Step-by-Step Guide for Creating the Trade Operations Power App

Step-by-Step Guide for Creating the Trade Operations Power App

Objective

To build a Power App that allows trade operation business users to manage and monitor the generation and distribution of trade reports. The app will integrate with Power Automate to trigger report generation and will display the status of the latest reports.

Prerequisites

1. Access to Microsoft Power Apps.

2. Necessary permissions to access the SQL Server database and BlackRock Aladdin API.

3. Credentials for the client's SFTP MFT account.

Step 1: Setting Up the Environment

1. Open Microsoft Power Apps.

2. Select Create > Canvas App from Blank.

3. Name the app: Trade Operations Reporting.

4. Choose the Tablet format for a better user experience.

Step 2: Connecting Data Sources

1. Go to Data > Add Data.

2. Add SQL Server as a data source:

   - Choose SQL Server from the connectors.

   - Enter the server name, database name, username, and password.

3. Add Custom Connector for BlackRock Aladdin API:

   - Use the API endpoint and authentication details.

4. Add Azure Blob Storage for file holding.

5. Add Power Automate as a data source to trigger flows.

Step 3: Designing the User Interface

1. Add a Home Screen:

   - Add a Label: "Trade Operations Reporting".

   - Add a Button: "Generate Report" to trigger Power Automate.

   - Add a Gallery to list recent reports.

2. Add a Status Screen:

   - Add a Label: "Report Status".

   - Add a Data Table to display report generation logs.

Step 4: Integrating with Power Automate

1. Click the Generate Report button.

2. Set the OnSelect property to launch the Power Automate flow:

   'YourFlowName'.Run(DateInput.SelectedDate, PortfolioInput.Selected)

3. Configure the flow to receive inputs:

   - In Power Automate, add a Manual Trigger with two inputs:

     - Date Range: Type: Date, Name: StartDate, EndDate

     - Portfolio Group: Type: Text, Name: PortfolioGroup

   - Use Date Picker and Dropdown controls to pass inputs.

   - Map these inputs in the Power Automate flow and test manually.

Step 5: Implementing Report Monitoring

1. Bind the data table to the Azure Blob storage connection.

2. Display report name, generation time, and status.

Step 6: Testing the Power App

1. Run the app and click "Generate Report".

2. Check the status update on the Status Screen.

3. Test for success, failures, and network issues.

Step 7: Deployment

1. Save and publish the Power App.

2. Share the app with the Trade Operations Team.

Maintenance and Monitoring

1. Monitor app usage and gather feedback.

2. Update flows and app features as needed.

3. Perform regular maintenance to ensure smooth operation.

Success Criteria

- Users can generate and view trade reports effortlessly.

- Accurate and timely status updates.

- Smooth integration with Power Automate.