Designing Flows to Automate an Approval Process

Agenda

- Working with the Start an Approval Action
- Implementing the Approval Process
- Monitoring Approval and Rejection
- Managing Approvals using Approvals Center

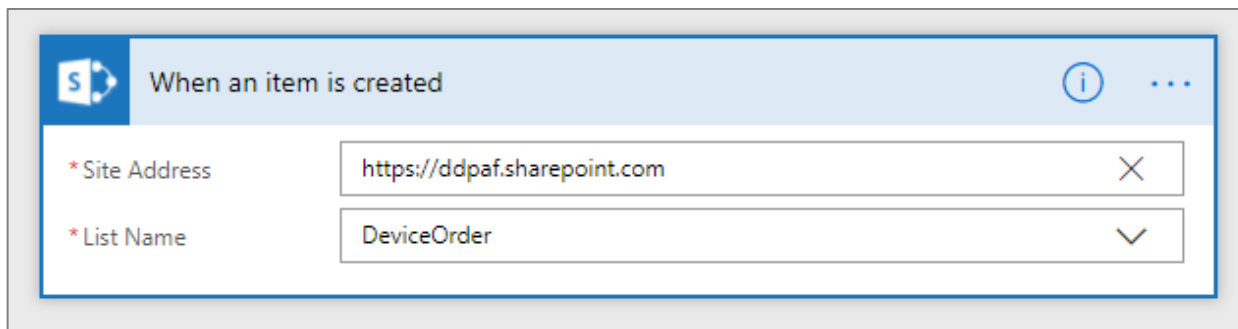# Creating a Flow for Device Request Approval

- Create a flow from blank

- Select a SharePoint trigger for **When an item is created**
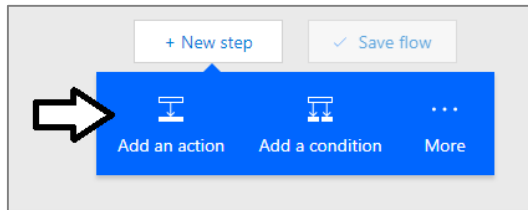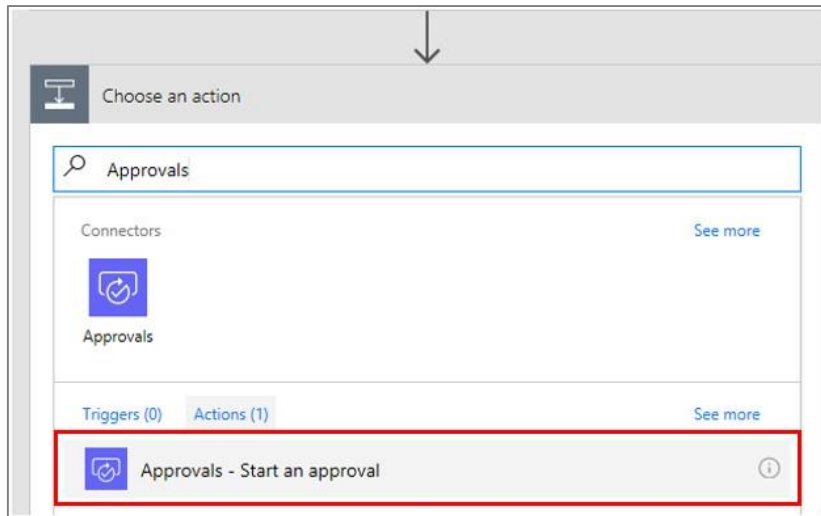

- Configure the trigger to use the **DeviceOrder** list

Add the Start an Approval Action

- An **Approval** process is added as an action

- Select the Approvals action named **Start an approval**

Approval Types

- There are two types of approvals
  - Determine behavior when there are two or more approvers
  - "Anyone" allows single approver to complete approval process
  - "Everyone" requires all approver to approve the request

Building Out The Start an Approval Action

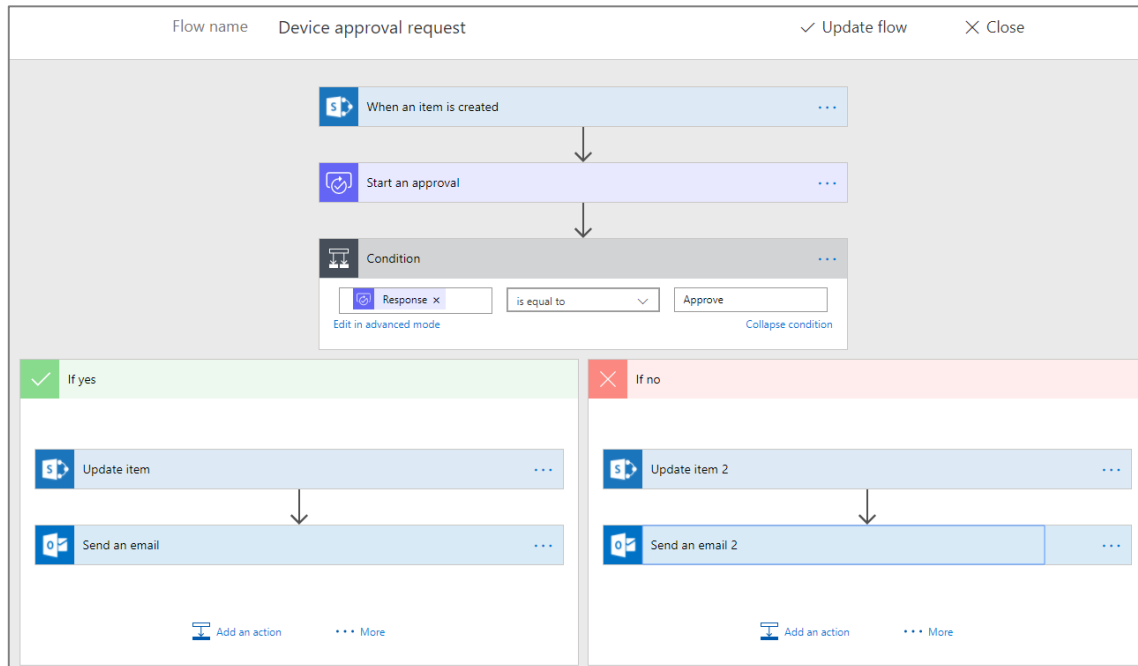- You provide data which is sent to approver

Responding to the Approval Response

- Start an Approval action followed by a condition
  - Allows flow to determine if approval was accepted or rejected
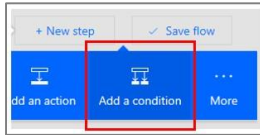
- Condition has If yes branch and If no branch for both outcomes

Implementing If yes Branch using Email

- If request is approved, send notification email to requestor

Testing the Approval Flow

- Start by creating a new device request

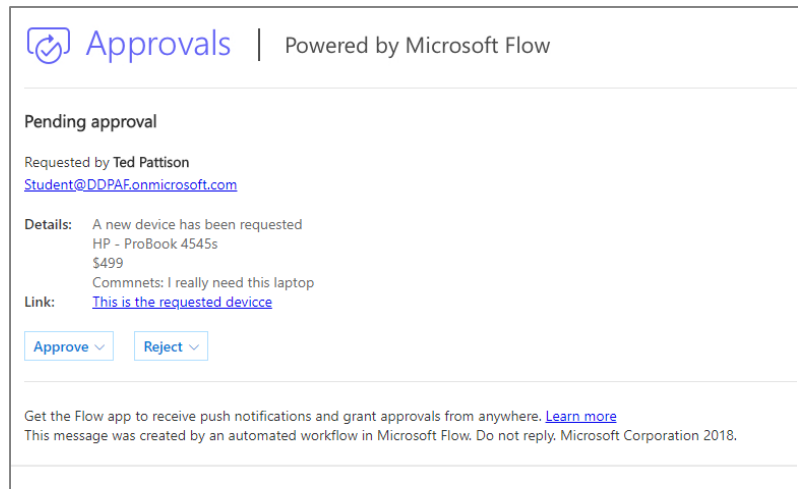- Adding item to SharePoint list triggers approval process to start

Sending Email Notification to an Approver

- The flow sends notification email to the approver
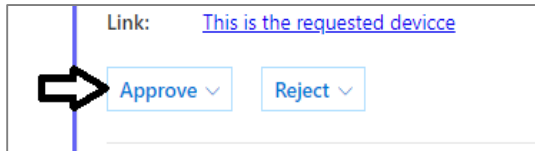 - Flow execution currently paused inside **Start an Approval** action
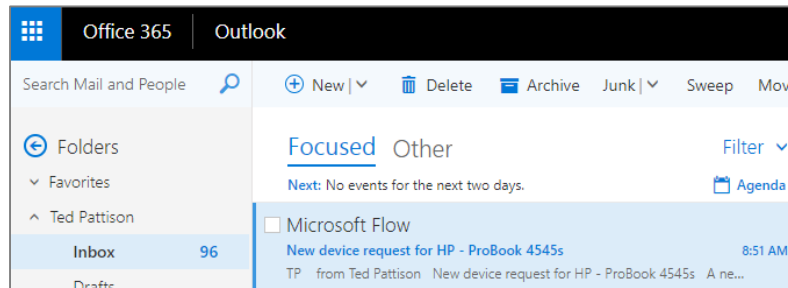
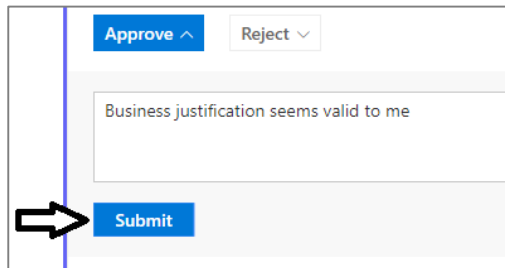 - Email allows approver to approver or reject approval request
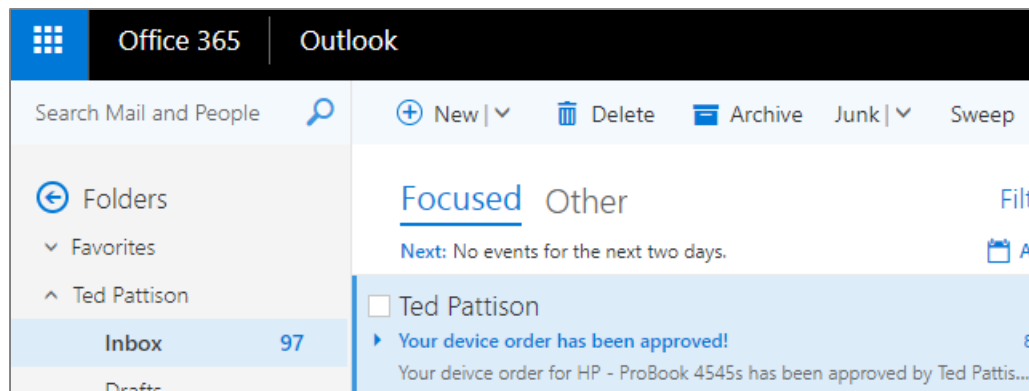
Approving an Approval Request

- Notification email provides button to approve or reject request

- Approver can enter comment and submit approval (or rejection)

- Approval or rejection unblocks flow which continue down appropriate branch
  - Approval response determines whether to send approval email or rejection email

Rejecting an Approval Request

- In the case of a rejected request…

- Approval flow sends a notification about rejection
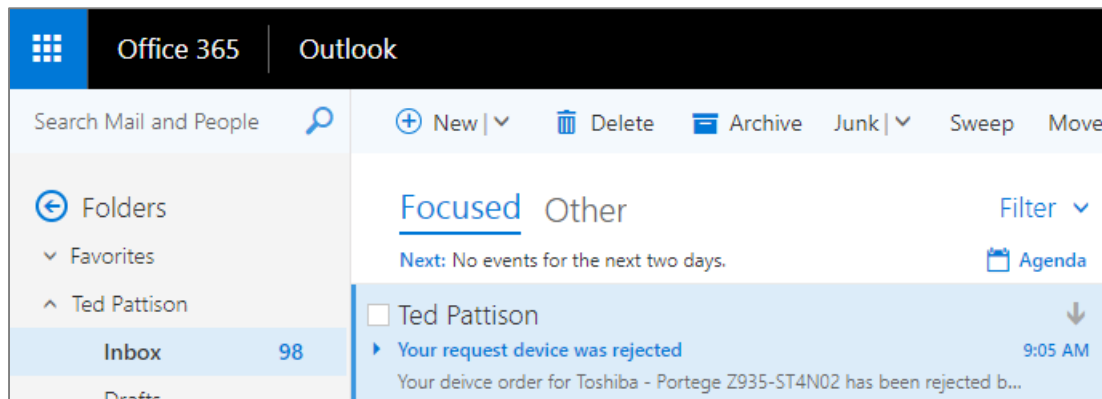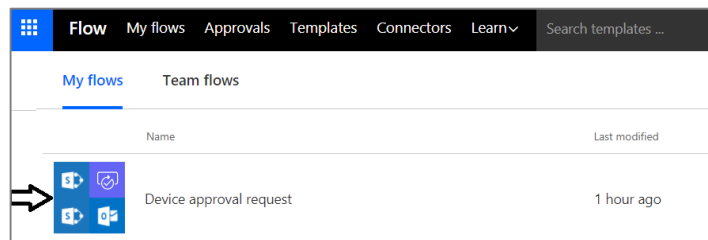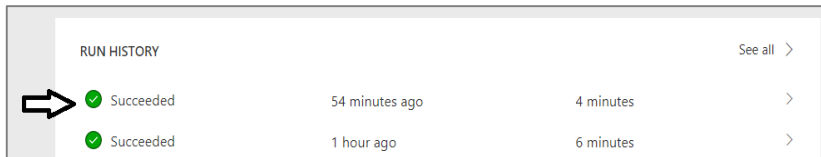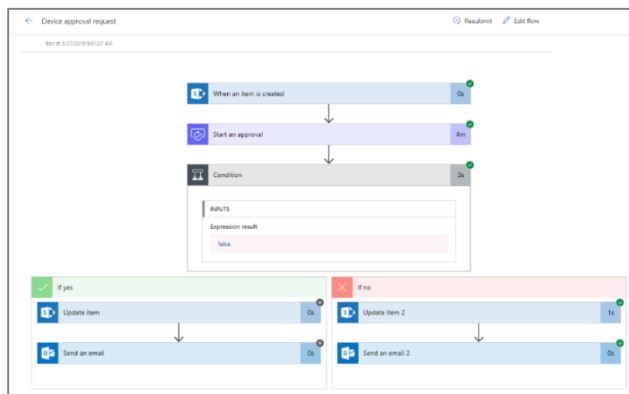
Run History

- Flow tracks run history of flow that have started
  - Click on a flow to see its RUN HISTORY list

  - RUN HISTORY list has entry for each flow that has started

  - Drilling into flow run history shows execution path and data

Updating a SharePoint List Item

- Approval flow can update SharePoint list items
  - Used to show SharePoint users the outcome of approval process

Approvals Center

- Microsoft Flow provides Approvals Center
  - Provides alternative to email for approve/reject processing
  - Accessible through browser
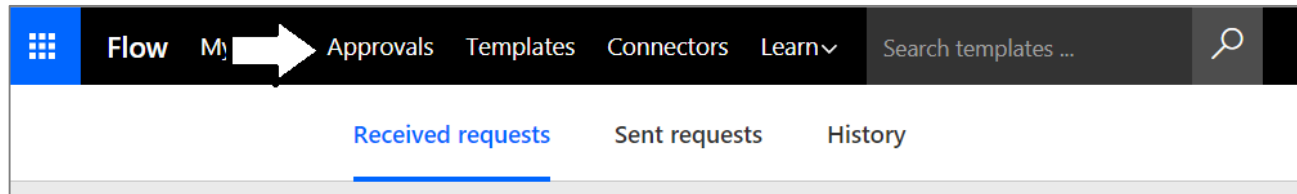
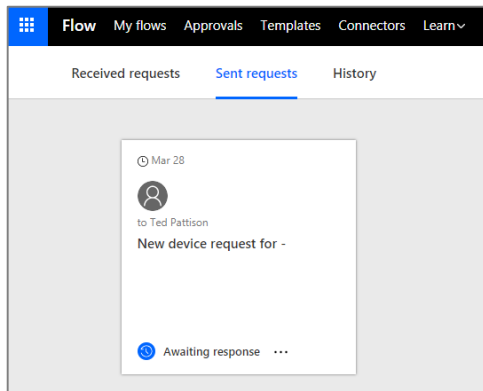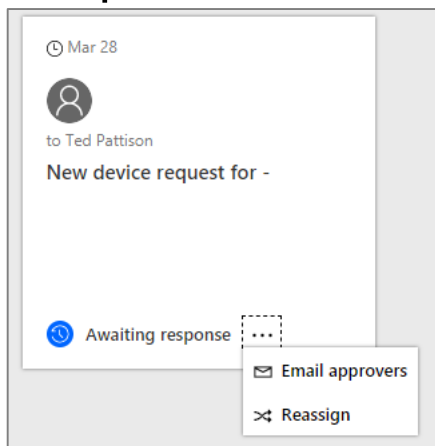 - Provides monitoring of completed approvals and pending approvals

Examining Sent Request

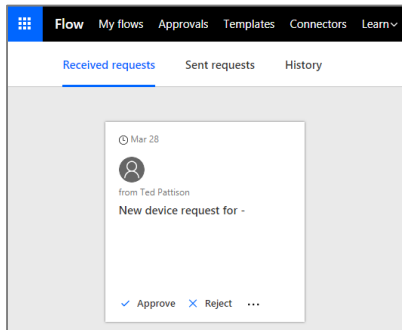- Requester can view requests he/she has submitted

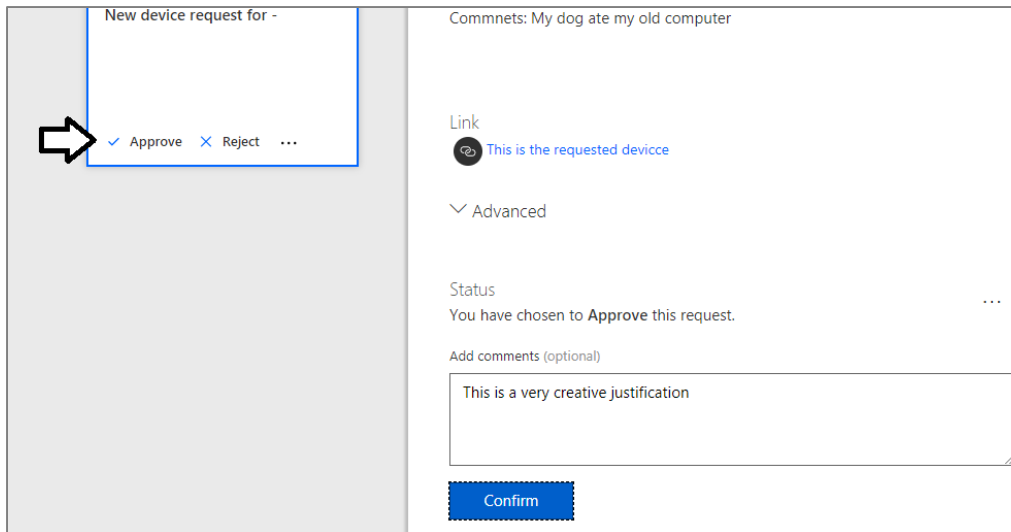- Requester can email approver(s) or resign to different approver

Examining Received Requests

- Approvers can see list of all their approval requests

- Approver can approve or reject approval request

Summary

- ✓ Working with the Start an Approval Action
- ✓ Implementing the Approval Process
- ✓ Monitoring Approval and Rejection
- ✓ Managing Approvals using Approvals Center