

Project 2: PowerApps/Teams Chat Box

Deepak Budwani, Chief Financial and Administrative Officer, will serve as Project Sponsor on behalf of the Office of the Public Defender, Santa Barbara County. Luis Ramirez will lead the project with Xavier Navarro serving as co-lead. AJ Voisan, Mark Perez, Brent Modell and Alan Bediaamol will serve as additional project team members and subject matter experts.

Background

Over the last two years, the Public Defender's Office has been developing solutions to bring task administrative services such IT helpdesk requests, General service requests, time off and other needs to a central location. The first app, PDHelpDesk will allow users to submit any requests from a number of categories, from their laptop or their work-issued phone. Currently, the department is using Outlook with a service account email in order to submit requests for help. These requests include general troubleshooting of software/hardware errors, optimization of media (audio, video), and help with our Content Management System (eDefender).

The goal of the PDHelpDesk is to allow the request to be as specific as needed, to alert tech admins of incoming tickets, and track the status of the ticket from creation to completion. In addition to it being a service to our users, the analytics provided by the ticket history database will provide valuable insights, allowing IT to address pain points that may occur frequently, and preempt the most common ticket categories.

The other application, PDGO is focused on administrative issues such as general service, time off requests and MCLE training tracker. The goal of this app is to eliminate multiple online forms and bring them all into one central location. Requests can now be tracked and delivered to the right points of contact. Analytics will also provide valuable insights and will allow management to shift their priority wherever necessary.

Description

We are using Microsoft PowerApps as the infrastructure to these projects. PowerApps is an obvious choice because its native to the Microsoft environment as a whole, and is a feature included as part of each user license. Its low code and offers modular building blocks that reduces the learning curve to app development significantly and allows granular customization.

PowerApps supports a wide variety of connectors that allow you to connect your app to different data sources and services. Utilizing these connectors, PA can connect to Microsoft Teams, SharePoint, Smartsheet and web APIs. We can also use PowerBI to convert all data use being logged in the backend to provide valuable information that will help in future operations of the team.

Connecting PDHelpDesk and PDGO to Microsoft Teams will provide the following benefits:

1. A centralized point of interaction for users to find everything they need without leaving the tool that they spend a lot of their time. It reduces the need to switch between apps.
2. As a central hub, it can provide access to any of the requests available but also provide any content currently stored in our department's SharePoint site.
3. Users can access these apps from within Teams on a laptop or their mobile phone. Since these apps live within the county's domain along with apps from other departments, setup time for users could be drastically reduced by embedding in Teams.
4. Custom notifications could potentially provide custom notifications and status alerts within Teams.

The vision for this project is to create a chat box based on the capabilities available in both Teams and PowerApps. You would open/access the chat box from within Teams and be able to fill out a time off request, submit a helpdesk ticket for IT, access the library of tutorials currently in SharePoint site, and countless other things. When PDGO offers the ability to sign up for MCLE training, a user will be able to sign up and attend an online event without clicking away from Teams.

The first part of the project will serve as the exploratory period.

1. Understand the basics of Microsoft PowerApps and Teams as standalone services.
2. Learn about the chat box service offered within Teams. Develop a features list most essential to the Public Defender's office. Learn about the restrictions to generative AI within the county.
3. Familiarize yourself with both apps being finalized by the Public Defender's development team. Also familiarize with the different SaaS services the department uses (Smartsheet, SharePoint, etc.). Learn how they contribute to productivity of the office.
4. Learn about the connectors and workflows available between PowerApps, Teams and SharePoint. Understand the limitations set by the software as well as the restrictions placed by Santa Barbara County.
5. Developing a workflow process for the information that is being submitted and the data that is being requested.
6. Determine if a simple chat box can be implementing based on all the information gathered.
7. Create Documentation of research done.

The second part of the project will serve as the development period.

1. Create a Sandbox environment where creation and testing will take place. Replicate the structure as it exists now within the Public Defender's office.
2. Create the first version of the chat box that offers content retrieval (e.g. tutorials) from our established libraries in SharePoint and Smartsheet.
3. Connect both PDHelpDesk and PDGO to chat box within Teams. If possible, start testing with a single category from each app, if processes are able to be isolated.
4. Determine if chat box version of a helpdesk request can be restructured a certain way, even if it holds on to the same backend mechanism created for the app.
5. Create Documentation and provide a beta version for continued development in house.