

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

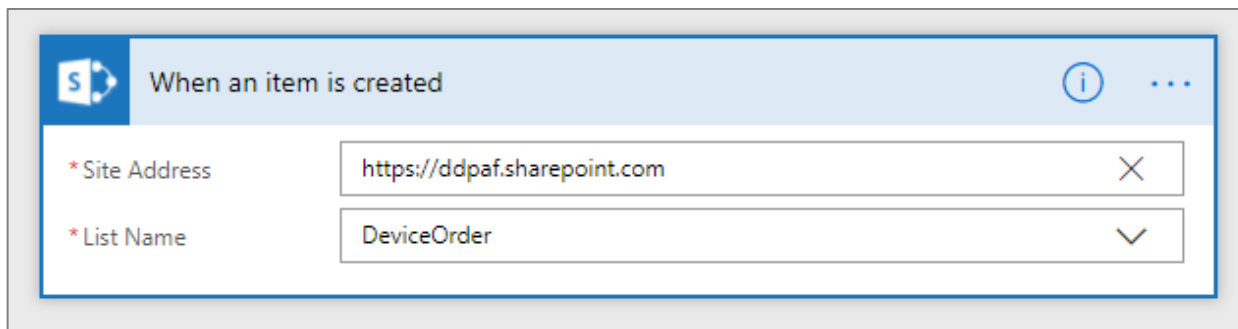
- Create a flow from blank



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

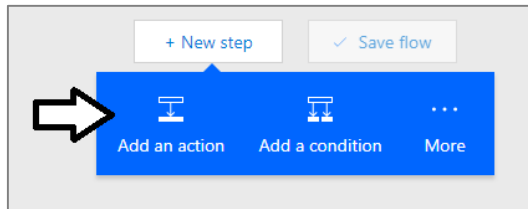


- Configure the trigger to use the **DeviceOrder** list

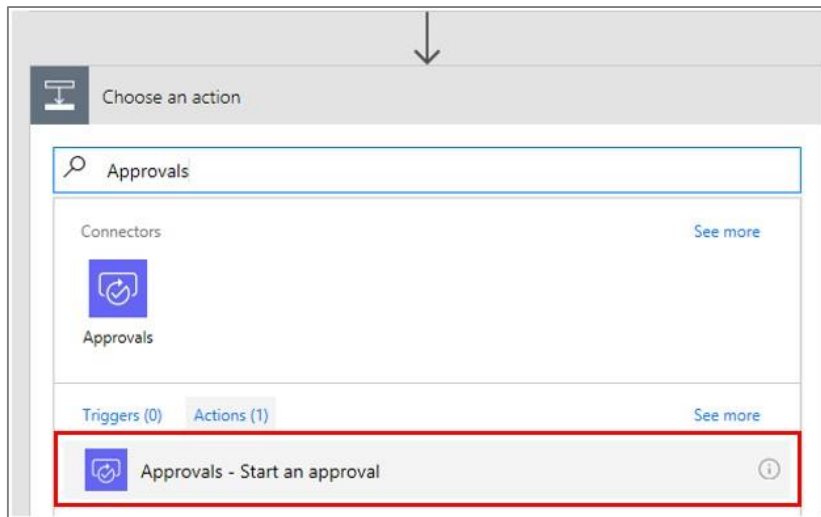


Add the Start an Approval Action

- 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

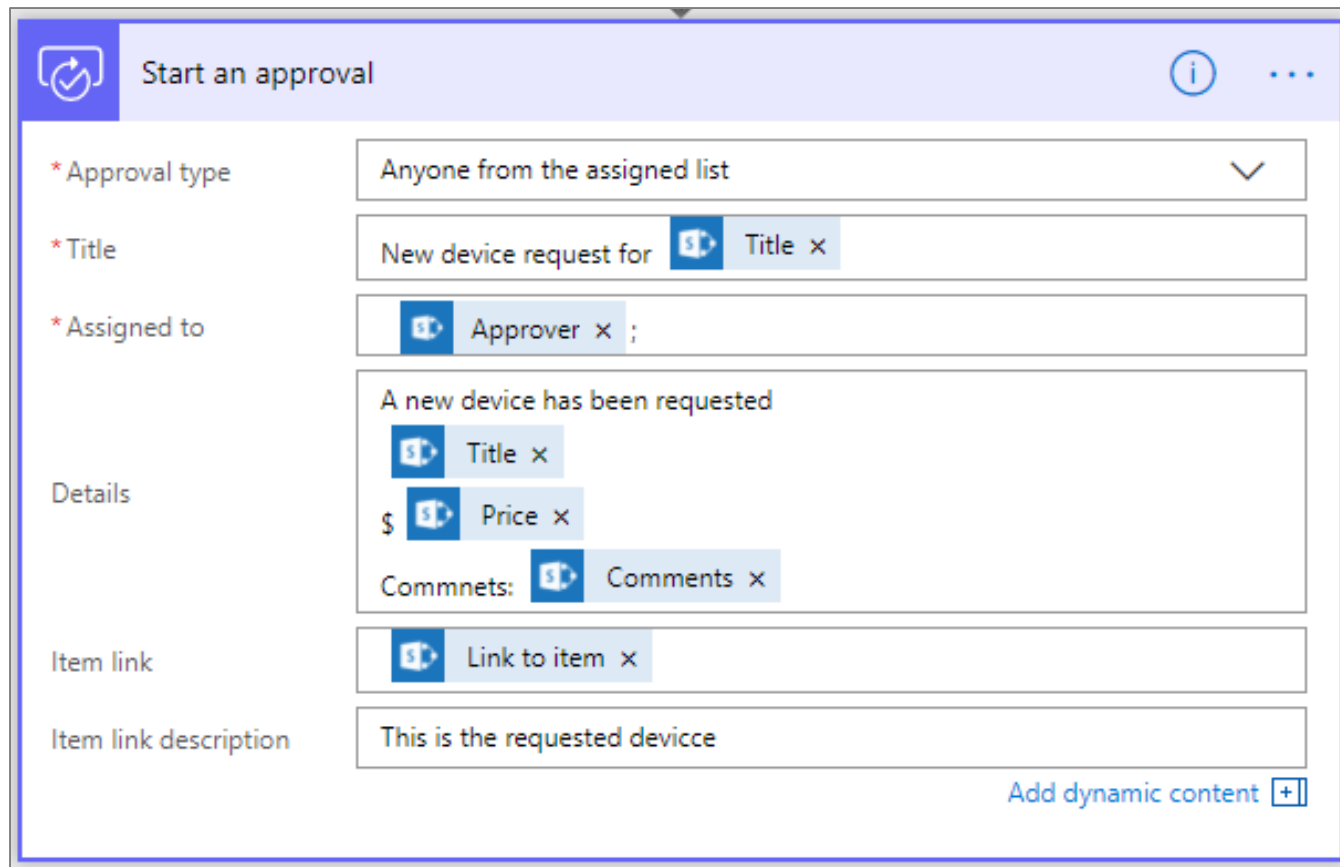


The screenshot shows a 'Start an approval' dialog box. The title bar is light blue with a circular arrow icon on the left and an information icon and three dots on the right. Below the title bar, there is a label '* Approval type' followed by a dropdown menu. The dropdown menu is open, showing four options: 'Who should approve this?' (with a downward arrow), 'Anyone from the assigned list' (highlighted with a red border), 'Everyone from the assigned list', and 'Enter custom value'.



Building Out The Start an Approval Action

- You provide data which is sent to approver



The screenshot shows a 'Start an approval' dialog box with the following fields and content:

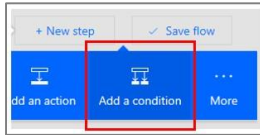
- * Approval type:** A dropdown menu with the text 'Anyone from the assigned list' and a downward arrow.
- * Title:** A text field containing 'New device request for' followed by a dynamic content placeholder (blue square with 'S' and a dot) and 'Title x'.
- * Assigned to:** A text field containing a dynamic content placeholder (blue square with 'S' and a dot) and 'Approver x ;'.
- Details:** A larger text area containing the text 'A new device has been requested' followed by three lines of dynamic content: a placeholder and 'Title x', a placeholder with a dollar sign '\$' and 'Price x', and the text 'Comments:' followed by a placeholder and 'Comments x'.
- Item link:** A text field containing a dynamic content placeholder (blue square with 'S' and a dot) and 'Link to item x'.
- Item link description:** A text field containing the text 'This is the requested device'.

At the bottom right of the dialog, there is a link that says 'Add dynamic content' followed by a plus icon in a square box.

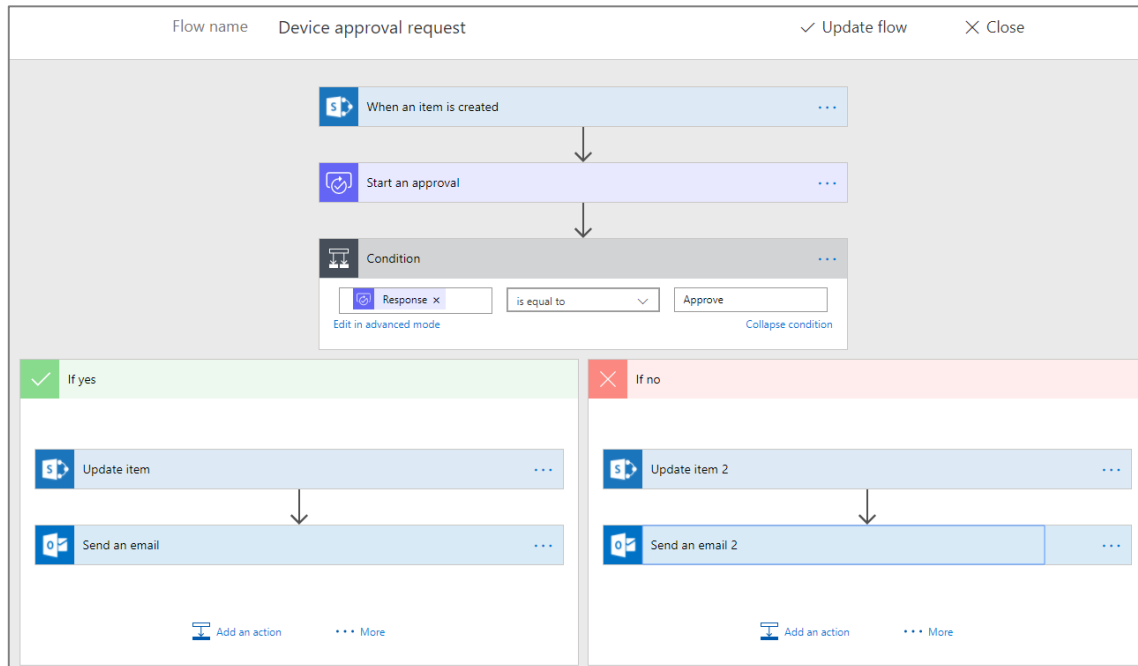


Responding to the Approval Response

- 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

Send an email

*To: RequestBy x ;

*Subject: Your device order has been approved!

*Body: Your device order for Title x has been approved by Approver name x

Arrpover comments: Comments x

From (Send as): Email address to send mail from (requires "Send as" or "Send on behalf of" pe

CC: Specify email addresses separated by semicolons like someone@contoso.com

BCC: Specify email addresses separated by semicolons like someone@contoso.com

Attachments Name: Attachment name

Attachments Content: Attachment content

Importance: Importance

Is HTML: Yes

Hide advanced options ^



Testing the Approval Flow

- Start by creating a new device request

The screenshot shows the 'Device Ordering App' interface. On the left, three product cards are displayed: 'ProBook 4440s' (\$679.00), 'ProBook 4545s' (\$499.00), and 'Compaq Pro 4300' (\$859.00). The 'ProBook 4545s' card is highlighted. On the right, a form is filled out with the following details:

- Title: HP - ProBook 4545s
- Price: 499
- Approver: student@DDPAF.onmicrosoft.com
- Comments: I really need this laptop
- RequestBy: Student@DDPAF.onmicrosoft.com

A 'Submit device request' button is located at the bottom right of the form.

- Adding item to SharePoint list triggers approval process to start

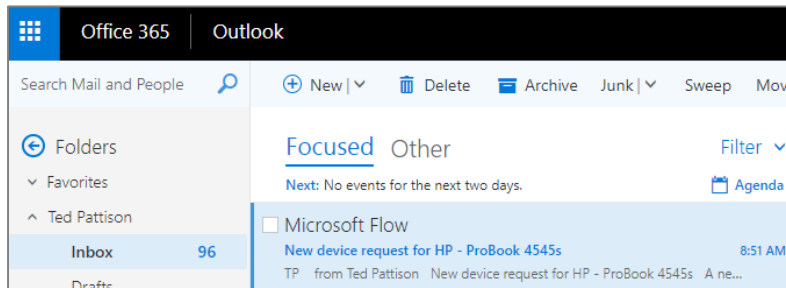
The screenshot shows a SharePoint list titled 'DeviceOrder' on the 'Critical Path Labs Team Site'. The list contains one item with the following details:

Title	DeviceID	Price	RequestBy	Approver	ApprovalStatus	Comments
HP - ProBook 4545s	45	\$499.00	Student@DDPAF.onmicrosoft.com	student@DDPAF.onmicrosoft.com	InReview	I really need this laptop

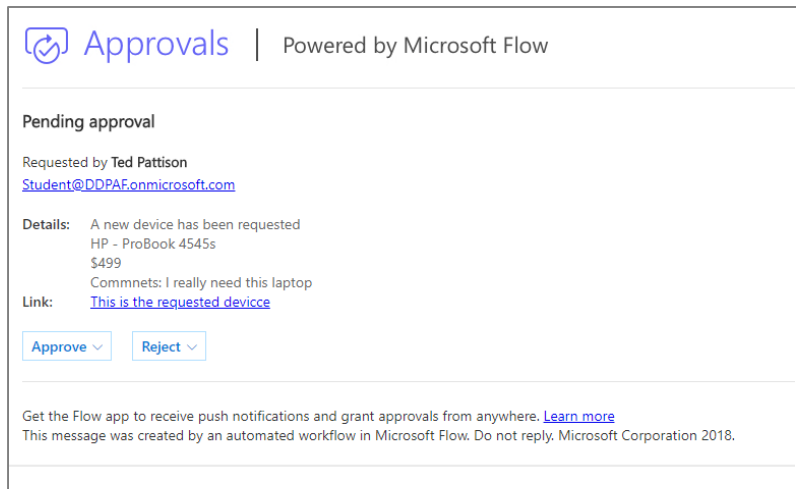


Sending Email Notification to an Approver

- The flow sends notification email to the approver
 - Flow execution currently paused inside **Start an Approval** action

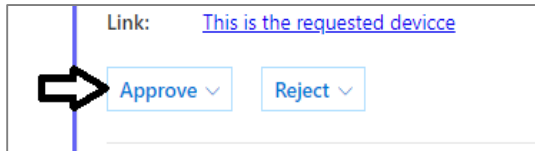


- Email allows approver to approve or reject approval request

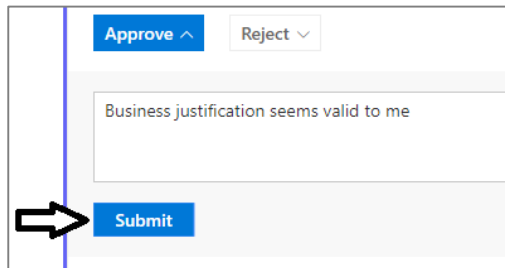


Approving an Approval Request

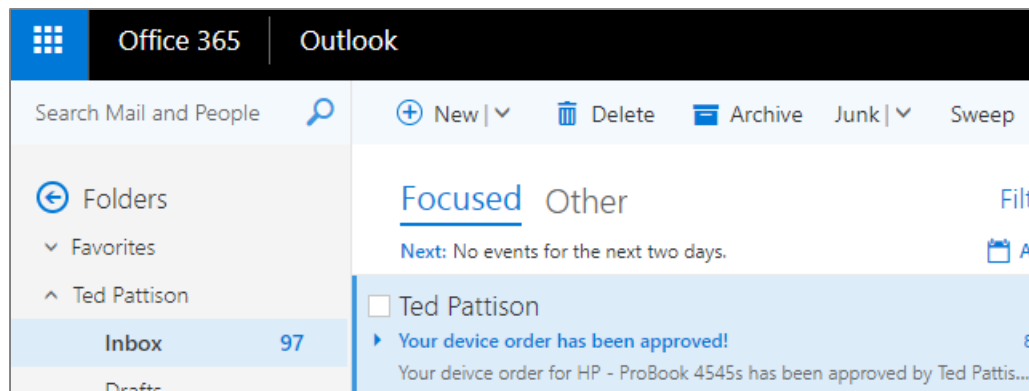
- Notification email provides button to approve or reject request



- 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...

Details: A new device has been requested
Toshiba - Portege Z935-ST4N02
\$979.99
Comments: I already have a great laptop but I want another one for no good reason.

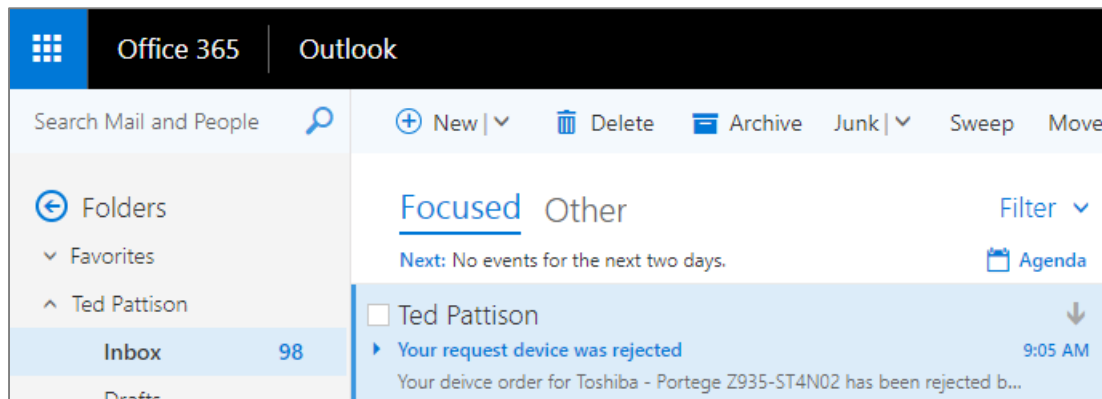
Link: [This is the requested device](#)

Approve  Reject ^

You only need one laptop!

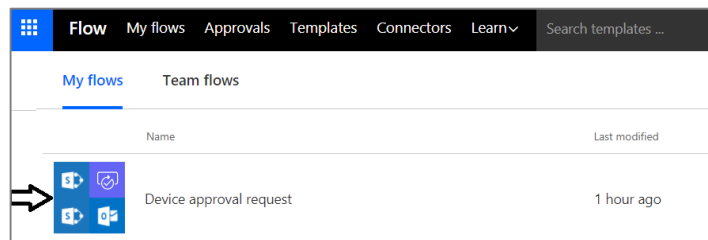
 Submit

- Approval flow sends a notification about rejection

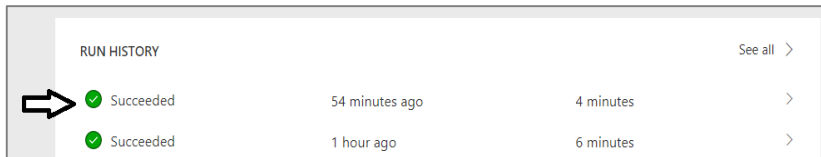


Run History

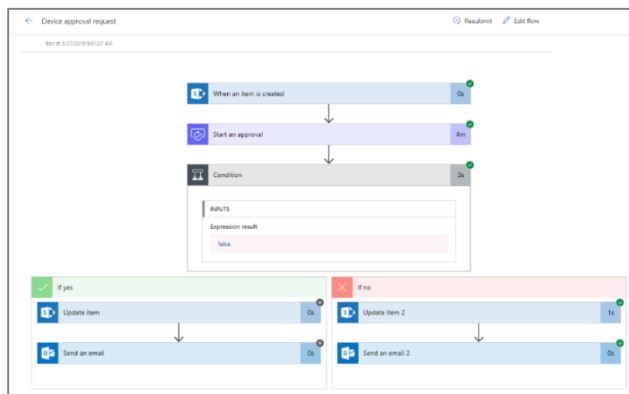
- Flow tracks run history of flow that have started
 - Click on a flow to see its RUN HISTORY list



- 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

Home

CP Critical Path Labs Team Site

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

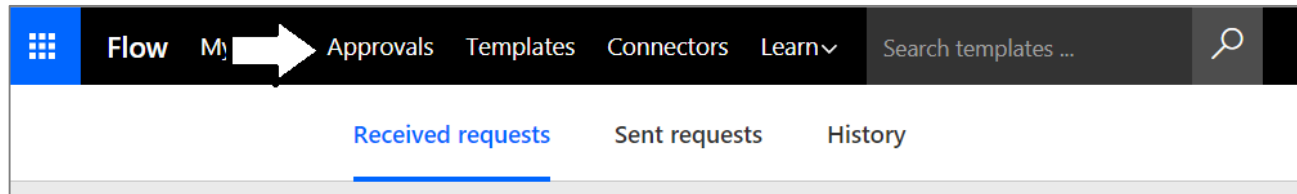
DeviceOrder

Title ▾	DeviceID ▾	Price ▾	RequestBy ▾	Approver ▾	ApprovalStatus ▾
HP - ProBook 4545s	45	\$499.00	Student@DDPAF.onmicrosoft.com	student@DDPAF.onmicrosoft.com	Approved
Toshiba - Portege Z935-ST4N02	98	\$979.99	Student@DDPAF.onmicrosoft.com	student@DDPAF.onmicrosoft.com	Rejected



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

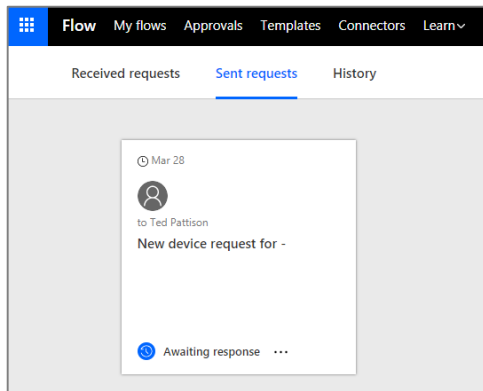
This screenshot shows the 'History' tab in the Microsoft Flow Approvals Center. It features a search bar labeled 'Filter by title' and a dropdown menu set to 'Received'. Below this is a table with four columns: REQUESTER, TITLE, DATE, and OUTCOME. The table contains two rows of data.

REQUESTER	TITLE	DATE	OUTCOME
Ted Pattison	New device request for Toshiba - Portege Z935-S...	52 minutes ago	Rejected
Ted Pattison	New device request for HP - ProBook 4545s	1 hour ago	Approved

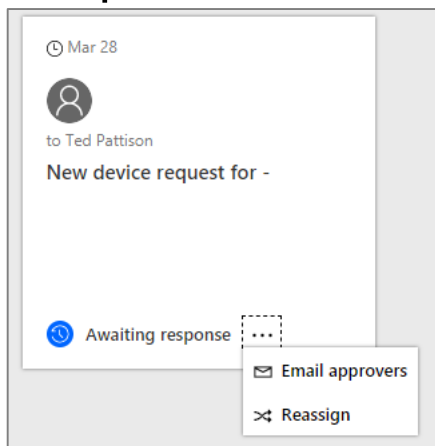


Examining Sent Request

- Requester can view requests he/she has submitted

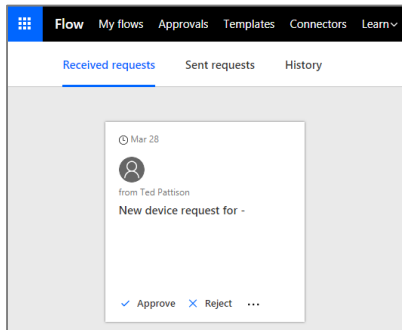


- Requester can email approver(s) or resign to different approver

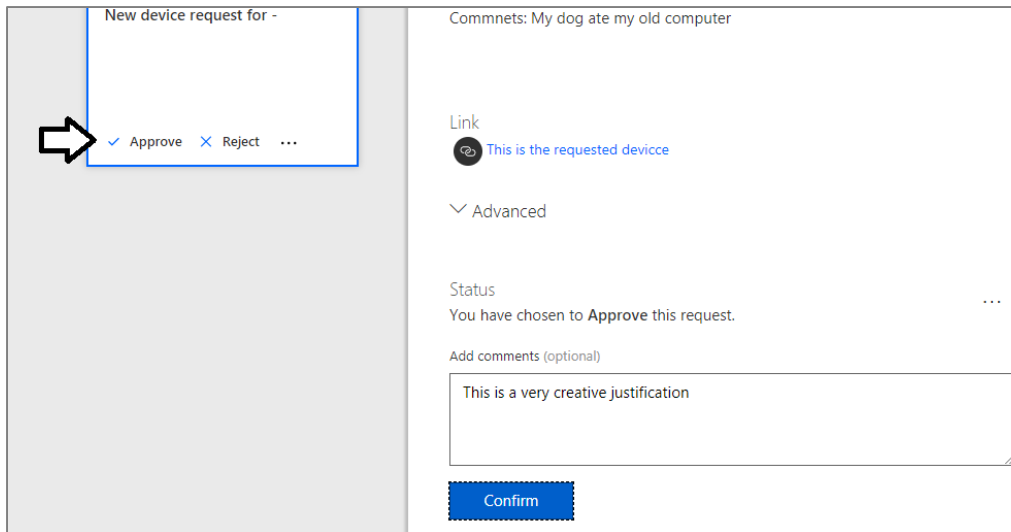


Examining Received Requests

- 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

