

Microsoft Power App

User Guide

This document provides the default TSANet Connect Power App user experience.

The following user types are used in this manual.

**Technical Support Engineer:** Staff who are responsible for the resolution of customer cases. This group of users will initiate outbound collaboration requests with other Members and collaborate with Members who make inbound requests.

**Customer Service / Management Team:** This group handles the inbound request process. This documentation shows the manual method for responding to an inbound request, but Members can also implement automation in this area.

Note: When the Power App is integrated into Microsoft Dynamics, the user experience could change, and this guide is then used as a baseline for custom documentation.

# Collaboration Process Overview

The TSANet Connect collaboration process allows a Member to request collaboration with other TSANet Members with whom they have a relationship. The system is designed to create a consistent experience for all members. The diagram below shows the high-level process.



This Power App uses REST API to POST and GET data from the TSANet Connect system. The default interval for the GET polling is 15 minutes, and the user can manually Refresh Data from the main navigation.

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Refresh Data on Navigation

# Technical Support Engineer

The Technical Support Engineer has two use cases:

1. Create a New outbound request
2. Work on a New inbound request that has been assigned to them

## Create an Outbound Request to a Member

#### Go to TSANet Cases (LWC located on the Case Form)

* Click NEW – search for a Member, fill out the required fields, and submit

View Screenshots below:

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Select New from the main navigation

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Search for the Member

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Fill out Fields and press submit

* After submitting, the Case will appear under TSANet Cases with the status (Open). You can also view the case details in the Case Feed.
* When the other member responds to the case, the TSANet Case will be updated with the Engineer’s contact information. The status will be updated to ACCEPTED, INFORMATION, REJECTED

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List View Showing the outbound case

## TSANet Case Status Definitions

#### The following status definitions are used for the TSANet Collaboration Case.

* **Open** (New waiting initial response)
* **Information** (Sent if information is needed to accept or reject)
* **Accepted** (Collaboration Accepted)
* **Rejected** (Collaboration rejected.  For example, end customer does not have support).  This status is not used for solution support.
* **Closed** (set by submitter or auto-close after 30 days of inactivity)

## Working on an Inbound Request from a Member

The inbound process will result in either a new case assigned to an engineer or a link to an existing case already assigned to an engineer. The functionality for working on this collaboration is the same as for outbound requests.

**Note**: Multi-vendor collaborations are complex cases. Members should assign these cases to experienced Support Engineers and alert management.

**Note**: When integrated into MS Dynamics the Power App can trigger a notification to the case owner

## Ongoing Collaboration – Notes and Responses

Select the TSANet Case from the list to view the detail.

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Select the TSANet Case from the list

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Select Add Note

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Add the note and hit save

When the other member adds a **Note** to your case or **Updates the Response**, it will appear under the Case Feed. This Power App feed can also be integrated into the MS Dynamics case.

## Closing a Collaboration Case

Submitters can close a case from the case detail view navigation. If a TSANet Collaboration case has not been active for 30 days, it will be automatically closed.

**Note**: Only Submitters can close a case

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Close case action from the navigation

# Customer Service / Management Team

The process for responding to inbound collaboration requests can be manual or automated. The manual steps are documented below.

The management team can also monitor the progress of all collaborations and define workflows that align with the organization's case management processes.

## **Note**: The Power App install guide defines the details of the package, including flows that could be used to automate the process

## View the Inbound (Open) Requests

The TSANet Cases has several List views.

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*View of TSAnet Cases (See status Open)*

## **Note**: As this is not a high-volume process, it is suggested that a notification be set up for the team that manages inbound requests

## Respond to an Inbound Request from a Member

Opening the TSANet Case will show all details related to the request. The receiving Member can create or link an existing case in Microsoft Dynamics from this record. This section will be updated with examples of Microsoft Dynamics screens showing the link between the TSANet and Microsoft Dynamics Case.

### Respond to the Case by clicking the “Approve, Reject or Request Information.”

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*Action Buttons on the TSANet Case*

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*Approving the Request*

### Exception – Information Requested

**The information requested** status is set if the information provided does not allow for creating a case and assigning it to a Technical Support Engineer. This status could also be used when an entitlement issue is found and a customer service team is working on the case. When the TSANet Case is in this status, the user can exchange notes with the submitter to obtain the required information.

### Exception - Rejected

Rejecting a case is like sending an Accept response. The user provides details on why the case was Rejected and any necessary steps to re-submit it in the future.

**Example**: The end customer is not found in the member’s system, or a supplied serial number is not supported.

**Note**: Best practice is to use the information requested process to try to accept the case. Then, as agreed with the submitter, reject the case.