**CPFC – Cisco Partner Feedback Central**

**Hand Over Document**  
**Date:** May 19, 2025

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**1. Objective and Solution Design**

**Objective**

The goal of the **CPFC Phase 2 Intake Process Refinement Project** is to streamline and enhance the intake, tracking, and reporting process for partner support requests. This phase focuses on:

* Refining the existing Qualtrics intake form for accurate data capture.
* Automating task creation and updates between SharePoint and Asana using Power Automate.
* Implementing a Power BI dashboard for real-time executive insights.
* Documenting the data workflow to support scalability and handover.

**Solution Design Overview**

The architecture is modular and API-driven, designed for seamless data integration across systems:

**High-Level Workflow**

Qualtrics ➝ Power Automate ➝ SharePoint ➝ Power Automate ➝ Asana ➝ Power BI

↑

OneDrive

**Solution Components**

**1. Qualtrics**

* **Purpose:** Primary intake platform for partner/customer requests.
* **Key Features:**
  + Dynamic branching logic in the form.
  + Real-time export to Excel in OneDrive.
  + SharePoint Link – [CPFC Qualtrics Output Excel.xlsx](https://cisco.sharepoint.com/:x:/r/sites/CPFC/_layouts/15/Doc.aspx?sourcedoc=%7B5EDDF751-1EF9-4029-AFEA-163414A57B6C%7D&file=CPFC%20Qualtrics%20Output%20Excel.xlsx&action=default&mobileredirect=true)

**2. Power Automate Workflow**

**i) Overview**

* **Created By:** Pradeep Reddy Pathi
* **Date of Handover:** May 19, 2025
* **Recipient:** CPFC Team

**ii) Data Source**

* **Source File Location:** [CPFC Qualtrics Output Excel.xlsx](https://cisco.sharepoint.com/:x:/r/sites/CPFC/_layouts/15/Doc.aspx?sourcedoc=%7B5EDDF751-1EF9-4029-AFEA-163414A57B6C%7D&file=CPFC%20Qualtrics%20Output%20Excel.xlsx&action=default&mobileredirect=true)
* **Destination:** SharePoint List

**iii) Flow Details**

* **Link:** [Manage your flows | Power Automate](https://make.powerautomate.com/environments/Default-5ae1af62-9505-4097-a69a-c1553ef7840e/flows/shared/ef20a7bf-b81e-47f6-818b-a713d6c08f84/details?v3=false)
* **Personal Access Token:** In Power Automate the PAT is used primarily for authentication when integrating services 2/1209743531022523/1209779121490965:80540b951c33eeed1d46bf39fb267ba0

**iv) User Access & Permissions**

* **Access Level:** Currently, only Michele has ownership rights. If they have Admin access only they can able to run the flow

**v) Maintenance & Updates**

* Monitor weekly or as needed.
* Regular reviews for error handling, connection integrity, and performance optimization.

**3. Asana Integration**

**i) Overview**

* **Project Name:** Cisco Partner Feedback – Asana Integration
* **Prepared By:** Pradeep Reddy Pathi
* **Handover Date:** May 19, 2025
* **Recipient:** CPFC Team
* **Purpose:** Ensure smooth management of Asana-based components supporting the CPFC dashboard.

**ii) Asana Usage Context**

* **Role:** Task and project tracking for engagement actions, sentiments, and escalations.
* **Integrations:**
  + Export metadata (JSON)
  + Integration with Power Automate and Power BI

**iii) Project Structure**

* **Workspace:** Cisco Partner Feedback – Central Workspace
* **Project Milestones:** PXP, Black Belt, Cisco360, API Integrated Solutions, Buying Program,
* **Task Details:** 
  + **Tasks**: Escalations, Notable Quotes, Requirements, Risks, Pain points, Action items
  + **Custom Fields**: Name of Person Submitting, Date Submitted, Partner, Status, Assignee, Due date, Region, Fiscal Quarter, Engagement Type, PES Council Engagement, Engagement Format, Attendees, Workstream Topic, PXP: Functional Training or Use Case Application Details, GPRS Strategic Priority, Session Date, Session Title, Session Objective, Session Recording Link, Session Recording Password, C360: Partner Sentiment, C360: Feedback Topic, Details: Benefits & Incentives, Details: Capabilities, Details: Specializations & Authorizations, Details: Partner Lifecycle Engagement, Details: Marketing, Branding, Promo, Details: Buying Programs, Details: Partner Experience, Details: Other

**iv) Integration & Automation**

* **Workflow:**
  + Asana to Power BI
  + Files combined with Partner List and SharePoint output in Power BI
* **Tools:** Power Automate, Excel, Power BI

**v) Development Artifacts**

* Power Automate Flows
* Manual Asana field configuration
* Planned for Phase 2: Direct API Integration

**vii) Access Management**

* **Access:** CPFC team have full access
* **Integrations:** SharePoint, Excel, Power BI

**viii) Recommendations and Future Enhancements**

* API-based live sync
* Auto-export scheduling
* Role-based field visibility

**ix) Links**

* **Asana Dashboard:**  [**PXP - Asana**](https://app.asana.com/1/5557457880942/project/1210198966334247/overview/1210198966334270)
* **Template Link:** [CPFC - AutomationTemplate - Asana](https://app.asana.com/0/project-templates/1209984943121229/list)
* **Personal access tokens:** [**Asana**](https://app.asana.com/0/my-apps)

**4. Power BI Dashboard**

**i) Overview**

* **Dashboard Name:** Cisco Partner Feedback
* **Created By:** Pradeep Reddy Pathi
* **Handover Date:** May 19, 2025
* **Recipient:** CPFC Team
* **Purpose:** Consolidate partner engagement data for executive-level insight

**ii) Data Sources**

* **Systems:** SharePoint Excel, Asana
* **Mode:** Import
* **Files Used:**
  + SharePoint Output Excel
  + Asana Table
  + Tasks
  + Partner List Excel

**iii) Dashboard Structure**

* **Reports:**
  + CPFC Partner Details
  + Engagements by Quarter
  + Risks & Pain Points
  + Escalations and Partner Mapping
* **KPIs:**
  + Escalation count
  + Pain Points & Risks
  + Custom calculated columns (e.g., BEO ID + Country)
* **Filters:**
  + Region, Quarter, Workstream
  + Engagement Format, Strategic Priority, Country, GEO, BE

**iv) User Access**

* **Permissions:** All team members have View and Write access
* **Workspace:** Cisco Partner Feedback Central
* **Power BI URL:** https://app.powerbi.com/groups/d29e4488-08f1-4d1a-b10c-2dcef65062d1/datasets/4e72493c-6f09-42ca-a970-4302c3f728c4/details?experience=power-bi

**v) Maintenance**

* **Refresh:** Manual refresh to get latest data
* **Issues:** None reported
* **Phase 2 Plans:** Scheduled refresh and performance optimization

**vi) Notes**

* **Dependences:** Power Automate, Asana Integration, Excel Files

**5. Data Flow and System Architecture**

A diagram of a power automate

AI-generated content may be incorrect.

**6. Workflow Diagrams and Reference Materials**

**Power Automate Diagram:**

**A screenshot of a computer

AI-generated content may be incorrect.**

**Asana Dashboard: A screenshot of a computer

AI-generated content may be incorrect.**

**Power BI Dashboard:**

**A screenshot of a computer

AI-generated content may be incorrect.**

Asana Material: [Overview](https://developers.asana.com/reference/rest-api-reference)

**7. Testing and Validation**

* Manual testing conducted for data sync
* Asana to SharePoint to Power BI validation done
* Weekly check-in planned for flow health

**8. Recommendations and Future Enhancements**

* Full Asana API Integration
* Scheduled refresh in Power BI
* Field-level permissions in Asana
* NLP-driven sentiment classification

**9. Support and Contact Information**

**Primary Contact:**  
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