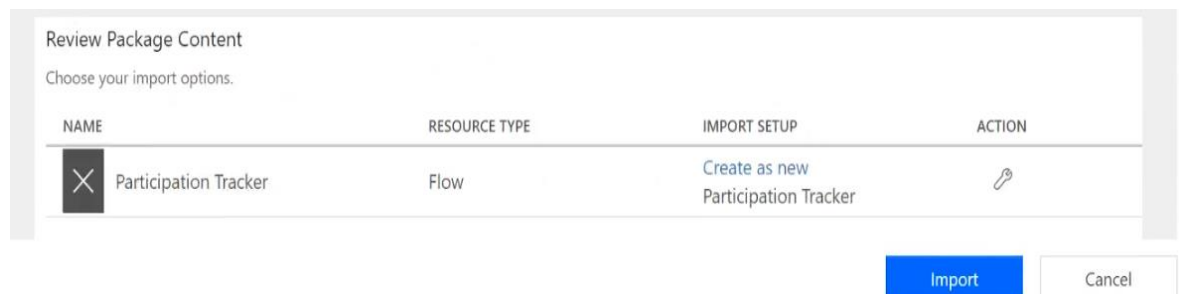


Figure 13 - Import package page ready to import the new flow

4 Execute the "Participation Tracker" Flow

1. **Go to My Flows:** Navigate to "My flows" page in Power Automate.
2. **Select the Flow:** Find the "Participation Tracker" flow and click over its name.
3. **Activate the Flow:** Make sure to activate the flow, by clicking "Turn on" button, before executing it.

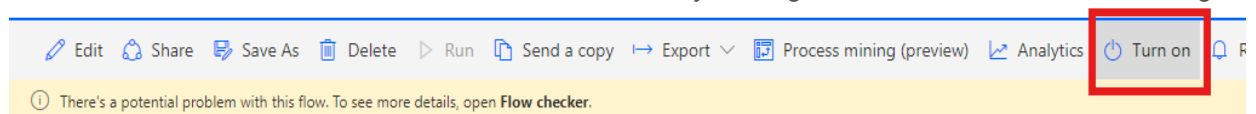
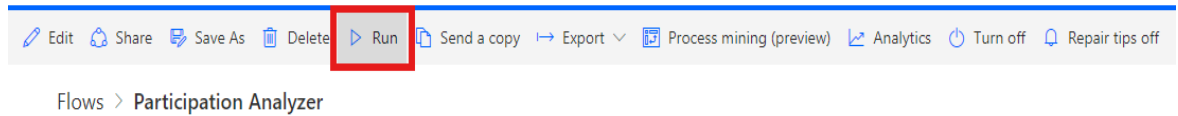


Figure 14 - Activating the new flow

4. **Run:** As the flow was activated, now you can click on "Run" button to start the flow.



Flows > Participation Analyzer

Figure 15 - Flow page with flow active and ready to be executed

5. **Input Data:** This flow requires two input data: the *ProjectId* and an *Email* address.
- ProjectId:** This is a unique value that you included in the subject of all communications that you want to evaluate. In example, asking for feedback about Tooling Standard Refreshing, I wrote an email using the next subject "[ES-TSR] Tooling Standard Refreshing draft version for revision", and then, I used "[ES-TSR]" string as the value for *ProjectId* to analyze all communications related.
 - Email:** This is the email account (as plain text) where you will receive the final report. Please look [Common issues](#) section to be aware of some issues that could happen depending on the value used here.

Run flow ✕

Participation Analyzer
Owner: Arenas, Fabian
Allow to the user generate a simple report with insights related to the participation stats of a working group through the analyze of their interactions using emails

ProjectId *

Email *

This flow uses Office 365 Outlook.
[Review connections and actions](#)

Run flow

Cancel

Figure 16 - Flow execution form

Appendix A – Issues & Support

1 Common issues

This implementation was developed to work only with the BHP corporative account and only with the email mailbox of the owner of the flow, its federated under office 365 and Azure AD capabilities to comply with Cybersecurity restrictions. In the working version, there is no possibility to access other person email accounts/messages.

1. **Connection Errors:** Ensure you are using the corporate account and Office 365 Outlook connector is configured and associated to the working flow.
2. **Flow Not Running:** Verify that working flow was *Turned on* and that there are no errors in the configuration.
3. **Parameters problems:** As these are plain text data, there could be some potentials issues that can cause tricky behaviours. Please have the next considerations using these fields:
 - a. **ProjectId input field**
 1. If the string used doesn't match with any email, this situation is handled by the system and user will receive the report associated.
 2. The implementation is not prepared to handle some special characters like simple quote (') or double quotes (") among other, so, using this could cause failures in the flow's execution
 - b. **Email input field**
 1. This field is prepared to work only with one BHP email account, and it must be the user's BHP email account
 2. You can input multiple email accounts separating them by using the semicolon character (;), the flow will process as expected, but this will cause two impacts:
 - a. All email accounts included will receive a copy of the report.
 - b. The report will have a typo saying that all emails accounts included where analyzed where it wasn't.
 3. If user input a non-BHP email account, the flow will fail and user will receive an Office 365 error email.

2 Support requests

1. **Support:** Support and help requests should be directed specifically to Fabián Arenas (fabian.arenas@bhp.com).
2. **Monitoring:** As this is just an MVP, reports generated are being monitored, anyway, there is no access to the single process and partial results generated in the execution of every flow.
3. **Modifications:** The user is receiving the full implementation, and it's allowed to modify their imported versions, so, feel free to play and improve what was done at your own risk.

3 Future work

There are a lot of features that can improve the existing flow, like automate the generation of the report every certain time, we can improve on the UX of the report, allow Managers, HO, VP, etc, to get reports from their team members and/or team's initiatives, but we will not implement more features unless the team define and prioritize its needs and the value of these changes.