

LI Load Fabric Plan

Monday, December 2, 2024
1:56 PM

Microsoft Forms Power Apps and Microsoft Power Automate project plan.

Initial Plan:-

- ~~1. The following is the form we could replicate:
 - ~~a. MBDA | Client Intake Form (hyperlink removed)~~~~
- ~~2. Store the data as a pdf file or Word file.~~
- ~~3. Ingest the data to an Excel file in SharePoint.~~
- ~~4. Create a CSV file as an output from the Excel file data.~~
- ~~5. Build a Power BI report showing the data.~~

mm / dd / yyyy

Primary Contact:

Name*

Phone*

Email*

Fax

Company Information:

Company Name*

Company Phone*

Company Address*

...

City*

State*

Zipcode*

Website

Ethnicity of Principal Owner

Business Information:

Business Type and Description -Core Competencies*

- Revised Plan:
- Replicate form in Power Apps

- Use Claude for initial implementation
- Connect to Fabric dataverse (data storage)
 - Need fields
 - column for every field
 - row ID
 - RowCreateDateTime
 - Record Create User entra id
 - Record_Deleted? (Default: False)
 - Create field validation
 - Optional (Future)
 - Historical update management
 - Separate activity log
 - Advanced field validation
- Controls:
 - Insert New
 - Update existing (with search functionality for existing)
 - Delete existing (with confirmation of deletion)
 - Mark record as deleted instead of removing record
- Limit users ability to only access records created from their domain
 - Create login
 - Use entra id for initial verification
 - Request confirmation email/text for 2ndary verification
 - Create User approval flow
 - When creating record, limit email contact to pre “@” text – post text will match users’ domain
 - When updating, only show records where domain matches users domain
 - When deleting , only show records where domain matches users domain
- Create Power BI Report with direct-connect to dataverse
 - Using direct-connect instead of semantic model because dataset will be limited and want to see changes as they occur
 - Limit to only approved users
 - Add automated Data Dictionary
 - Add source Metadata (start with fixed... but, allow for future automated)
 - Create DAX table [Calendar] and join to RowCreateDateTime – but only on date
 - Reporting Purpose:
 - Search/filter by date/period, companies, email domains, other
 - List counts – Average/period, total, total in period, future expected, etc...
- Power Automate to extract csv of whole dataset (less items marked for deletion)
 - Trigger to be in Power BI

Expectations per Phase:

Phase 1 - Due Friday 12/6

- Add all same inputs from form
 - Some inputs can be completed in phase 2
- Need to hit all solution software
 - Capture data from Power App form
 - Put on Sharepoint
 - Move data to dataverse
 - Alternative for phase 1 - add data to Sharepoint list

- Phase 2 will be for transitioning to Dataverse (?)
 - Process data through Power Automate
 - Output data to - export to CSV
 - Excel
 - CSV
 - Create Power BI
- Log In with Username/Password
 - Will have rights to Power BI, Form on Sharepoint, Channel access
- Diagram of dataflow
- Create Teams Channel specifically for this project

Phase 2 - Due Friday 12/13

- Formatting Power BI
- Adding additional datasets
 - Washington State Office of Minority & Women's Business Enterprises Certification Management System (hyperlink removed)
 - <<Directory_2024-12-02.xls>>
 - <<Directory_2024-12-02_276.csv>>
- Show movement of data
- Power Automate Extract data from file on a folder
 - Merge data/cleanse data
- Update diagram
- Add web-form to direct our users
 - Go to Power BI to view
 - Go to Submit form
 - Download to CSV
 - Download to excel

Phase 3 - Due in January

- Create a back-end editor/viewer
- Incorporate Data Activator
- Security - log in with ID

Solution software

- Microsoft Fabric
 - MS Power apps
 - Dataverse
 - MS Power Automate
 - Power BI
 - Excel
 - Data Activator (?)
 - DevOps
 - Data Factory

Purpose:

- Reduce costs using MS
- End-users be able to easily modify on their own
- Reduce custom programming

Customer Issues to solve:

- Form creates PDF
 - Which means someone needs to transcode pdf
 - Solution: use Power Apps instead of MS forms
- Option is to use SmartSheet and then have it go to Salesforce
 - Very expensive
 - Possibility: get Salesforce API and load data via Power Automate