OCS – MEL Data Integration (Partner) Codeless Method

OCS REST API – Microsoft Power Automate (a.k.a. Microsoft Flow) – MEL REST API



Process Flow – Partner Creation

OCS: New donor / partner created OCS: Generate notification to a dedicated mailbox to trigger the process Microsoft Flow: **GET** donor / partner info via OCS REST API Microsoft Flow: Map and validate data to fulfill MEL's requirement Microsoft Flow: **POST** donor / partner info via MEL REST API



Pre-requisite

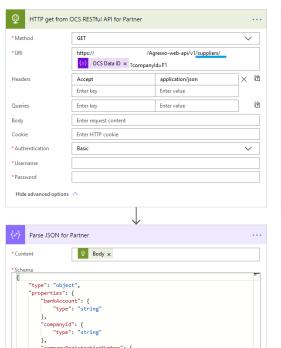
- a) OCS user account with menu access and appropriate data control on Public Web API / Object
 - To harvest data from OCS REST API
 - Get it from center OCS team
- b) Center owned Office365 account with license on OneDrive, Outlook and Microsoft Flow Premium (Connector to call HTTP request only available for Premium account, P1 for charity cost approximately USD29 per year, WorldFish is using Microsoft E2 account)
 - To setup Microsoft Flow
 - Get it from center ICT team
- c) Master spreadsheet hosted on OneDrive with Table / master sharepoint list to define linkage of OCS Partner Type to MEL Partner Type
 - For data cleansing of OCS data
 - Create it with the same Office365 account
- d) MEL REST API authorization token

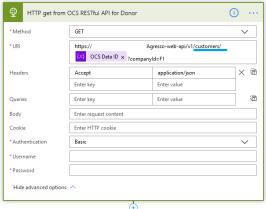


Microsoft Flow – GET from OCS REST API

Generate from sample

- <u>Partner</u> dataset in MEL consist of both <u>Donor and Partner</u> dataset in OCS.
- For WorldFish, Donor dataset is hosted in Customer Master File while Partner dataset is hosted in Supplier Master File.
- Call both Supplier and Customer REST API using OCS account.



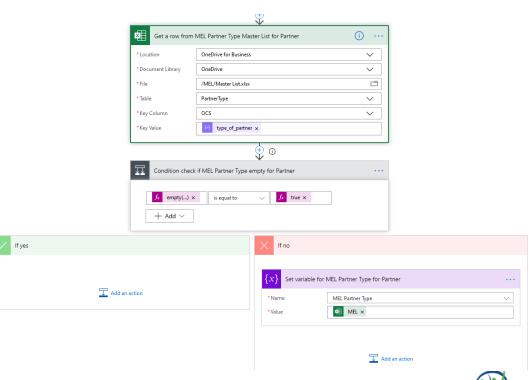




Microsoft Flow – Data Cleansing / Mapping

- Compare and correct partner type of OCS into MEL structure.
- If center decided to store MEL structure into OCS master file, this step can be skipped.

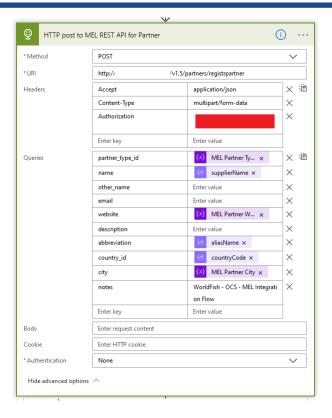






Microsoft Flow – POST into MEL

- POST the dataset via MEL REST API using the Authorization Token.
- Data posted will be review by an authorized MEL user before publish as Partner in MFI





Known Issue (for WorldFish)

- Donor and Partner dataset did not indicate clearly which master profile is Headquarters or non-headquarters – Required only Headquarters data by MEL
- City is a mandated filed in MEL, not OCS. OCS master file address section do have this info, but consists of many addresses, this may caused some issue for the reviewer.



