ADASTRA

Adastra Power Platform Capability

Kevin Harmer / Michael De Abreu

Agenda

Adastra Power Platform Overview

Why Power Platform?

Power Platform RPA

Power Platform Governance

Power Platform Training

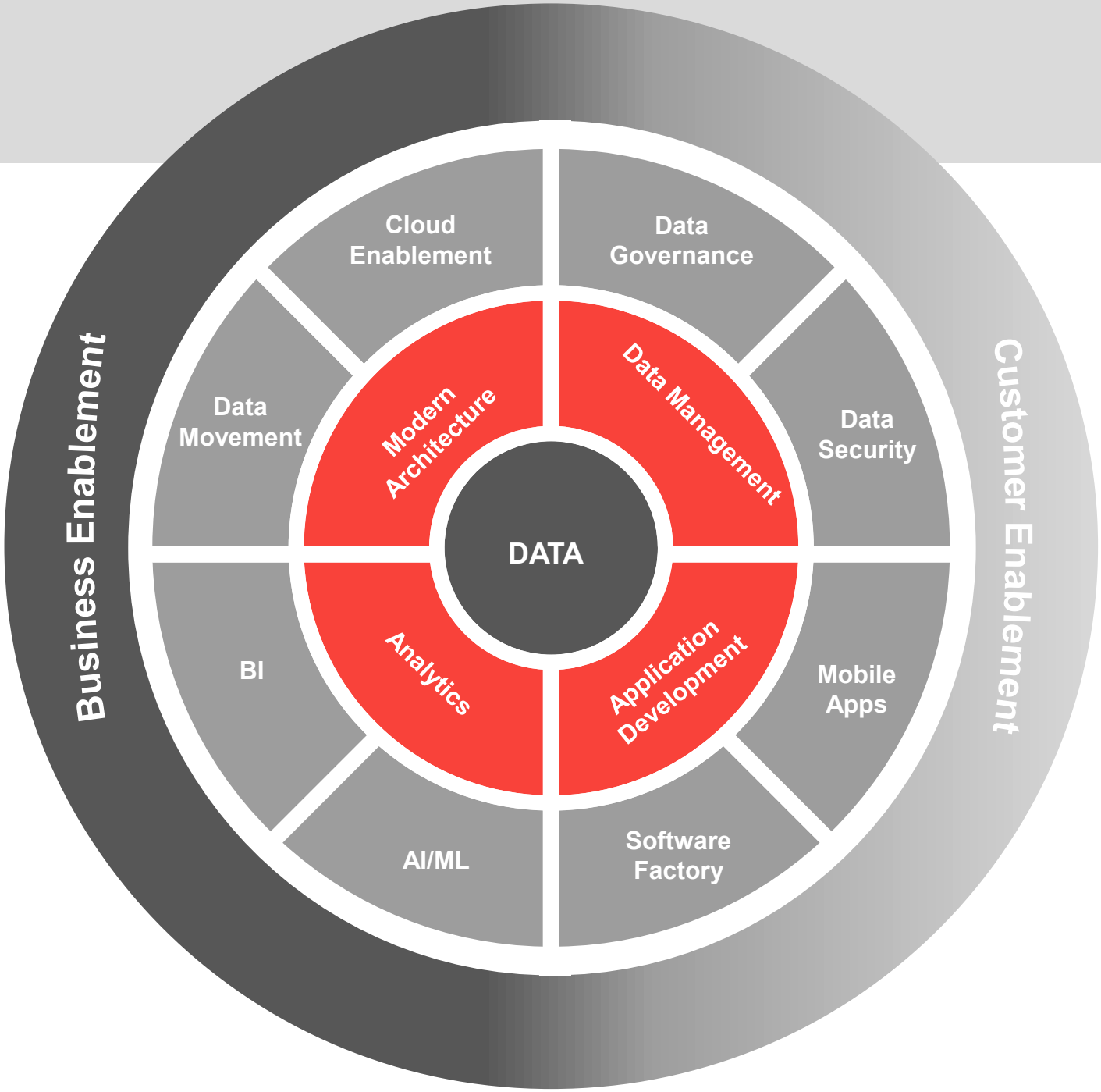
Power Platform Development

Adastra Overview

ADASTRA'S Superpowers

Data is the heartbeat of every organization - it brings strategy to life and enables great customer experiences.

For over 20 years, Adastra has been driving our customers forward leveraging Data & AI as a guiding light and business enabler.



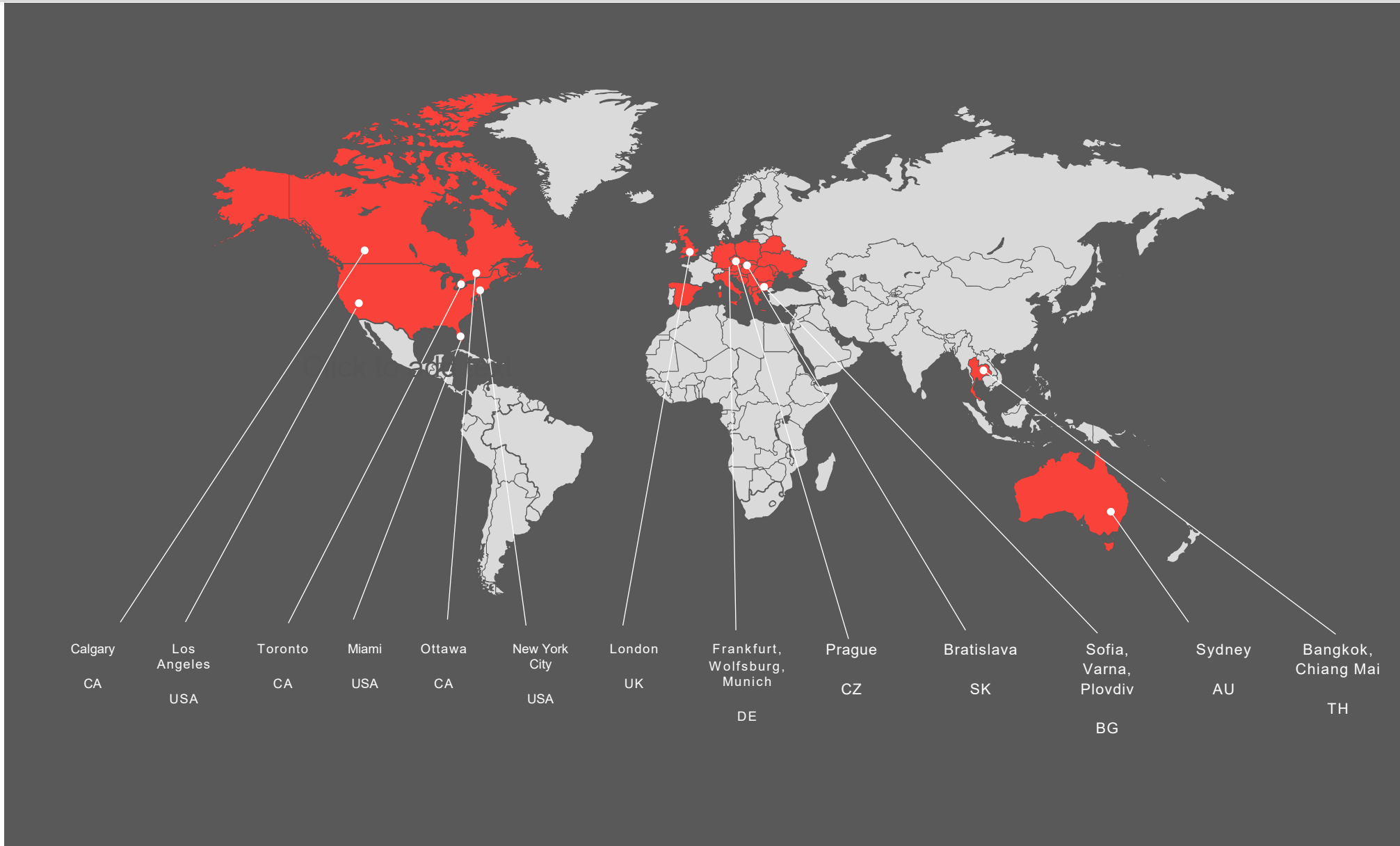
Adastra Worldwide

2100+

Data & Analytics Professionals

16

Offices in 9 countries



Adastra: #1 Modernization / Data / AI Partner

Microsoft Impact Awards Won: Analytics, AI, Data Platform Modernization, Financial Services, Manufacturing, Commercial
Microsoft Impact Awards Runner-Up: Partner of the Year, Global Analytics, Global Power BI, Migration, Customer Journey

Ability to Scale

With over 2600 GLOBAL staff, 500 CDN staff, and 500 Azure and Power Platform specialists, Adastra is ready to scale

Complete Stack Delivery

Azure Infrastructure, Azure AppDev, Azure BizApps (O365 / D365), Azure BI Analytics, Azure Big Data, Azure Data Science, and Power Platform

Proven Success

Adastra has the best record, successfully driving customer Azure adoption / ROI, for over 200 organizations in the last two years

Bestshore Delivery

Adastra's best-shore model offers 24/7 delivery and support, through our North America, Europe, and Asia based Delivery Centres

Adastra Microsoft Partnership

Microsoft Solutions Partner

Data & AI
Azure

Specialist
Windows Server and SQL Server Migration
Analytics

Microsoft Solutions Partner

Infrastructure
Azure

Specialist
Windows Server and SQL Server Migration

Microsoft Solutions Partner

Digital & App Innovation
Azure

Specialist
Low Code Application Development

Microsoft Solutions Partner

Business Applications

Specialist
Low Code Application Development

Adastra: Go-To Partner for Data & AI

- **10x** Impact Award Winner
- **12x** Impact Award Runner-Up
- **2x** Global Impact Award Runner-Up

- Azure Migration Partner
- Advanced Specialization for Analytics
- Advanced Specialization for Windows / SQL Server Migration to Azure

- Lead Canadian Partner for Synapse Migration / Implementation
- Product Team Collaboration for Azure Synapse / Azure Purview / Azure Databricks / Microsoft Fabric

Adastra Azure Specializations

AZURE FOUNDATION

cloud adoption framework, well architected framework, tenant design, resource naming, service tag approach, network architecture, governance design, tco analysis, hybrid network implementation, devops integration, azure foundation implementation, iac automation, …

AZURE APP / DATA

app / data assessment, app / data decisioning (lift / shift vs modernize), app / data architecture, api architecture, microservices architecture, app/ data security design, migration roadmap, migration execution, iac pipelines, devops integration, …

AZURE SECURITY

security assessment, identity strategy, role based access, secrets management, encryption, data loss protection, api management, private zone configuration, siem / soar integration, policy enforcement, security implementation …

AZURE ANALYTICS

analytics assessment, analytics architecture, analytics roadmap, data zoning, enterprise model design (kimball, inmon, data vault), ETL data pipelines, persona enablement, citizen report development, trusted data as a service, …

AZURE LAKEHOUSE

lakehouse assessment, data lake design, Hadoop integration, pyspark data engineering, ELT pipelines, spark delta lake, spark streaming, serverless compute, devops integration, …

AZURE AI / ML

advanced analytics assessment, cognitive service integration, r&d model training / testing, mlops implementation, ai / ml pipelines, data science workbench automation, devops integration, …

POWER PLATFORM

citizen development assessment, power platform governance, roles / responsibilities, environment strategy, CoE kit, canvas / model apps, power automate flows, power automate rpa, power platform dataverse, power bi datasets / reports, …

AZURE DATA GOVERNANCE

data governance assessment, data catalog, data classification, data sensitivity, data use governance, data privacy, data lineage, master data management, data quality management, reference data management, …

AZURE INTEGRATION PAAS

integration paas assessment, api management, logic workflows, service bus management, event grid distribution, peer to peer patterns, pubsub patterns, managed file transfers, iot telemetry streaming, iot edge device management, ...

Azure / Power Platform Offers

Azure Data Integration	
Azure Integration PaaS Framework	Accelerate guaranteed message delivery for A2A, B2B, EDI, and MFT use cases, using Adastra's iPaaS framework built on Azure Logic Apps / Service Bus.
Azure Ingestion Framework	Accelerate batch / streaming data to Azure, using Adastra's ingestion framework based on data factory / spark + kafka; metadata driven with resiliency.
Azure IoT Framework	Accelerate IoT integration using Adastra's IoT framework built on Azure IoT Hub / IoT Edge, supporting Edge and Azure IoT Central patterns.

Azure Analytics Modernization	
Azure Synapse Modernization	Implement Centralized DaaS or Data Mesh using Adastra's framework for fully integrated pipeline / sql / spark on Azure Synapse Analytics.
Azure Lakehouse Modernization	Implement Centralized DaaS or Data Mesh using Adastra's framework for bronze / silver / gold data lake zones managed by Azure Synapse / Databricks.
Azure Enterprise Search	Facilitate search and analysis of large volumes of unstructured data using Adastra's search framework on Azure Cognitive Search / Power BI.
Advanced Analytics Enablement	Facilitate your advanced analytics in Azure journey thru governance, R&D workbench, and MLOps phases using Adastra's framework.

Azure Core / App Modernization	
Azure Landing Zone	Establish or improve design for an Azure tenant, with the right security, network, and governance design, using Adastra's cloud adoption framework.
Azure App Modernization	Assess and modernize your application hosting, leveraging Azure App / Kubernetes services, while supporting edge governance thru Azure Arc.

Azure Data Platform Migration	
Azure SQL Migration	Lower database platform costs / risks by modernizing on premise DB's (SQL, Oracle, DB2, Sybase, …) using Adastra's accelerated migration.
Data Warehouse Migration	Unleash new cloud analytics capability by migrating your premise data warehouse to Azure Synapse Analytics using Adastra's accelerated migration.
Hadoop Migration Framework	Improve performance and reduce complexity by modernizing your Hadoop environment to Azure, converting to data lake / spark / sql processes.

Azure Data Governance	
Azure Purview Implementation	Enable data democracy and risk mitigation, and position for future data use governance, thru Adastra's Azure Purview implementation.
Better Together Data Governance	Extend Azure Purview to cover Master Data Management, using Adastra's Purview / Ataccama connector, thereby completing the Azure DG loop.

Power Platform	
Power Platform Governance	While Power Platform enables citizen solutions, ensure management and guardrails using Adastra's Power BI / App / Automate governance framework.
Power BI Migration	Facilitate mass migration of legacy reports to Power BI, using Adastra's migration accelerators / methodologies.
Power Automate RPA	Thru Adastra process mining, identify manual time intensive processes that are candidates for automation, then /w Adastra help convert to RPA.
Power App Deployment	With Adastra, drive transformational change by piloting interactive Power Apps and training users, to unleash app development by analysts.

Additional Technology Offers

Azure Intelligent Data Platform: Integration Offers

D365 Data Integration	Leverage Adastra's D365 Data Integration framework to integrate D365 Data, in real-time, with Azure's Intelligent Data Platform. Leverages Azure Data Lake trickle feed to integrate data in real-time, for D365 / Other integrated analytics.
SAP Data Integration	Leverage Adastra's SAP Data Integration framework to integrate SAP Data, in batch or real-time, with Azure's Intelligent Data Platform. Supports SAP ECC, SAP HANA, SAP BW, and SAP Cloud Platform sources.
JDE Data Integration	Leverage Adastra's JDE Data Integration framework to integrate JDE Data, in batch or real-time, with Azure's Intelligent Data Platform. Supports Finance, Supply Chain, Order, Project, Real Estate, Manufacturing, and other modules.
Salesforce Data Integration	Leverage Adastra's Salesforce Data Integration framework to integrate Salesforce Data, in real-time (via API or streaming patterns), with Azure's Intelligent Data Platform. Leverages API calls or Push Topics / Bayeux to achieve real-time.
Workday Data Integration	Leverage Adastra's Workday Data Integration framework to integrate Workday Data, in real-time, with Azure's Intelligent Data Platform. Supports multiple Workday instance integration, and includes Workday / Azure IDP integrated security.
Guidewire Data Integration	Leverage Adastra's Guidewire Data Integration framework to integrate Guidewire Data, in real-time, with Azure's Intelligent Data Platform. Enables analytics on Guidewire data, and optionally leverages the Synapse Insurance template.
Maximo Data Integration	Leverage Adastra's Maximo Data Integration framework to integrate Maximo Data, in real-time, with Azure's Intelligent Data Platform. Enables self service and advanced analytics on assets, projects, and work. Supports batch and streaming patterns.
OSISoft PI Data Integration	Leverage Adastra's OSISoft PI Data Integration framework to integrate OSISoft PI real-time telemetry data with Azure's Intelligent Data Platform. Includes an OSISoft PI tiered architecture, for performance / consistency at scale.

NOTE: Adastra also has experience integrating >200 additional sources (Peoplesoft, Infor, Yardi, JD Edwards, …) with Azure Intelligent Data Platform.

Virtual / Mixed Reality Offers

Hololens + D365 Guides	Leverage Adastra's framework for Hololens / D365 Guides deployment, to empower employees where the work happens by layering interactive guides and training through augmented reality. Improves employee efficiency, quality, and safety.
Hololens + D365 Remote Assist	Leverage Adastra's framework for Hololens / D365 Remote Assist deployment, to empower employee collaborative assistance where the issue occurs. Enables team collaboration via the assistee's real world view through augmented reality.
Azure Digital Twin	Leverage Adastra's framework for Azure Digital Twin (/w optional VR Headset) to create interactive virtual digital twins, covering real world places, processes, and people. Enables optimized operations, cost reductions, and improved products / experiences.

Power Platform @ Adastra

Adastra's Power Platform Team

125 Power Platform Specialists

15 Power Platform Architects

50 Power App Developers

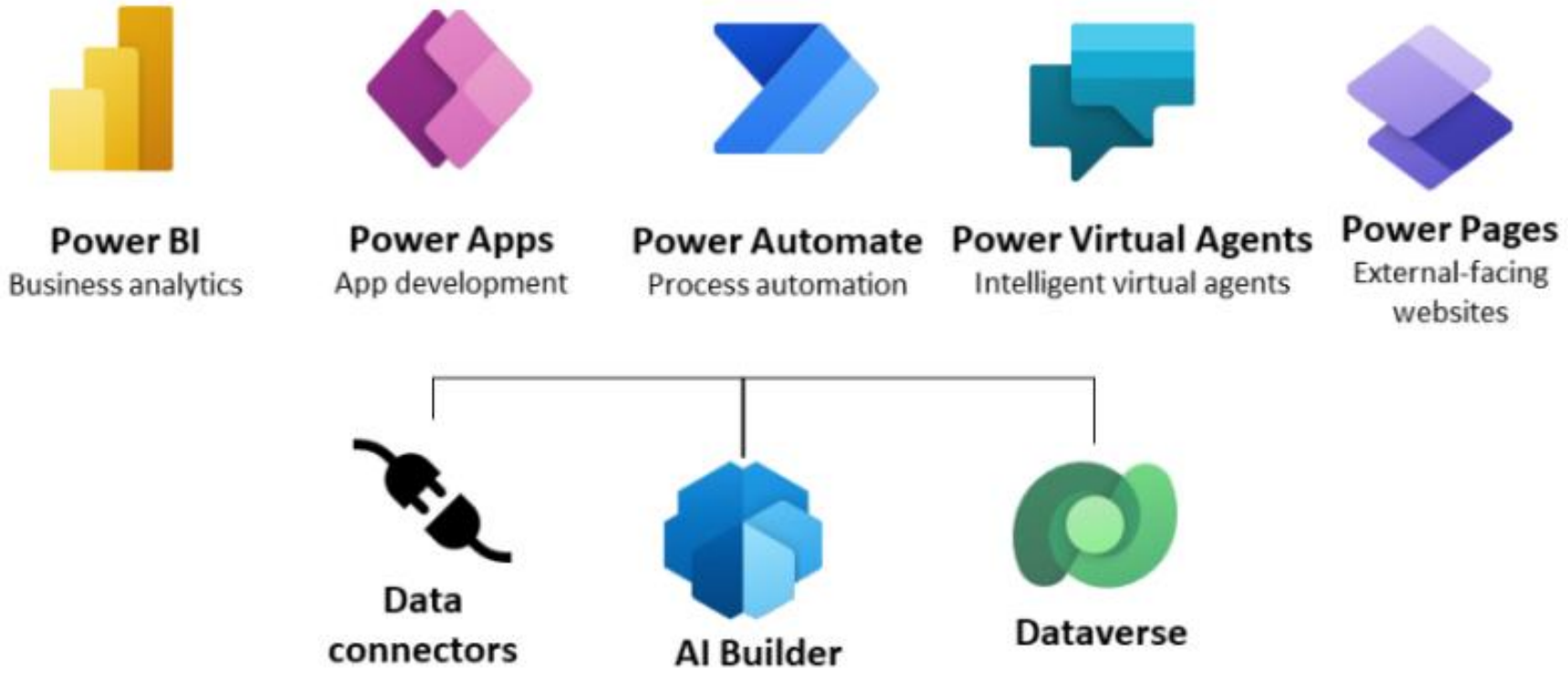
50 Power Automate Developers

15 Power Automate RPA Developers

25 Power Virtual Agent Developers

Power Platform Overview

Adastra Covers the Full Power Platform Stack



Adastra Power Platform Services

Visioning	Center of Enablement	Governance
Skills Assessment and Training	Solution Lifecycle	Development / Testing
Operations / Support	Turnkey Solutions	Staff Augmentation

Power Platform Solutions

Adastra Power Platform Accelerators

Accelerator Name	Description	Phase	Use Cases
Requirements Discovery Framework	Facilitates the collection and analysis of business requirements, ensuring a comprehensive understanding of project goals.	Intake	• Conducting interviews and workshops with stakeholders to gather requirements. • Analyzing existing processes and workflows to identify improvement areas. • Documenting user stories and use cases for the Power Platform solution.
Use Case Assessor	Tool to assess complexity, effort, and licensing required for new Power Platform use cases. Analysts complete an initial survey, then a detailed. Enables intake management	Intake	• Initial assessment whether the use case is a fit for Power Platform with + / - 75% accuracy. • Detailed assessment determining the complexity, effort, and licensing for the use case with + / - 25% accuracy. • Managed of all Intake to enable CoE control partner engagement / approval for solutions.
Solution Design Toolkit	Provides templates and guidelines for technical design and architecture, including data models, application layouts, and user interface (UI) design.	Design	• Designing system architecture, defining data models, and establishing integration points. • Creating application layouts to visualize the user interface. • Documenting design decisions and technical specifications for the solution.
Solution Assembly Toolbox	Offers pre-built components, reusable templates, and custom connectors to accelerate development and configuration tasks.	Build	• Utilizing pre-built components and templates to expedite the development of Power Apps. • Creating reusable workflows and connectors in Power Automate. • Building custom controls and user interface components for enhanced user experience.
Automated Testing Framework	Includes automated testing tools and test scripts for functional, regression, and performance testing of the solution.	Test	• Conducting functional testing to validate the behavior and functionality of the Power Platform solution. • Performing regression testing to ensure that existing functionality remains intact. • Evaluating performance and load testing to assess system scalability.
Deployment Automation Toolkit	Provides scripts and tools for automating the deployment process, including resource provisioning and solution package deployment.	Deploy	• Automating the provisioning of Power Platform resources and configuration settings. • Streamlining the deployment of solution packages to different environments (e.g., development, test, production). • Facilitates mass migration of solutions from unmanaged to managed, when establishing governance.
App Storefront	Provides a highly curated and customizable interface for users to find apps relevant to their role, to start or request access to the app.	Operate	• Improves on the very basic app catalog available in the CoE kit, via customization and role alignment • Becomes the launching pad for any Power Platform app relevant to the user • Makes users aware of app's they don't have access to, but align to their role, to trigger access requests
Health Monitoring and Maintenance Dashboard	Offers a centralized dashboard for real time monitoring, performance metrics, and alerts to proactively manage and maintain the Power Platform solution.	Operate	• Monitoring system health, performance metrics, and usage analytics to ensure optimal system performance. • Tracking user adoption and identifying areas for improvement. • Setting up alerts and notifications for critical events or system anomalies.
CoE Guardrail Automations	Suite of automations that enhance the Microsoft CoE kit, to monitor unmanaged solutions to ensure they stay within guardrails, and monitor managed solutions for best practice alignment.	Operate	• Detect unmanaged solutions that should be migrated to managed (due to enterprise connectivity, # of users, …). • Detect managed solutions that are not aligning to best practices (dev environment apps connecting to prod systems, …). • Detect apps / automations that are not in use and automate notification / approval / removal.
End-user Support Portal	Provides an interactive self service portal with FAQs, knowledge articles, and a ticketing system for user assistance.	Support	• Allowing end-users to access self-help resources, FAQs, and video tutorials for troubleshooting. • Enabling users to submit support tickets and track their status. • Providing a platform for community engagement and knowledge sharing among users.

Power Platform Solutions

Power Platform Solutions	
Use Case Assessor	Manage Power Platform intake by having analyst's complete questionnaire's regarding their Power Platform use case. The toolkit advises on complexity, benefits, effort, and licensing required for Power Platform to deliver the use case, based on simple survey questions.
Intelligent Dynamic Forms	Metadata driven Power App which auto generates forms from metadata, to support complex data entry scenario's with less effort and ease of administration (simply change data in the Dataverse to customize form layouts). Includes an intelligent rules engine to customize the user forms experience based on the user attributes. Includes approval workflows. (i.e. Application Onboarding, Access Management, …)
Dynamic Chatbot	Metadata driven virtual agent logic tree, stored in the Dataverse, to customize the bot journey. Enables quick adjustment to bot logic, without having to adjust code. Integrates with D365 Omnichannel to enable seamless transition from virtual agent to live agent.
KPI Manager	Centrally manage KPI thresholds (i.e. red / yellow / green), to enable consistent KPI outcomes across reports. Integrates with Power BI to ensure KPI thresholds are dynamically read into reports, so changes to thresholds are immediately reflected in every related report.
Power Platform Storefront	Create a centralized location for Power App access by users, which automatically shows all apps a user can access, or triggers requests for app onboarding. Simplifies locating apps for users, is contextual based on the user, and highly customizable to the organization.
D365 DQ Evaluator	Evaluates and reports on the data quality of D365 data. Automatically classifies data by quality, and can automatically alert users if an issue is detected. Links back to D365 to enable quick remediation of detected issues. Includes a management dashboard for overall scoring.
Payment Manager	Centrally manage the triggering, approval, and journey for payments with B2B partners. Includes a dataverse model, approval workflows, and maintenance screens to facilitate payments and wire transfers with 3rd parties.
Product Mapper	Maintain mappings between 3rd party SKU's and internal SKU's. Facilitates successful integration of 3rd party data with systems, by correlating 3rd party product info to your product hierarchy, Includes historical versioning to support legacy and / or current mappings.
Health & Safety Tracker	Track health and safety events (planning, incidents, etc) through a digitized app, aligned to regulatory requirements. Includes automated flows and alters to ensure and enable appropriate response to incidents.
Industry Kiosk	Enable a paperless plant, by digitizing personnel, time, and health and safety tracking on the shop floor via Power Platform kiosks, via Adastra's Industry Kiosk Power App solution.
Industry Quality Control Card	Enable a paperless plant, by digitizing quality control tracking via a metadata driven / easily customizable Power App solution.
1Guard Logistics	Monitor temperature / humidity / jolt / shock / tilt pressures on shipments using Adastra's IoT and Power Platform shipment monitoring app.

Use Case Assessor

Case Summary

Close | Save

Add Picture

USE CASE ASSESSMENT STATUS

High-Level Questionnaire	Detailed Questionnaire	Suitability Assessment	Technical Estimation Tool	Use Case RACI	Application List
32/53	13/22	0/32	0/19	0	

USE CASE COMPLEXITY RATING

AFTER INTAKE	AFTER DEFINE & DESIGN
LOW	HIGH

⚠ 45 Changes Pending Save

Use Case Name — *ID Not Generated*

Use Case Description

PROCESS CHARACTERISTICS

# of Actions	<10
# of Stages	N/A
Multiple Decision Paths?	Yes
# of Decision Points	34
# of Approval Points	-
User Interface(s) Required?	Yes
Highest Data Classification?	Confidential
BASEL / SOX / PCI / PII compliance required?	Confidential

APPLICATIONS CHARACTERISTICS

Main Data Repository Involved	Unstructured File(s)
Number of Applications	71

BUSINESS BENEFITS (QUICK START)

Potential Capacity Savings (FTE)	-
Additional Non-FTE Benefits (Annualized)	-

TECHNICAL DEVELOPMENT COMPLEXITY CATEGORIZATION

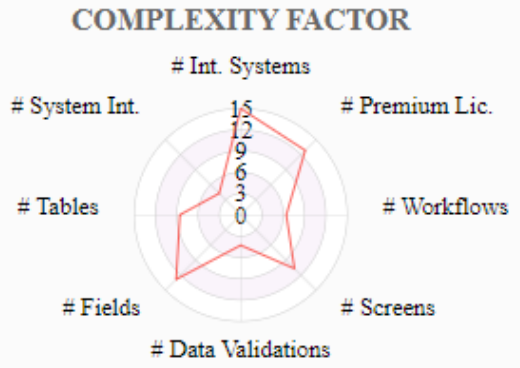
New Power Platform Features or Connections Required	-
Access to Dataverse Required?	-
New Sensitive data additions to Delivery Hub Dataverse?	-
Volume of components (Screens, Tables, Fields, Flows, Actions)*	-

EFFORT ESTIMATES

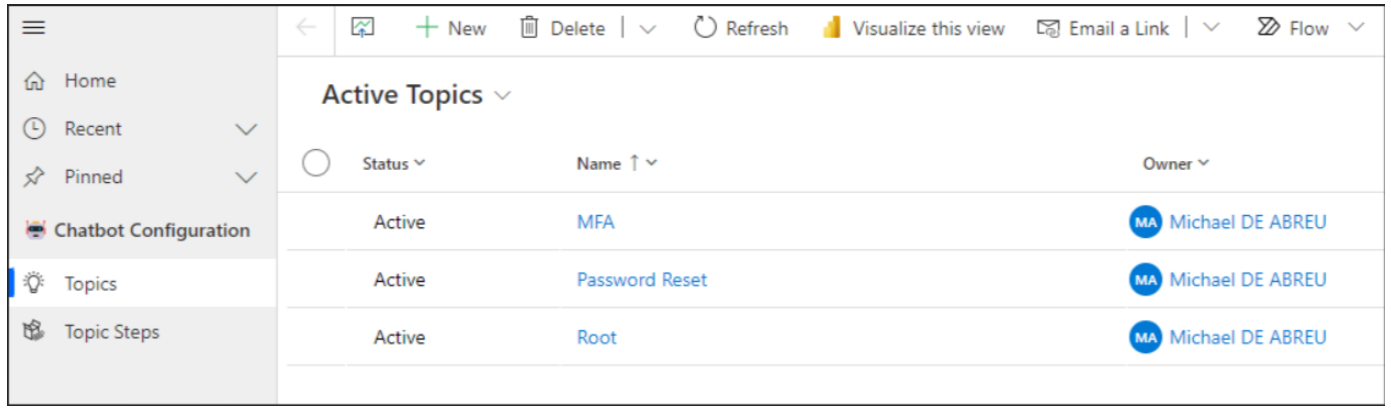
Quick Start Estimate (Days)	-
Technical Estimate (Days)	-

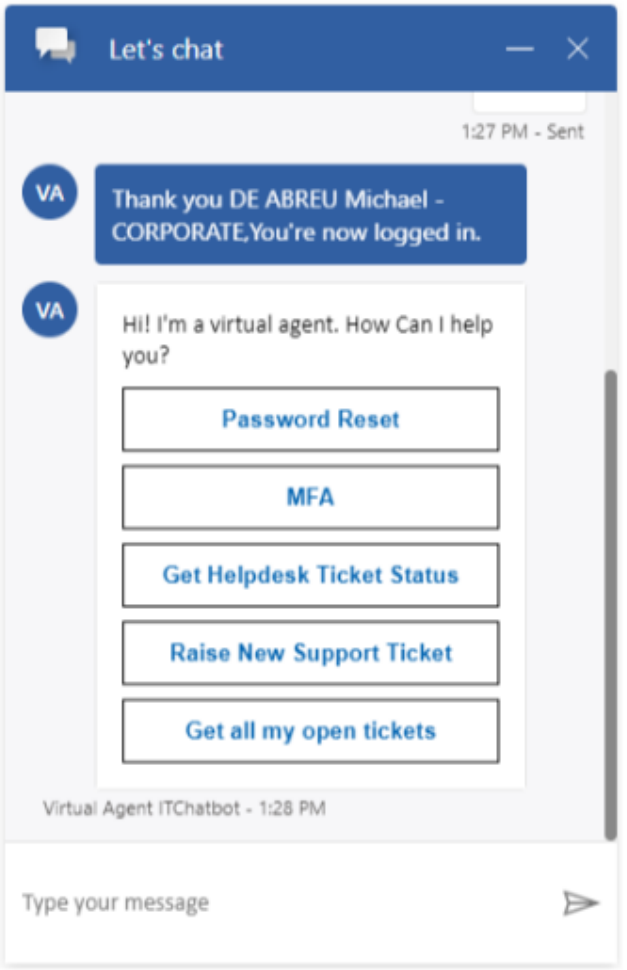
COST ESTIMATES

WAG Estimate - Not including Licensing Costs	-
Technical Estimate (Define & Design Phase)	-



Dynamic Chatbot





Power Platform Storefront

D365 DQ Evaluator

Data Quality Classification

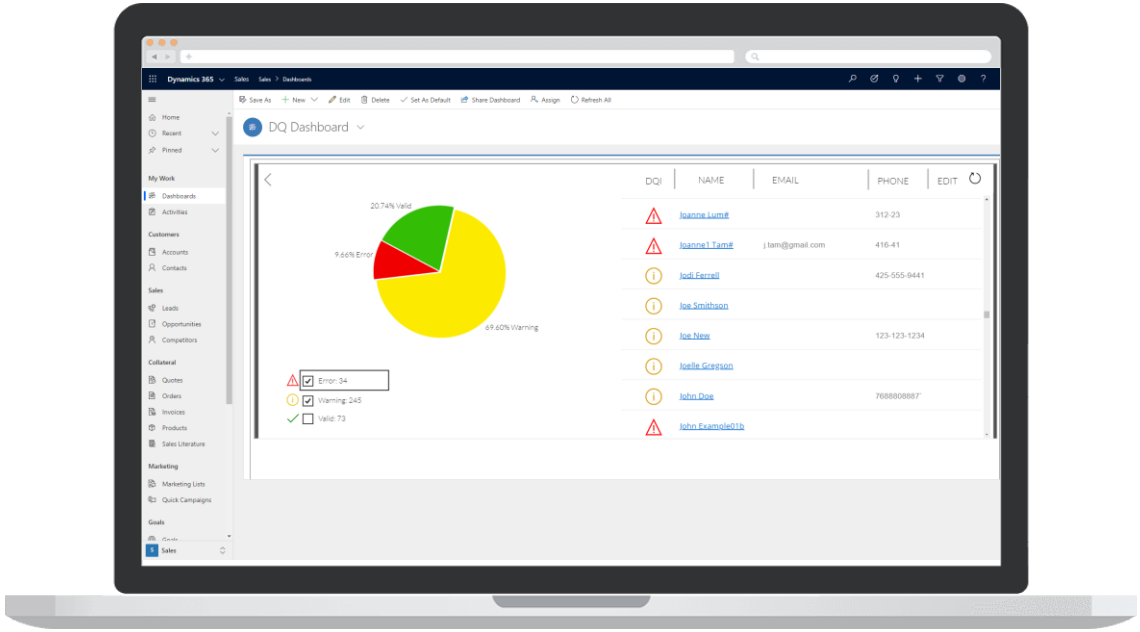
- Instant DQ validation with “Valid, Warning, or Error” classification

Business User Alerts

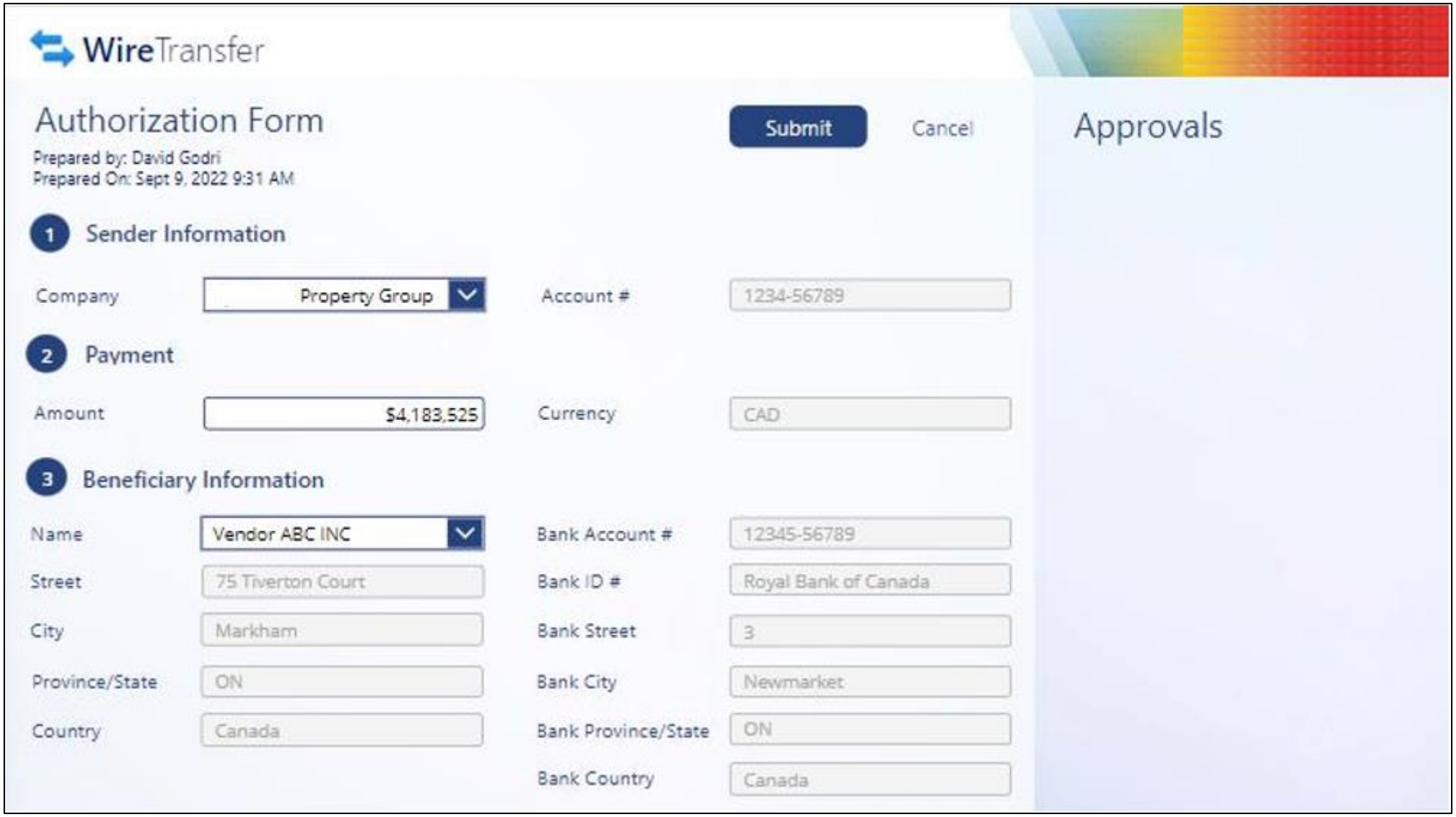
- Receive automated alerts for immediate data quality intervention

DQ Dashboard

- Review aggregated data quality for key master entities and drill down to specific issues



Payment Manager



Product Mapper

Material Mapping Manager - List Mapped Records

Customer Number: 0000101661 | Sales Organization: | Distribution Channel: | Search

Customer	Sales Organization	Distribution Channel	
0000101661	CA01	00	Select
0000101661	HK40	00	Select
0000101661	US07	00	Select
0000101661	US80	00	Select
0000101661	HK01	00	Select
0000101661	HK30	00	Select

Total Record Displayed: 7

NOTES:
1.Custom Number is mandatory.
2.The search will be just for searching in reference table for initial data

Industry Quality Control Card

Back | Log Off | Quality Control Card | Control Cards | New Inspection

Customer:

Part No.: G22934996

Inventory No.: G22934996

Eng Level: test

Frequency: 1/250

Operation: test

#	Method	Jig	Characteristic	Inspection #				
				Edit	Edit	Edit	Edit	Edit
			Inspection No.	1	2	3	4	5
			First Off/Last Off/NA	F.O.	NA	NA	NA	NA
			Datetime	9/21/2022 5:15 PM	10/17/2022 10:11 AM	10/17/2022 10:17 AM	10/17/2022 10:26 AM	10/17/2022 11:07 AM
			Shift	2	1	3	1	1
			Counter Reading	100	101	102	103	104
1	VIS		VISUAL DEFECTS: NO DAMAGE TO THREADLESS NUT 6 PLACES (100%)	OK	OK	OK	NG	OK
			T.W.O. Issue Datetime if Applicable					
			R&D No.	0			0	0

Offer: Quick Win Solution

ADASTRA

Adastra Solution In A Week

Accelerate your business in 5 Days with a $10K Power Platform / Azure Data Platform Solution Implementation

Microsoft's Power Platform enables accelerated low-code solution development, for application / workflow / reporting solutions built by analysts. Azure Data Platform provides a highly scalable, developer driven enterprise data platform, delivering data for Power Platform solutions. Through our offer, Adastra will build a complete end-to-end Power Platform / Azure solution, in 5 days, delivering swift business value through Power Apps, Power Automate, Power BI and/or Azure Data cloud services.

Offer

Power Apps

Face business problems with innovation and efficacy by digitalizing processes in custom apps.

Power Automate

Improve employee productivity by automating monotonous tasks, leaving your employees to focus on what's important.

Power BI

Enable your organization with powerful insights that allow you to stay engaged with your customers and maintain business resiliency.

Azure Data /w Power Platform

Load data to Azure data platform (up to 5 tables), then build one Power Platform solution from ingested data.

Adastra will work with your team to identify a high value Power Platform / Azure Data use case, deliver a validated solution, and a set of next steps to scale your innovation across your organization.

Use Case Development → Build Solution → Demonstrate and Validate → Establishing Next Steps

Contact Adastra To Get Started >

About Adastra

Since 2000, Adastra has been helping global organizations accelerate innovation, improve operational excellence, and create unforgettable customer experiences, all with the power of their data. By providing cutting-edge services and solutions, Adastra helps enterprises leverage data that they can control and trust, connecting them to their customers – and their customers to the world.

Why Power Platform?

The Need for Citizen Development

Business Perspective

IT Perspective

Business Developer Enablement

Why Business Developer?

Self Service

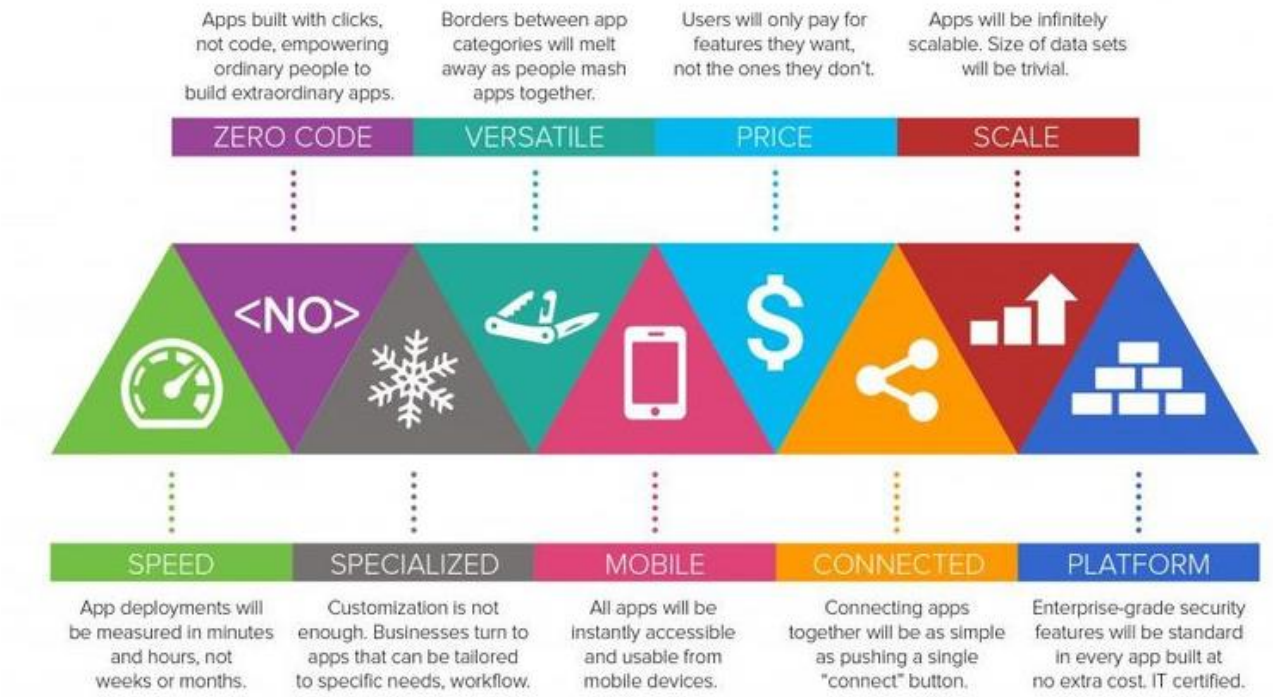
Self service build app faster, usable from mobile, data integration, workflow, and business approval process.

Analyst Controlled

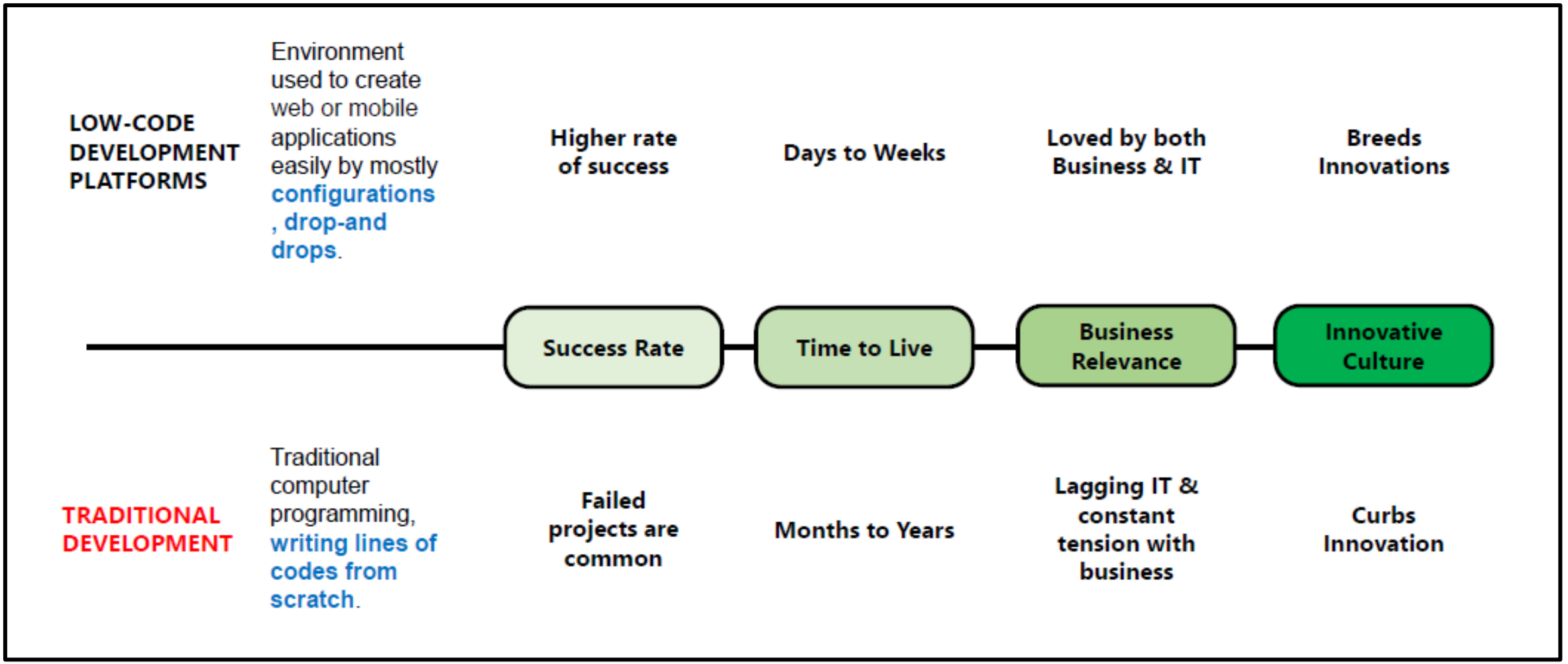
Aligns to self service, analyst-controlled end to end solutions.

Business Developer Success Model

The next generation of business applications

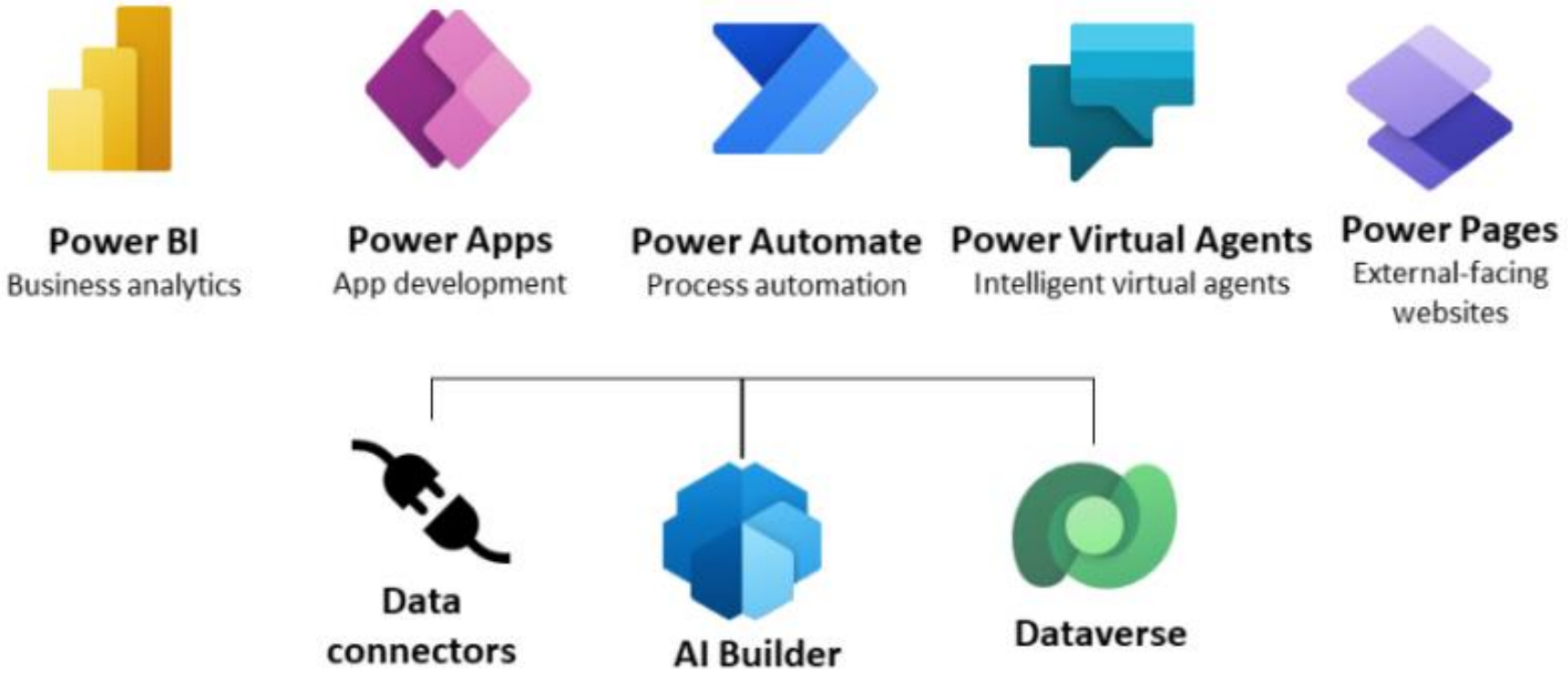


Benefits of Low Code Development



Power Platform Overview

The low-code platform that spans Office 365, Dynamics 365,
Azure and standalone applications.
Innovation anywhere. Unlocks value everywhere.



Power Platform Integration /w Azure

	MEASURE	ACT	AUTOMATE
	Unlock Insight	Intelligent Interfaces	Evolved Integration
Super User		PowerApps	Flow
Professional Developer	Cortana Analytics Suite SQL Server Analysis Services Data Warehousing Big Data, etc	Azure Functions Azure App Service Service Fabric Web Apps	Logic Apps API Management BizTalk

Power Platform Key Benefits

For the Business:

- Quickly develop and deploy apps to address dynamic and changing needs
- Automate processes to free up time for more innovative work, and explore data to uncover actionable insights
- Empower the business to solve problems tailored to how people really work and drive productivity

For IT:

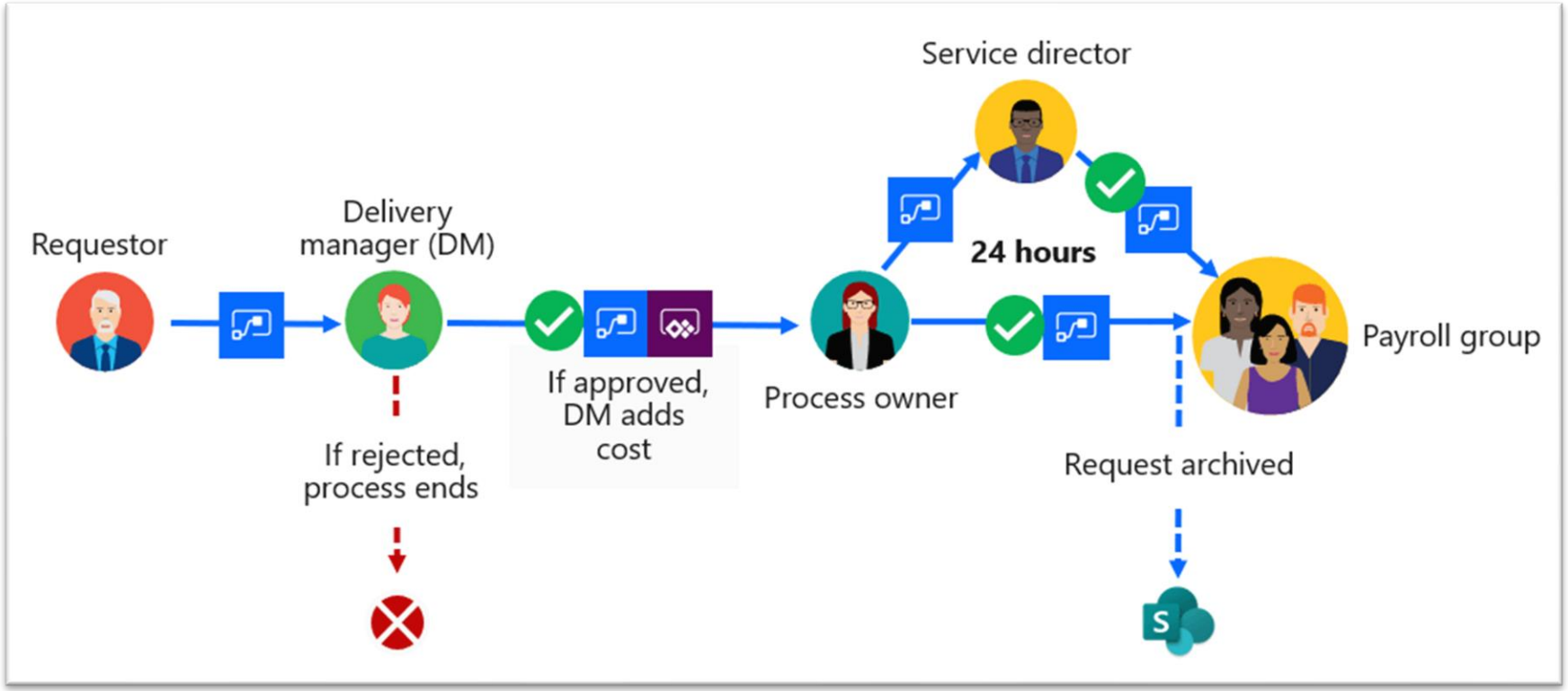
- Build apps quickly, reducing time to market
- Lower dev costs, reducing the threshold for application ROI and reducing the need to find scarce development talent
- Gain centralized governance of app catalog, enabling benefits such as identifying the most used apps

For the User:

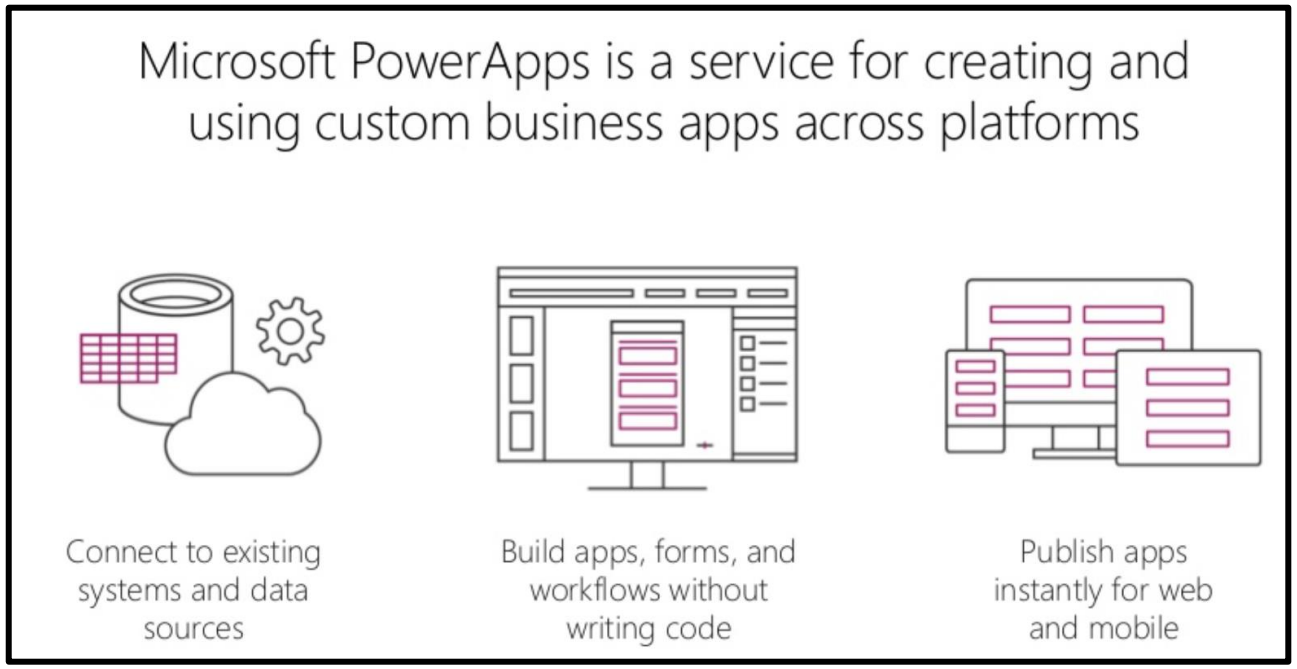
- Focus on realizing value from app / automations, rather than executing manual process

What is Power Automate?

It is all about having computers manage repetitive tasks. It allows anyone with knowledge of the business process to create a repeatable flow that when triggered, leaps into action and performs the process.



What is Power Apps?

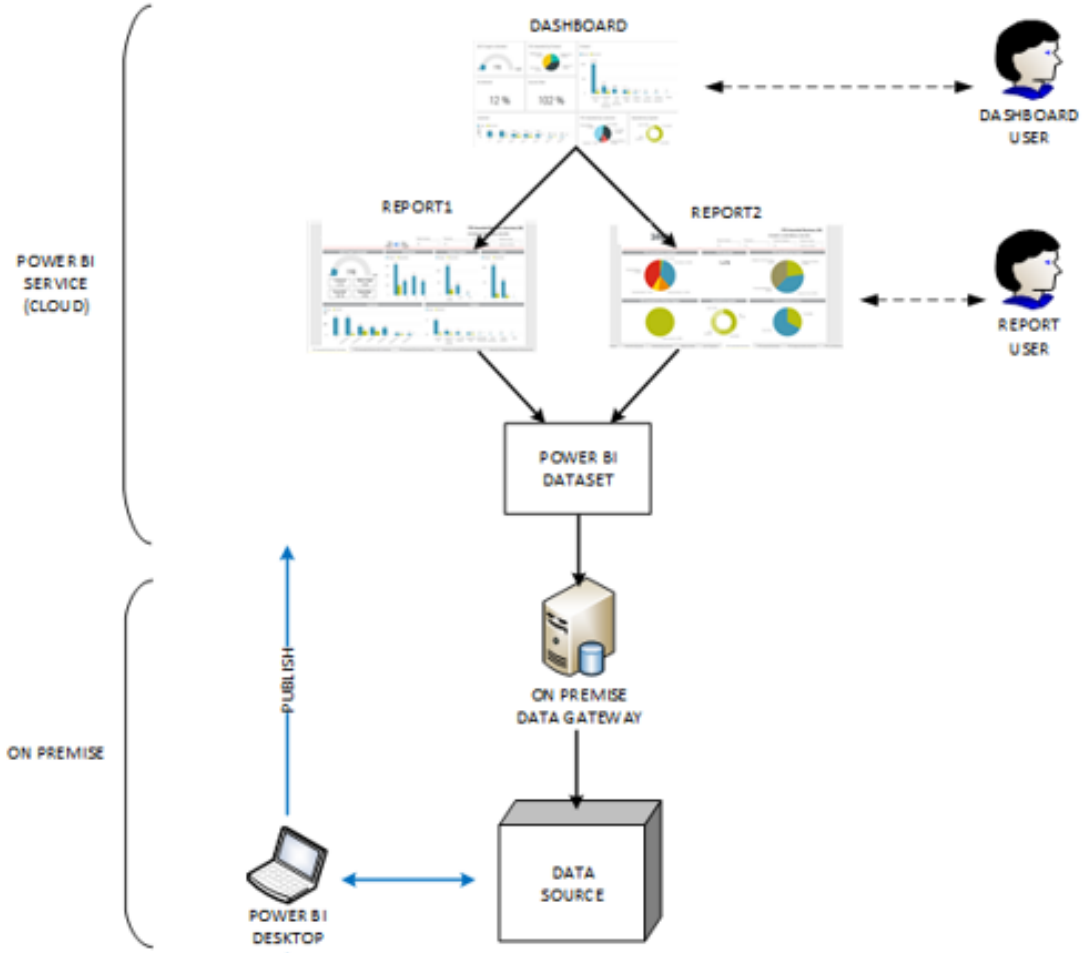


- Transform your manual business processes to **digital, automated processes.**
- Apps built using PowerApps provide **rich business logic** and **workflow capabilities.**
- PowerApps can connect to the systems which organization is already using.

- Deliver innovative apps instantly to customers enabling productivity and digitalization.
- Power Apps provides responsive unified apps designed to support mobile/tabular devices.
- Enable power users to rapidly build their own apps with low code or no code.
- Provides capability to connect and bring data with Microsoft out of the box connectors.
- Per app or per user standalone licensing model. Offered in various Office 365 and Dynamics 365 licenses.
- Build value-add custom apps for any horizontal.

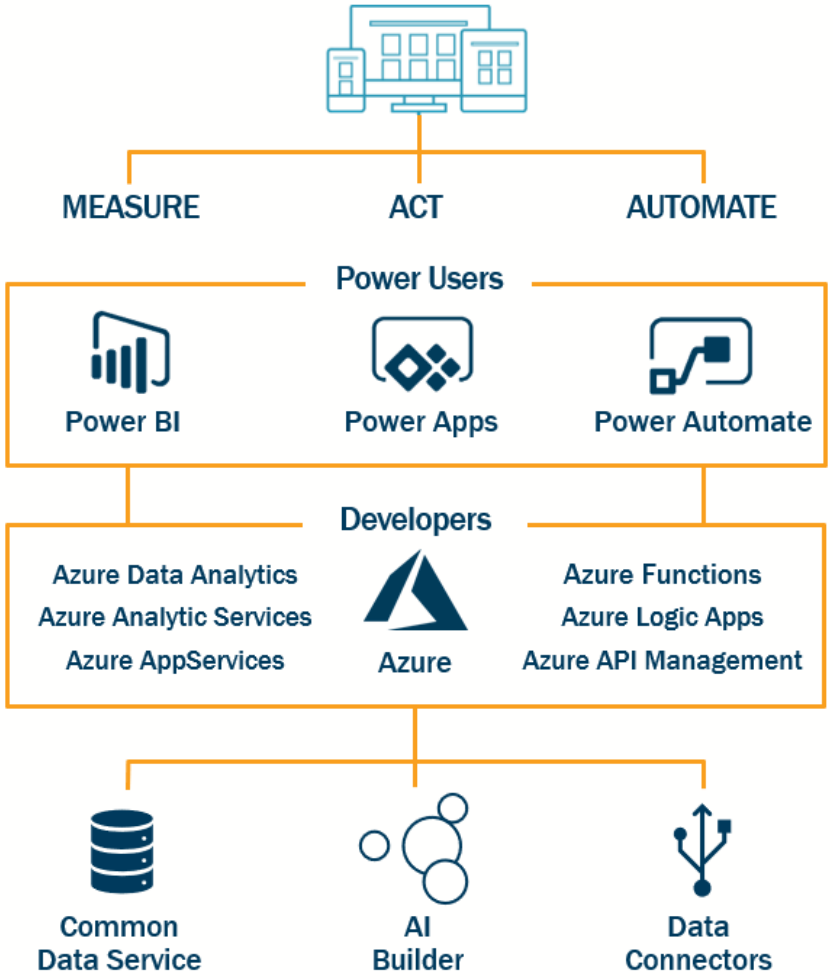
What is Power BI?

- Power BI is the industry leading, cloud-based data prep and visualization tool
- Dataset / Report development occurs using Power BI Desktop, producing a *.pbix file which gets deployed to the cloud service
- Reports use data from one dataset, to visualize results across one or more report pages
- The Power BI Service provides the latest Power BI features, and supports additional capabilities like dashboards, re-usable datasets, and report access from anywhere
- Dashboards present visuals from multiple reports, aligned to a specific filter context



Power Platform Integration

- With Power BI, Power Apps, and Power Automate, non-technical power users can create simple applications or data visualizations with **little-to-no code**
- Enables **self-service IT empowerment** and overall digital transformation.
- Low-code still requires knowledge of development, standardization and maintenance to be successfully implemented at scale in an enterprise
- The business and IT must work closely together to get the most value from low-code technologies like Microsoft Power Platform, to ensure effective governance and adoption

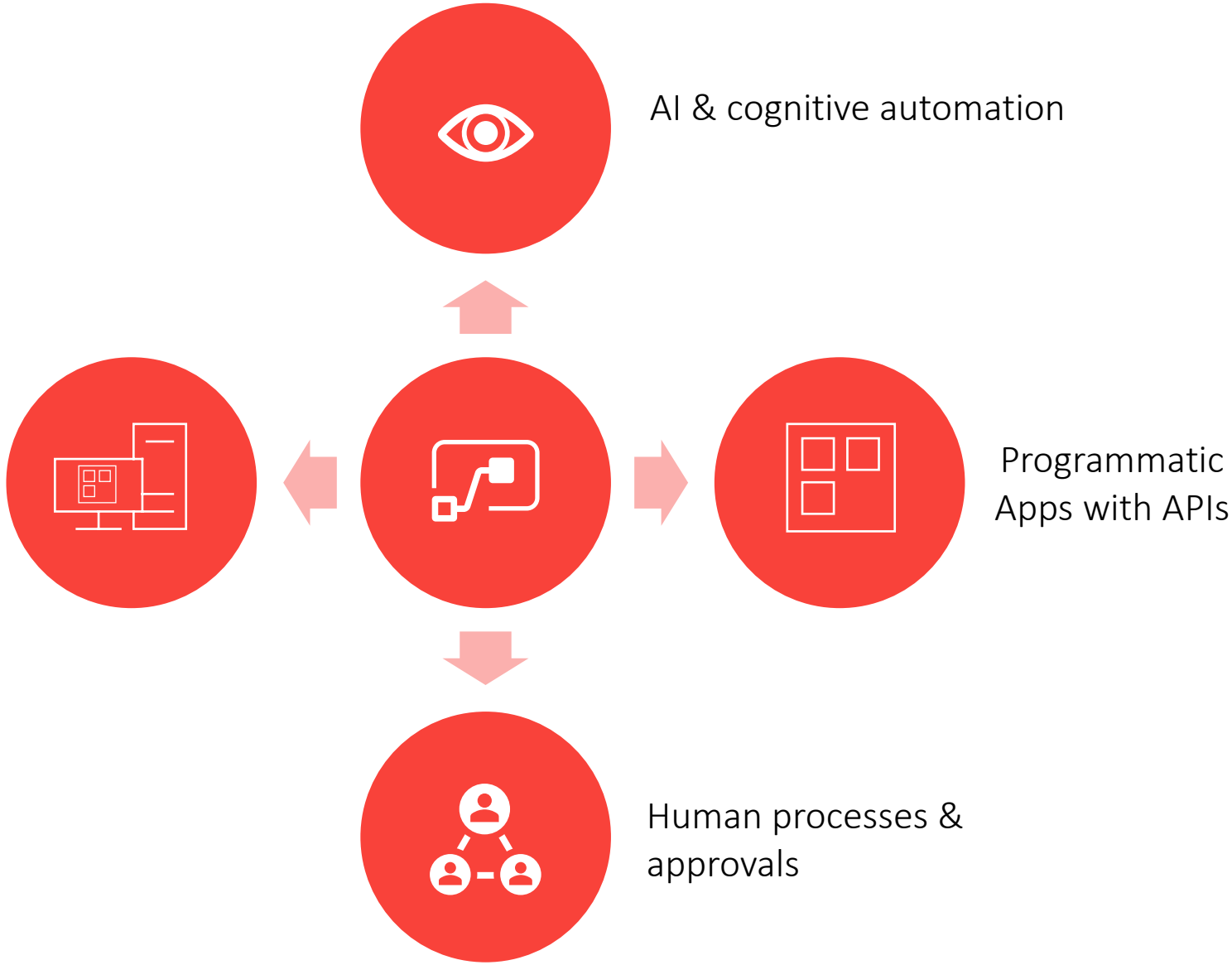


Power Platform Automation

Flow type	Use case	Type	Target
Automated flows	Perform tasks after being triggered by an event	Cloud	
Instant flows	Start an automation with a click of a button	Cloud	
Scheduled flows	Create a flow that performs one or more tasks on a schedule	Cloud	
Business process flows	Define processes for people to follow to a desired outcome	Cloud	Human processes
Desktop flows (UI flow)	Record and automate the playback of manual steps on Web or Desktop	Desktop	Application without APIs for automation

Hyper automation

RPA shifts beyond traditional UI automation to incorporate AI and other advanced technologies to cover the full automation spectrum

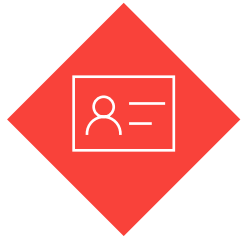


RPA with Power Automate

	Attended	Unattended
	Interactive automation	Background automation
Overview	Drive efficiencies and automate manual, individual tasks across desktop and web	Accelerate the automation of high-volume and tedious tasks without lifting a finger
Scenario	On-demand task automation	Automate company processes at scale
Audience	Citizen developer in business unit	Automation specialist (for now) in a Center of Excellence dedicated to RPA
Requirement	User signed in on their device/human initiated	Jobs on dedicated machines/robots do the work

Comprehensive tool to run Desktop Flows

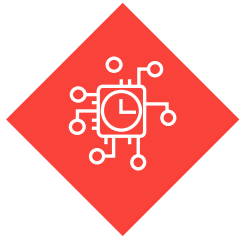
Power Automate Desktop



Windows 10 Apps

Compatible with Windows 10 machines running 64-bit operating systems

Based on the UI Automation framework and Image Recognition technologies



Web Apps

Runs on the latest versions of Microsoft Edge (Chromium) and Google Chrome

Based on Selenium

WinAutomation

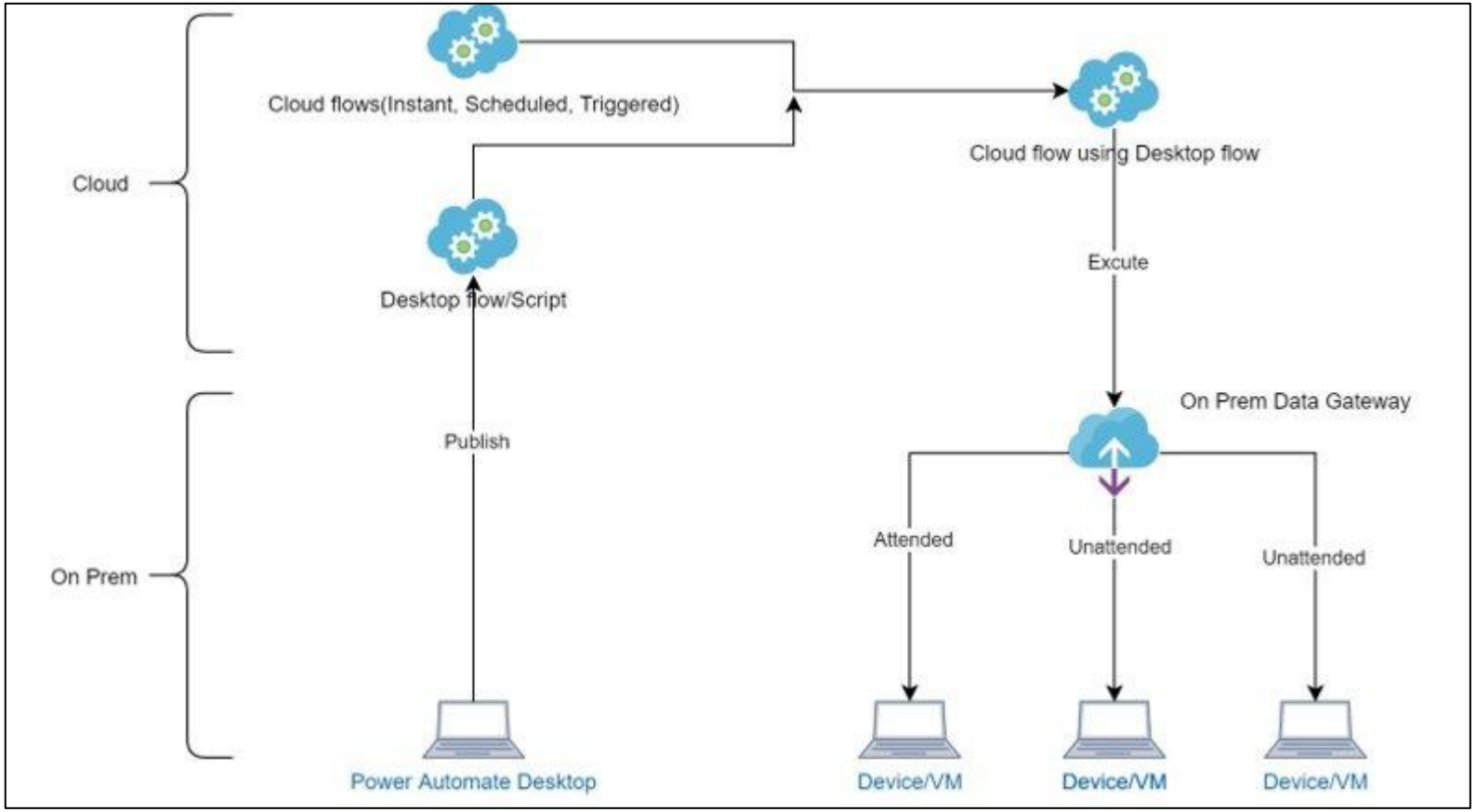
Now available!

Low code development environment

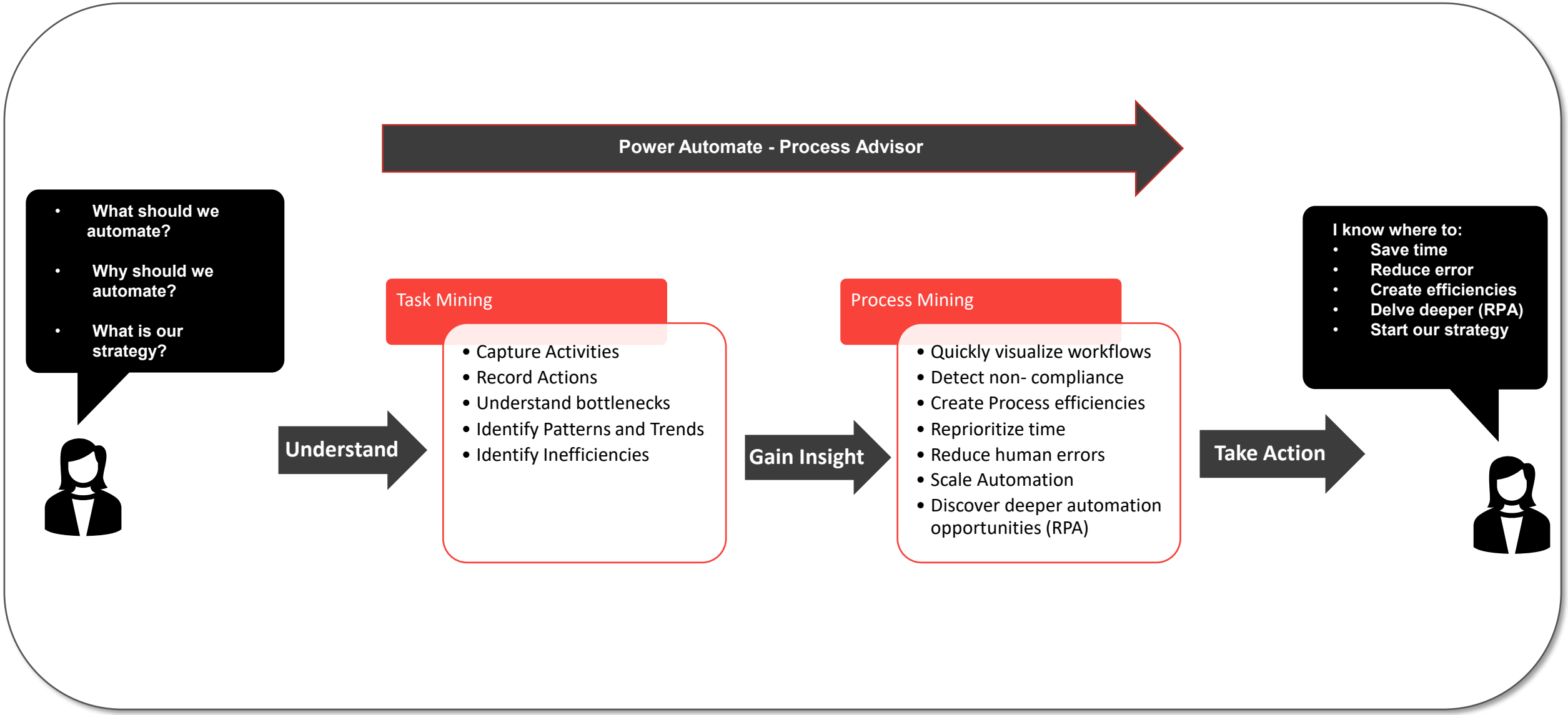
Diverse set of connectors to many different systems

RPA with Power Automate

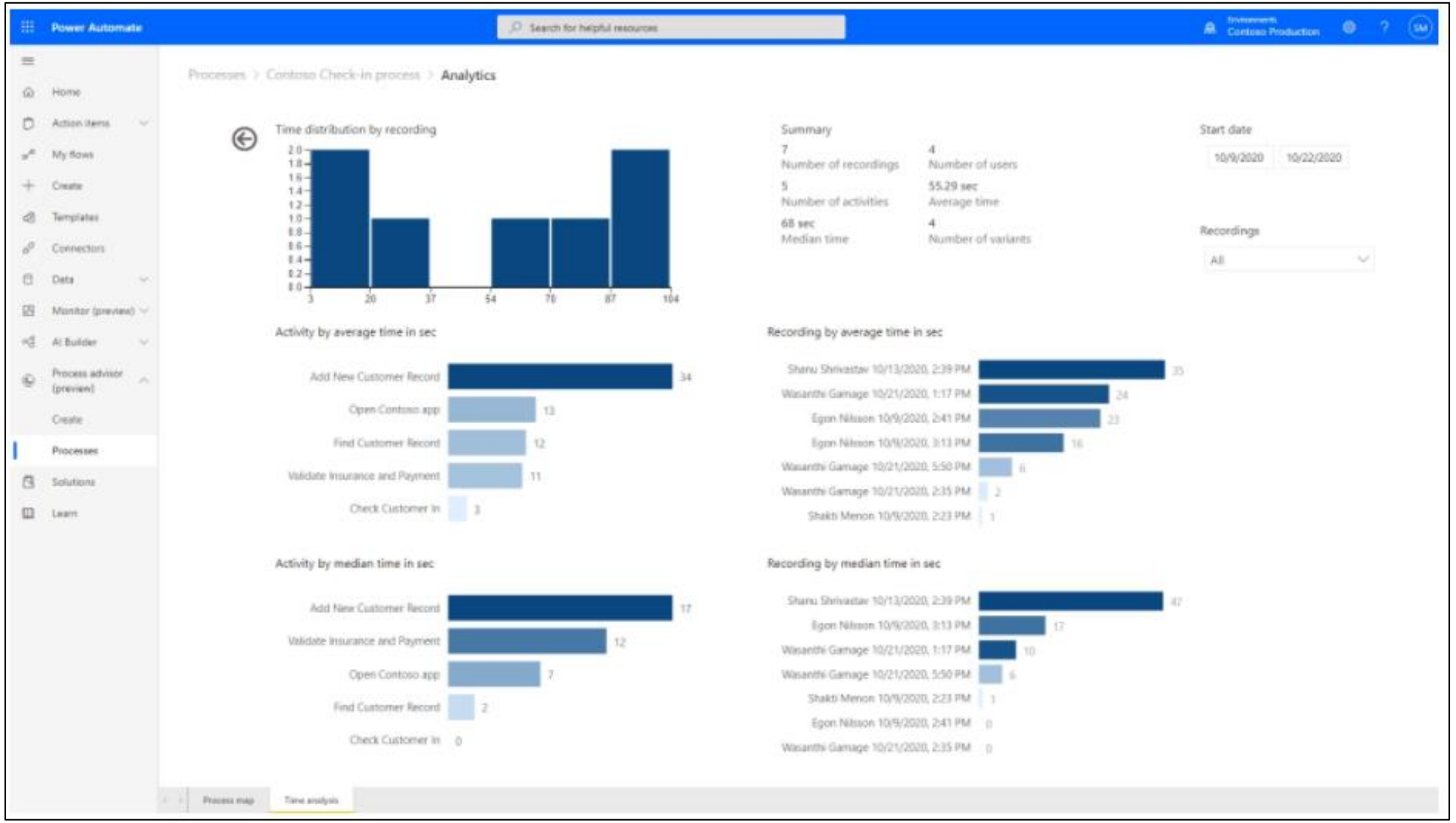
- Use Power Automate + Office 365 account to create a desktop flow that runs an on-prem application or web application (without API)
- Publish the Desktop flow to Cloud
- On cloud, create cloud flows which will trigger the published desktop flows
- In the cloud flow, specify the connection information, data gateway, connection string and credentials to log in the device. Make sure the target devices is accessible through the selected gateway



Plan RPA with Process Advisor



Plan RPA with Process Advisor



Power Platform Governance

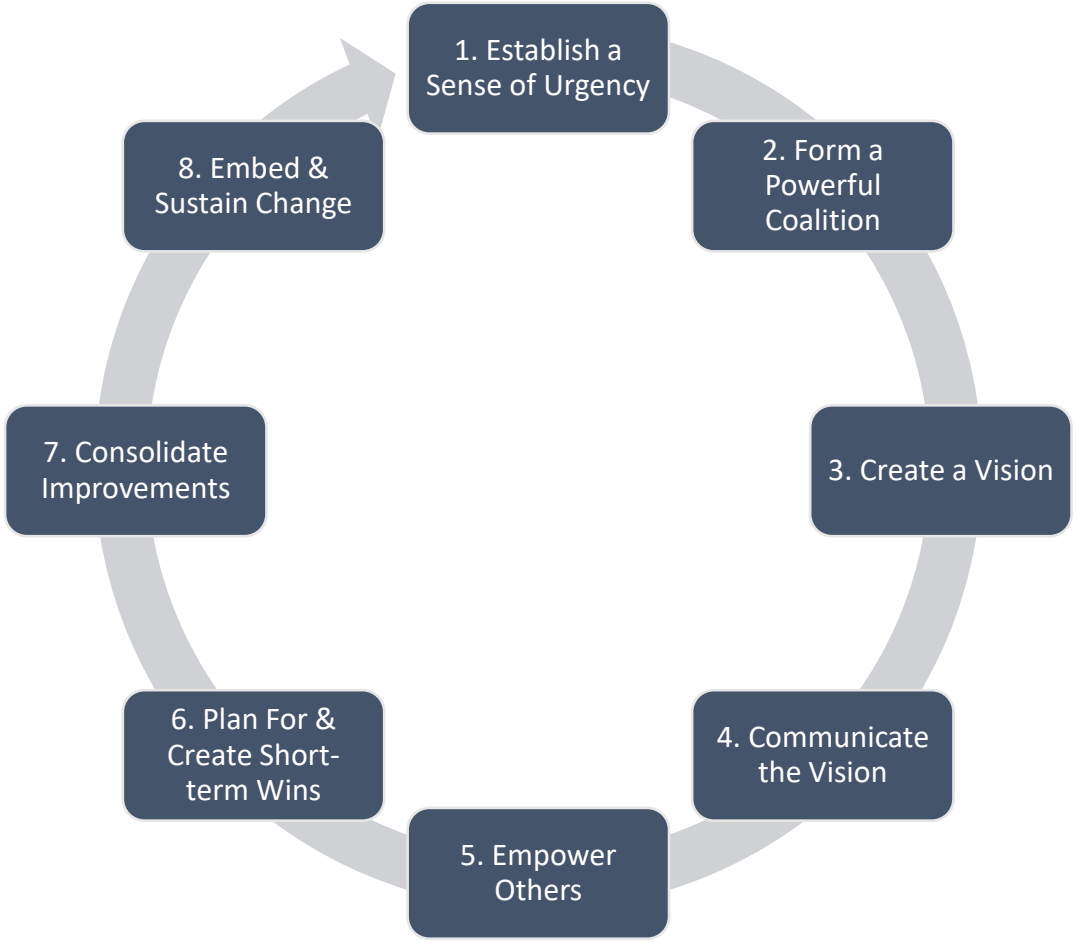
Why Adastra Governance?

Defining Power Platform governance is critical to successful adoption and operation of the platform. Through Adastra defined roles / responsibilities and design / build / operate approach, successful business / IT collaboration is established, guardrails covering appropriate use are implemented, citizen development is accelerated, and Power Platform solutions are well supported / maintained.

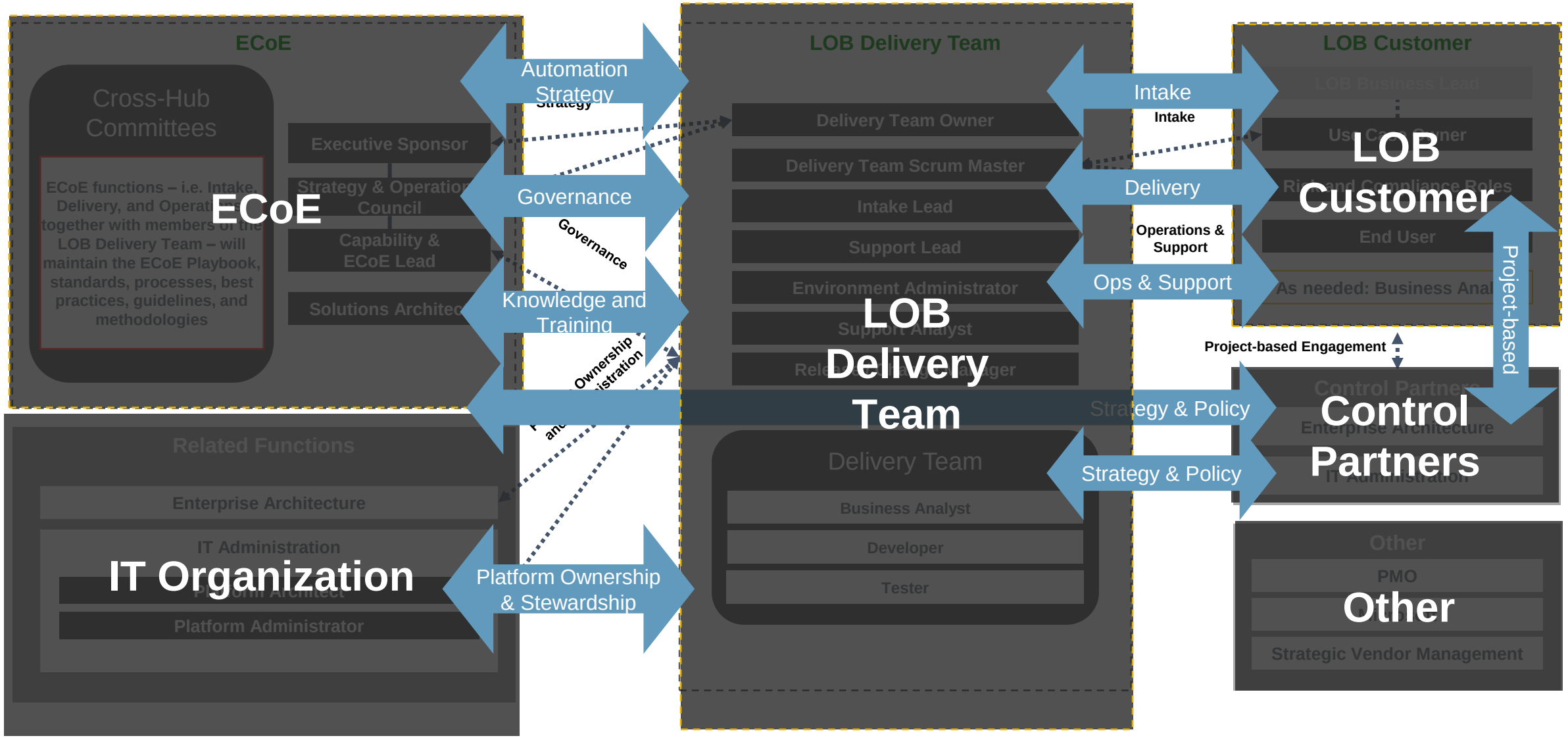
Enable Cloud Modernization

Successful cloud modernization requires organizations create awareness, build a compelling case for change, engage stakeholders, and establish end user readiness.

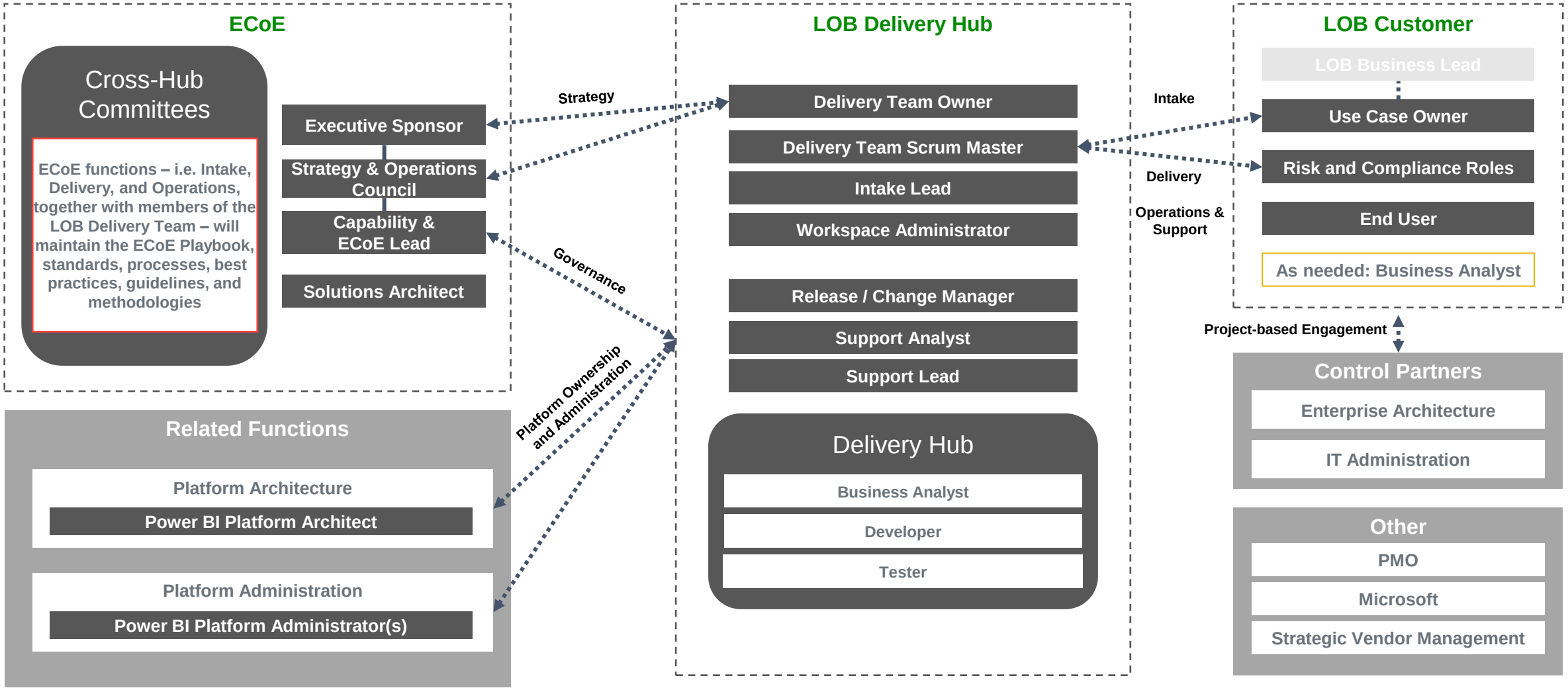
Adastra's Organizational Change Management (OCM) methodology is founded on key principles, developed through best practice research, practical, on the ground application in a range of environments and maturity level.



Define Roles / Responsibilities



Role Mapping



Define Process

ECoE

Strategy & Oversight

- Establishes and maintains vision for the organization
- Establishes and owns House View
- Performs Strategic planning & prioritization
- Performs capability and skills/talent management

Operating Functions

Governance

- Owns and maintains ECoE Playbook
- Owns and maintains ECoE Operating Model
- Owns and maintains Risk and Control Framework
- Owns and maintains standards, guidelines, processes, methodologies, roles, and responsibilities
- Compiles and delivers Enterprise Reporting

Competency Management & Innovation

- Tools research and evaluation
- Market research
- Knowledge management
- Owns Training Program
- Continuous improvement and process optimization
- Product management / product roadmap

Delivery Hub Support

- Enterprise opportunity assessment
- Architecture
- Cross-LOB program and project coordination

LOB Delivery Team

Business Enablement

Automation Lifecycle Execution

- Business Analysis and requirements
- Automation Subject Matter Expertise
- Intake, Delivery, Operations, and Support

Environments Management

- Environment and sandbox provisioning
- User / Role management
- Application / Flow management

Program & Project Management

- Project Risk & Controls
- Change Management
- Resource Management

Automation Lifecycle

Control Partners

- Provide control requirements to ECoE Governance
- Provide control requirements to individual LOB projects

Related Functions

- Platform Ownership
- Platform Administration

Build Targeted Playbook

1. INTAKE
- 1.1. Intake
  - 1.1.1. Consult Power Platform Automation Catalog (for provisioning)
  - 1.1.2. Complete Intake Questionnaire
  - 1.1.3. Complete Process Metrics
  - 1.1.4. Complete RACI
- 1.2. Automation Suitability Assessment & Project Sizing
  - 1.2.1. Use Case Complexity Assessment
  - 1.2.2. Team Structure / Effort / Timing / Cost
  - 1.2.3. Deliver WAG Estimate
- 1.3. Use Case Risk Assessment
  - 1.3.1. Conduct Workshops
  - 1.3.2. Complete Documentation Templates
  - 1.3.3. Deliver Process Demo (Consultation & Discovery)
  - 1.3.4. Perform Risk Assessment (CRA)
- 1.4. Technical Evaluation
  - 1.4.1. Features & Components
- 1.5. Business Process Analysis
  - 1.5.1. Define Scope (High-Level Requirements)
  - 1.5.2. Define High-level Target State
  - 1.5.3. Develop Business Case
  - 1.5.4. Complete Initial Process Assessment (L1 & L2)
- 1.6. Licensing

2. DEFINE & DESIGN
- 2.1. Define Requirements / Plan
  - 2.1.1. User Stories & Work Items
  - 2.1.2. Functional Flow Design
  - 2.1.3. Gather, Review & Validate Process Definition (L3 & L4)
  - 2.1.4. Detailed Impact Assessment
  - 2.1.5. Detailed Implementation Plan
  - 2.1.6. Deliver Detailed Cost Estimate
- 2.2. Technical Solution Design
  - 2.2.1. Design Review / Approval
- 2.3. Application / Workflow Types
- 2.4. Common Data Service
- 2.5. Connectors
  - 2.5.1. Standard / Premium
  - 2.5.2. Gateway Dependencies
- 2.6. Onboarding
- 2.7. Data Security
  - 2.7.1. Encryption
  - 2.7.2. Data Masking
- 2.8. Perform Technical Assessment
  - 2.8.1. Solution Volumetrics

3. BUILD
- 3.1. Environments
  - 3.1.1. Environment Request
  - 3.1.2. Delivery Hub Alignment
  - 3.1.3. Sandbox, Dev, QA, UAT, PAT, Prod
  - 3.1.4. Personal Productivity
  - 3.1.5. Provision Access
  - 3.1.6. Implement Connectors
- 3.2. Application Lifecycle Management
  - 3.2.1. Work Issue Tracking
  - 3.2.2. Repository / Version Control
  - 3.2.3. Solution Packager
  - 3.2.4. Testing / Gating Strategy
  - 3.2.5. Issue Resolution
  - 3.2.6. Unit Testing
  - 3.2.7. Solution / Code Review & Approval
- 3.3. Patterns
  - 3.3.1. Power App Patterns / Templates
  - 3.3.2. Power Automate Patterns / Templates
- 3.4. Build Power Platform Best Practices
  - 3.4.1. Forms
  - 3.4.2. Flows
  - 3.4.3. Data
- 3.5. Reusable Apps / Workflows
  - 3.5.1. Service Oriented Architecture
  - 3.5.2. Parent / Child
- 3.6. Implement RBAC Security Design
  - 3.6.1. For App / Flow / Data

Build Targeted Playbook

4. TEST
4.1. Testing
4.1.1. Test Gating / Ownership
4.1.2. Test Plan / Approval
4.1.3. Test Cases Definition
4.1.4. Test Automation
4.1.5. Perform E-to-E Test
4.1.6. Perform UAT (PAT + BAT)
4.1.7. Test Exit Reporting /Approval
5. DEPLOY
5.1. Complete Application Inventory
5.1.1. Update Power Platform Automation Catalog
5.1.2. Assign automation flow owner and determine MAL code
5.2. Change Management
5.2.1. Deployment Automation
5.2.2. Deployment Plan (System Implementation Plan)
5.2.3. Release Build Pipeline
5.2.4. Release Deployment Pipeline
5.2.5. Deployment Validation Approach
5.2.6. Release Communication Plan
5.2.7. Deployment Gating
5.3. Evaluate / Deploy to App Marketplace
5.3.1. Validate Deployment Approach
5.3.2. Coordinate all First Occurrence Verification (FOV) activities (LOB)?
5.3.3. Transition to LCW Operate
5.3.4. Deploy to Marketplace
5.4. Update Governance Documents and Artifacts
5.4.1. Create and Review Application Support Deployment Plan
5.4.2. Create NPS Survey (Optional)
6. OPERATE
6.1. RBAC By Environment
6.2. Data Security
6.2.1. Encryption
6.2.2. Data Masking
6.3. Infrastructure Monitoring
6.3.1. Logging (Default, Custom)
6.3.2. Power Platform Analytic Reports
6.3.3. CoE Starter Kit
6.3.4. Health Checks
6.4. Infrastructure Alerting
6.4.1. Automation
6.4.2. Infrastructure Events
6.5. Problem Management
6.6. Auditing
6.6.1. Regulatory Compliance
6.6.2. Sensitive Data Considerations
6.6.3. Lineage
6.6.4. Role / Permission Management
6.7. Tracking Citizen Footprint
6.7.1. Manage App Catalog
6.7.2. Usage Monitoring
6.8. Zero Trust Model
6.9. Gateway Management
6.10. Vendor Management
6.10.1. License Management
6.10.2. Planning / Adopting New Features / Capabilities
6.10.3. Usage Reporting
6.11. Power App Admin Center
6.12. Secrets Management
6.13. SIEM / SOAR Integration
6.14. BC/DR Capability
6.15. Backup / Restore Capability
6.16. Review Data Loss Policy (DLP)
6.17. License Maintenance
7. SUPPORT
7.1. Onboard/Offboard Users
7.2. Solution Monitoring
7.2.1. Logging (Default, Custom)
7.2.2. Power Platform Analytic Reports
7.2.3. Coe Starter Kit
7.2.4. Lineage Tracking
7.3. Solution Alerting
7.3.1. Automation
7.3.2. Infrastructure Events
7.4. Incident Management
7.4.1. Severity
7.4.2. Notification
7.4.3. Resolution
7.4.4. Remediation
7.5. Retry / Resubmit for Flows
7.5.1. Automated Retry / Limits
7.5.2. Mid-Process Restart
7.6. Detecting Orphan Flows
7.6.1. Missing Child Flows
7.6.2. Unexecuted Flows
7.7. Troubleshooting Approach

Playbook: Roles and Access

ACCESS LEVEL

PA: Power Platform Admin
EA: Environment Admin
EM: Environment Maker
SA: System Administrator
SC: System Customizer
CA: Canvas App / Flow Read Access
CE: Canvas App / Flow Edit Access
CU: CDS User
CS: CDS User / Support / Delegate
CC: CDS Custom Role

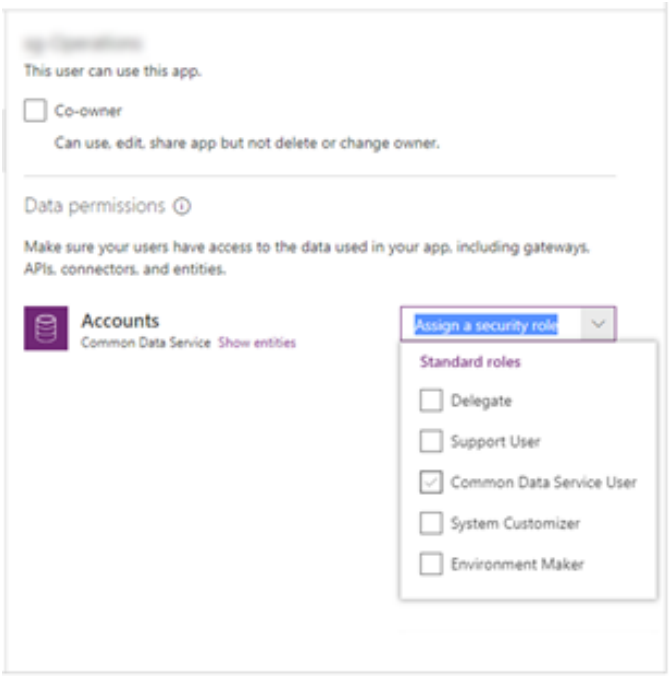
NOTE: EA / SA users of Production Type environments (i.e. Prod environments) should be AAD “priviledged” users. This includes Platform Administrator, Environment Administrator, and Release Manager.

Role	Power Platform Admin / Gateway / Default	Power Platform Environments						Power Platform License Required
		Dev		Test		Prod		
		App / Flow	Data	App / Flow	Data	App / Flow	Data	
Platform Administrator (L3)	PA							Power App Per User (Power Automate Per User)
Environment Administrator (L2)		EA / SA						Power App Per User (Power Automate Per User)
Support Lead (L1)		EM / SC						Power App Per User Power Automate Per User
Support Analyst (L1)				CE	CS	CA	CS	Power App Per User Power Automate Per User
Release Manager				EA / SA				Power App Per User Power Automate Per User
LOB Developer (Senior)		EA / SA						Power App Per User Power Automate Per User
LOB Developer (Jr/Inter)		EM / SC						ONE OF: O365 User Power App Per User Power App Per App User Power Automate Per User Power Automate Per Flow (use case dependant)
Tester (Simple App)				CA	CS			
Tester (Complex App)				CA	CC			
End User (Simple App)						CA	CU	
End User (Complex App)						CA	CC	

Playbook: App / Data Security

- To share a canvas app with users, add the relevant security group(s) to the canvas app's share list
  - Optionally grant co-owner rights, if a support user requiring edit access to the app
  - If the canvas app connects to CDS, also grant CDS entity permissions using one of the below CDS options

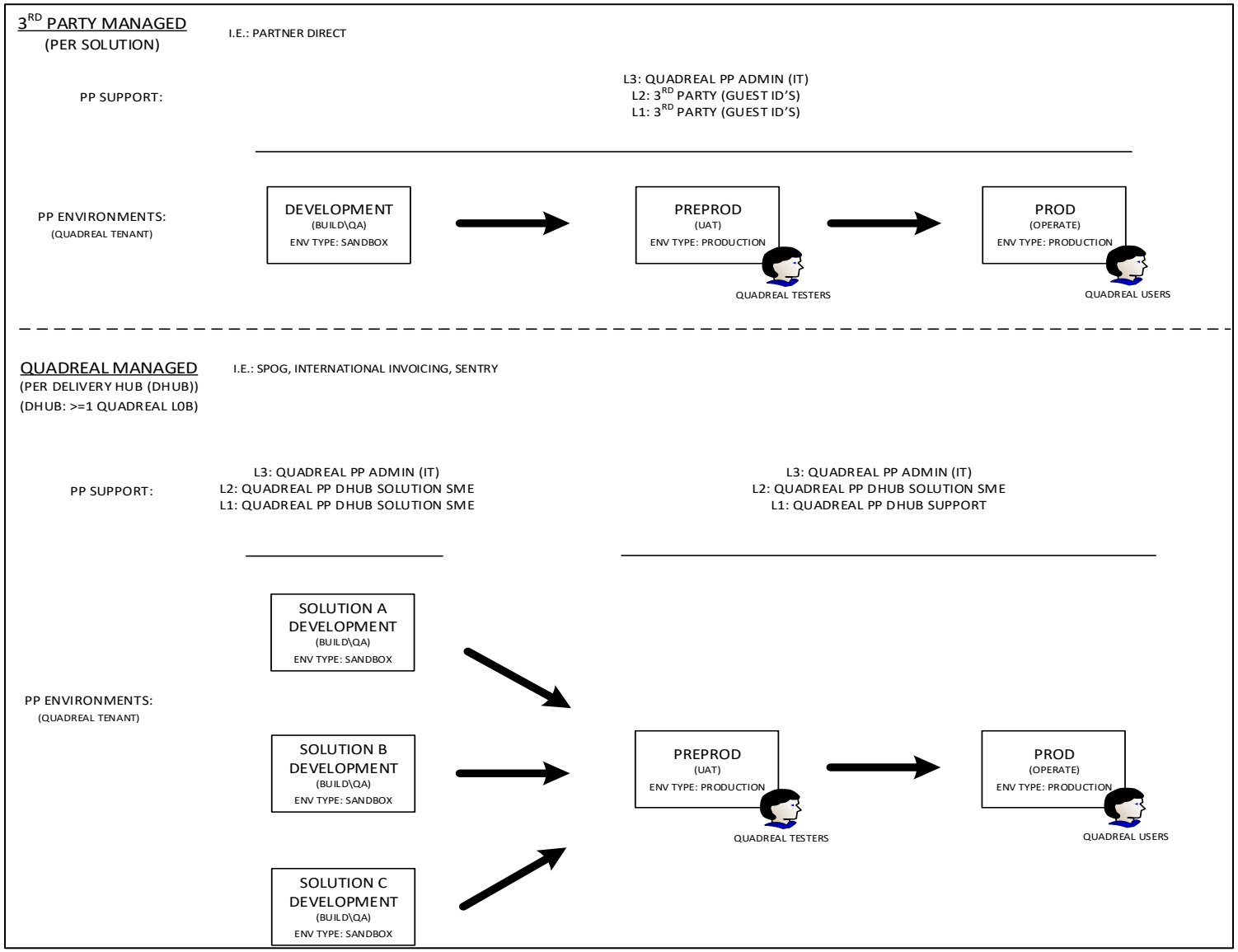
- To share a model driven app with users, or to grant access to CDS data:
  - Option 1: Add the user to the *Common Data Service User* system role, granting the user access to view / edit their own data only
    - Test / Support staff can also be granted *Delegate* system role (to impersonate user access), or *Support User* system role (to read custom entities and business unit settings)
  - Option 2: Create a custom security role, granting the user access to relevant data only
    - Custom security roles should first be granted Read access to the Web Resource entity, to ensure the model driven app forms work
    - For each CDS entity, identify the *privilege level* for the role; **Create, Read, Write, Delete, Append** (join this record to another), **Append To** (join another record to this), **Assign** (change ownership of a record), or **Share** (allow others to see your records)
    - For each privilege, assign the *access level* for the role: **Global** (all data), **Deep** (data associated with the user's business unit and related child business unit's), **Local** (user's business unit only), and **Basic** (data the user owns or is explicitly shared only)
    - NOTE: Business Units are optionally created in Power Platform to support record level security by department hierarchy
      - If no Business Unit's are defined, then the only relevant access level are **Global** and **Basic**



Playbook: Environments

	Default	CoE Kit	LOB Dev / Test	LOB PreProd / Prod	PreProd Tenant
Environment	Default	CoE Starter Kit	Dev / Test (per team / solution)	PreProd / Prod	Dev / Test
Environment Owner	IT	IT	LOB	LOB	IT
Access	Individual Developer	Platform / CoE Admins	LOB Developers / Testers	LOB Users	IT Developers / Testers
Environment Type	Default	Production	Sandbox	Production	Sandbox
Environment Purpose	Personal prototyping environment for apps / flows. No CDS. All users = maker rights.	Host CoE Starter Kit's CDS model, Power Apps, and Power Automate Flows.	Solution specific environment for apps / flows / CDS. Simple copy / reset capability.	Managed environment covered by L1 / L2 / L3 support, for solutions to end users.	Validate Power Platform new features / new connectors / new guardrails / complex app / new framework templates …
Tenant	Primary	Primary	Primary	Primary	PreProd
Support	Peer Only	IT	L1 / L2 / L3	L1 / L2 / L3	L3
Host Mission Critical Apps	No	No	Yes	Yes	No
Application Life Cycle	No	No	Yes	Yes	Yes
Common Data Service	No	Yes	Yes	Yes	Yes
Recommended Data Source	SharePoint List / Excel	CDS	CDS	CDS	CDS
Includes Sensitive Data	No	Yes	No	Yes	Same Tenant Only
Integrated with DevOps	No	No	Yes	Yes	Yes
Connects to Other Systems	No	Yes	Yes	Yes	Same Tenant Only
Typical License	O365	Per User	Per User	Per User	Per User
Custom Components	No	No	Yes	Yes	Yes
Custom Connectors	No	No	Yes	Yes	Yes
Key Risk	Prototype becomes SLA App.	Unauthorized Access.	Pre-Prod becomes SLA App.		Pre-Prod becomes SLA App.
Key Risk Mitigation	Monitor usage via Analytic Reports.	Ensure only Platform / CoE Admins are granted access.	Monitor usage via Analytic Reports.	Monitor usage via Analytic Reports.	Monitor usage via Analytic Reports.

Playbook: Environment Design

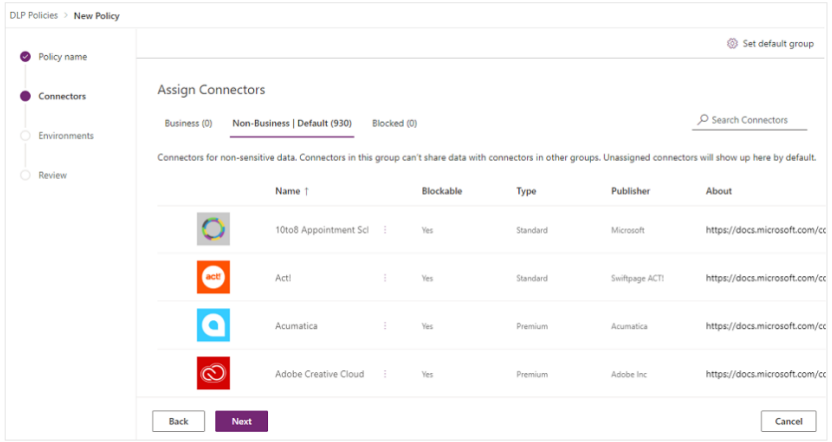


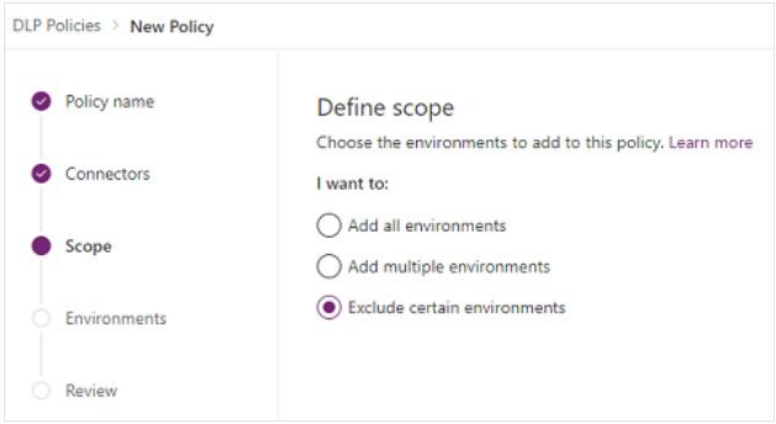
Playbook: Licensing

License Type	Power App	Power Automate
O365 Included	Unlimited canvas apps, standard connectors only, 2000 API calls daily	Unlimited standard workflows, standard connectors, 2000 API calls daily
Per User	Unlimited canvas / model apps, any connectors, CDS support, 5000 API calls daily, 250MB CDS data, includes “Power Automate for Apps” ($20 / month)	Unlimited workflows any type, any connectors, CDS support, 5000 API calls daily, 50MB CDS data ($15 / month /wo RPA, $20 / month /w RPA)
Per App User / Flow	User license for specific apps, up to 2 apps and 1 custom portal, any connectors, CDS support, 1000 API calls daily, 50MB CDS data ($5 / user)	Flow license for unlimited users, five workflows any type, any connectors, CDS support, 15000 API calls daily, 50MB CDS data ($250 / month)
Add On’s	Additional CDS Data Storage: 1GB ($20 / month) Additional Daily API Requests: 10,000 / day ($25 / month) External Users Power App Portal Logins: 100 / month ($100 / month) External Users Power App Page Views: 100,000 / month ($50 / month) Power Automate Unattended RPA: One bot ($75 / month)	
Licensing Considerations	Are consuming users external or internal? What is the estimated API call count? What type of app will be implemented (canvas vs model)? Does the solution depend on premium connectors? Will all users have Per User licensing, or will Per App / Flow licensing be needed?	

Playbook: Data Policy

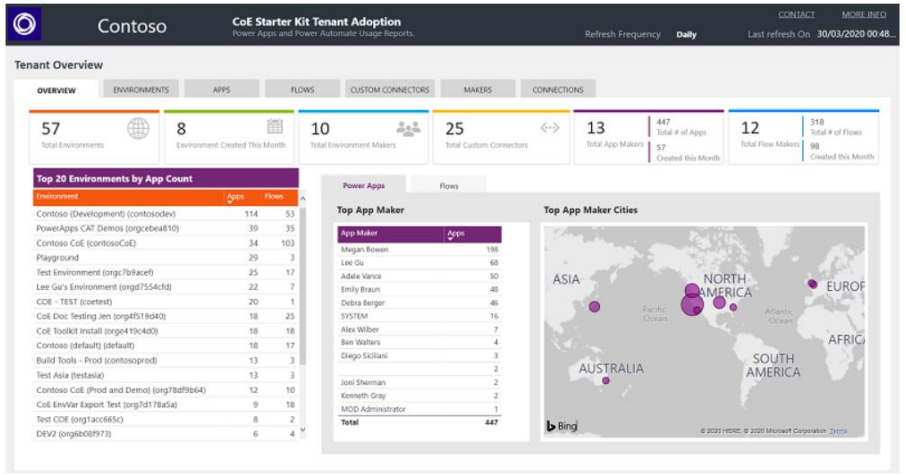
- In Power Platform, a Data Loss Prevention (DLP) policy controls which connectors can work with each other in Power App / Power Automate solutions
- Connector's are classified as "Business Data", "Non-Business Data", and "Blocked"
  - Business Data connectors can share with other Business Data connectors, and Non-Business Data connectors can share with other Non-Business Data connectors, but Business Data connectors cannot share with Non-Business Data connectors
    - For example, if SQL Server / SalesForce / SharePoint List connectors are added to the Business Data list, but OneDrive / Twitter connectors are added to the Non-Business Data list, then a SQL Server cannot share data with an Excel file in One Drive through a Power Platform solution
  - Connectors can be blocked as well, to prevent a specific connector's use within an environment
- The DLP policy can be applied to all Power Platform environments, or to specific environments only
  - For example, the personal productivity environment requires a different connector policy, and therefore would be excluded from the tenant "all environments" policy
- Set a default policy for new connectors, indicating whether they are blocked etc. for future connectors not currently found in this list

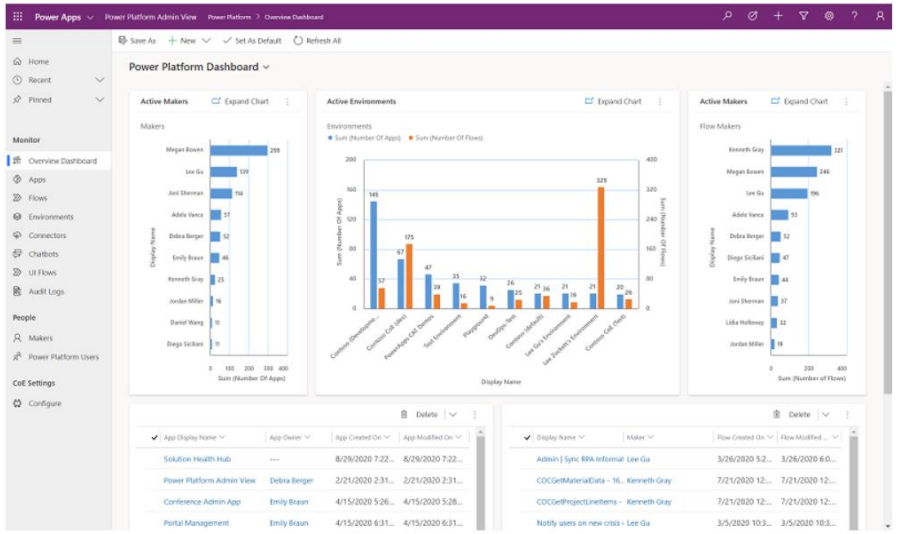




Playbook: CoE Starter Kit

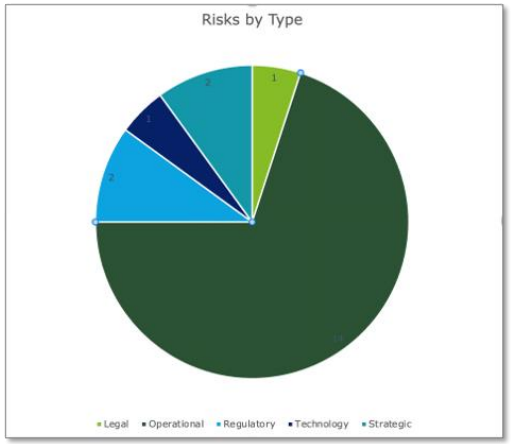
- The Power Platform CoE Starter Kit is a community driven solution that helps organizations govern their Power Platform implementation
- The kit contains the following components:
  - A CDS model to collect information about all environments, apps, flows, …
  - Sync flows to collect Power Platform metadata into the CDS model
  - A Power BI report to visualize the CDS collected metadata
  - A Power App (model type) to view CDS collected metadata
  - Two Power Apps (canvas type) to centrally manage app / flow permissions
  - Two Power Apps (canvas type) to manage DLP policies
- As part of Power Platform standup the started kit should be implemented and be ready for use for all future solutions
- Additional details re: use of the CoE Starter Kit will be included in the Playbook
- The key differentiator between the CoE Starter Kit, and the Power Platform Analytics reports, is the CoE Starter Kit covers all environments for >28 days

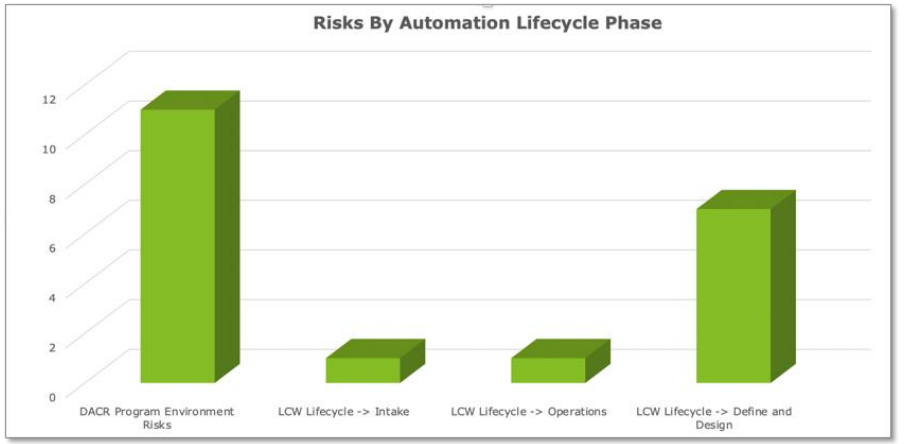




Playbook: Risk and Control

Risk ID	Risk Description	Planned Control	Playbook Location
D1.12	**Estimates** which are provided by estimation tool may be materially more (or less) than actual time to implement leading to suboptimal decision making concerning LCW solutions.	The tool will be thoroughly tested before implementation into production. Periodic review of "estimates" and "actual" effort will be provided to ensure accuracy of the tool.	ECoE Operating Model (6.1.6 - Governance) -> Define and maintain processes, practices, standards, guidelines, methodologies and playbooks
D5.22	A **lack of well understood best practices and CoE oversight** (which will evolve as the platform evolves) could lead to employees creating their own applications without the knowledge, oversight and or best practices of the organization.	CoE will deliver training to all persons who are involved in the build and design of solutions to ensure effective knowledge of best practices. Clear guidelines and policies (end-user low code policy, Tenant DLP policy) will be incorporated into playbooks and training given to end users to understand and mitigate when solutions do not take advantage of best practices and or become a significant EUC. CoE will also undertake steps to production ecosystem to identify instances of EUC to "promote" things to a more managed world. The platform will also enable this monitoring throug metrics and KPI's such as number of times a LCW is shared (and other ways).	Define & Design -> Technical Solution Design and Complexity Evaluation -> Design Review / Approval (2.2.8) ECoE Operating Model (6.1.6 - Governance) -> Define and maintain processes, practices, standards, guidelines, methodologies and playbooks
D6.1	Incorrect **design of Governance organization** will cause gaps in accountability for ownership and maintenance of governance artifacts.	Pre-implementation review of organizational design will be conducted. Periodic reviews of organizational alignment bave to be performed on a regular basis. Enterprise CoE owns this task and it will be executed and maintained by delivery hubs.	ECoE Operating Model (6.1.6 - Governance) -> Define and maintain processes, practices, standards, guidelines, methodologies and playbooks ECoE Operating Model (6.1.6 - Governance). -> Continuous Improvement and Process Optimization
D6.2	**Inadequate staffing** of Governance organization will cause gaps in accountability for ownership and maintenance of governance artifacts.	Pre-implementation review of organizational staffing for staffing levels will be conducted. Periodic reviews of staffing levels bave to be performed on a regular basis, likely in conjuction with organizational design.	Not in scope for project (0.0.0)
D6.4	Lack of ownership and/or **improper maintenance of governance** artifacts can cause inappropriate application of LCW lifecycle processes, leading to adverse impact to production systems	Periodic testing of relevant controls bave to be performed, as per testing. requirements for control	ECoE Operating Model (6.1.6 - Governance) -> Define and maintain processes, practices, standards, guidelines, methodologies and playbooks ECoE Operating Model (6.1.6 - Governance). -> Continuous Improvement and Process Optimization





Power Platform Training

Why Adastra Training?

Adastra will establish an effective Power Platform training / adoption plan, aligned to roles within your organization, to enable *all* role coverage for Power Platform responsibilities. This plan is a critical pre-requisite to successful enterprise platform operation and citizen development.

Customize Training Modules

- Power Automate Introduction
- Flows building parts
- Conditions & Loops
- Variables & Expressions
- Working with SharePoint Data and Files
- Power Automate - Administration
- Approval Process
- Custom Connector
- Business Process Flow
- Power Automate - Monitoring, Testing and Troubleshooting
- Power Automate - Deployment and Power Automate Application Lifecycle management
- Power Apps Advanced
- Power Platform Admin – Overview
- Power Platform Admin – Security
- Power Platform Admin – Monitoring
- Power Platform Admin – Alert and Action
- Power Platform Admin – Deploy
- Overview Power Platform architecture
- Overview Power Apps
- Overview Power Automate
- Overview Power BI
- Power Apps Test Studio
- Power Platform Testing

Power Automate - Introduction
- General introduction of Power Automate
- Purpose of Power Automate
- Tasks performed by Power Automate
- Accessing Power Automate
- Power Automate Interface
- Power Automate - Mobile App
- Types of Flows
- Walkthrough of Power Automate

Flows building parts
- Standard and Premium Connectors
- Triggers and Actions
- Specify an event to start the flow
- Trigger a flow based on email properties
- Create a reminder flow
- Lab 2.1 Track Time
- Lab 2.2: Important e-mails notifications

Conditions & Loops
- Microsoft Power Automate Templates
- Conditions and Nested conditionals
- Loops: Apply to each, Do-until, Filter arrays
- Compose string variables
- Lab 3.1 : Copy files between OneDrive for Business folders
- Lab 3.2 : Send potential customer list through e-mail
- Lab 3.3 : Daily Loop
- Lab 3.3 : My Overdue Tasks

Variables & Expressions
- Add an Action
- Add a Condition
- Use Data Operations
- Use Expressions in Condition
- Submit a template to the Power Automate gallery
- Lab 4.1 : Office Capacity
- Lab 4.1.1 : Office Capacity – Simple HTML
- Lab 4.1.2 : Office Capacity – CSS
- Lab 4.1.3 : Office Capacity - Advanced

Working with SharePoint Data and Files
- Overview
- Templates
- Various Actions of SharePoint
- MS Word/Excel Online (Business Connector)
- Create a flow that stores documents when item is added in SharePoint List
- Lab 7. Document generation with the Word Connector.pdf
- Lab: Copy/Move file from One Drive to SharePoint
- Lab 13. Calling the SharePoint API from a flow

Power Automate - Administration
- Environments
- Admin Center
- Data Loss Policies
- Power Automate mobile app supports Microsoft Intune
- Data Groups
- Sharing and connectors admin analytics reports
- Power Platform, and how to do administration of Flows and PowerApps in organization
- Reporting and admin alerts

Correlate Training Modules to Roles

	Environment Admin	Technical Developer	Business Developer	Support Analyst	Business Analyst	End User	Platform Admin	Tester
Power Automate Introduction		X	X	X		X		
Flows building parts		X	X	X		X		
Conditions & Loops		X	X	X		X		
Variables & Expressions		X	X					
Working with SharePoint Data and Files		X	X					
Power Automate - Administration		X	X					
Approval Process		X	X					
Custom Connector		X	X					
Business Process Flow		X	X					
Power Automate - Monitoring, Testing and Troubleshooting		X	X	X				X
Power Automate - Deployment and Power Automate Application Lifecycle management		X	X	X				
Power Apps Advanced		X	X	X				
Power Platform Admin – Overview	X	X	X	X			X	
Power Platform Admin – Security	X	X	X	X			X	
Power Platform Admin – Monitoring	X	X	X	X				
Power Platform Admin – Alert and Action	X	X	X	X				
Power Platform Admin – Deploy	X	X	X	X				
Overview Power Platform architecture					X	X		
Overview Power Apps					X	X		
Overview Power Automate					X	X		
Overview Power BI					X	X		
Power Apps Test Studio								X
Power Platform Testing								X

Customize Training Agenda By Roles

Example: Environment Administrator Training Agenda

Role / Description	Training Goals
Environment Management: • Requests creation of new Environment from Administrator • Creates sandboxes • Re-sets sandboxes to save point • Grants / revokes access to environments	To be able to populate CDS in Environments and reset data to save points.
User / Role Management: • Adds Role to User for Environment Access • Maintains Power Platform Role Lifecycle (Assign, Create, Maintain, Delete) • Creates custom roles for an environment	To assign/revoke users roles (create if required) to enable access to an environment
Application / Flow Management: • Provides Access • Manages app/flow sharing • Monitors Environments Usage • Monitors Application/Flow Usage • Monitors license utilization • Implements change requirements in Production	Perform key monitoring activities

Training Segments	
Power Automate - Deployment and Power Automate Application Lifecycle management	1 hr
Power Automate - Monitoring, Testing and Troubleshooting	1 hr
Power Platform Admin – Overview	1 hr
Power Platform Admin – Security	1.5 hrs
Power Platform Admin – Monitoring	1 hr
Power Platform Admin – Alert and Action	1.5 hrs
Power Platform Admin – Deploy	1.5 hrs
Total	**8.5 hrs**

Define and Execute Training Schedule

Monday	Tuesday	Wednesday	Thursday	Friday	
12	13	14	15	16	
	1 — 3.5 Hrs Tech Dev Bus Dev Support Analyst End User	2 — 4 Hrs Tech Dev Bus Dev	3 — 3.5 Hrs Tech Dev Bus Dev	4 — 2 Hrs Tech Dev Bus Dev Support Analyst	
		5 — 2.5 Hrs Environment Admin Tech Dev Bus Dev Support Analyst Platform Admin	6 — 4 Hrs Environment Admin Tech Dev Bus Dev Support Analyst	7 — 3.5 Hrs Business Analyst End User	
19	20	21	22	23	26
1 — 3.5 Hrs Tech Dev Bus Dev Support Analyst End User	1 — 3.5 Hrs Tech Dev Bus Dev Support Analyst End User	2 — 4 Hrs Tech Dev Bus Dev	3 — 3.5 Hrs Tech Dev Bus Dev	10 — 2 Hrs Management Overview	4 — 2 Hrs Tech Dev Bus Dev Support Analyst
		5 — 2.5 Hrs Environment Admin Tech Dev Bus Dev Support Analyst ITS Platform Admin	6 — 4 Hrs Environment Admin Tech Dev Bus Dev Support Analyst	8 — 3 Hrs Testers	7 — 3.5 Hrs Business Analyst End User

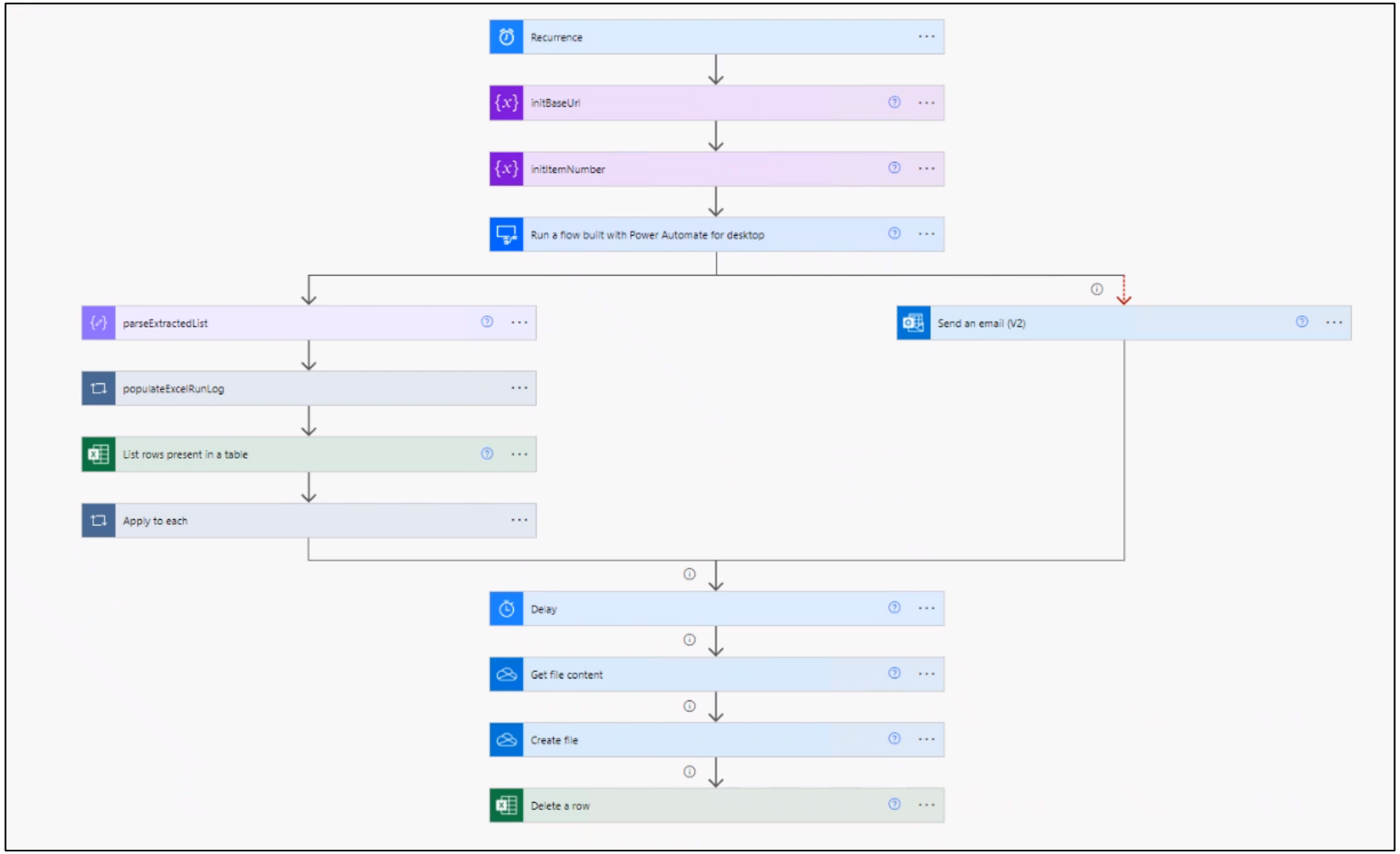
Power Platform Development

Why Adastra Development?

Adastra has a team of experienced Power Platform designers and developers, with deep skill on all components of the platform. Our customer's leverage Adastra's Power Platform development team to build pilots, establish patterns, augment internal capacity, and address complex use cases.

Power Automate RPA @ Security Commission

- **Use Case:** Thousands of companies submit security filings to a security commission through a security portal, with attachments, on a monthly / quarterly / yearly basis. Significant manual effort was needed to analyze, classify, and attribute each filing into internal systems.
- **Solution:** Adastra built a Power Automate RPA solution, to automatically analyze, classify and attribute each corporate filing, then submitting the filing to the relevant container in the security commissions internal records management system. Solution includes automated auditing and reporting.
- **Benefit:** Filing processing effort was reduced by 10X, filing processing execution now occurs 24/7 (vs business hours), and filing quality issues were resolved.

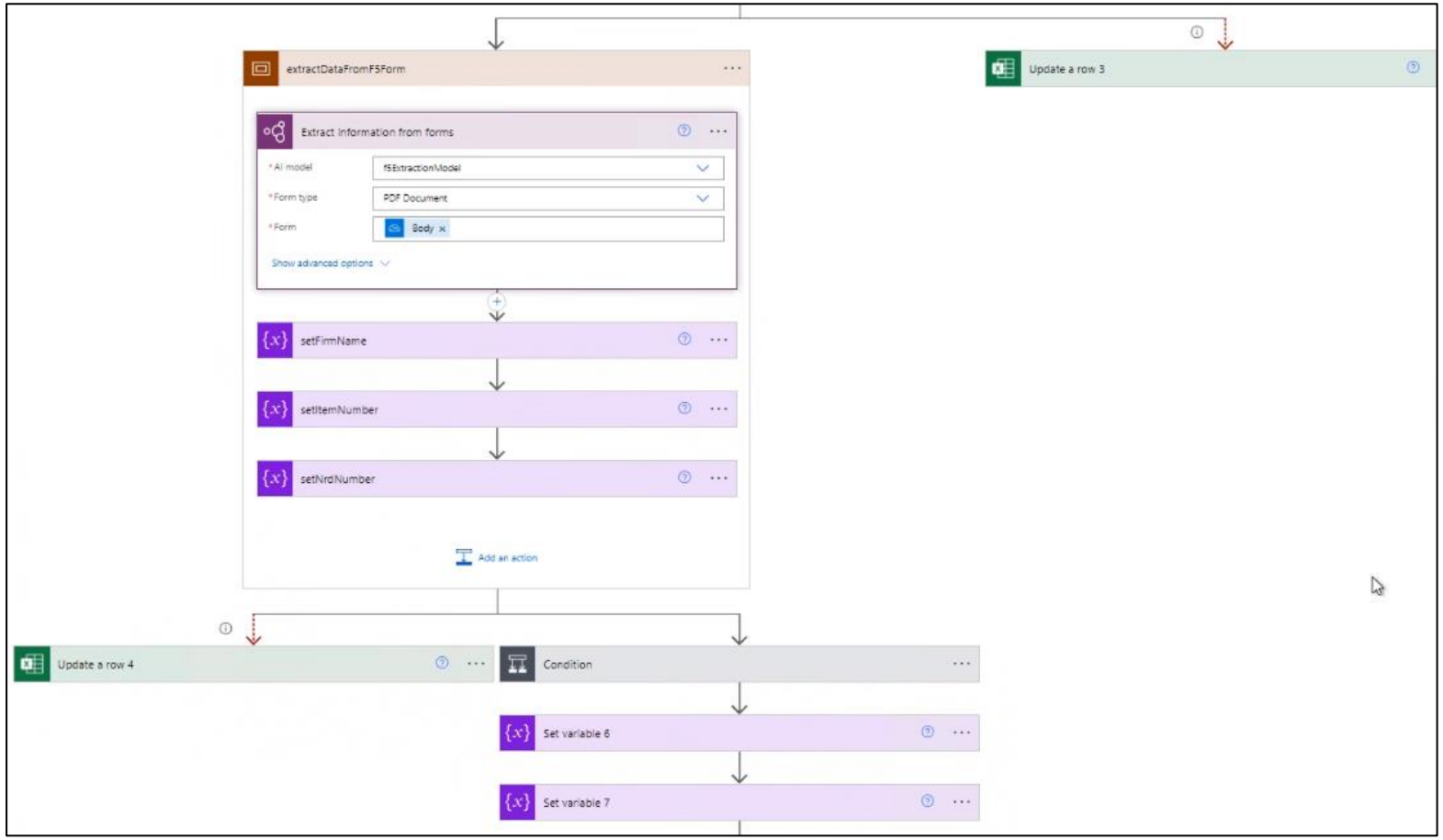


Power Automate RPA @ Security Commission

- **Use Case:** When a company change occurs (corporate name, corporate registration, officer position, …), the company submits the change (and related hand written documents) to the security commission through a web portal. Significant manual effort is required to process hundreds of corporate registrations changes per day.

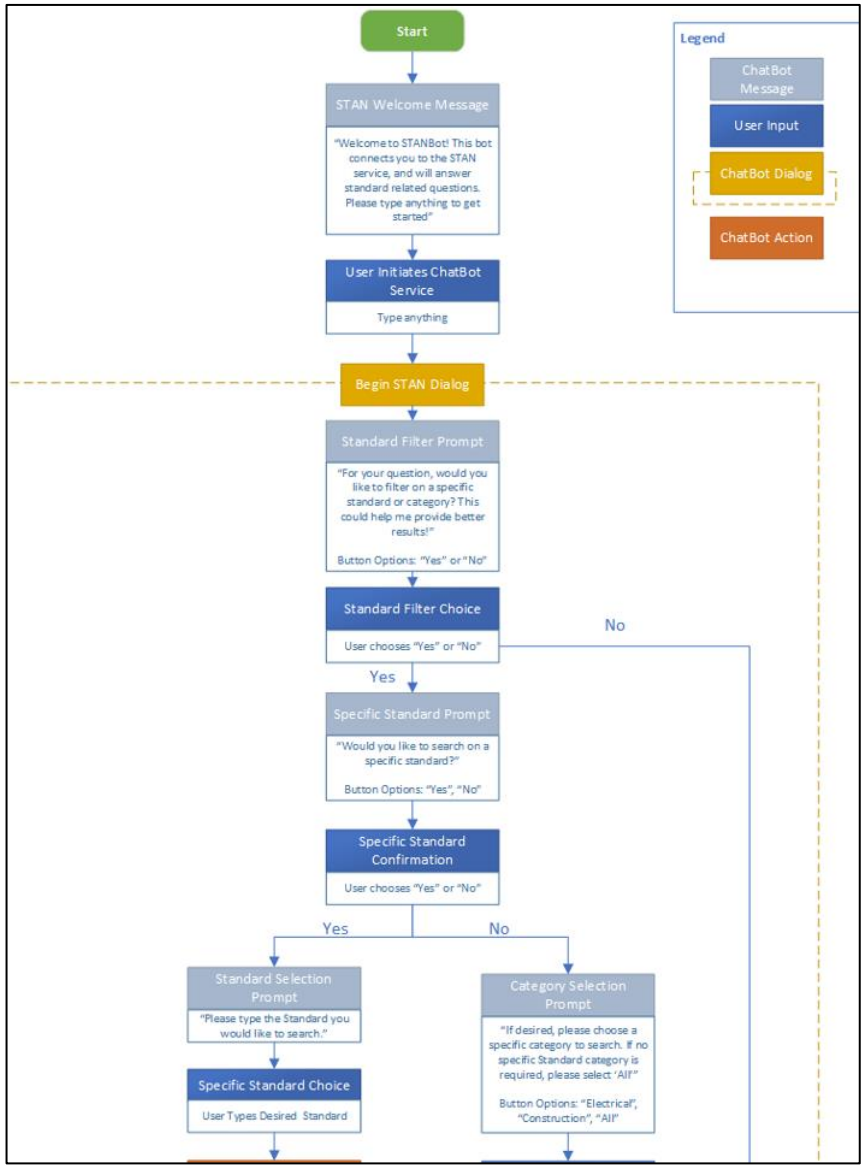
- **Solution:** Adastra built a Power Automate RPA solution, to automatically analyze, classify and attribute each corporate registration change. This includes automatically scanning documents for change details using AI builder. The change is then submitted to a legacy IBM system (through a legacy client app) via a Power Automate Desktop agent. The relevant security commission officer is then notified of the change.

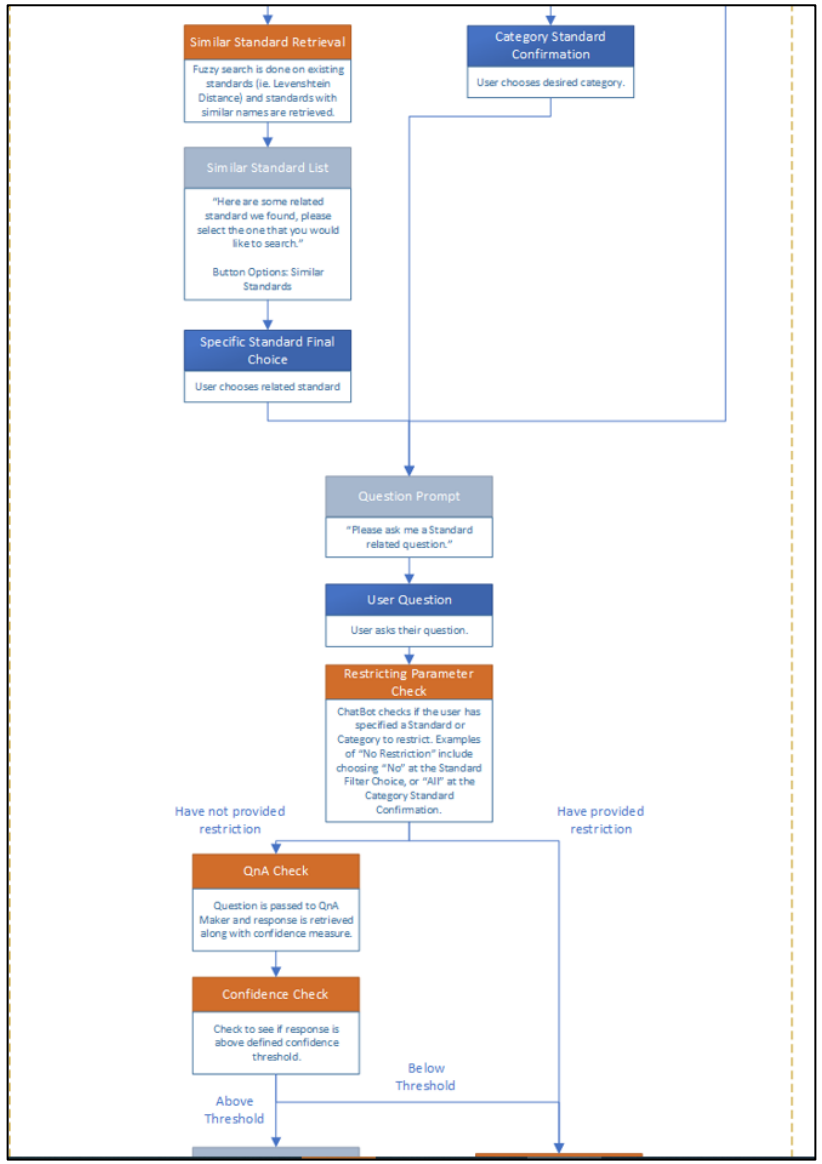
- **Benefit:** Change processing effort was reduced by 25X, change processing execution now occurs 24/7 (vs business hours), and change quality issues were resolved.



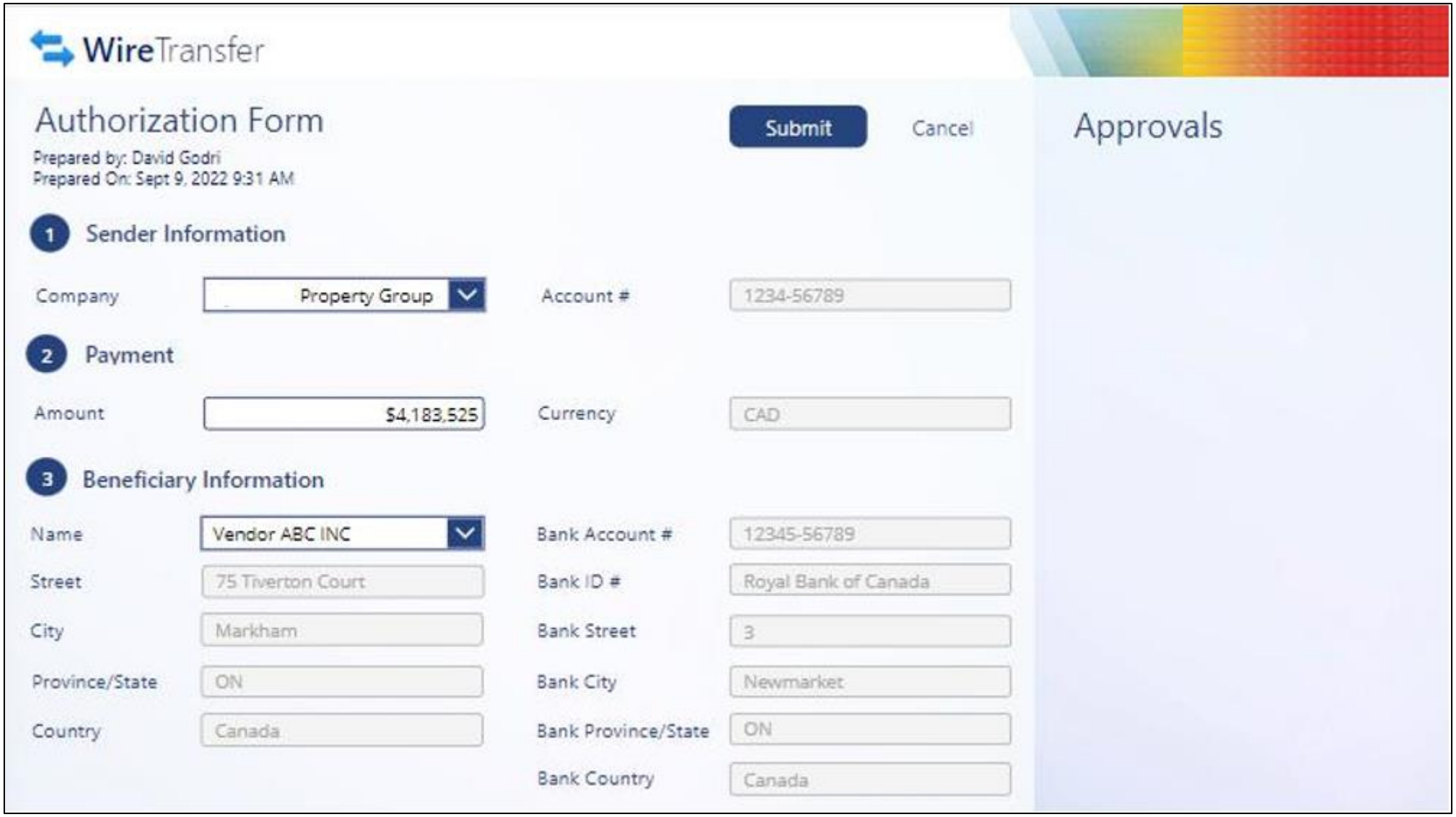
Power Virtual Agent @ Standards Association

- **Use Case:** To facilitate improved customer experience, Adastra built a chatbot using Power Platform Virtual Agent, to enable simple and easy search of a large repository of standards documents. This improved user self service ability to locate required standards.
- **Solution:** First, Adastra indexed standards using Azure Cognitive Search, facilitating fuzzy search and ranked results. Second, Adastra designed the virtual agent logic (see diagrams). Third, Adastra built the Power Platform agent, integrated with Cognitive Search, and delivered the bot thru the relevant web portal.
- **Benefit:** Virtual agent users located relevant standards at a >40% improved success rate compared to legacy search methods.

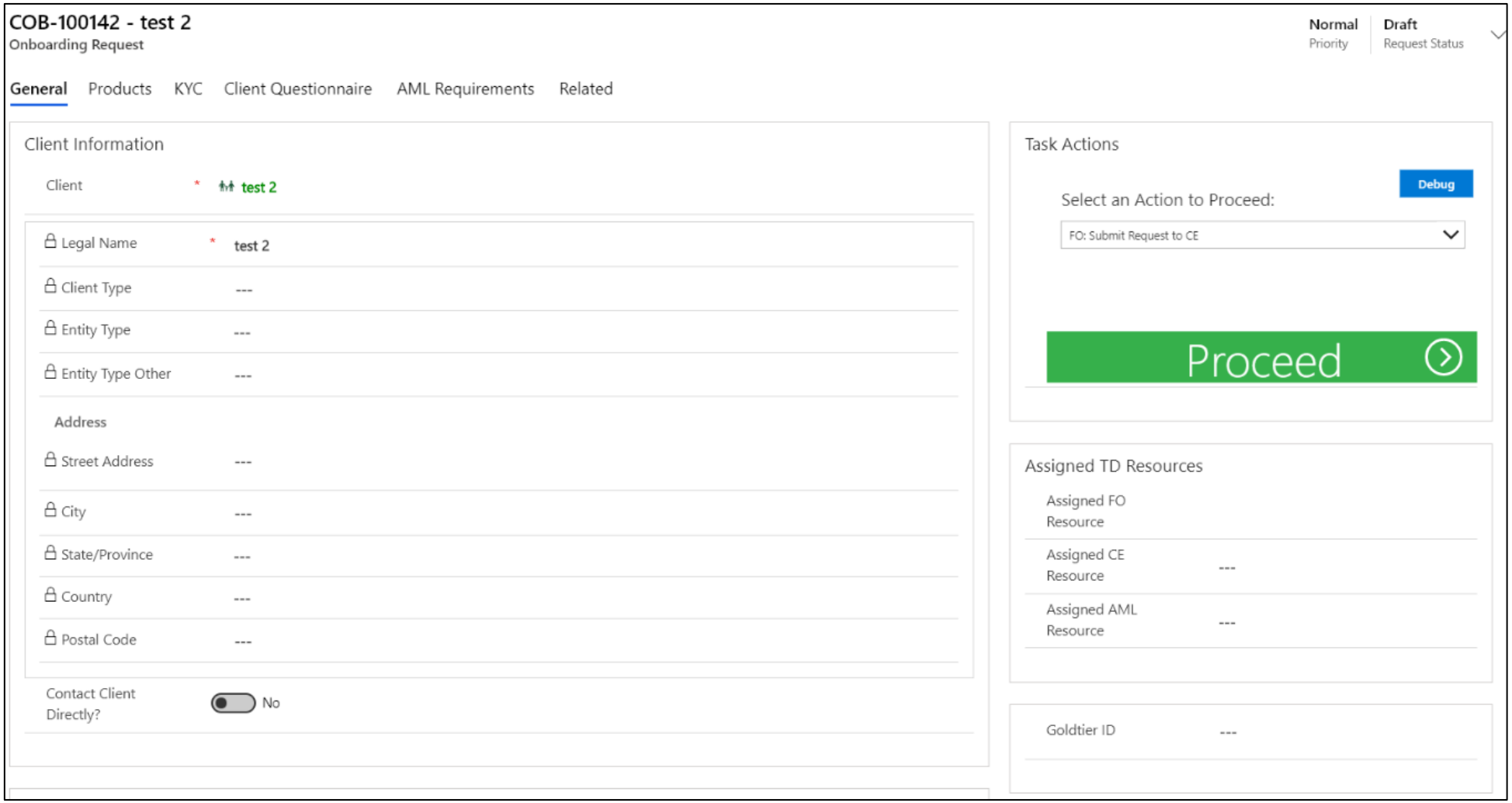




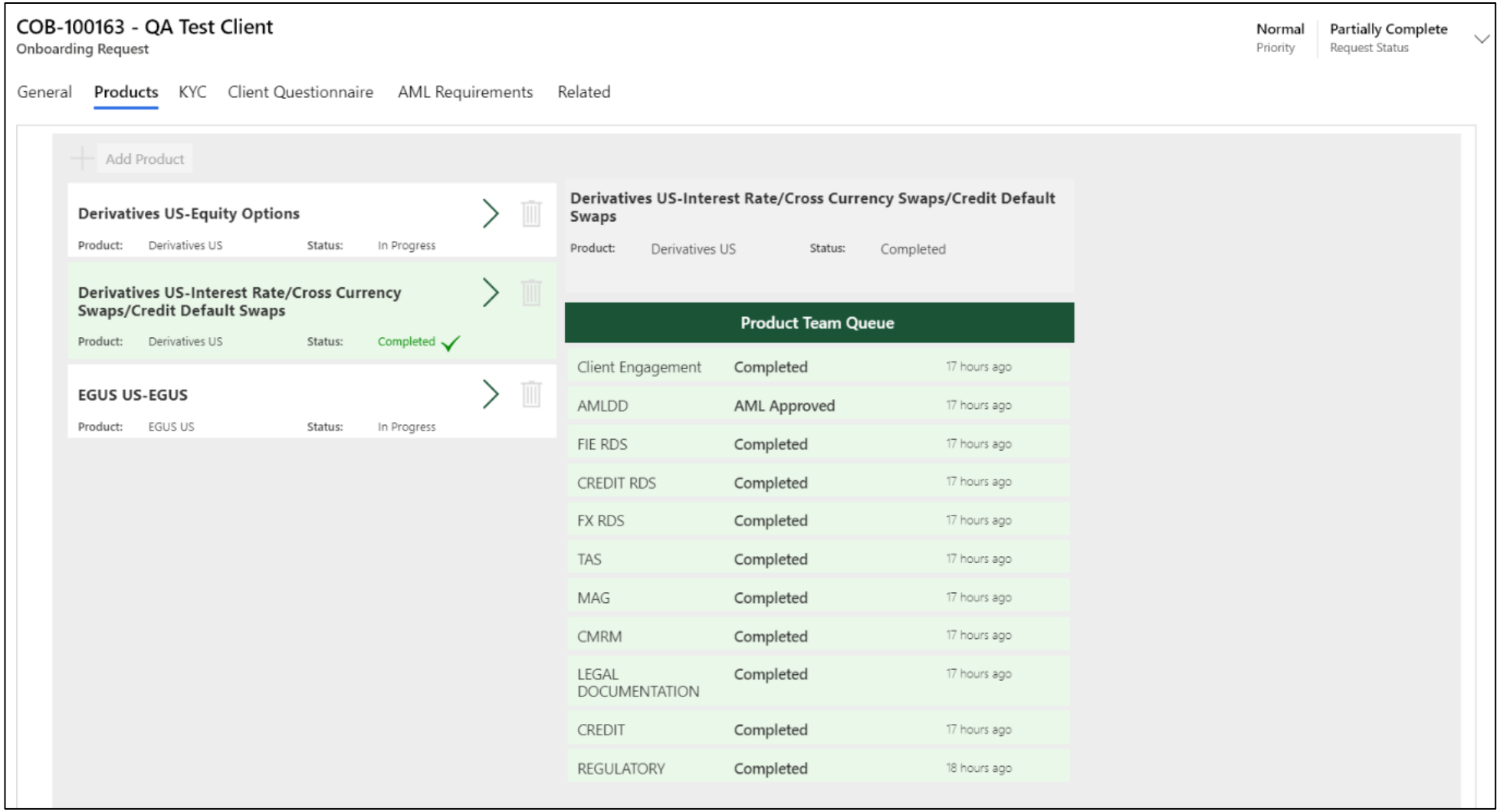
Wire Transfer Request App @ REIP



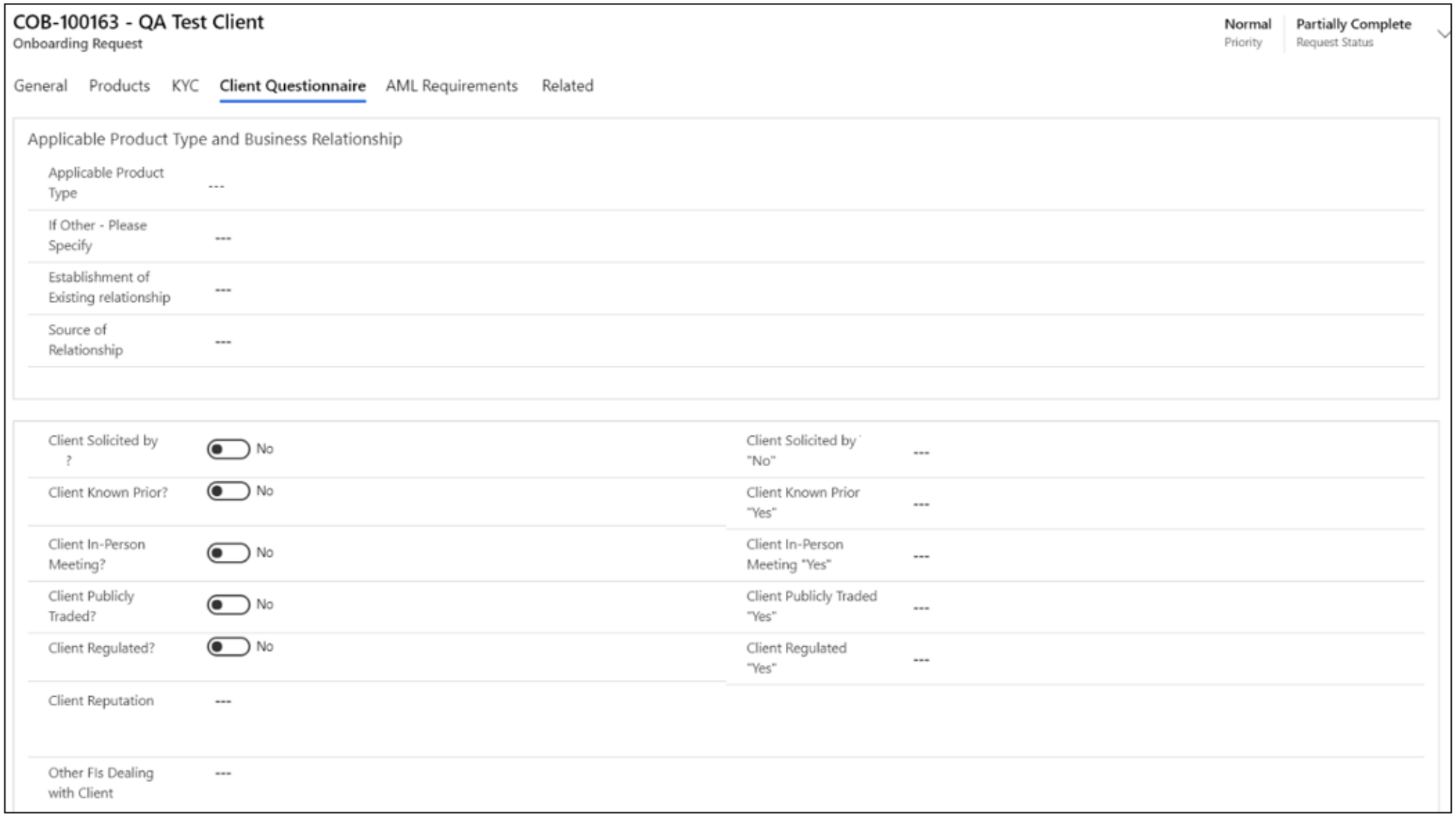
Adastra Example: Customer Onboarding App



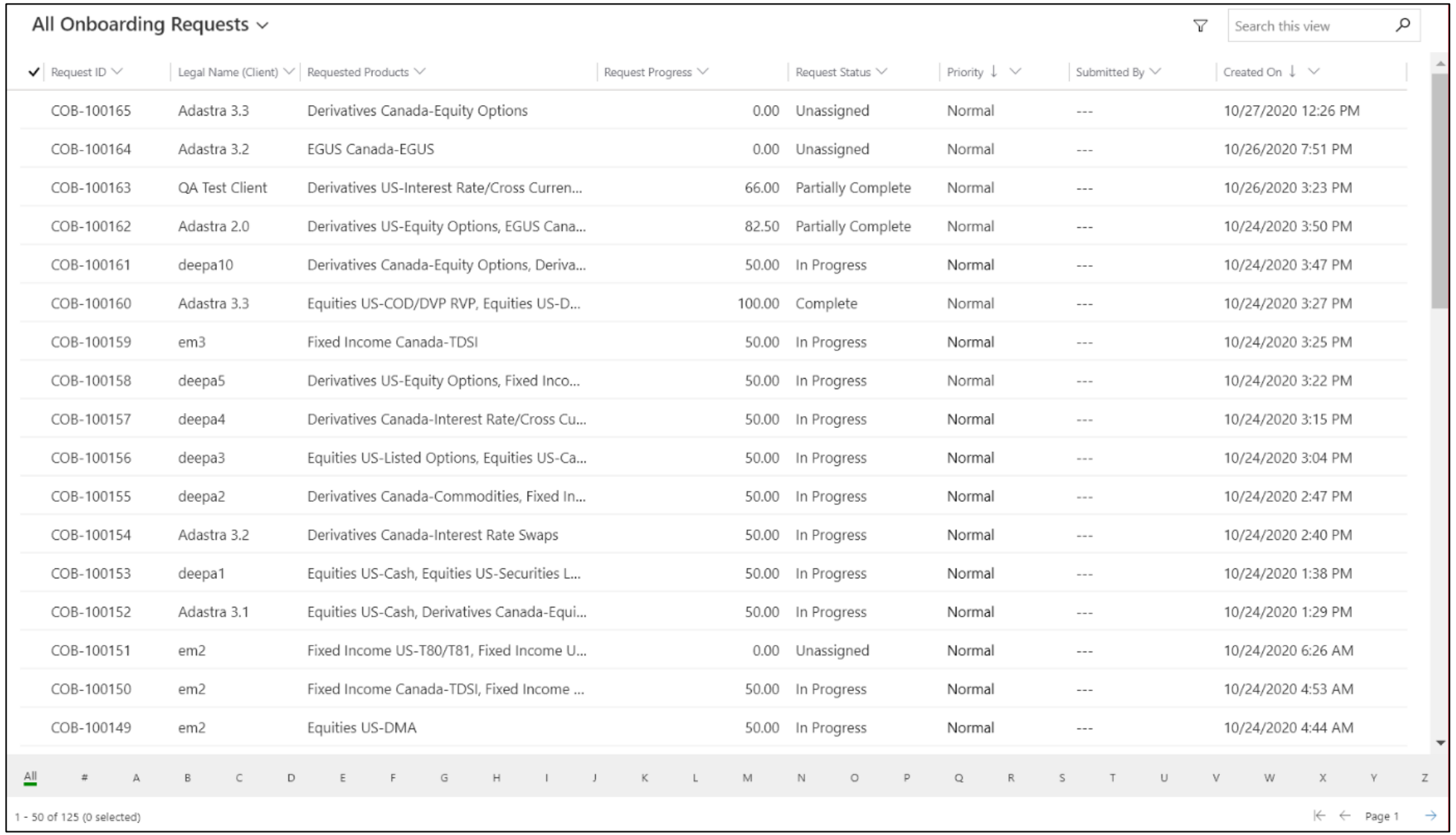
Adastra Example: Customer Onboarding App



Adastra Example: Customer Onboarding App



Adastra Example: Customer Onboarding App



All Onboarding Requests

Search this view

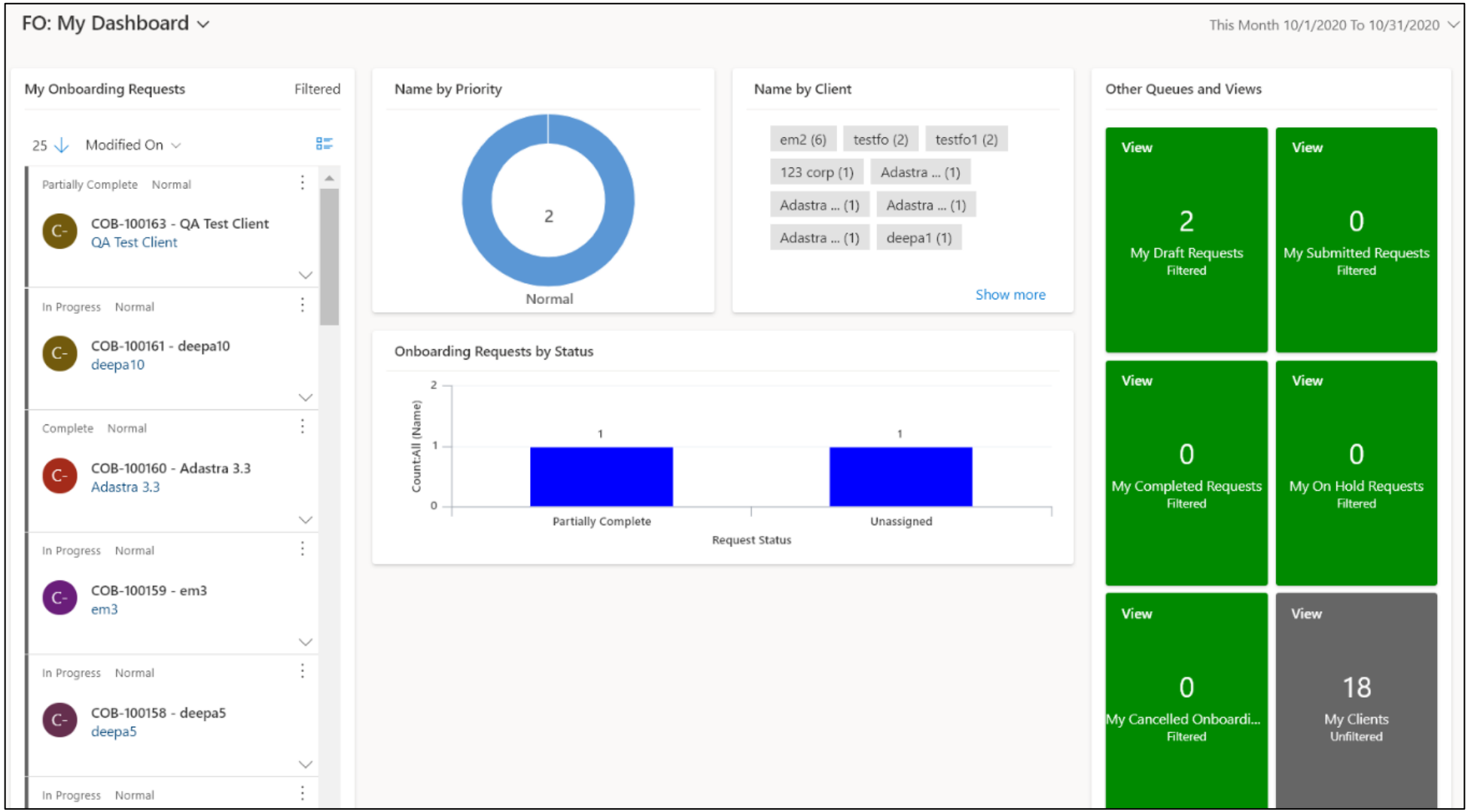
Request ID	Legal Name (Client)	Requested Products	Request Progress	Request Status	Priority	Submitted By	Created On
COB-100165	Adastra 3.3	Derivatives Canada-Equity Options	0.00	Unassigned	Normal	---	10/27/2020 12:26 PM
COB-100164	Adastra 3.2	EGUS Canada-EGUS	0.00	Unassigned	Normal	---	10/26/2020 7:51 PM
COB-100163	QA Test Client	Derivatives US-Interest Rate/Cross Curren...	66.00	Partially Complete	Normal	---	10/26/2020 3:23 PM
COB-100162	Adastra 2.0	Derivatives US-Equity Options, EGUS Cana...	82.50	Partially Complete	Normal	---	10/24/2020 3:50 PM
COB-100161	deepa10	Derivatives Canada-Equity Options, Deriva...	50.00	In Progress	Normal	---	10/24/2020 3:47 PM
COB-100160	Adastra 3.3	Equities US-COD/DVP RVP, Equities US-D...	100.00	Complete	Normal	---	10/24/2020 3:27 PM
COB-100159	em3	Fixed Income Canada-TDSI	50.00	In Progress	Normal	---	10/24/2020 3:25 PM
COB-100158	deepa5	Derivatives US-Equity Options, Fixed Inco...	50.00	In Progress	Normal	---	10/24/2020 3:22 PM
COB-100157	deepa4	Derivatives Canada-Interest Rate/Cross Cu...	50.00	In Progress	Normal	---	10/24/2020 3:15 PM
COB-100156	deepa3	Equities US-Listed Options, Equities US-Ca...	50.00	In Progress	Normal	---	10/24/2020 3:04 PM
COB-100155	deepa2	Derivatives Canada-Commodities, Fixed In...	50.00	In Progress	Normal	---	10/24/2020 2:47 PM
COB-100154	Adastra 3.2	Derivatives Canada-Interest Rate Swaps	50.00	In Progress	Normal	---	10/24/2020 2:40 PM
COB-100153	deepa1	Equities US-Cash, Equities US-Securities L...	50.00	In Progress	Normal	---	10/24/2020 1:38 PM
COB-100152	Adastra 3.1	Equities US-Cash, Derivatives Canada-Equi...	50.00	In Progress	Normal	---	10/24/2020 1:29 PM
COB-100151	em2	Fixed Income US-T80/T81, Fixed Income U...	0.00	Unassigned	Normal	---	10/24/2020 6:26 AM
COB-100150	em2	Fixed Income Canada-TDSI, Fixed Income ...	50.00	In Progress	Normal	---	10/24/2020 4:53 AM
COB-100149	em2	Equities US-DMA	50.00	In Progress	Normal	---	10/24/2020 4:44 AM

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

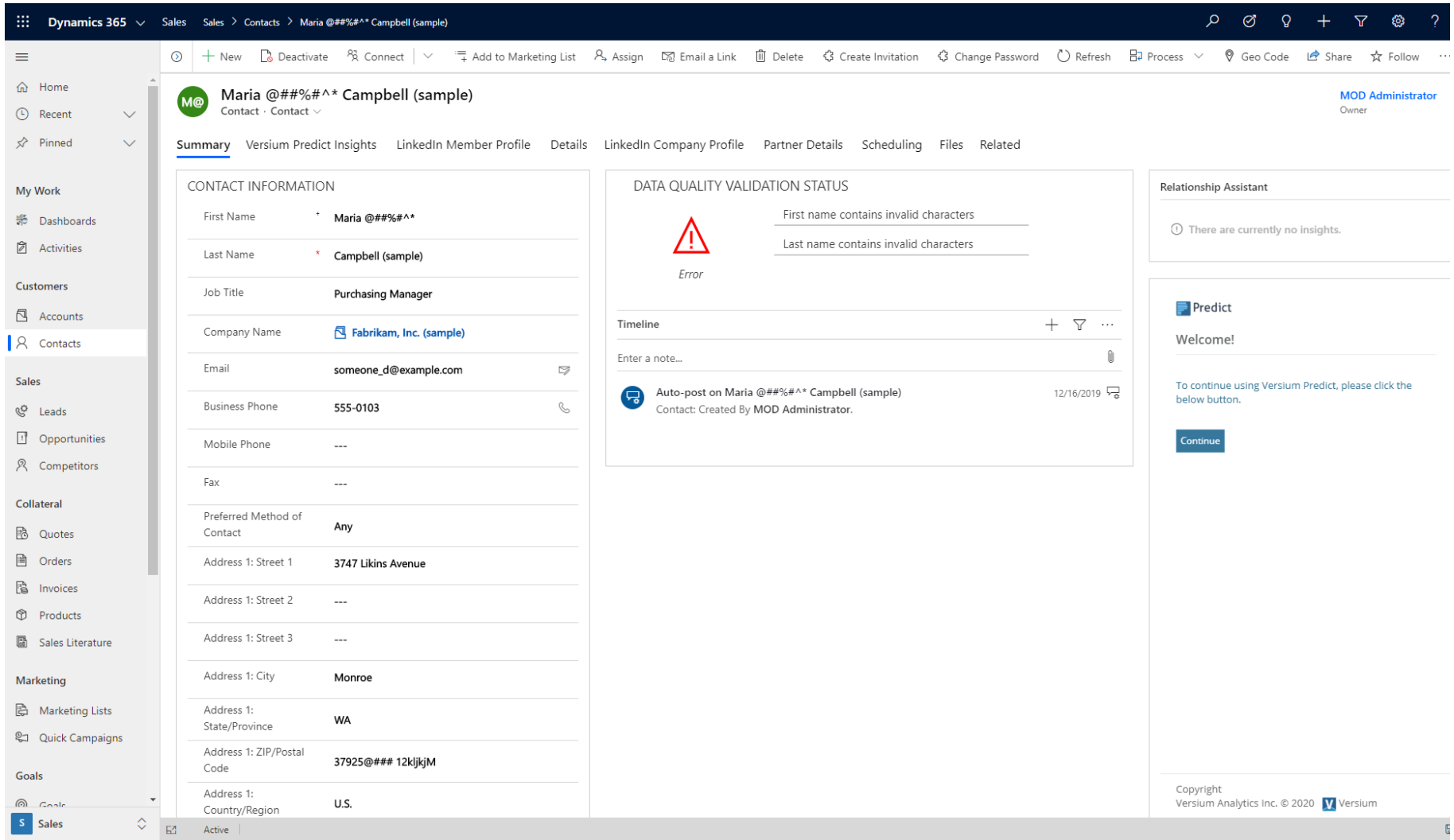
1 - 50 of 125 (0 selected)

Page 1

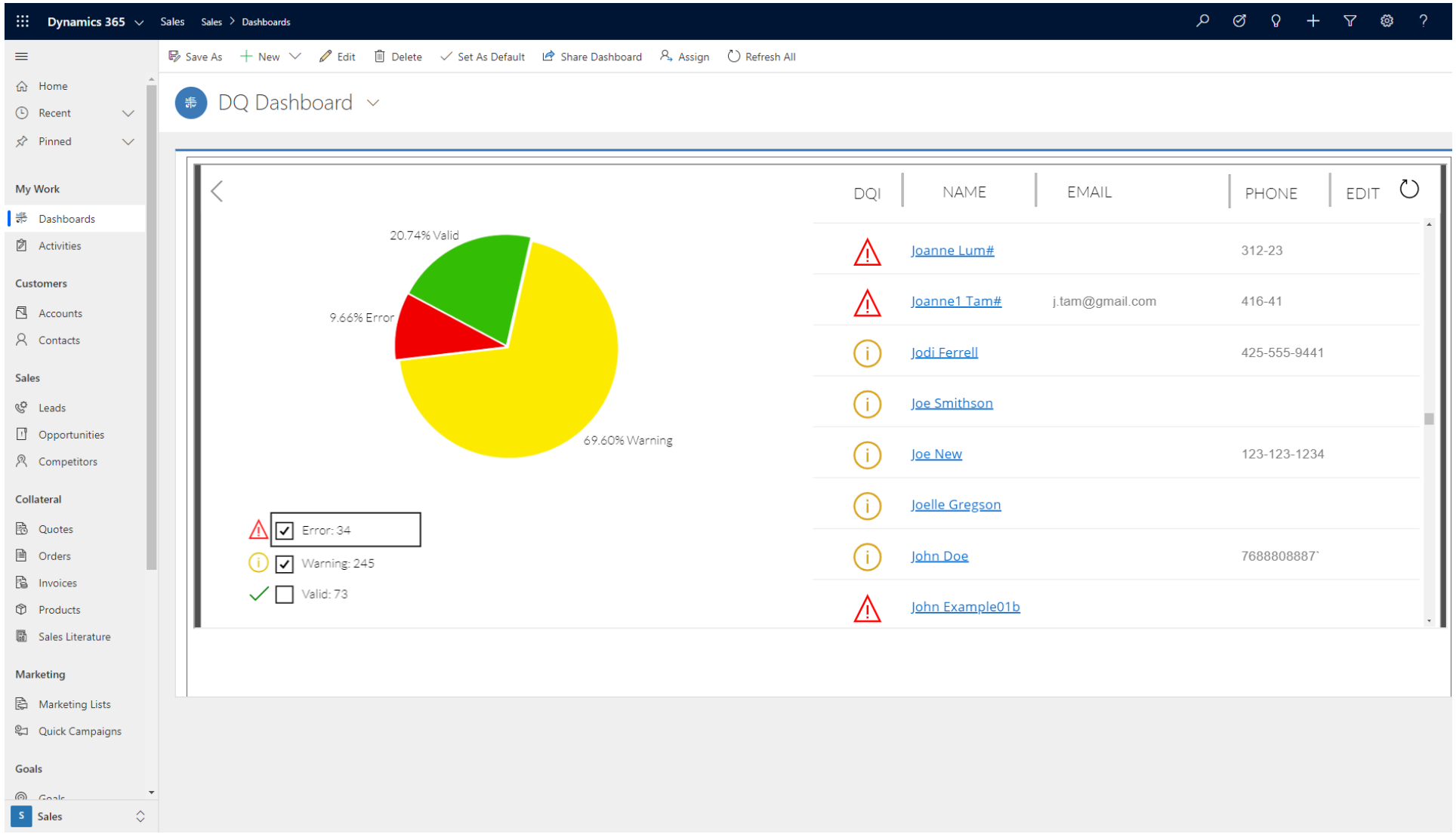
Adastra Example: Onboarding App



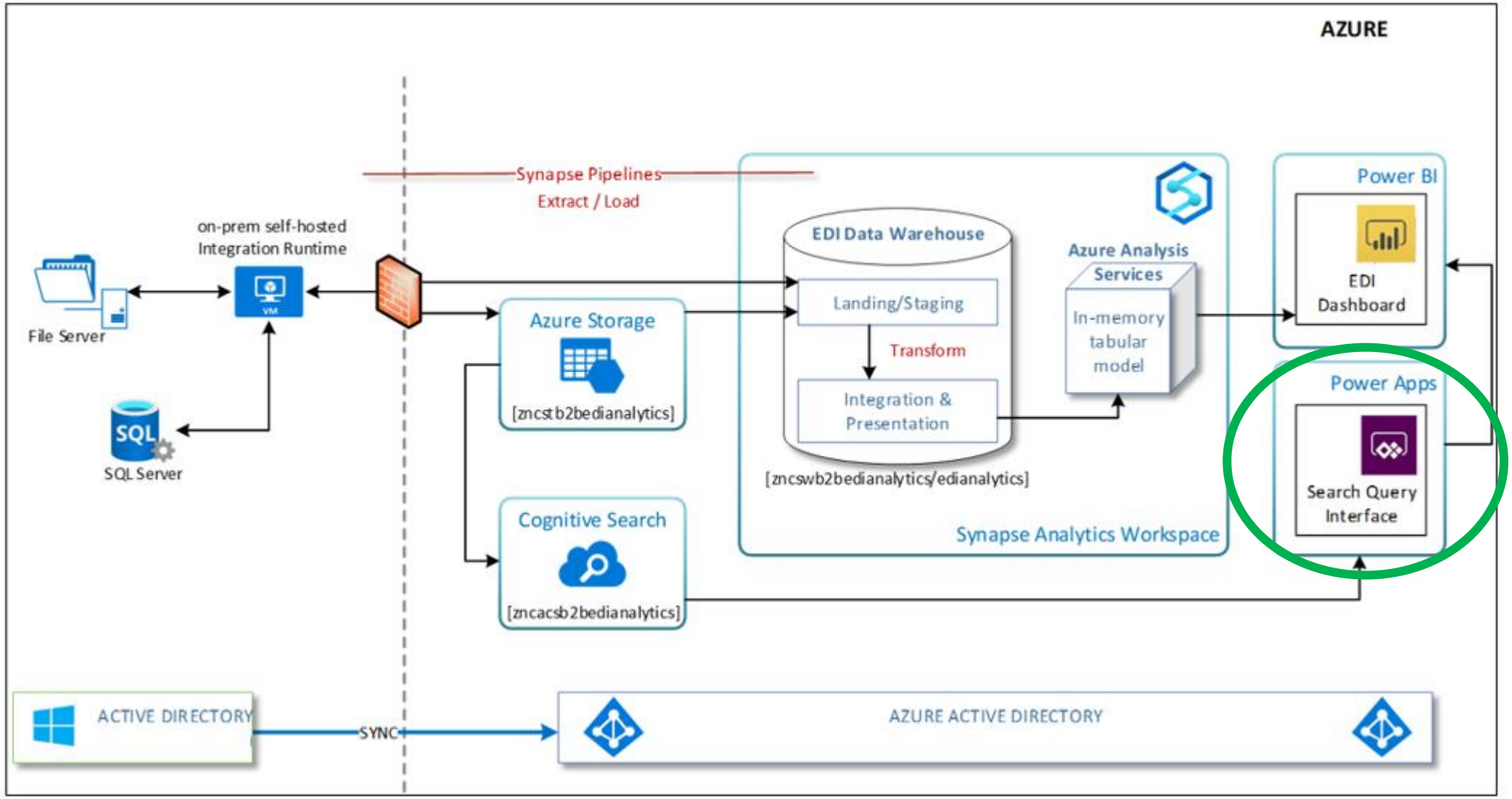
Adastra Example: Data Quality App



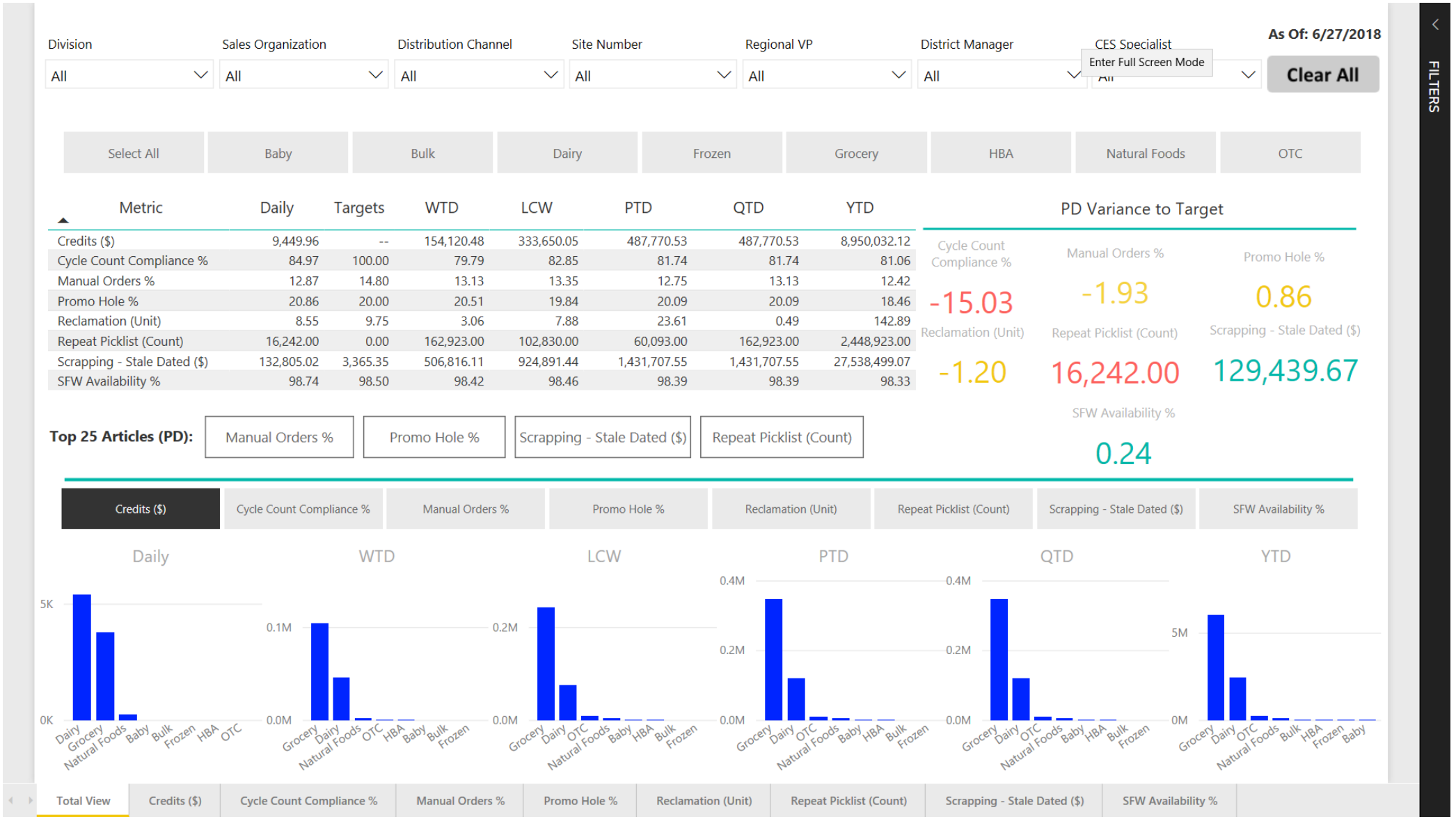
Adastra Example: Data Quality App



Adastra Example: Cognitive Search Query App

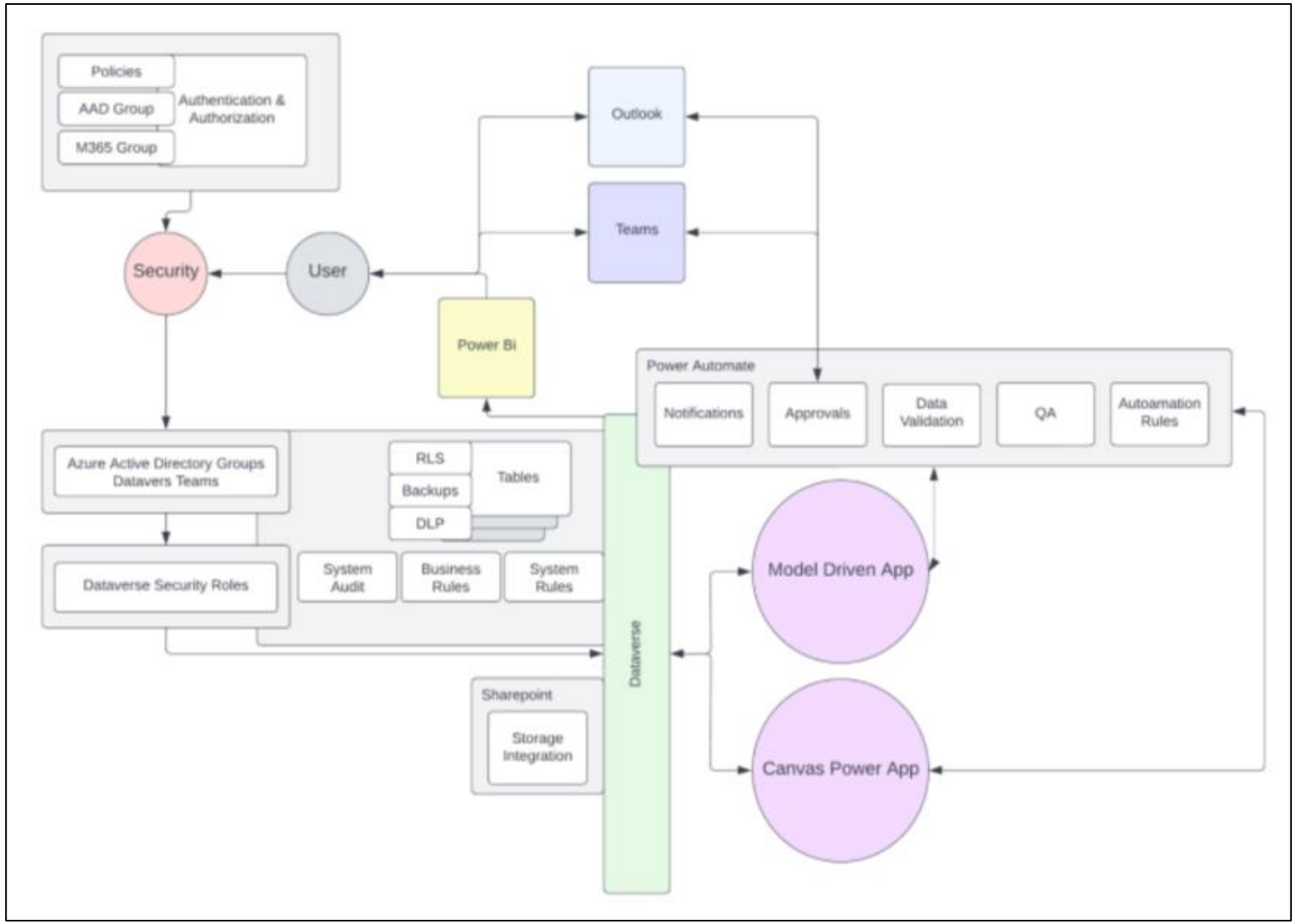


Adastra Example: KPI Report

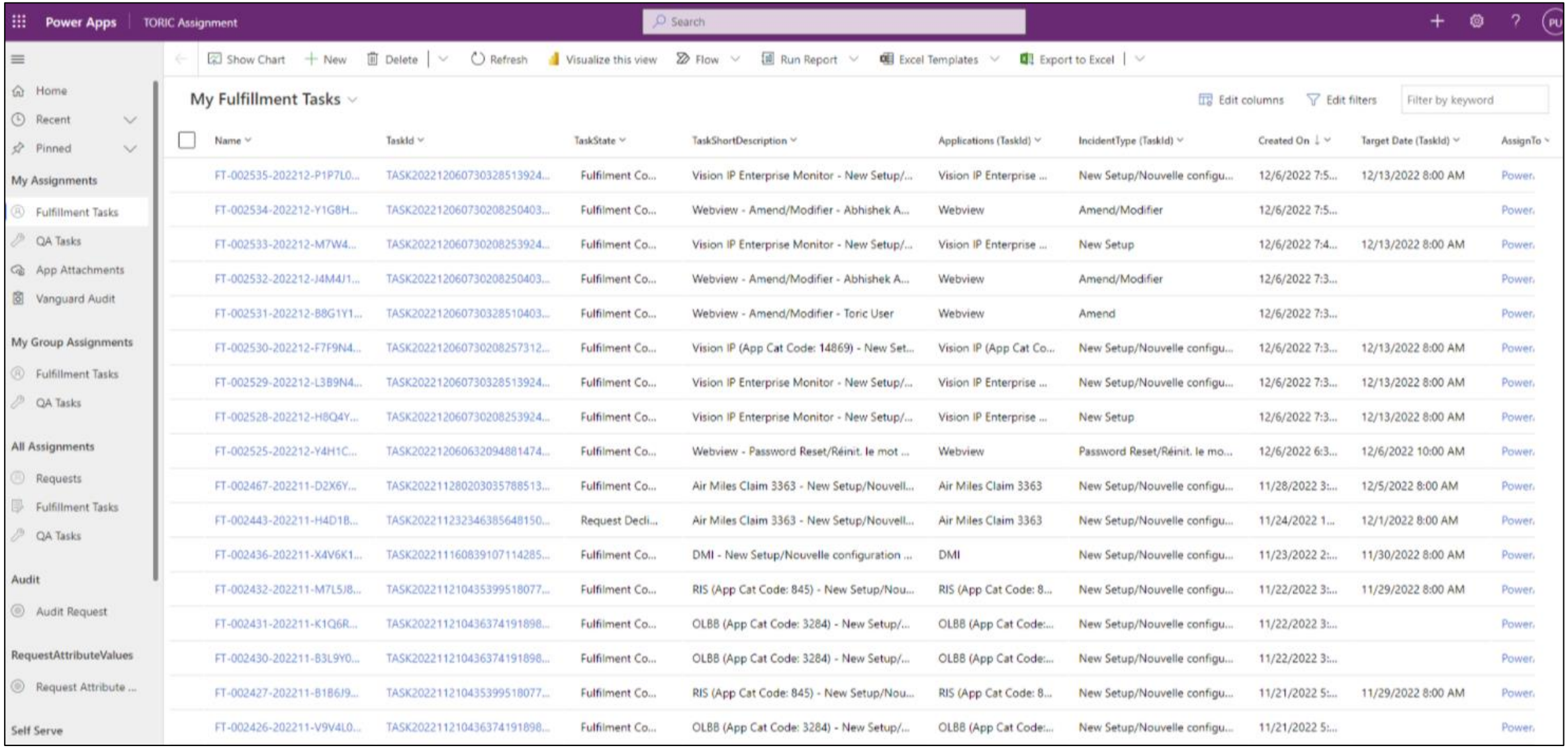


Enterprise Application Onboarding (350+ Apps)

Power App / Automate Architecture



Power App Management Page



Power Platform for Industry

Power Apps Store

Paperless Plant Floor

Name	Description
Quality Control Card	Digitize the Quality inspection data from paper on the shop floor
Shop Floor Kiosk Apps	Enable Paperless reporting of HR, Health and Safety, Time Reporting for plant workers

Powered By

PowerApps

Power BI

Sample Page

Back | Log Off | Quality Control Card | Control Cards | New Inspection

Customer:

Part No.: G22934996

Inventory No.: G22934996

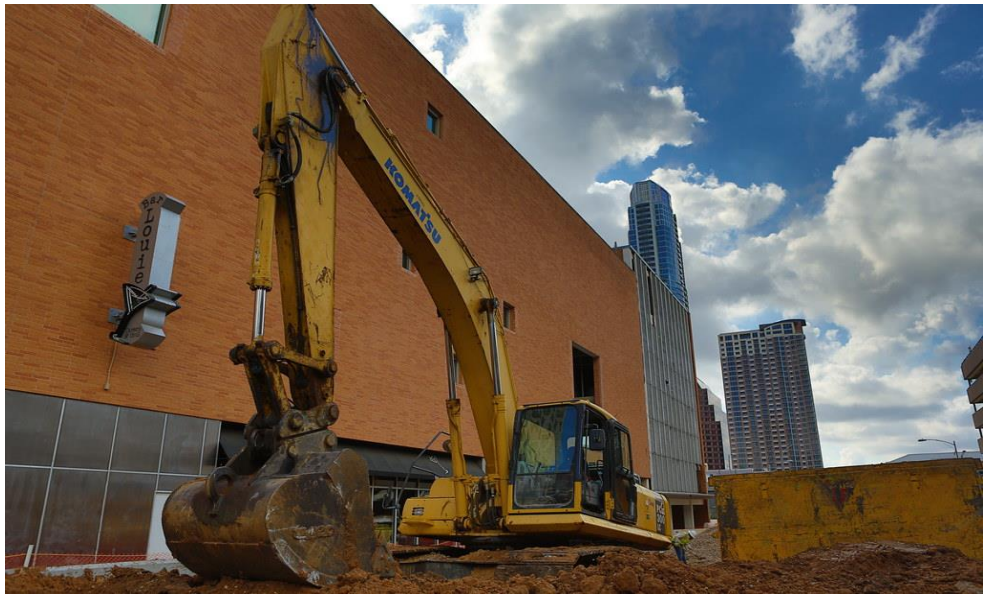
Eng Level: test

Frequency: 1/250

Operation: test

#	Method	Jig	Characteristic	Inspection #				
				Edit	Edit	Edit	Edit	Edit
			Inspection No.	1	2	3	4	5
			First Off/Last Off/NA	F.O.	NA	NA	NA	NA
			Datetime	9/21/2022 5:15 PM	10/17/2022 10:11 AM	10/17/2022 10:17 AM	10/17/2022 10:26 AM	10/17/2022 11:07 AM
			Shift	2	1	3	1	1
			Counter Reading	100	101	102	103	104
1	VIS		VISUAL DEFECTS: NO DAMAGE TO THREADLESS NUT 6 PLACES (100%)	OK	OK	OK	NG	OK
			T.W.O. Issue Datetime if Applicable					
			R&D No.	0			0	0

Excel Modernization



Name	Description
KPI Target Admin	Divisional and Subgroup Targets for the MP&L KPI's
ERP Assessment Management	Division reporting their usage of the 14 key functionalities in their ERP System.
Data Steward Record Admin	The SME's tracking of Cycle Count Guidelines, Delivery Performance Requirements, PFEP, and Physical Inventory Tracker for Exclusion.
Security and License	Tracking of access, permissions, and licenses to all the groups that are required for our role-based security required for all of our Power Apps and PBI reports.
Commercial Incident Management	Shared Excel based system to track Can/US Commercial Issues with Financial implications that was susceptible to human error.

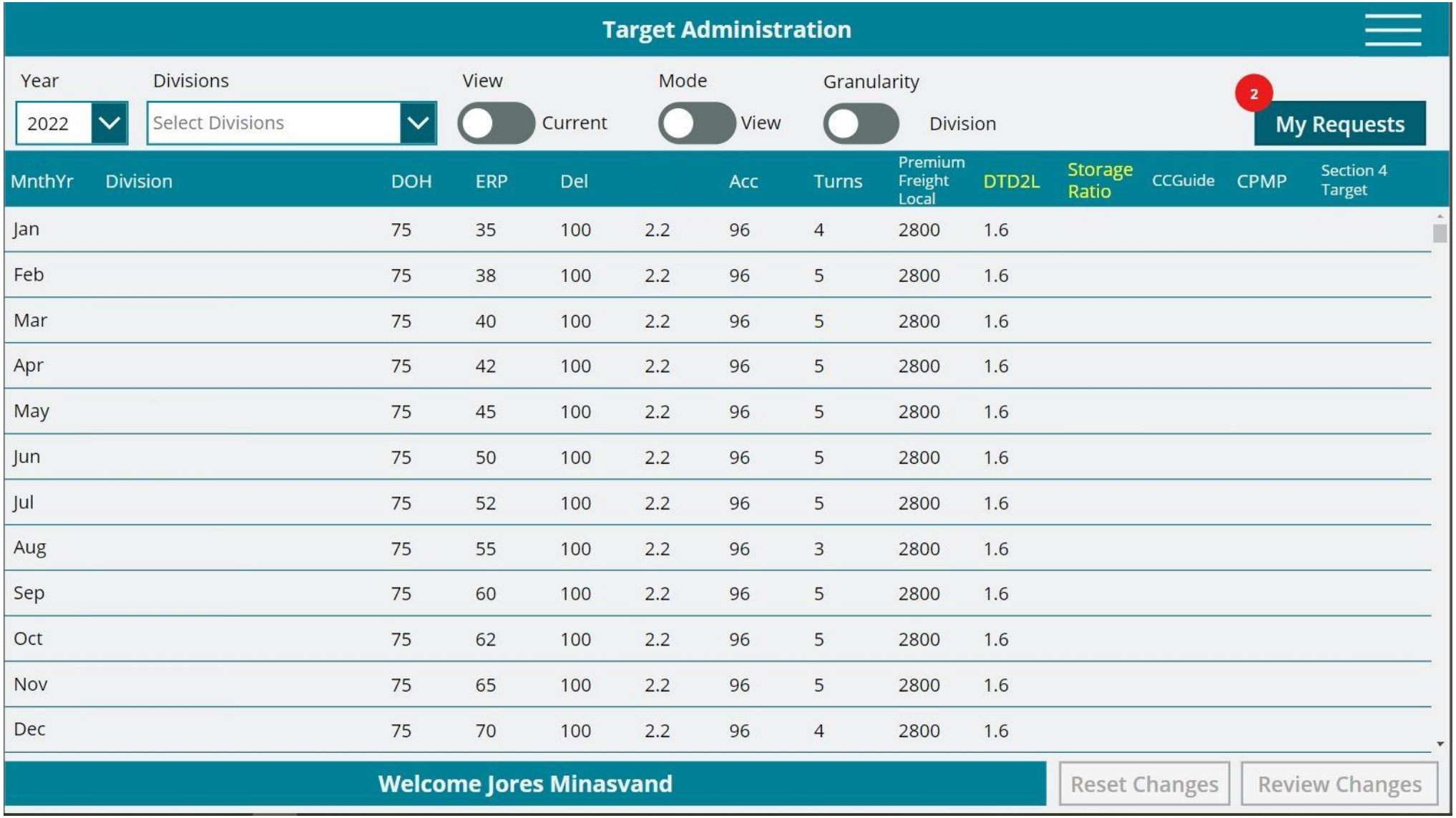
Powered By

Azure Data Factory

PowerApps

Power BI

Sample Page


Target Administration
Year
2022
Divisions
Select Divisions
View
Current
Mode
View
Granularity
Division
2
My Requests
MnthYr
Division
DOH
ERP
Del
Acc
Turns
Premium Freight Local
DTD2L
Storage Ratio
CCGuide
CPMP
Section 4 Target
Jan 75 35 100 2.2 96 4 2800 1.6
Feb 75 38 100 2.2 96 5 2800 1.6
Mar 75 40 100 2.2 96 5 2800 1.6
Apr 75 42 100 2.2 96 5 2800 1.6
May 75 45 100 2.2 96 5 2800 1.6
Jun 75 50 100 2.2 96 5 2800 1.6
Jul 75 52 100 2.2 96 5 2800 1.6
Aug 75 55 100 2.2 96 3 2800 1.6
Sep 75 60 100 2.2 96 5 2800 1.6
Oct 75 62 100 2.2 96 5 2800 1.6
Nov 75 65 100 2.2 96 5 2800 1.6
Dec 75 70 100 2.2 96 4 2800 1.6
Welcome Jores Minasvand
Reset Changes
Review Changes

Sample Page

Scorecard KPI Admin
Welcome Jores Minasvand
KPI
All
Division
Year
All
Month
All
Division
All
Clear Selection
Divisions
KPI
Division
MonthYr
KPI Value
Color Override
PPAP on Time
Oct 2021
0
Premium Freight $
Oct 2021
0
PPAP on Time
Oct 2021
Premium Freight $
Oct 2021
PPAP on Time
Oct 2021
Premium Freight $
Oct 2021
41777
PPAP on Time
Oct 2021
Premium Freight $
Oct 2021
PPAP on Time
Oct 2021
PPAP on Time
Oct 2021
PPAP on Time
Oct 2021

KPI & Reporting

Name	Description
Scorecard KPI	Excel Scorecard that was populated by the Directors of 9 different Functional Areas (HR, Quality, Mafact, Launch, Operations, Bus Dev, I4.0, & HS&E).
"On-Target" Monthly KPI Reporting	Excel workbooks that were emailed at month end with the MP&L KPI data, and manually entered the MP&L Database
Customer Delivery Rating Monthly Reporting	Excel workbooks that were emailed at month end with the MP&L KPI data, and then manually entered the MP&L Database
MRO Dashboard	Ingest data from across plants, integrate and standardize part, supplier and pricing detail to enable advanced analytics and identify cost saving opportunities and operational efficiencies.

Powered By

Azure Data Factory

PowerApps

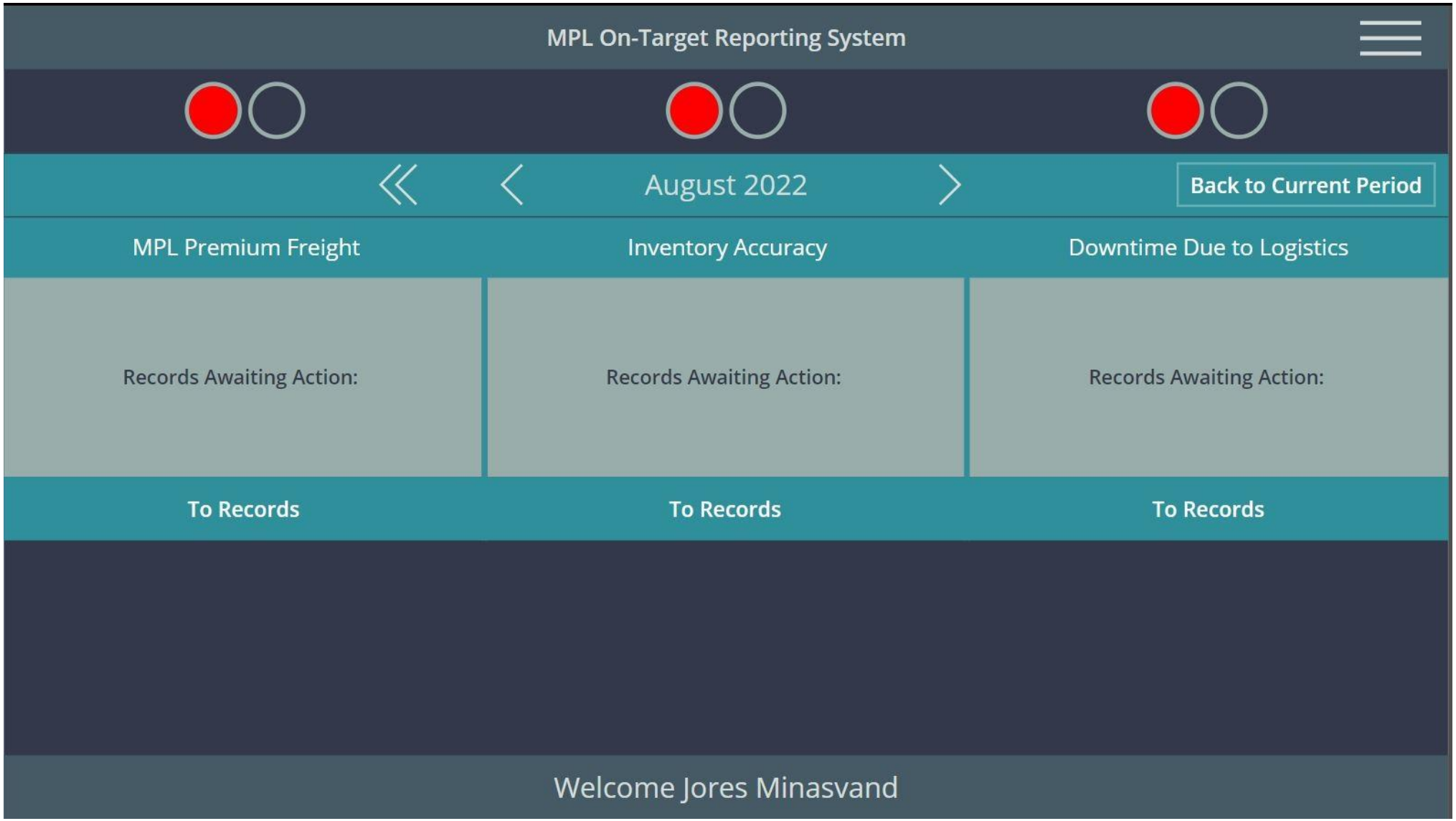
Power BI

Sample Page

Year	Month	Functional_Area	KPI	Region	Division
2021	November	All	All	All	All

Functional Area	KPI	Region Group	AC																		
HR	EOS Overall	83%	77%	87%	80%	70%	87%	91%	91%	87%	92%	90%	91%	88%	77%	85%	88%	75%	76%	73%	83%
	% Temporary Workers	6.3%	12.6%	17.3%	2.0%	2.0%	0.0%	4.2%	0.0%	7.6%	1.6%	8.0%	2.4%	3.6%	3.3%	3.9%	18.5%	5.1%	9.4%	22.0%	3.3%
	Turnover - Total (fulltime) Headcount	231	15	0	4	25	0	4	1	21	2	9	3	2	29	20	8	44	20	3	17
	Open Positions (hourly)	695	13	95	8	180	2	0	3	40	4	10	0	0	60	57	38	25	59	0	91
	Open Positions (hourly Skilled Trades)	160	11	11	3	4	6	2	3	7	1	5	4	4	11	21	7	19	22	2	12
	Open Positions (Professional)	118	4	13	2	1	0	1	9	3	0	12	10	1	16	7	5	6	12	3	2
	EOS Action Plan Past Due Status	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
HS&E	H&S Overall Score	13.0	14.4	12.8	15.0	13.6	13.5	12.6	12.8	13.6	13.6	12.9	15.0	12.5	13.8	10.4	15.0	8.5	11.0	13.2	11.8
	Environmental Overall	3.00	4	2	3	3	3	4	3	3	5	5	3	5	5	3	NoData	1	2	3	3
Launch	PPAP on Time	57%	n/a	0%	100%	n/a	n/a	0%	0%	100%	n/a	n/a	n/a	n/a	n/a	n/a	n/a	100%	n/a	n/a	n/a
	Kick-Off on Time	38%	33%	0%	67%	n/a	50%	0%	0%	n/a	100%	0%	0%	0%	0%	67%	0%	n/a	50%	n/a	100%
	Gate Review on Time	94%	100%	100%	100%	100%	83%	80%	100%	100%	100%	88%	0%	100%	100%	100%	100%	100%	83%	n/a	100%
	TQP	64.7%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	66.7%	100.0%	66.7%	0.0%	0.0%	0.0%	53.3%	n/a	100.0%	27.3%	n/a	100.0%
	PPAP on Time 2	95.2%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	n/a	100.0%	n/a	100.0%	88.9%	n/a	100.0%	n/a	56.3%	n/a	100.0%
	Kick-Off on Time 2	89.6%	100.0%	n/a	87.5%	n/a	85.7%	n/a	75.0%	100.0%	100.0%	71.4%	0.0%	100.0%	100.0%	75.0%	100.0%	n/a	100.0%	n/a	100.0%
	TQP 2	65.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	71.4%	81.8%	100.0%	83.3%	100.0%	100.0%	0.0%	45.5%	100.0%	100.0%	21.7%	n/a	100.0%
Operations	IDL dollars % on sales	16.1%	14.5%	10.1%	16.0%	27.7%	20.6%	20.0%	11.1%	12.1%	17.2%	10.4%	17.1%	18.2%	19.5%	33.0%	14.6%	24.7%	17.0%	25.3%	15.0%
	DL dollars % on sales	6.2%	6.5%	4.0%	4.9%	6.5%	4.2%	6.3%	4.3%	5.8%	5.7%	5.6%	5.0%	4.5%	6.7%	7.6%	5.8%	11.4%	9.4%	12.2%	6.7%
	Tool SPM Efficiency %	66.5%	89.0%	n/a	47.0%	n/a	53.0%	52.0%	54.0%	72.0%	67.0%	n/a	71.0%	74.0%	48.0%	87.0%	n/a	n/a	70.0%	n/a	81.0%
	Press SPM Efficiency %	47%	46%	n/a	39%	n/a	40%	49%	45%	49%	51%	n/a	48%	43%	23%	64%	n/a	n/a	55%	n/a	56%
Bus. Dev. CI/CR	Total Productivity Initiatives (Full Year)	111%	133.8%	108.8%	83.2%	55.5%	108.6%	114.5%	129.9%	134.3%	95.3%	135.3%	122.1%	163.8%	88.0%	99.1%	126.3%	141.6%	101.1%	117.6%	78.0%
	Total Productivity Initiatives (Actual Year to Date)	90%	92.7%	92.2%	89.1%	87.1%	92.9%	88.6%	86.9%	89.3%	92.2%	88.0%	91.9%	95.4%	83.9%	88.8%	89.4%	91.9%	88.3%	94.6%	90.7%
	Sustainability	5	3	3	1	1	1	1	1	3	5	1	3	1	1	3	1	3	5	1	1
Quality	Incidents	36	1	1	0	0	0	1	0	0	2	1	2	0	1	7	0	4	9	0	7
	Cost of Poor Quality % Sales	1.03%	1.22%	0.58%	0.79%	0.76%	0.65%	0.56%	0.80%	0.79%	0.13%	0.69%	0.07%	-11.71%	0.61%	1.19%	1.06%	7.76%	0.67%	22.08%	0.25%
MP&L	Inventory Accuracy	97.9%	99.3%	98.2%	97.3%	98.5%	99.8%	99.9%	99.5%	98.3%	98.8%	86.0%	99.7%	97.9%	97.2%	97.0%	98.8%	92.8%	95.0%	95.8%	98.7%
	Premium Freight $	$90,965	$0	$8,048	$0	$0	$0	$0	$0	$140	$0	$0	$0	$0	$1,550	$15,125	$0	$25,210	$0	$0	$40,892
	Delivery Performance - Lowest Score	98.8%	99.0%	89.3%	100.0%	100.0%	100.0%	92.7%	90.0%	100.0%	100.0%	65.0%	100.0%	63.5%	97.0%	92.0%	100.0%	0.0%	60.5%	100.0%	66.0%
MAFACT	MAFACT Audit Overall Results	2.43	2.63	2.82	2.81	2.43	2.66	2.10	3.47	3.77	2.25	2.31	2.63	2.19	1.81	2.12	3.37	1.87	1.97	2.00	2.19

Sample Page

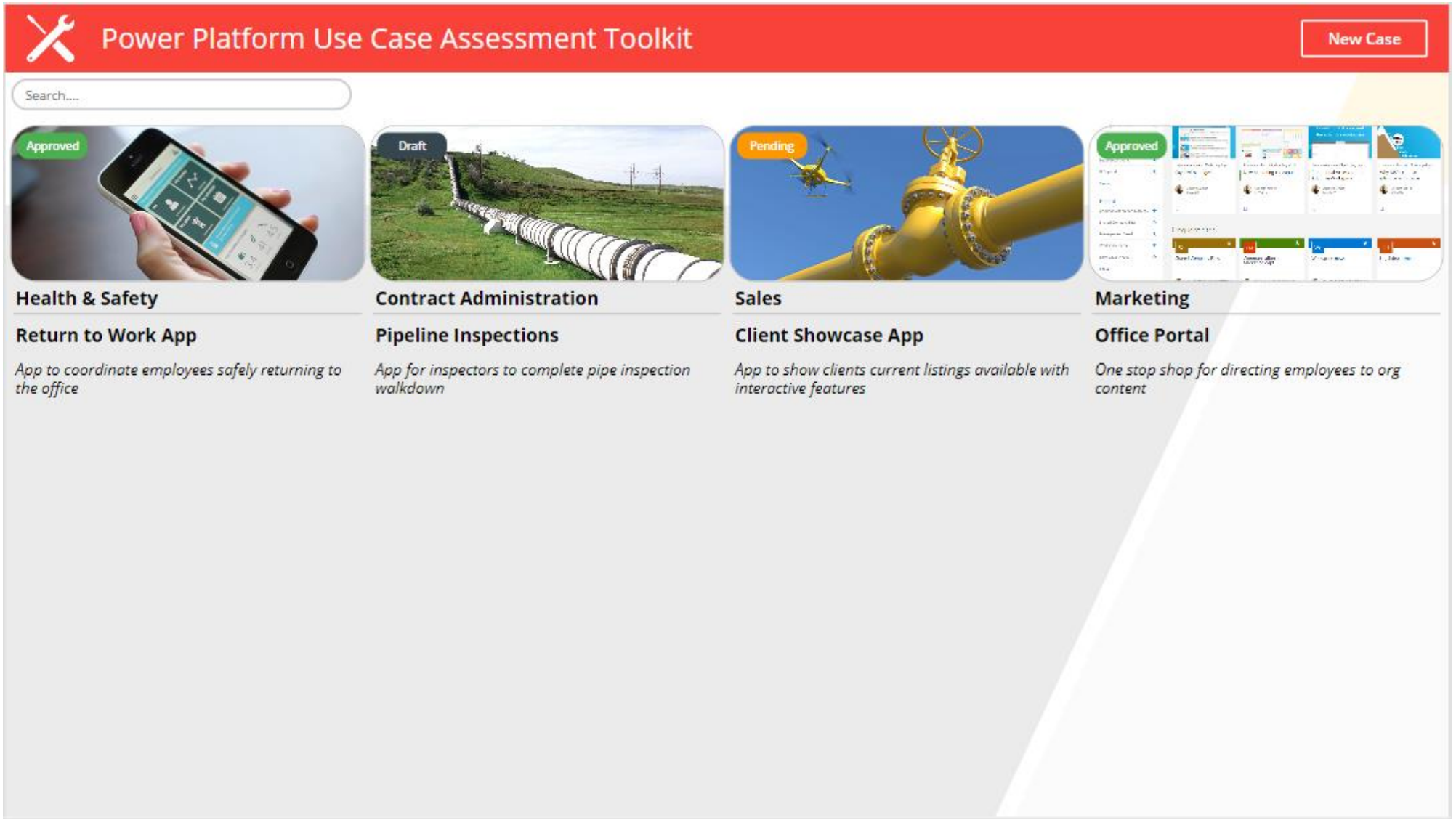

MPL On-Target Reporting System
August 2022
Back to Current Period
MPL Premium Freight
Inventory Accuracy
Downtime Due to Logistics
Records Awaiting Action:
Records Awaiting Action:
Records Awaiting Action:
To Records
To Records
To Records
Welcome Jores Minasvand

Use Case Assessor Toolkit App

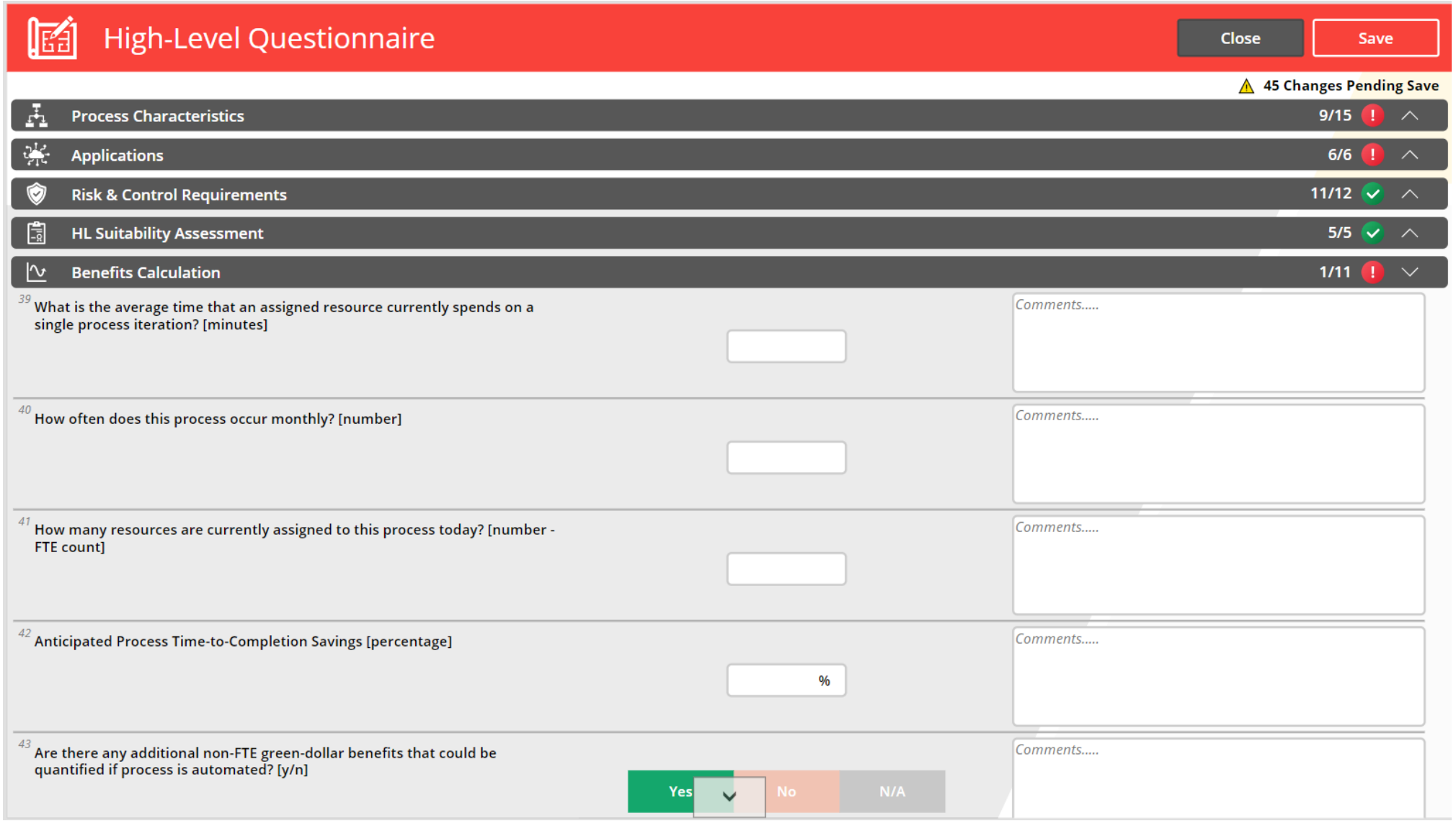
Use Case Assessment

The purpose of Adastra's Use Case Assessment Toolkit is to review the Power Platform opportunity presented by the business and assess viability, technologies, and effort for implementation. As part of the assessment, automation complexity is determined by analyzing process flow, key metrics, and technical factors. This tool produces a scorecard on the overall Power Platform opportunity. Adastra includes this toolkit at no cost with Power Platform governance engagements.

Use Case Assessment Toolkit

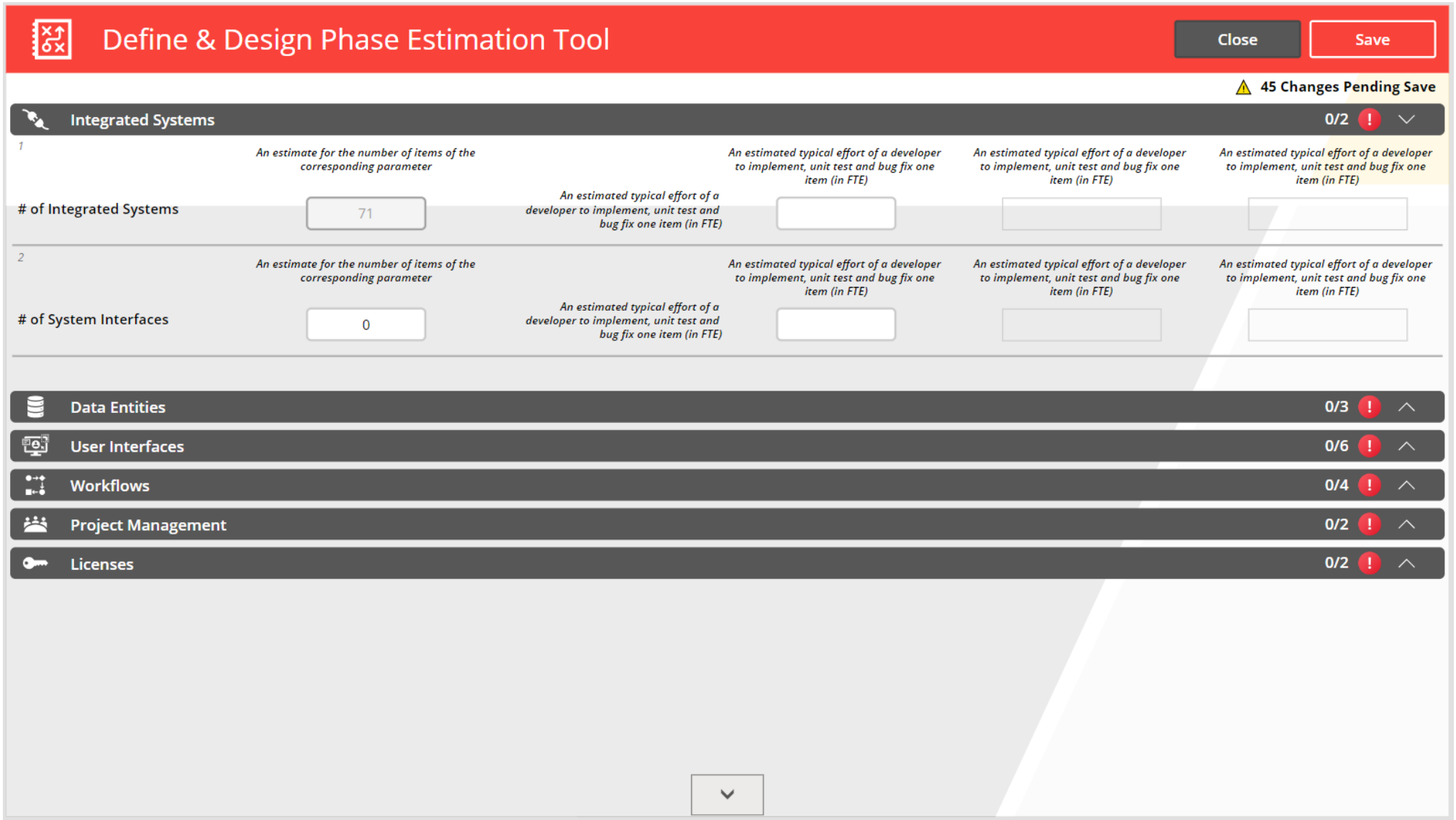


Use Case Assessment Toolkit



Use Case Assessment Toolkit

Use Case Assessment Toolkit



Use Case Assessment Toolkit

Case Summary

Close | Save

Add Picture

USE CASE ASSESSMENT STATUS

High-Level Questionnaire	Detailed Questionnaire	Suitability Assessment	Technical Estimation Tool	Use Case RACI	Application List
32/53	13/22	0/32	0/19	0	

USE CASE COMPLEXITY RATING

AFTER INTAKE	AFTER DEFINE & DESIGN
LOW	HIGH

Use Case Name *ID Not Generated*

⚠ 45 Changes Pending Save

Use Case Description

PROCESS CHARACTERISTICS

# of Actions	<10
# of Stages	N/A
Multiple Decision Paths?	Yes
# of Decision Points	34
# of Approval Points	-
User Interface(s) Required?	Yes
Highest Data Classification?	Confidential
BASEL / SOX / PCI / PII compliance required?	Confidential

APPLICATIONS CHARACTERISTICS

Main Data Repository Involved	Unstructured File(s)
Number of Applications	71

BUSINESS BENEFITS (QUICK START)

Potential Capacity Savings (FTE)	-
Additional Non-FTE Benefits (Annualized)	-

TECHNICAL DEVELOPMENT COMPLEXITY CATEGORIZATION

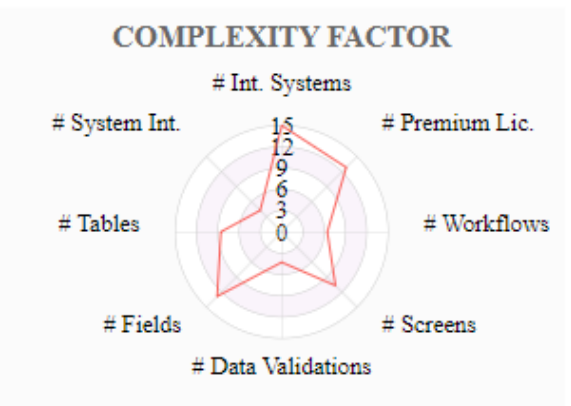
New Power Platform Features or Connections Required	-
Access to Dataverse Required?	-
New Sensitive data additions to Delivery Hub Dataverse?	-
Volume of components (Screens, Tables, Fields, Flows, Actions)*	-

EFFORT ESTIMATES

Quick Start Estimate (Days)	-
Technical Estimate (Days)	-

COST ESTIMATES

WAG Estimate - Not including Licensing Costs	-
Technical Estimate (Define & Design Phase)	-



KPI Thresholds App

Power Platform KPI Thresholds Offer

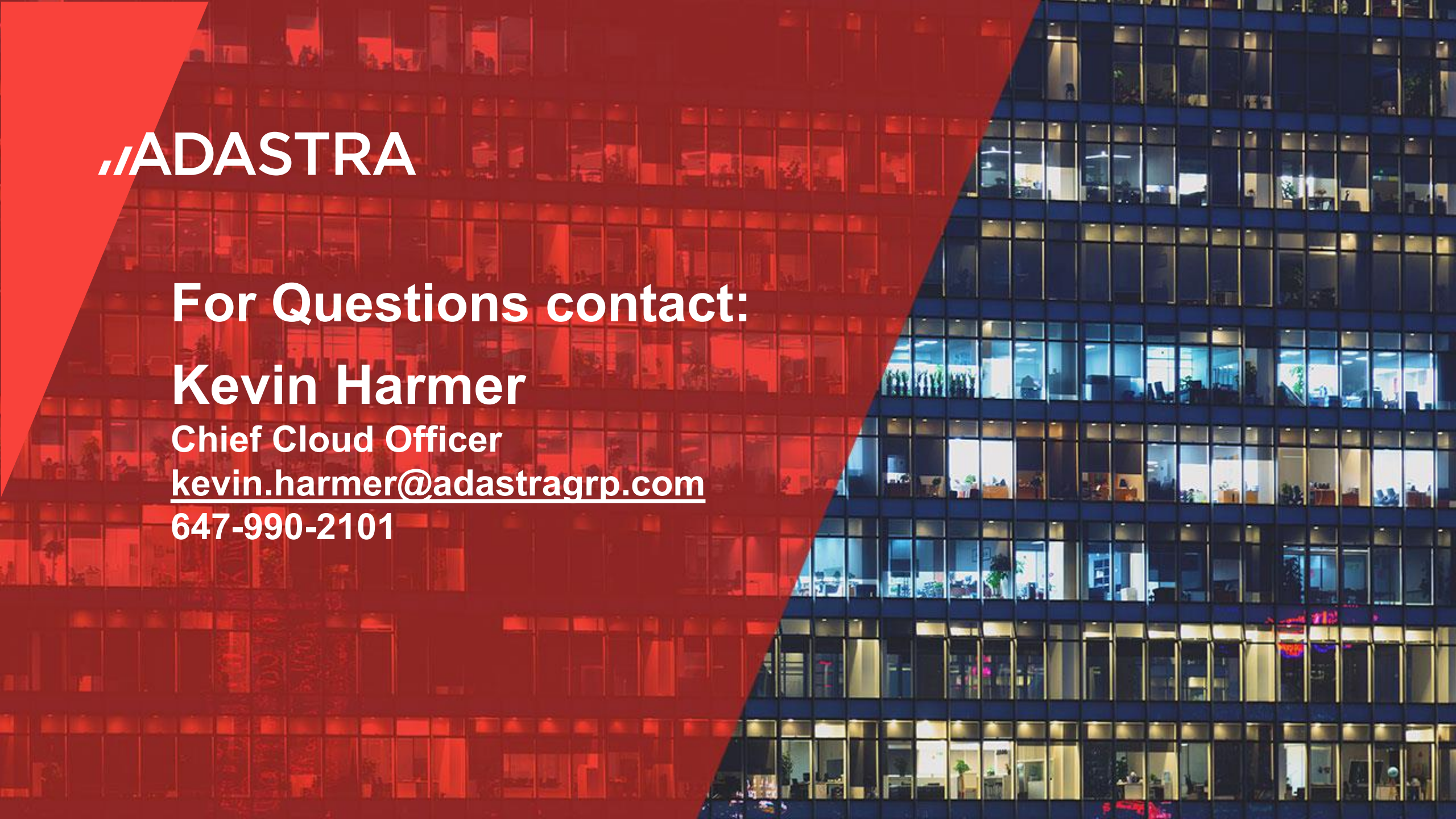
Task	W1	W2	W3	W4
Power App Implementation	→			

- 1 x Power Platform Developer

- **Cost: $25k**

Executive decision makers rely on KPI thresholds (i.e. red / yellow / green values) to evaluate corporate performance from Azure data. Traditionally, KPI thresholds are hard coded across many Power BI reports, making adjustments difficult and time consuming. Through Adastra's KPI Threshold's Power App, organizational KPI thresholds are centrally managed and integrated with Power BI, facilitating quick and dynamic self service adjustment across dashboards.

- Benefits:
  - Maintains a central dictionary of all KPI's and related thresholds
  - Enables self service KPI adjustments by executive decision makers
  - Automated integration of KPI threshold changes with Power BI
  - Delivers optimized report outcomes in minutes, with no developer engagement
- Through this offer, Adastra will:
  - Deploy our KPI thresholds Power App package in your tenant
  - Register up to 20 KPI's in the app
  - Integrate KPI thresholds with up to 4 Power BI reports
  - Setup automation to ensure KPI threshold changes immediately update in reports
  - Provide documentation and knowledge transfer so you are ready to support and operate the solution



For Questions contact:

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