

Lab 2. Approvals (Part 1) - Travel Approval

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Learning objectives: Approvals and conditions.

Duration: 20 minutes.

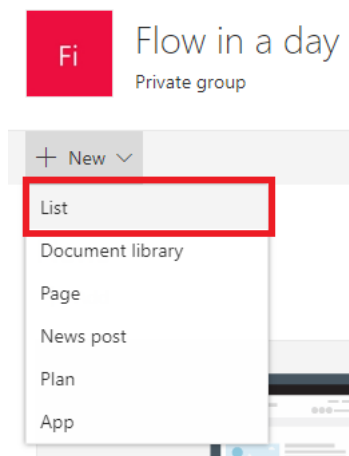
Scenario: A user stores his/her travel information in a SharePoint list named Travels. When a new travel request is created, a flow is triggered and ask a manager to Approve/Reject.

Prerequisites: Each student must have a dedicated custom SharePoint list named Travels_<name>. The list must have 3 fields: Title, Amount (currency), Status (single line of text). The student will create this list in the first task of this lab.

Remarks: the first time an approval is created in a tenant, the system creates the infrastructure (Common Data Service) needed for the approvals. Therefore, the first approval may take some time to appear.

Task 2.1: Create a SharePoint list

1. Create your own custom SharePoint list using the following steps:
 - a. Go to your SharePoint site. The site URL is:<tenant URL>sites/Flowinaday.
 - b. Click **New > List**:



- c. In the **Name** text box type something similar to, **Travels_<YourFirstnameYourLastname>**. Ensure the list name is unique.

- d. Click **Create**.

Create list

Name *

Travels_AyrtonSenna

Description

☒ Show in site navigation

Create

Cancel

2. Add 2 columns, Amount, and Status using the following steps:

- a. Click **Add column** > **Currency**.

Travels_AyrtonSenna

Title ▾

+ Add column

- b. Provide the following information, and then click **Save**.

Create a column

Learn more about column creation.

Name *

Amount

Description

Type

Currency

Number of decimal places

Automatic

Currency format

\$123,456.00 (United States)

Default value

Enter a number

☐ Use calculated value ⓘ

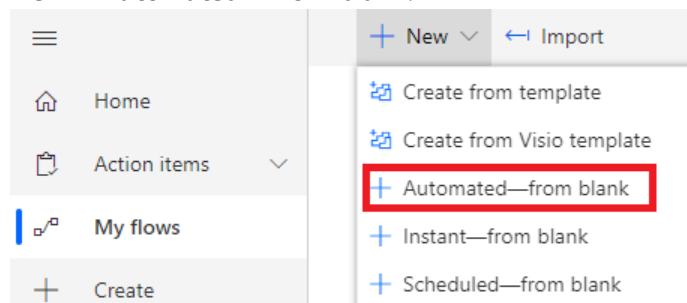
More options

Save Cancel

3. Add a **Single line of text** column named **Status**.

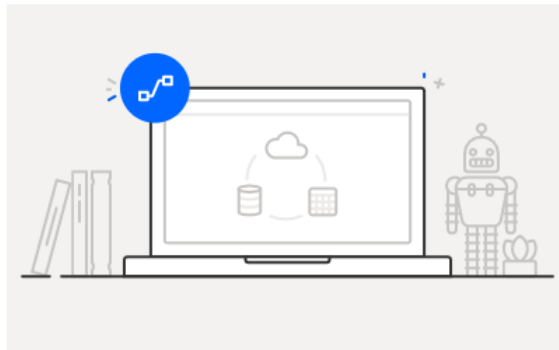
Task 2.2: Create an approval flow

1. Create a new Automated flow triggered when an item is created in a SharePoint list, using the following steps:
 - a. **New > Automated – from blank.**



- b. In the **Flow name** text box, type **Expense approval**, and select the SharePoint trigger **When an item is created**.

Build an automated flow



Free yourself from repetitive work just by connecting the apps you already use—automate alerts, reports, and other tasks.

Examples:

- Automatically collect and store data in business solutions
- Generate reports via custom queries on your SQL database

Flow name

Expense approval

Choose your flow's trigger * ⓘ

Search all triggers



When a new response is submitted
Microsoft Forms ⓘ



When an item is created
SharePoint ⓘ



When an item is created or modified
SharePoint ⓘ



When a file is created in a folder
SharePoint ⓘ



When a file is created
OneDrive for Business ⓘ



When a task is assigned to me
Planner ⓘ

Skip

Create

Cancel

- c. Click **Create**.

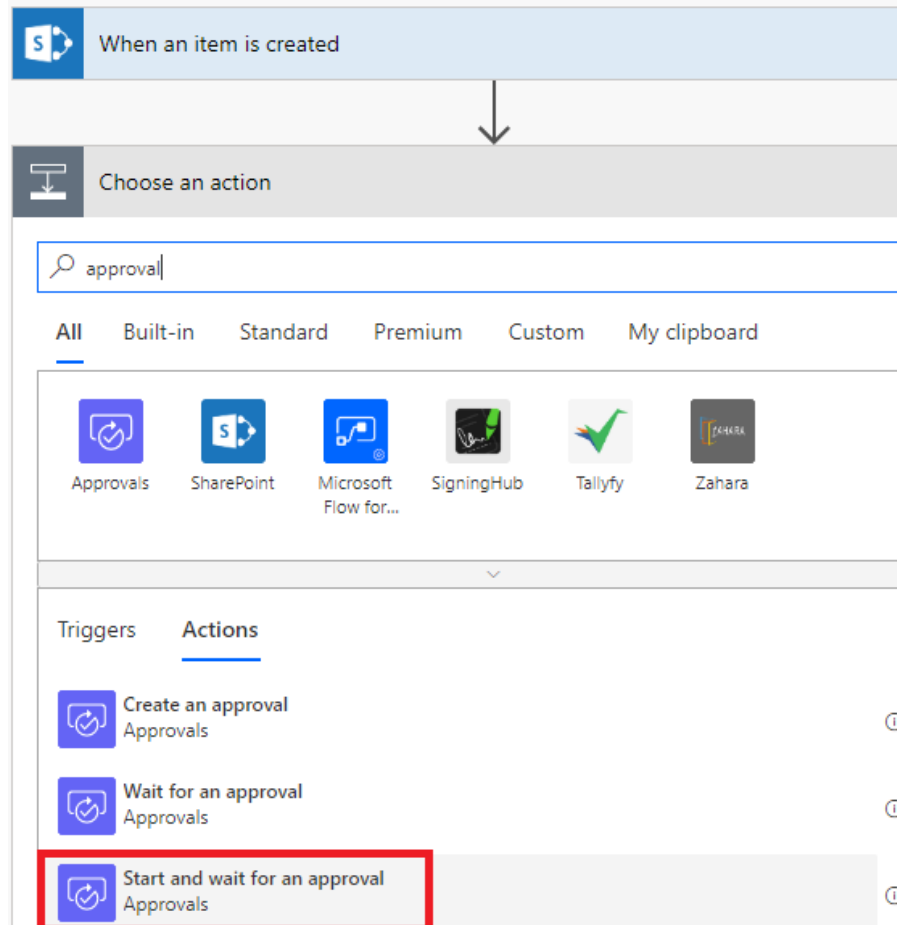
Note: If you have not connected to Office 365, SharePoint or Approvals before, you will need to provide your credentials to create connections to these services.

- d. From the **Site Address** drop-down list, select your SharePoint site and then from the **List Name** drop-down list select your list.




2. Add an approvals action

- a. **New step > Start and wait for an approval.**

Hint: search for approval.



- b. **Approval type** > **Approve/Reject -First to respond**
- c. **Title** > type **Please approve the following expense**
- d. **Assigned to** > type the e-mail address (the one provided by the trainer in the training tenant)
- e. **Details** > type the text as per the following screenshot:


Start and wait for an approval



Approval type *



Title *

Assigned to *


Details

The following expense:




Destination: Amount: has been submitted by:

Item link  

Item link description


Show advanced options 



- f. To define the destination, place the cursor to the right of destination; in the action panel, click the **Add a dynamic content** button.
- g. Scroll down to dialog and select **Title** from the trigger **When an item is created**:

 Start and wait for an approval  


Approval type*
 Approve/Reject - First to respond ▼


Title*
 Please approve the following expense


Assigned to*
 Select a user



Details  

The following expense:
 Destination: Insert a dynamic value Amount: has been submitted by:



Dynamic Value Learn more 

 Search content from previous steps

 When an item is created ▼


 ID 

Sample data not available



 Title 

Sample data not available

- h. Repeat the step above to select **Amount** and **Created By Display Name** properties.



Start and wait for an approval

Approval type*

Approve/Reject - First to respond

Title*

Please approve the following expense

Assigned to*

S

Details

The following expense:

Destination: Title Amount: Amount has been submitted by:

Created By DisplayName

Item link

fx

Add a link to the item to approve

Item link description

Describe the link to the item

Show advanced options

- i. Use the Dynamic content tab to set the **Item link** > **Link to item**

Start and wait for an approval

Approval type *

Approve/Reject - First to respond

Title *

Please approve the following expense

Assigned to *

S

Details

The following expense:

Destination: [Title] Amount: [Amount] has been submitted by:

[Created By DisplayName]

Item link

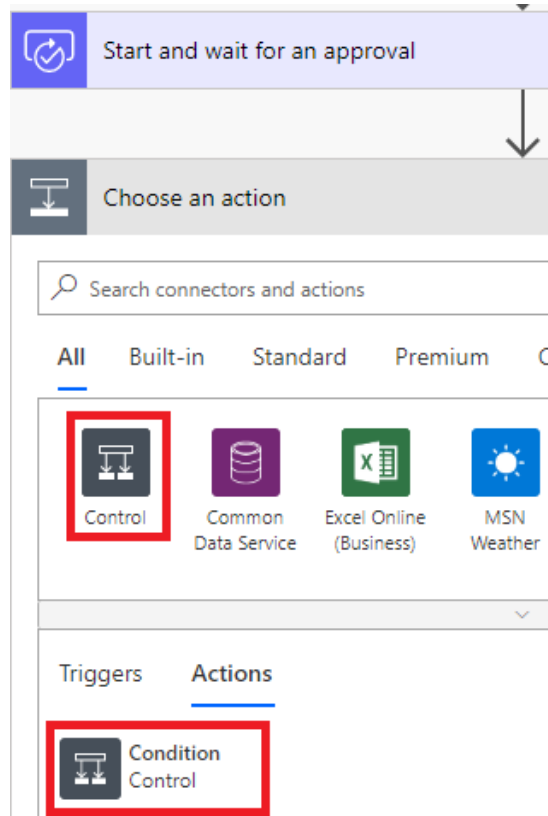
[Link to item]

Item link description

Describe the link to the item

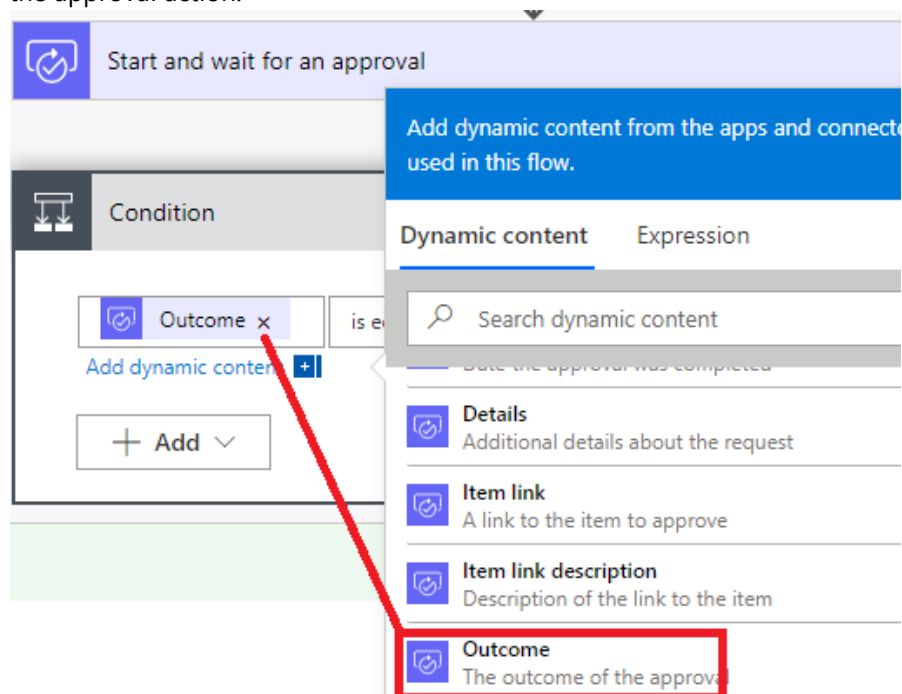
Show advanced options

3. Add a condition action using the following steps:
- a. After the **Start and wait for approval** action, select **New step** > **Condition control**

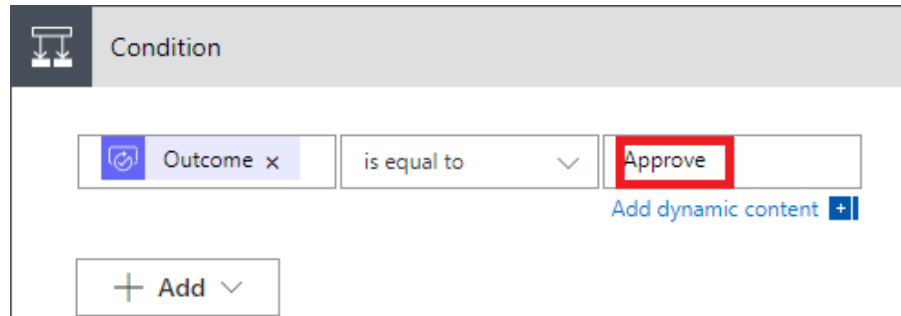


A condition is added to the flow containing three boxes, *choose a value*, *is equal to* and *Choose a value*.

- b. In the left **Choose a value** text box, use the Dynamic content tab to select **Outcome** from the approval action:



- c. In the right **Choose a value** text box, type **Approve**:



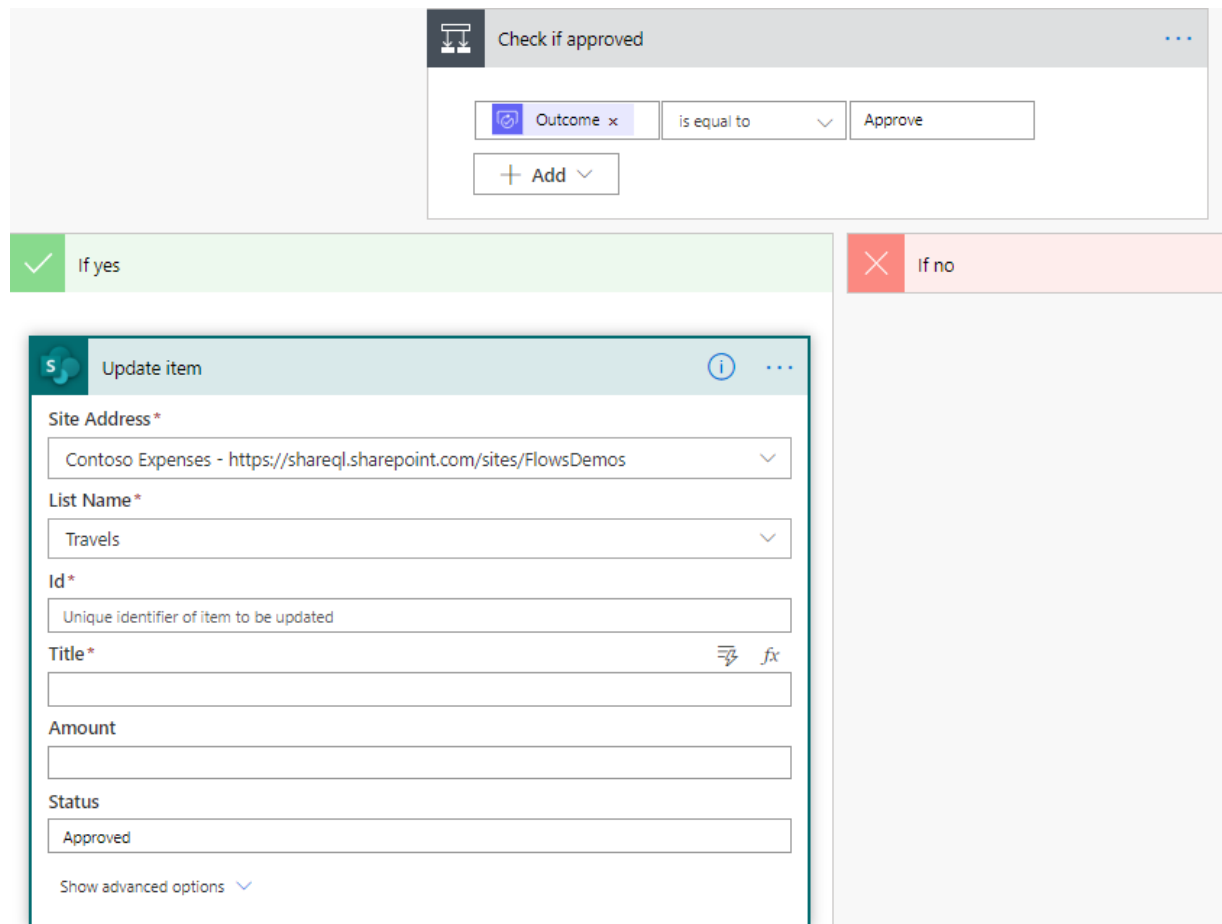
Condition

Outcome x is equal to Approve

Add dynamic content +

+ Add

4. Add a SharePoint Update item action to the *If yes* branch of the condition using the following steps:
- a. In the **if yes** branch, click **Add an action**, and select the SharePoint **Update item** action:



Check if approved

Outcome x is equal to Approve

+ Add

✓ If yes

✗ If no

Update item

Site Address *
Contoso Expenses - https://shareql.sharepoint.com/sites/FlowsDemos

List Name *
Travels

Id *
Unique identifier of item to be updated

Title *
fx

Amount

Status
Approved

Show advanced options

- b. Use the **dynamic value** tab to set **Id** > **ID** from the trigger:

Dynamic Value

Learn more X

Search content from previous steps

Update item

ID
Sample data not available

1

When an item is created

ID
Sample data not available

2

ID X

Insert a dynamic value

Title*

Amount

Status

Approved

Show advanced options

- c. Use the **Dynamic content** tab to set **Title** > **Title** from the approvals action.

- d. **Status** > type **Approved**:

The screenshot shows the 'Update item' action configuration. The 'Site Address' field is set to 'Contoso Expenses - https://shareql.sharepoint.com/sites/FlowsDemos'. The 'List Name' field is set to 'Travels'. The 'Id' field is highlighted with a red box and contains a placeholder 'ID'. The 'Title' field is also highlighted with a red box and contains a placeholder 'Title'. The 'Amount' field is empty. The 'Status' field is set to 'Approved'. A 'Show advanced options' link is visible at the bottom.

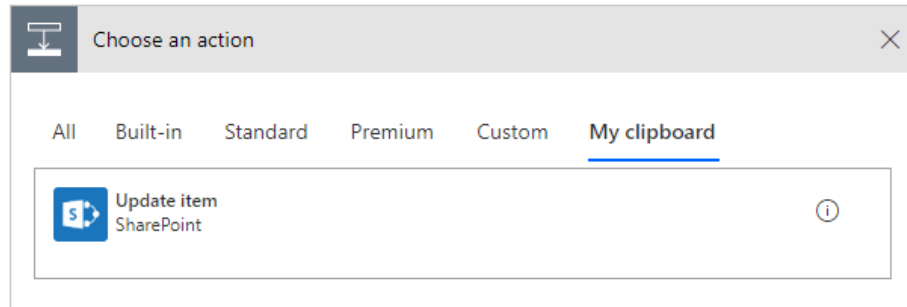
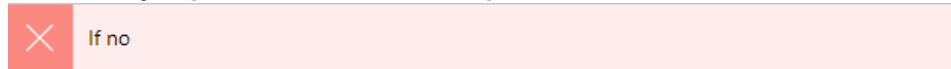
5. Complete the *If no* branch of the condition using as a starting point the SharePoint action from the *If Yes* branch.

- a. On the **Update item** heading, click the three dots and select **Copy to my clipboard**.

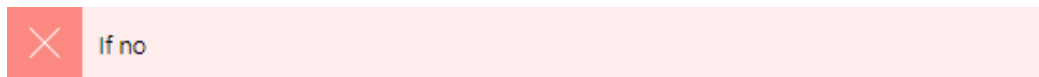
The screenshot shows the 'Update item' action configuration. The 'Site Address' field is set to 'Contoso Expenses - https://shareql.sharepoint.com/sites/FlowsDemos'. The 'List Name' field is set to 'Travels'. The 'Id' field is highlighted with a red box and contains a placeholder 'ID'. The 'Title' field is also highlighted with a red box and contains a placeholder 'Title'. The 'Amount' field is empty. The 'Status' field is set to 'Approved'. A 'Show advanced options' link is visible at the bottom. The 'If yes' branch is highlighted in green. The 'Copy to my clipboard' option is highlighted in the context menu.

- b. In the **If no** branch, click **Add an action**.

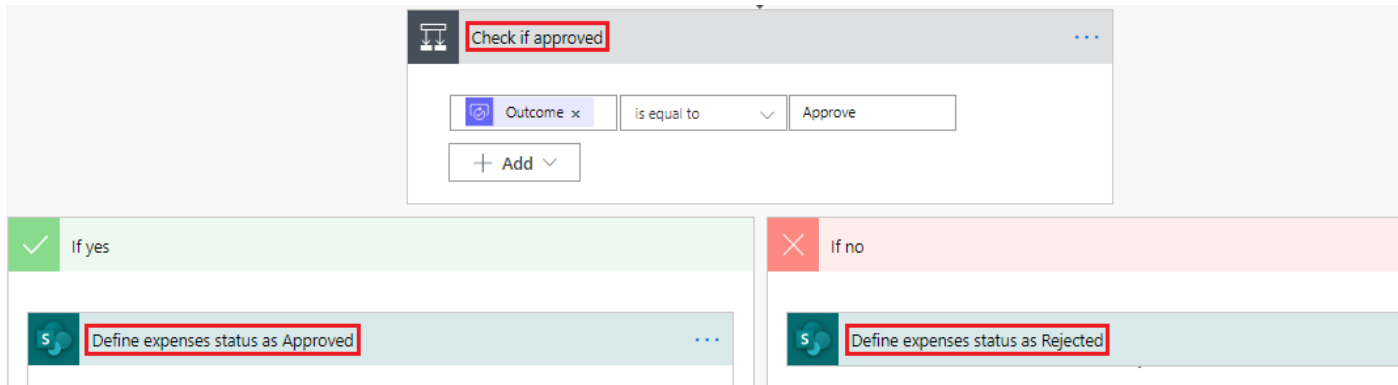
- c. Click the **My clipboard** tab, and select **Update item**.



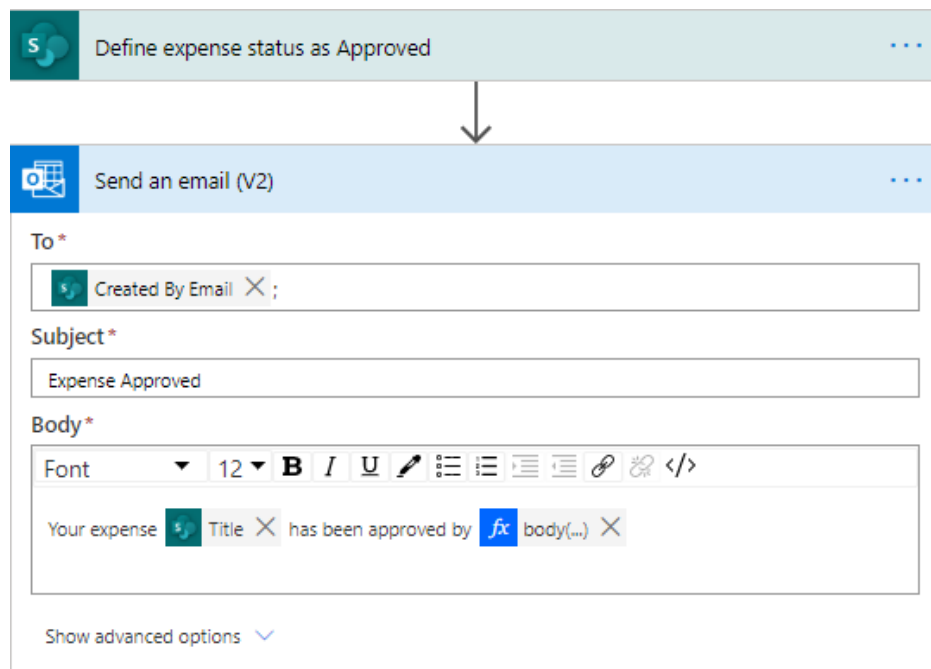
- d. Change **Status** to **Rejected**:

A screenshot of a 'Update item 2' form. The form has a title bar with a close button and an information icon. Below the title bar are fields for 'Site Address*', 'List Name*', 'Id*', 'Title*', 'Amount', and 'Status'. The 'Status' field is highlighted with a red box and contains the text 'Rejected'. There are also icons for 'fx' and 'fx' next to the 'Status' field. At the bottom, there is a 'Show advanced options' link with a dropdown arrow.


- e. Rename the condition and the two update item actions as shown in the following screenshot:




6. Send an email if the expense is approved or rejected, by using the following steps:
- In the **If Yes** branch, **Add an action** > **Send an email (V2)** action (Office 365 Outlook).
 - Complete similar to the following screenshot:



- c. Place the cursor to the right of **approved by;** in dialog pane, click the **Add an expression** button,


 Send an email (V2) - Inform creator of approval (i) ...










To*



 Created By Email X ;

Subject*

Expense Approved

Body*  fx

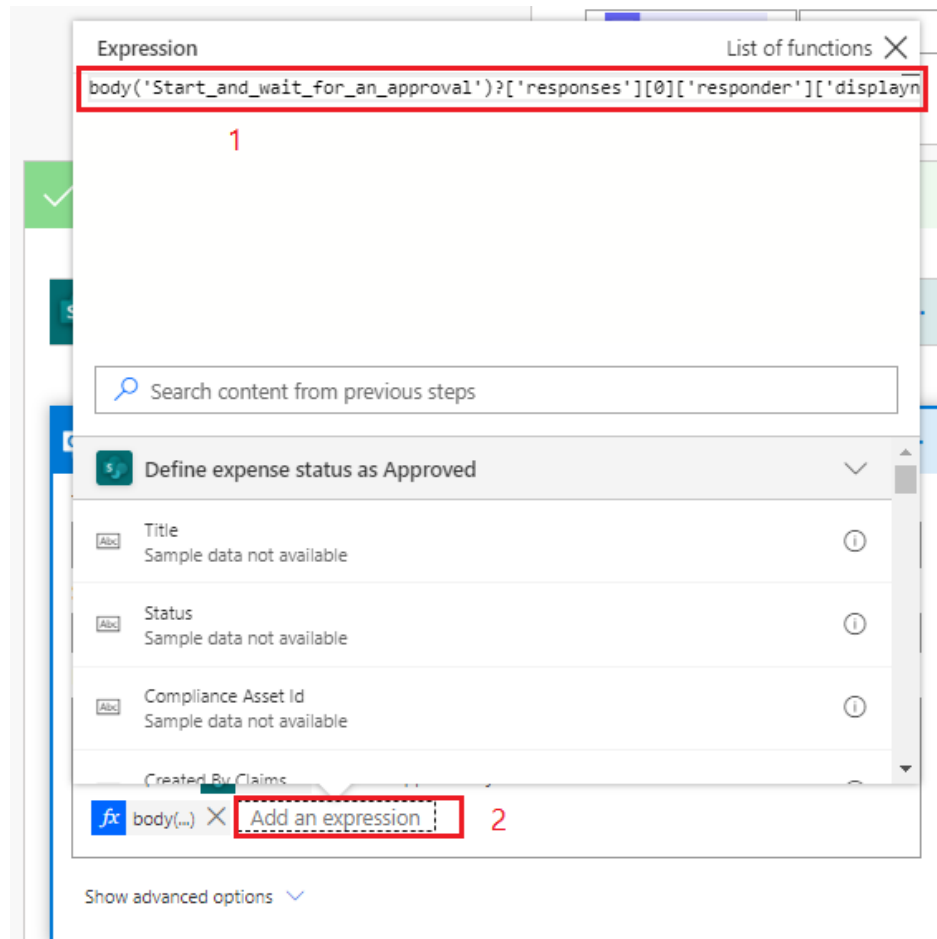
Font ▼ 12 ▼ **B** *I* U         

Your expense  Title X has been approved by 

[Show advanced options](#) ▼

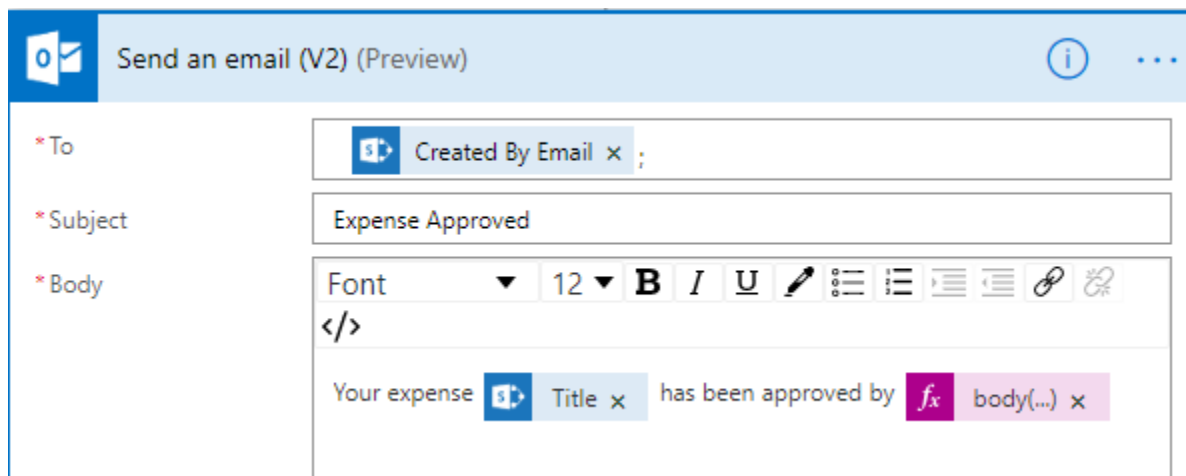
- d. copy and paste the following expression in the Expression area and click "Add an expression":

```
body('Start_and_wait_for_an_approval')?['responses'][0]['responder']['displayname']
```

e. In the dialog pane, click **OK**.

Your Send an email action should look similar to the following screenshot.



- f. Similar to before, copy and paste the **Send an email** action to the **if no** branch and update the text with **rejected**.

✕ If no

Define expense status as Rejected

+

Send an email (V2) 2 (Preview)

*To: Created By Email x ;

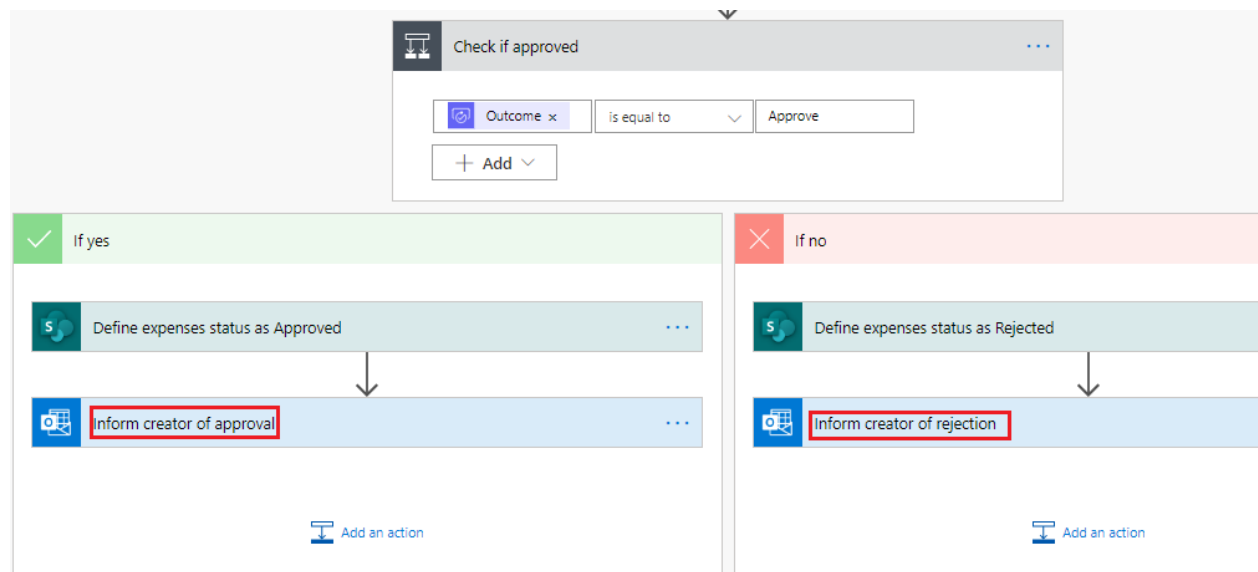
*Subject: Expense Approved

*Body: Font 12 B I U has been rejected by body(...) x

Add dynamic content +

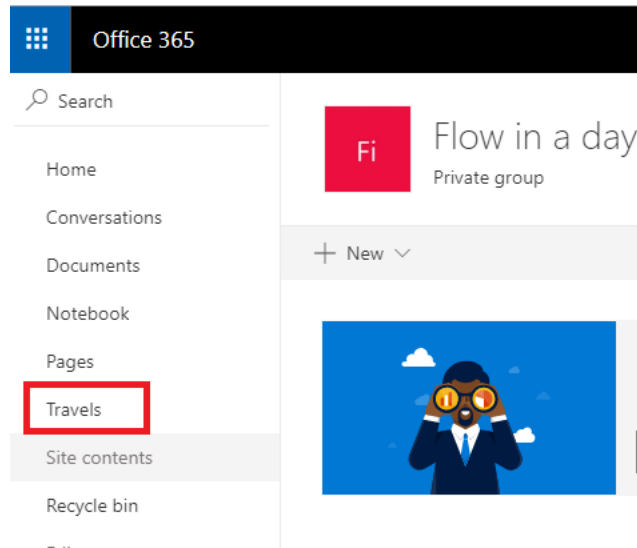
Show advanced options v

- g. Rename the **Send an email** actions in both branches as **Inform creator of approval** and **Inform creator of rejection**.

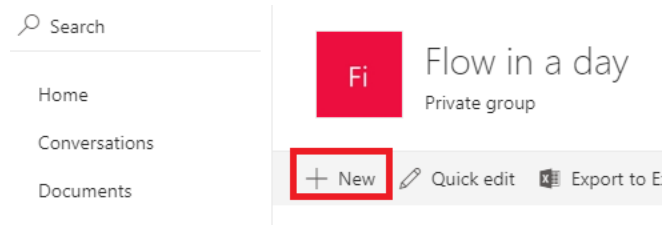


7. Save the flow.
8. Test the flow by adding an expense item to the SharePoint list, using the following steps:




- a. Navigate to your SharePoint list, for example by clicking on the list name on the Quick Launch bar.



- b. Click **New**:



- c. Complete the form similar to the following screenshot (keep the **Status** field empty):

 Save  Cancel  Copy link

New item

Title *
Tokyo

Amount
800


Status
Enter value here


Attachments
[Add attachments](#)


Save

Cancel

- d. Save the new record, which will automatically trigger the flow.
- e. Check the flow status, it should be **running**:


 **Approve Travel**
Use this template for processing approvals on SharePoint list items. The approver can view their approval requests in the Approvals Center and over email. Once an item is approved or rejected, the item creator is sent a confirmation email.
[Edit description](#)



 [See analytics](#)

RUN HISTORY

See all >

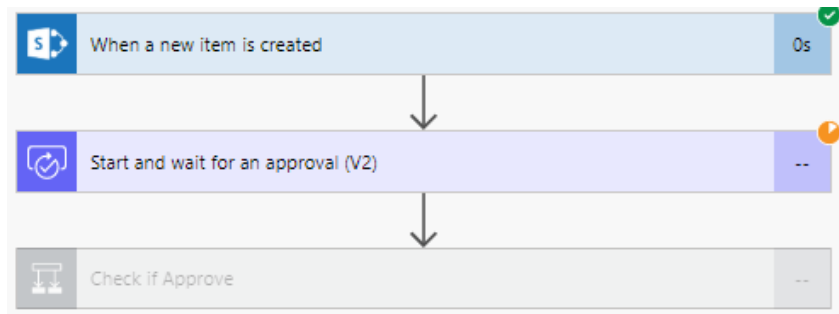
 Running

19 seconds ago

19 seconds ago

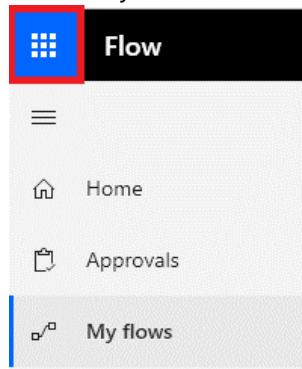
>

- f. Click the running flow to see the progress of this instance of the flow:



In this screenshot the flow is waiting for approval. Approvals send an e-mail to the person(s) in charge of the approval.

- g. Check your e-mail to display your approval e-mail:
- To check your e-mails, click the app launcher (the waffle).



- In the list of Apps, right-click **Outlook**, and select **Open in new tab**.
- In the Focused tab or in the Other tab you should see your Flow approval e-mail:

Please approve the following expense



Microsoft Flow <maccount@microsoft.com>
To serge Luca



Approvals

| Powered by Microsoft Flow

Pending approval

Requested by: serge Luca sergeluca@ShareQL.com

Date Created: Friday, October 11, 2019 11:19 AM GMT

Details: The following expense: Destination: tokyo Amount:800 has been submitted by: serge Luca

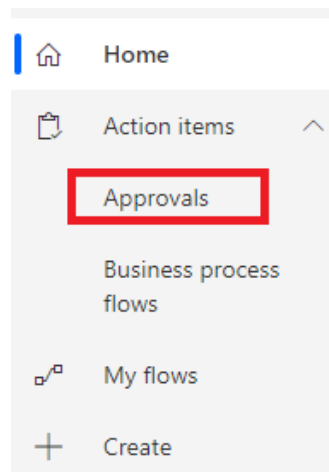
Link: <https://shareql.sharepoint.com/sites/FlowsDemos/layouts/15/listform.aspx?PageType=4&ListId=518e02b0-0c43-4dc7-a691-85e1a378bc6c&ID=2&ContentTypeId=0x01002B0A701F87F18345BF87AADA08C26571>

Approve

Reject

Get the Flow app to receive push notifications and grant approvals from anywhere. [Learn more](#)
This message was created by an automated workflow in Microsoft Flow. Do not reply. Microsoft Corporation 2019.

- h. Approvers can also find the pending approvals in the **Approvals center**:
 - i. Expand **Action items**, and then click **Approvals**.



The Approvals center is displayed.

Home

Action items

My flows

Create

Templates

Connectors

Approvals

ReceivedSentHistory

Request	Received	Details
Please approve the following expense	Oct 11, 01:19 PM (3 min ago)	The following exper

- ii. On the **Received** tab, click the item to be approved/rejected to display an information pane.

Respond: Approve

Overview

Approval

Please approve the following expense

Requester

SL

serge Luca

Received

Oct 11, 01:19 PM (4 min ago)

Link

<https://shareql.sharepoint.com/sites/Flows...PageType=4&ListId=518e02b0-0c43-4dc7-a691-85e1a378bc6c&ID=2&ContentTypeID=0x0...>

Details

The following expense:

Destination: tokyo Amount:800 has been submitted by: serge Luca

Approve

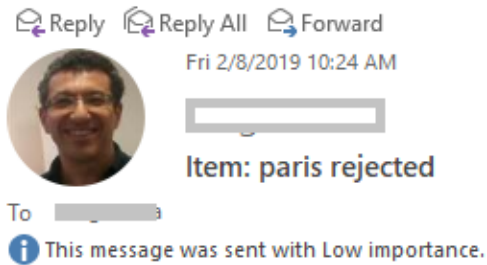
Add a comment (optional)

Confirm

Cancel

- iii. Select **Approve**, and then click **Confirm**.

The Flow will send a notification by e-mail to you:



Your request for paris has been rejected by [redacted]. Comments (if any): Sorry Paris is not approved in the compa

Task 2.3: Extending the flow by adding a new status when the flow is waiting

1. Click **Edit** on your flow's details page.
2. Add a SharePoint **Update item** action between the trigger and the condition, and complete as shown in the following screenshot.

A screenshot of the Microsoft Flow 'Update item' action configuration. The action is titled 'Update item' and has an information icon and a three-dot menu icon. Below the title, there are several fields: 'Site Address*' with a dropdown menu showing 'Contoso Expenses - https://shareql.sharepoint.com/sites/FlowsDemos'; 'List Name*' with a dropdown menu showing 'Travels'; 'Id*' with a text box containing 'ID' and a close button; 'Title*' with a text box containing 'Title' and a close button; 'Amount' with an empty text box; and 'Status' with a dropdown menu showing 'Being approved'. At the bottom, there is a link 'Show advanced options' with a downward arrow.

Hint:

- The **ID** Dynamic content comes from the trigger and identifies the corresponding SharePoint list item.

- **Title** also comes from the trigger,
- Type the value **Being approved** in the **Status** field:

Update item

Site Address*

Contoso Expenses - https://shareql.sharepoint.com/sites/FlowsDemos

List Name*

Travels

Id*

1 fx

Insert a dynamic value

Dynamic Value

Search content from previous steps

When an item is created

ID

Sample data not available 2

3. Apply the same logic to display Approved or Rejected in the SharePoint list
4. Add a new travel expense item to the SharePoint list and check the value in its status column (it might take a few seconds before the flow starts):

Fi Flow in a day
Private group

+ New Quick edit Export to Excel Flow PowerApps ...

Travels

Title	Amount	Status
Las vegas	\$900.00	
Brussels	\$750.00	Being approved

2. Approve and once the approval is completed, check the status value in the list,.



Flow in a day

Private group

+ New Quick edit Export to Excel Flow ▾ PowerApps ▾ ...

Travels

Title ▾	Amount ▾	Status ▾
Las vegas	\$900.00	
Brussels	\$750.00	Approved

Optional exercise if time permits:

Amend the flow to automatically approve the expense If the amount is smaller than \$500, otherwise, the expense item will progress through approved process.

