Microsoft Power Platform

Dataverse for Teams in a Day

Lab 02

Power Automate for Teams

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Overview

The estimated time to complete this lab is 60 minutes.

In this lab you will be working with the Power Automate app for Microsoft teams, to automate approvals and notifications. Power Automate enables users to make their workday easier by automating routine tasks and processes, with trigger and action style flows. The Power Automate app for Teams provides an approachable and straightforward experience for creating flows in Teams, with over 50 templates provided to help you get started.

Note: The flows created in Exercise 1 and 2 of this lab are not critical to Home Office Set up solution you are building. They serve as additional learning exercises for Power Automate and Teams.

- **Exercise 1: Create a flow in Teams**
  In this exercise you will explore the Power Automate app for Teams and create a flow using a template. This flow allows you to follow up on a Teams message.

- **Exercise 2: Collaboration**
  Create a flow that will post a welcome message when someone joins your team. In this flow someone being added to your team is the trigger. You will add other people from your lab group into your team during this exercise (and you will continue to collaborate in these teams throughout the later labs), to get the experience of using Teams for collaboration with colleagues.

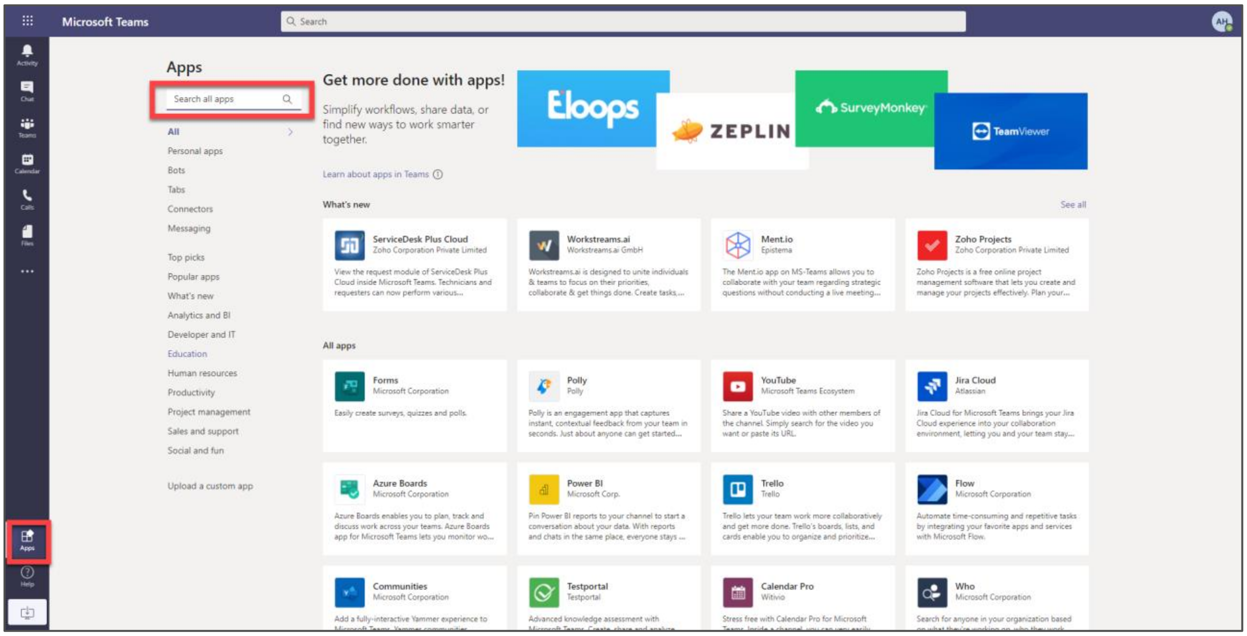
- **Exercise 3: Create an approval flow**
  Build a flow connecting to Dataverse for Teams that will trigger an approval process when a new request for home office equipment is submitted via the app you built in the previous lab.

- **Exercise 4: Create an approval notification**
  Extend the flow created in Exercise 3 to send an Adaptive Card to the user to let them know whether their request has been approved or rejected. Adaptive Cards can be used across any platform, and allow you to design a UI snippet using JSON, allowing you to design cards that bring in images, actions, and more. In this exercise we will create an Adaptive Card to show an approval notification.

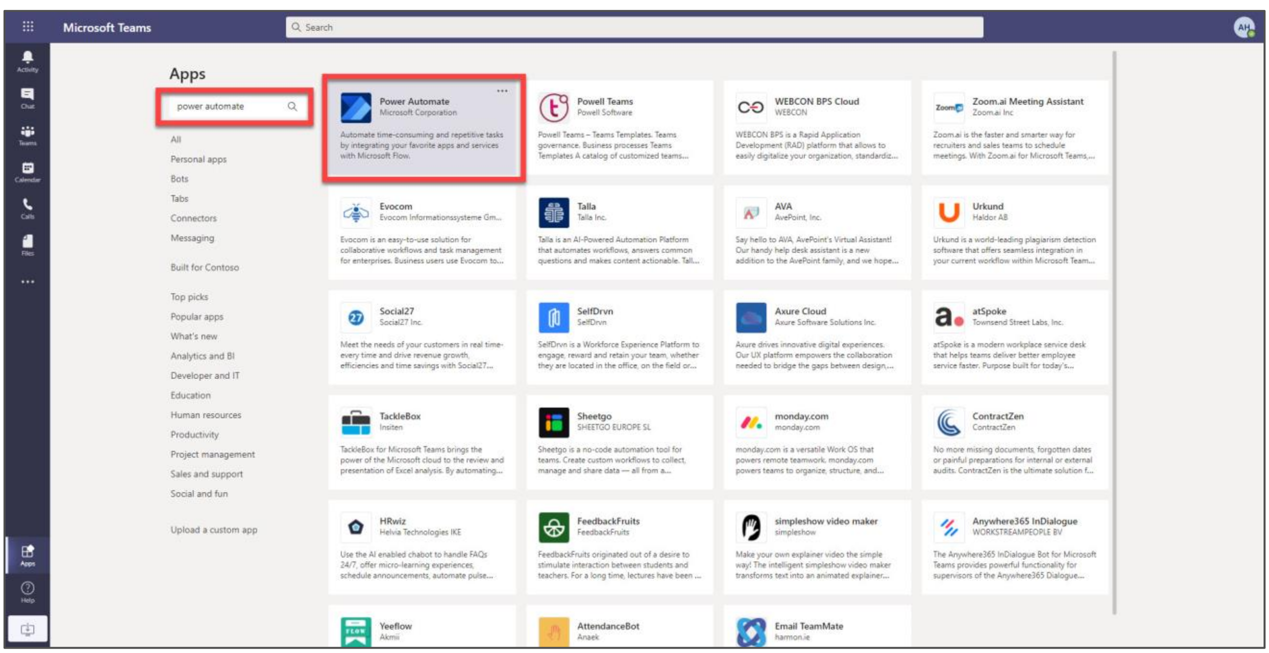
Exercise 1: Create a flow in Teams

Task 1: Discover and add the Power Automate app to Teams

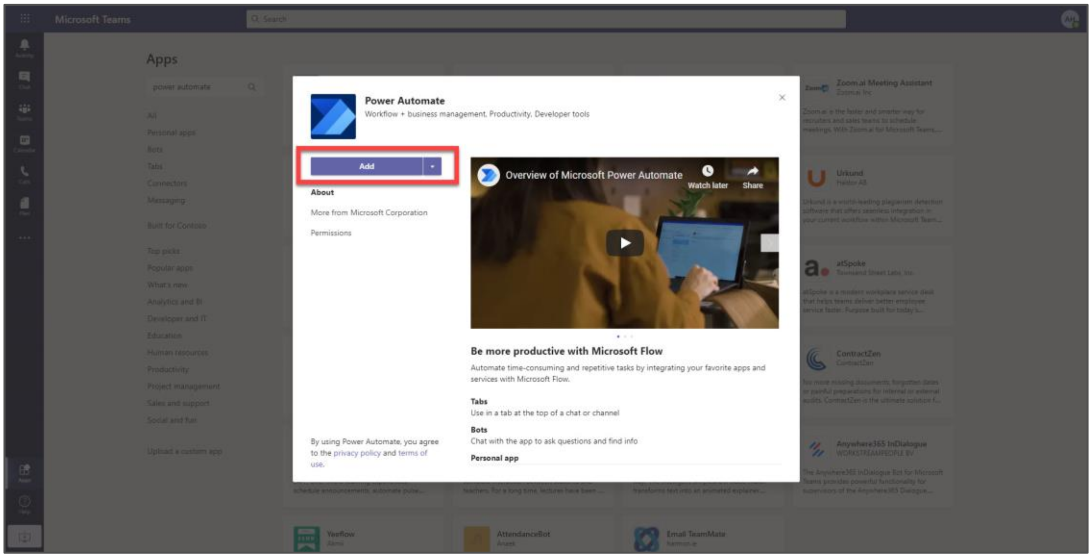
1. Click on the **Apps** icon on the left toolbar, and then search for Power Automate.



2. Click on the Power Automate App when you find it in the search results.

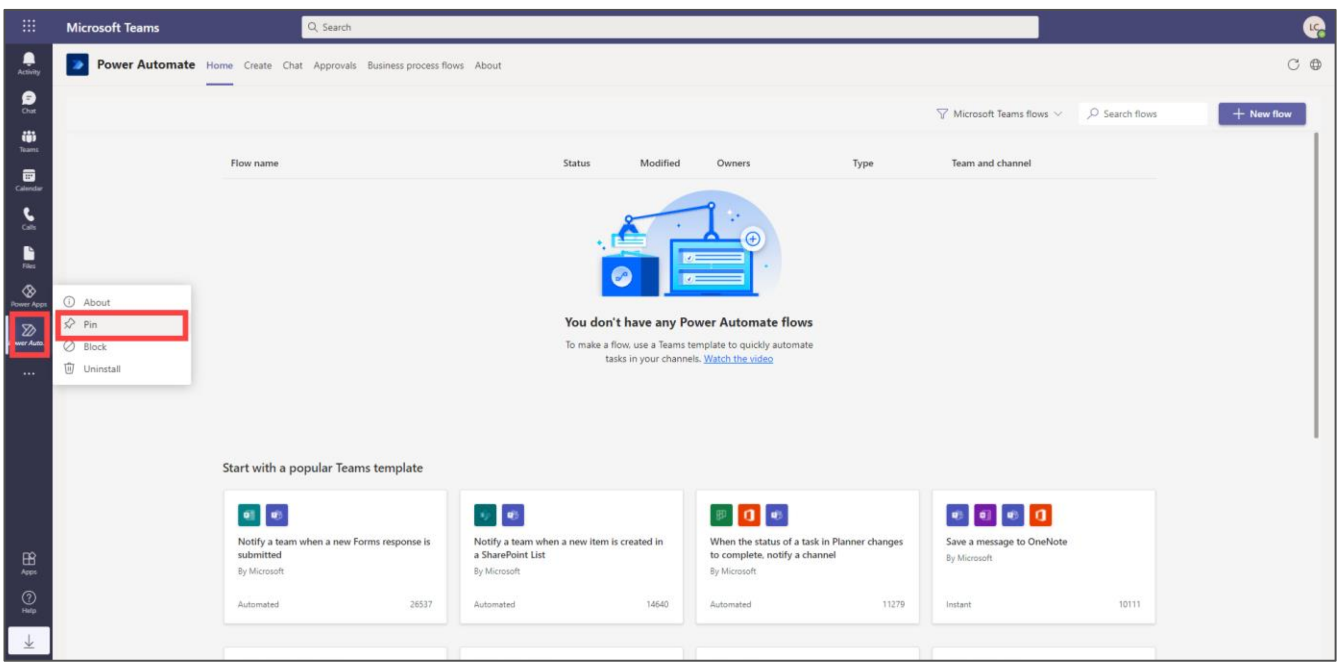


3. You will see a pop up with information about the Power Automate App for Microsoft Teams. Click on the **Add** button.



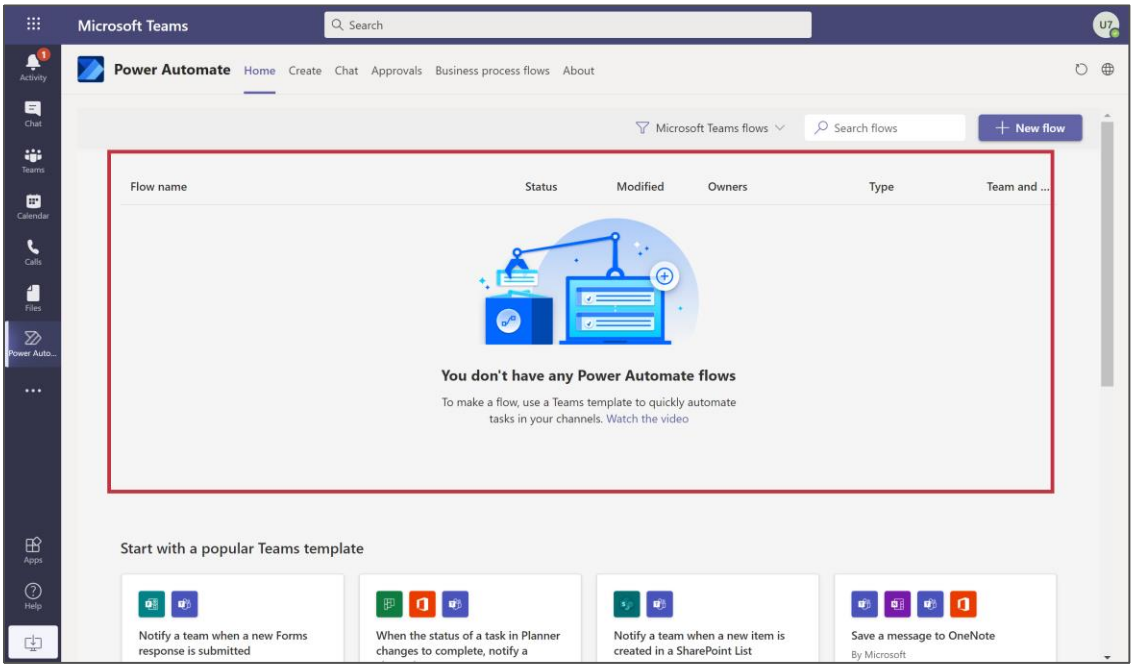
4. If prompted, select your country/region and click Get Started.

5. You will now see the Power Automate app in the left-hand navigation bar. Right click on that icon and select **Pin**. This pins the app to the navigation bar, making it easier to return to it when you need to.

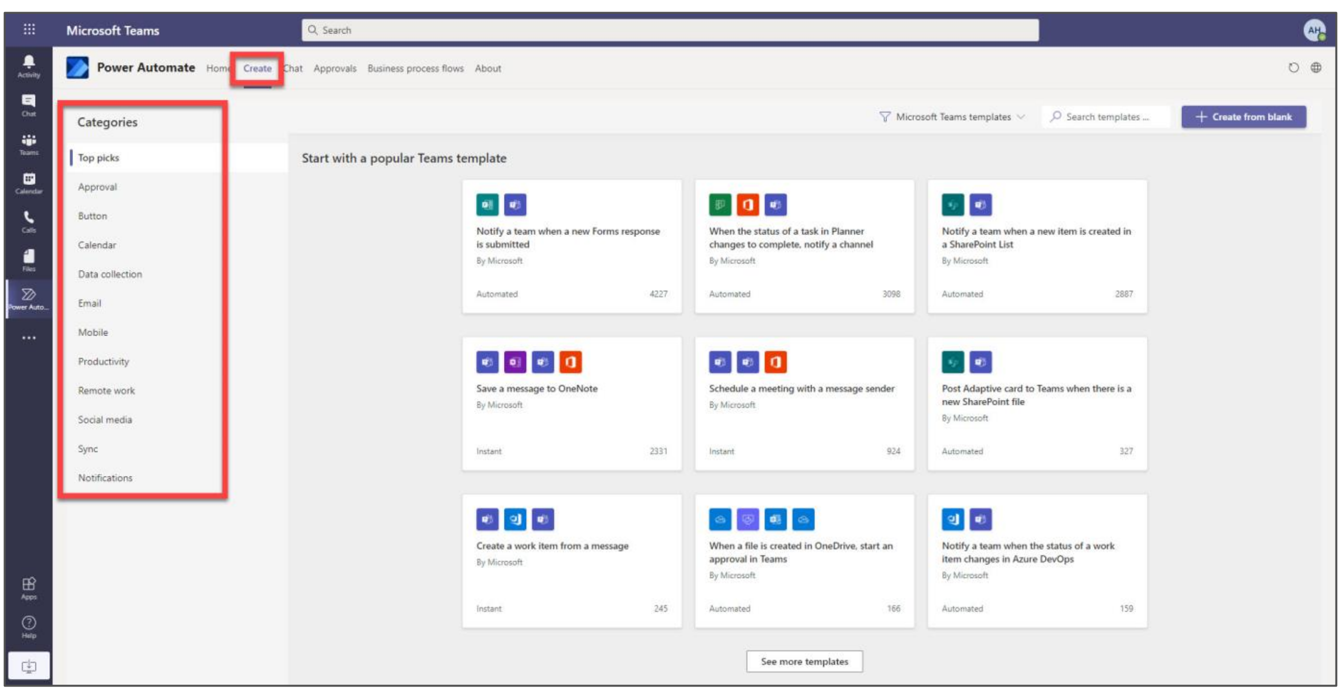


Task 2: Navigating the Power Automate app for Teams

1. On the home screen you will see a section for your flows. This is blank because you haven't created any yet, but as you work through this lab and create flows, this is where you will return to edit them and to see your flow runs for any troubleshooting.

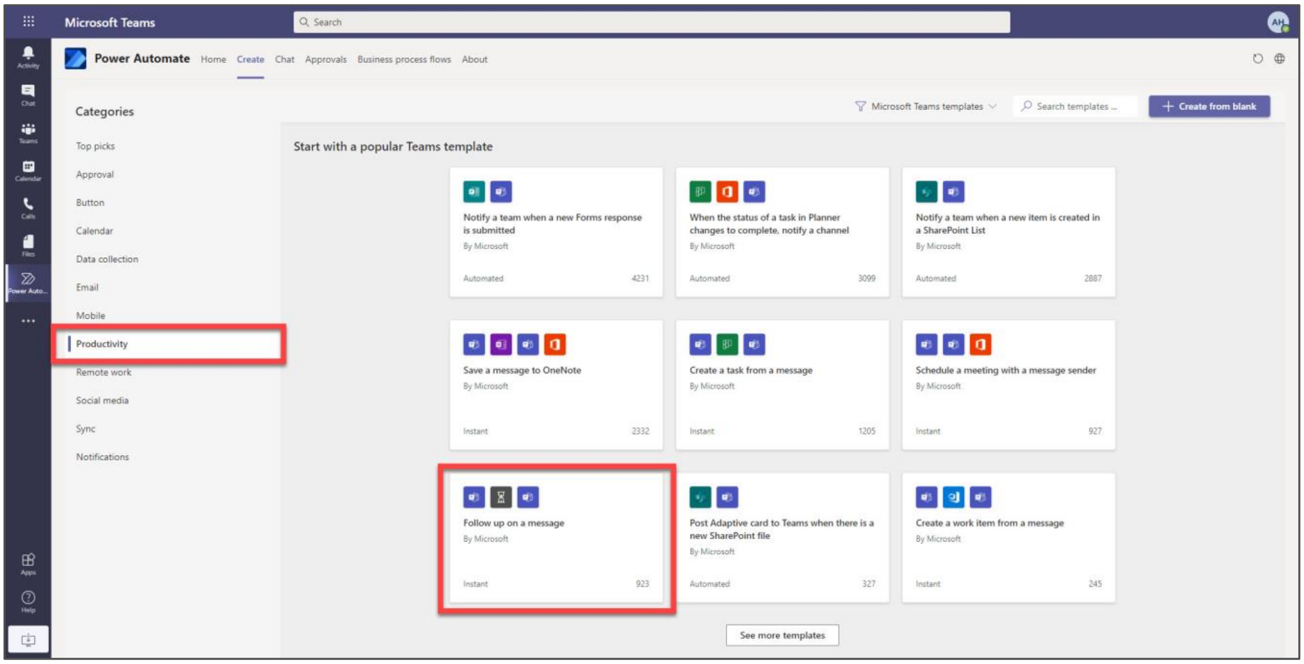


2. Click on the **Create** tab at the top. Here you will see a range of the most popular templates, and a menu of categories down the side to help you browse all the templates available. Click through some of these categories to get familiar with the range and types of Teams templates that are available here for you to work with.

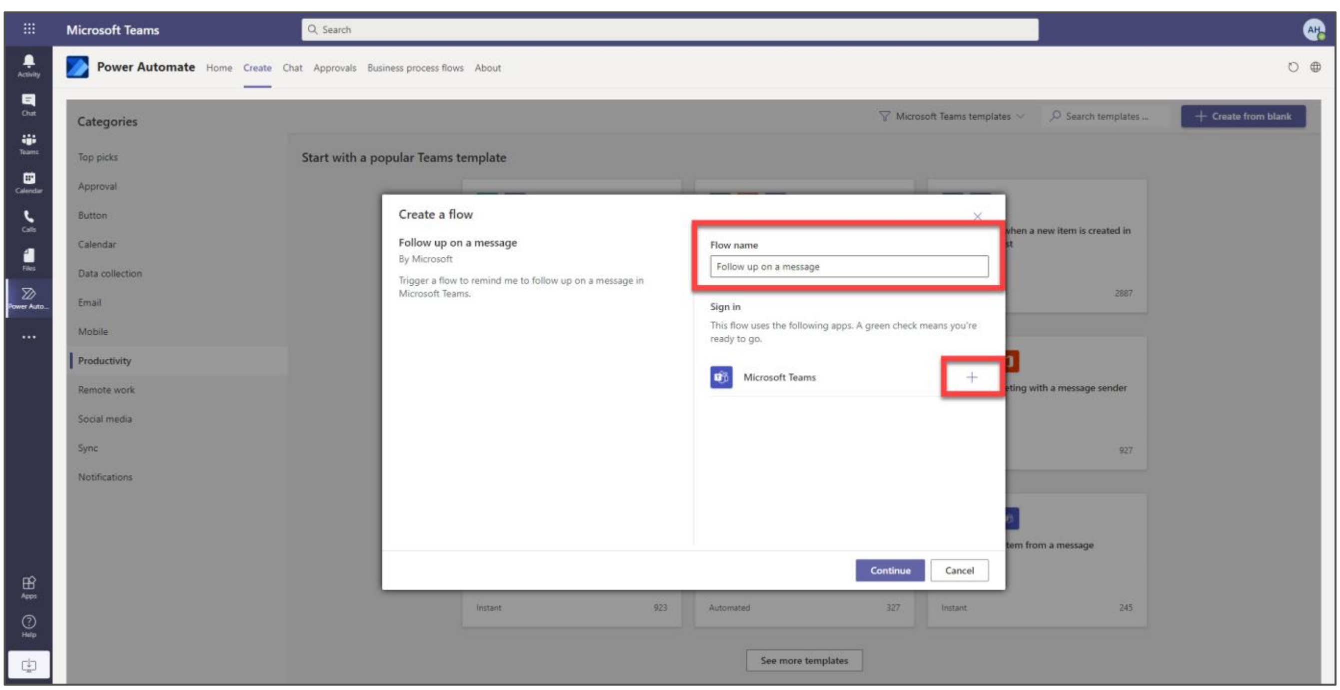


Task 3: Create a flow using a template: Follow up on a Message [Optional]

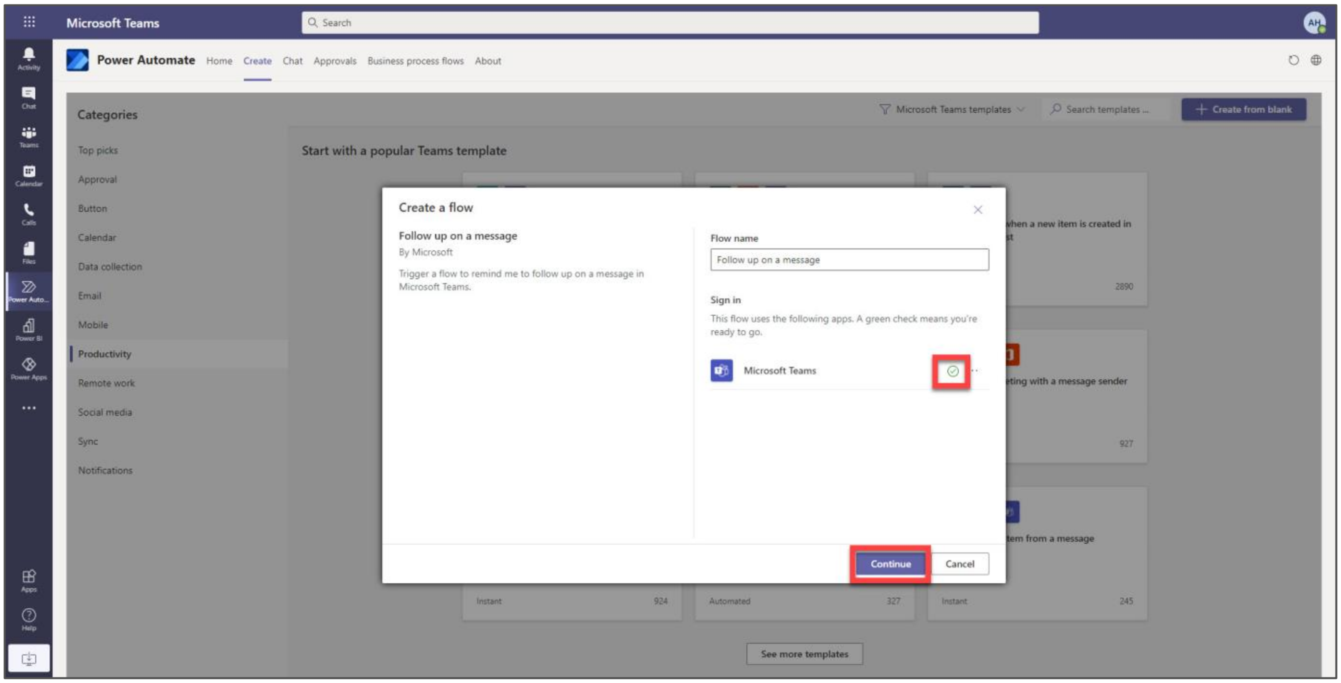
1. Navigate to the **Productivity** category and select the template called **Follow up on a Message** (you may need to click See more templates).



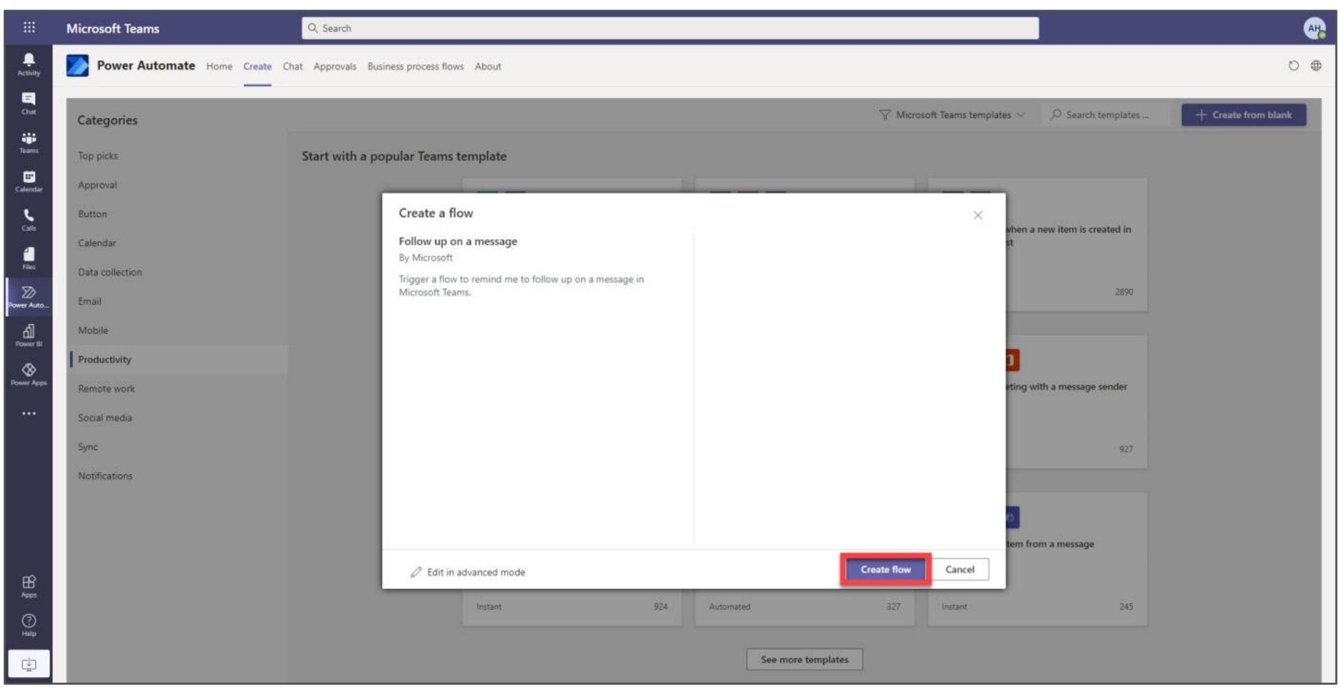
2. This provides you with a very simple template to get this flow built. You'll see the name is already filled in from the template (you can change it but for now we will leave it as it is). It also prompts you to sign in to any connectors that the flow needs to use. In this case, because it's the first time we are using a flow to connect to Microsoft Teams, we need to sign in. Click on the + icon next to the Microsoft Teams connector in the **Sign in** section.



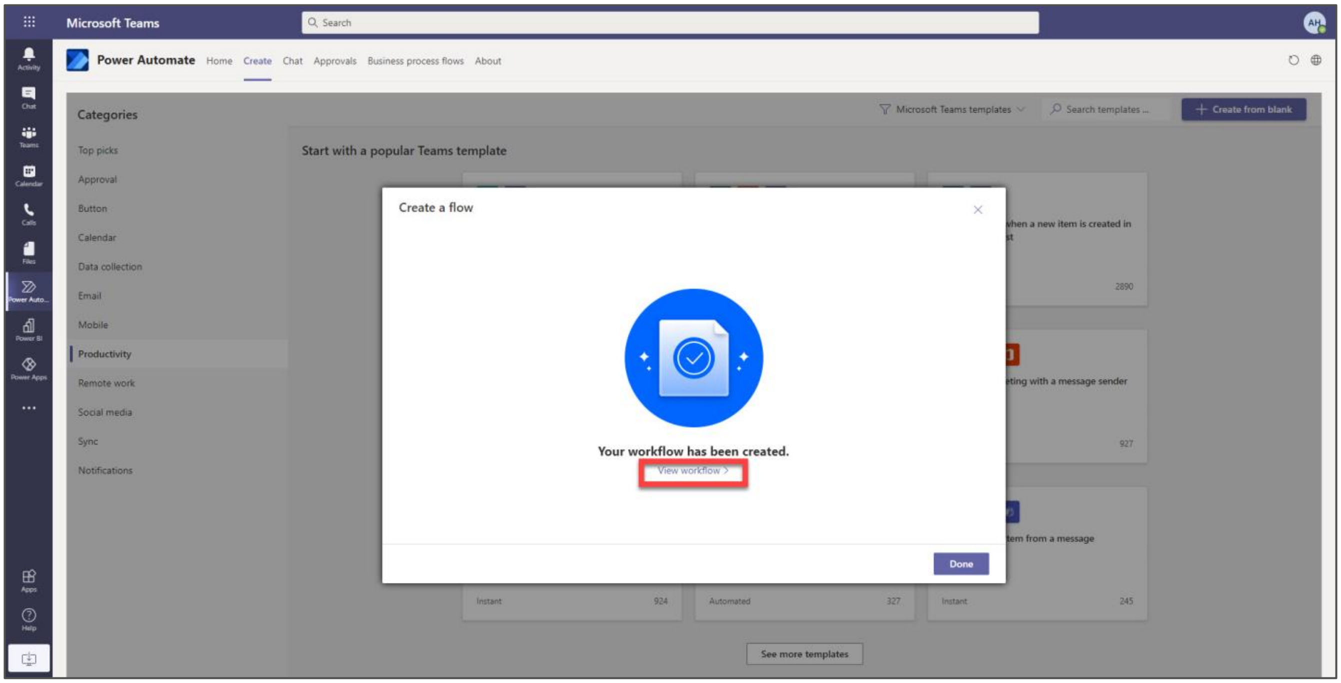
3. You will see a spinning wheel while the sign is in progress, and then when it is complete you will see a green check, which means you're ready to go. Once you see the green check, click **Continue**.



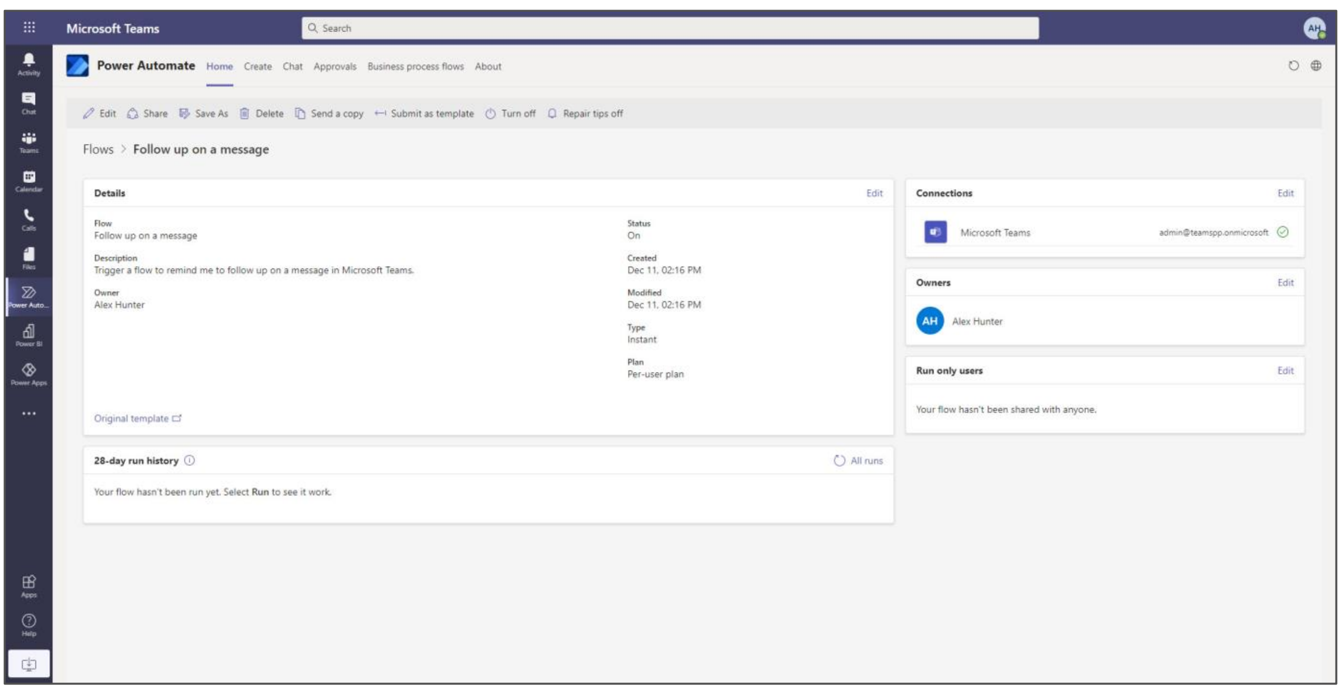
4. The next screen prompts you with any other options in the template. This is a very simple template, so there is nothing else to set up here. Click **Create flow**.



5. You will see a confirmation message that your workflow has been created. Click on the link to **View workflow**.



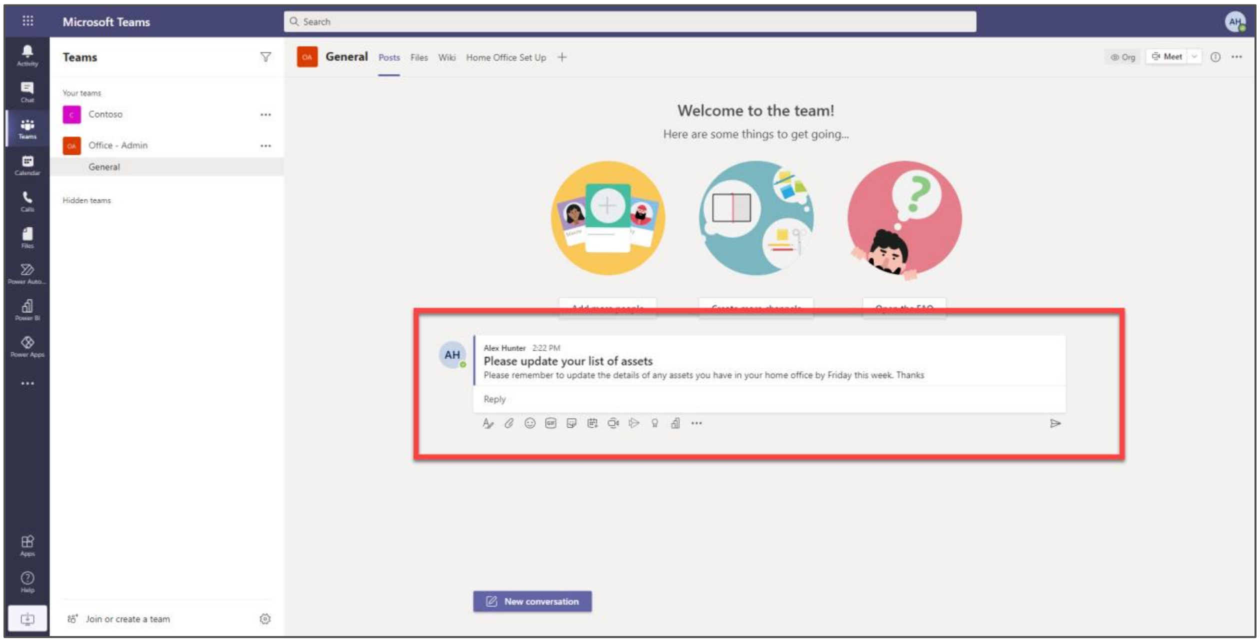
6. You will now see the details of your flow – when it was created, what connectors are being used, who the owners are, and details of any run history (nothing there yet because the flow hasn't been run). You can return to this screen at any time via the Home tab of the Power Automate app in Teams.



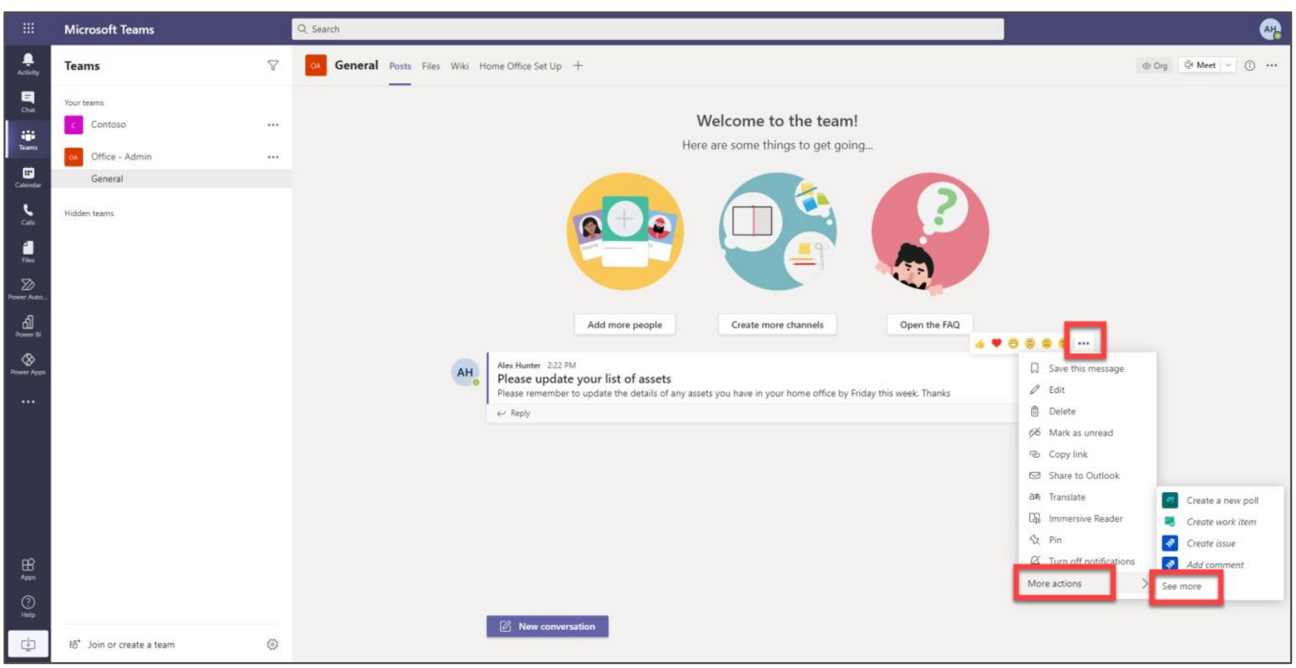
Task 4: Create a message in Teams and trigger your flow [Optional]

1. Click on the main Teams icon in the left navigation bar of Teams, and go to the general channel of the team you have been working in. Start a new conversation and type a message – for example:

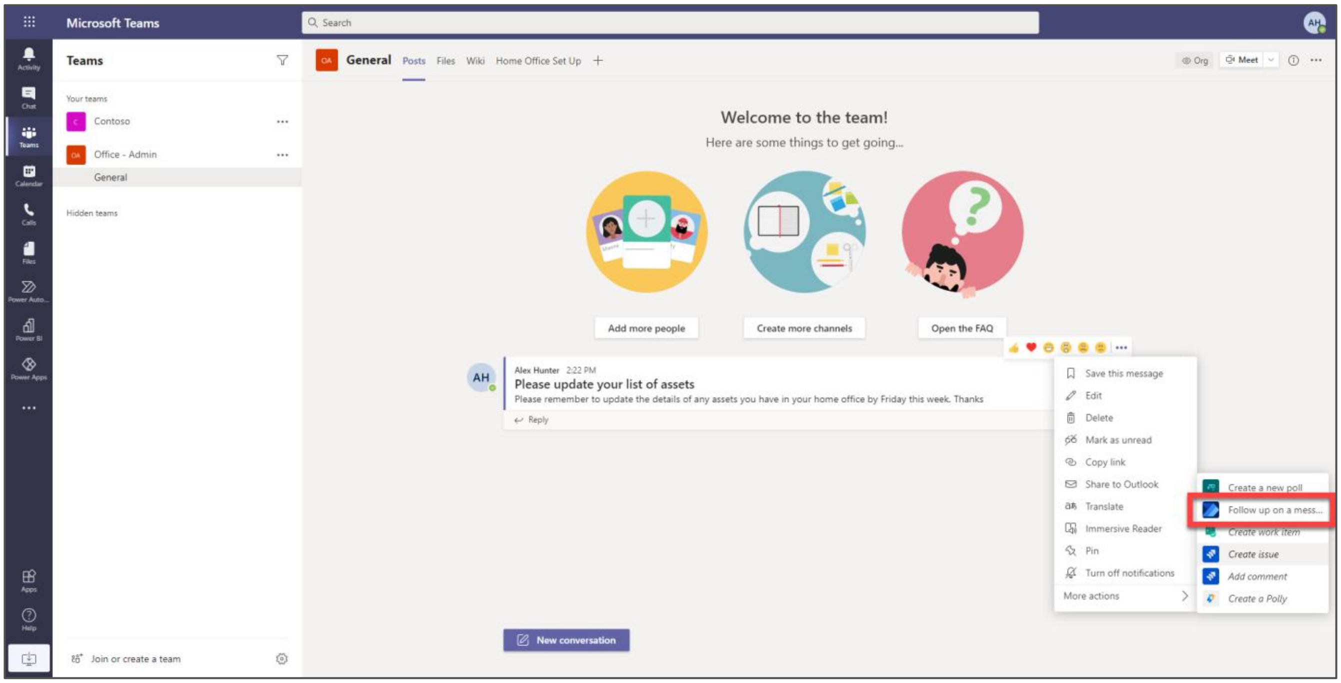
   Please update your list of assets
   Please remember to update the details of any assets you have in your home office by Friday this week. Thanks.



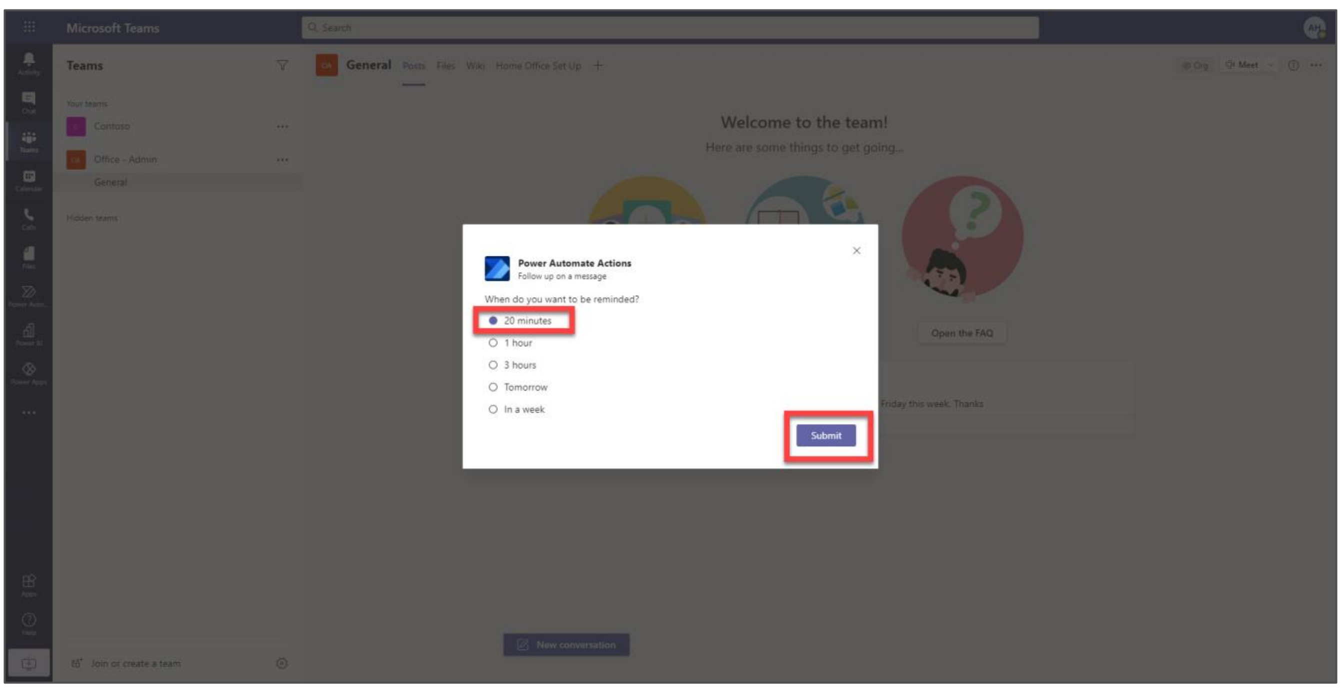
2. Now let's trigger the flow from this message, to set a reminder to follow up later. Hover over the message, click on the **...** and select **More actions**. In the list of actions, click on **See more.**



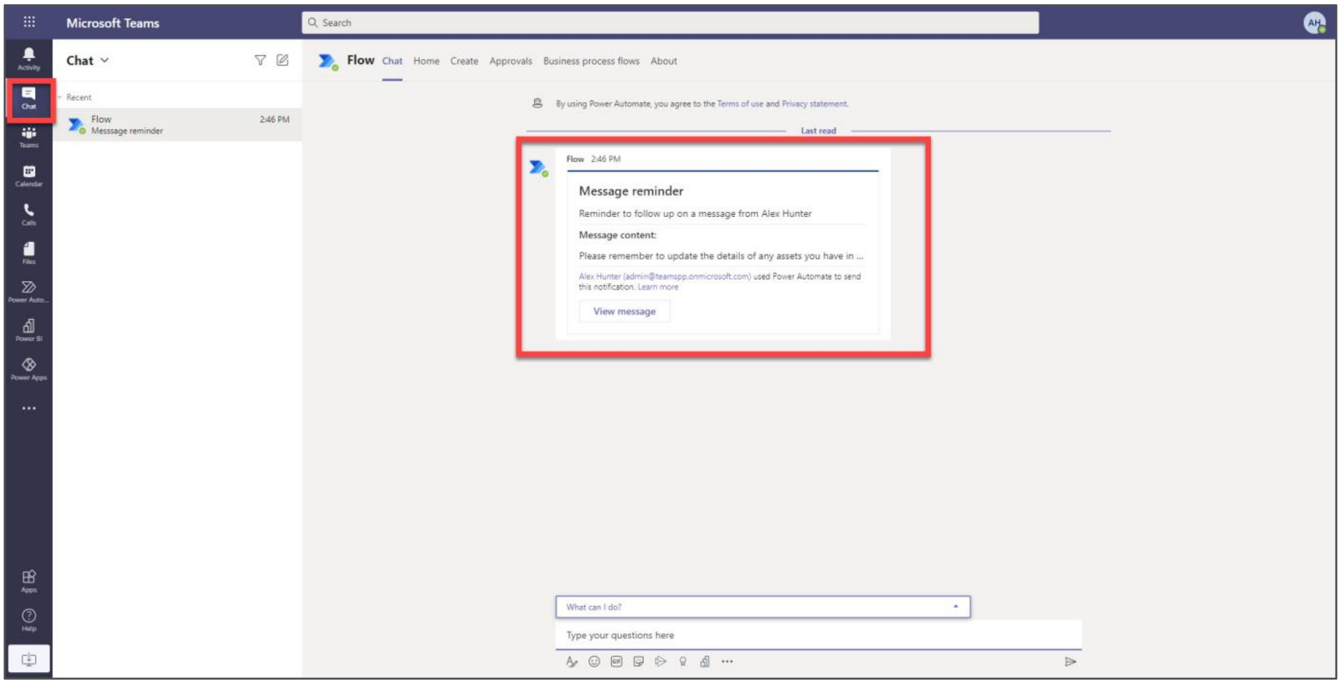
3. When you see your flow in the list, click on it.



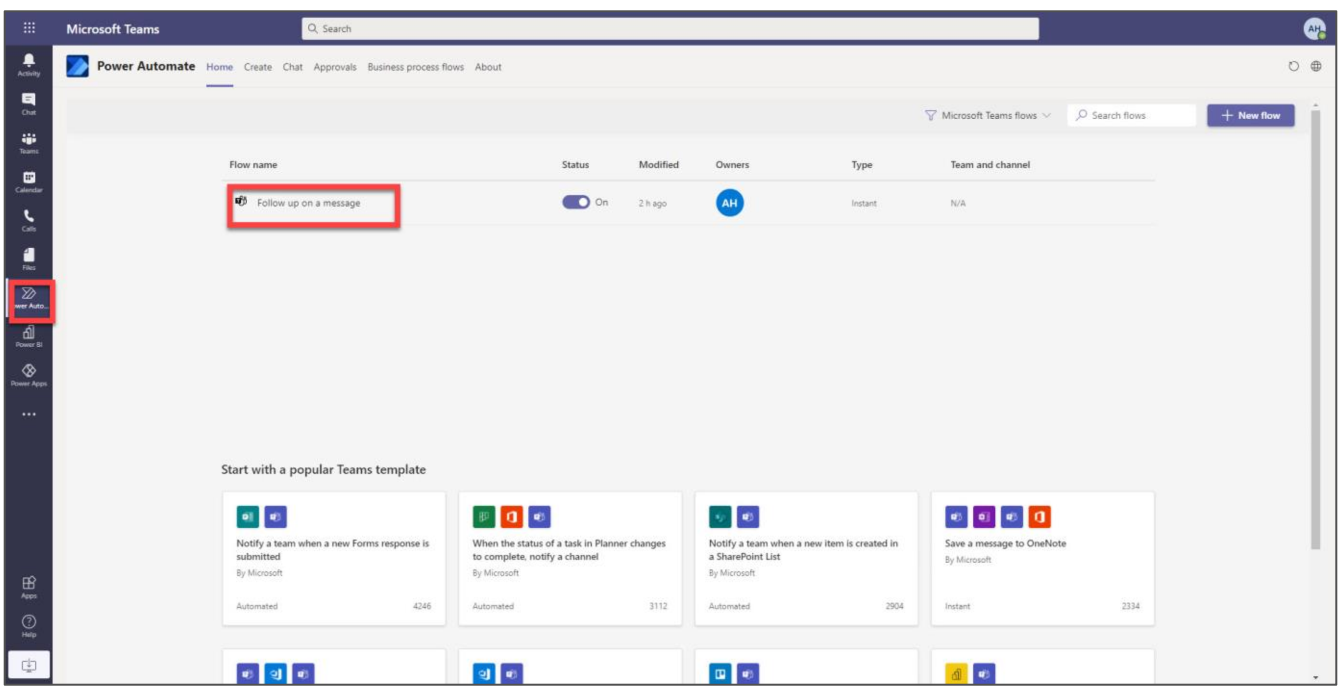
4. You will be prompted with a question asking you when you'd like to be reminded. Select 20 minutes and click submit.



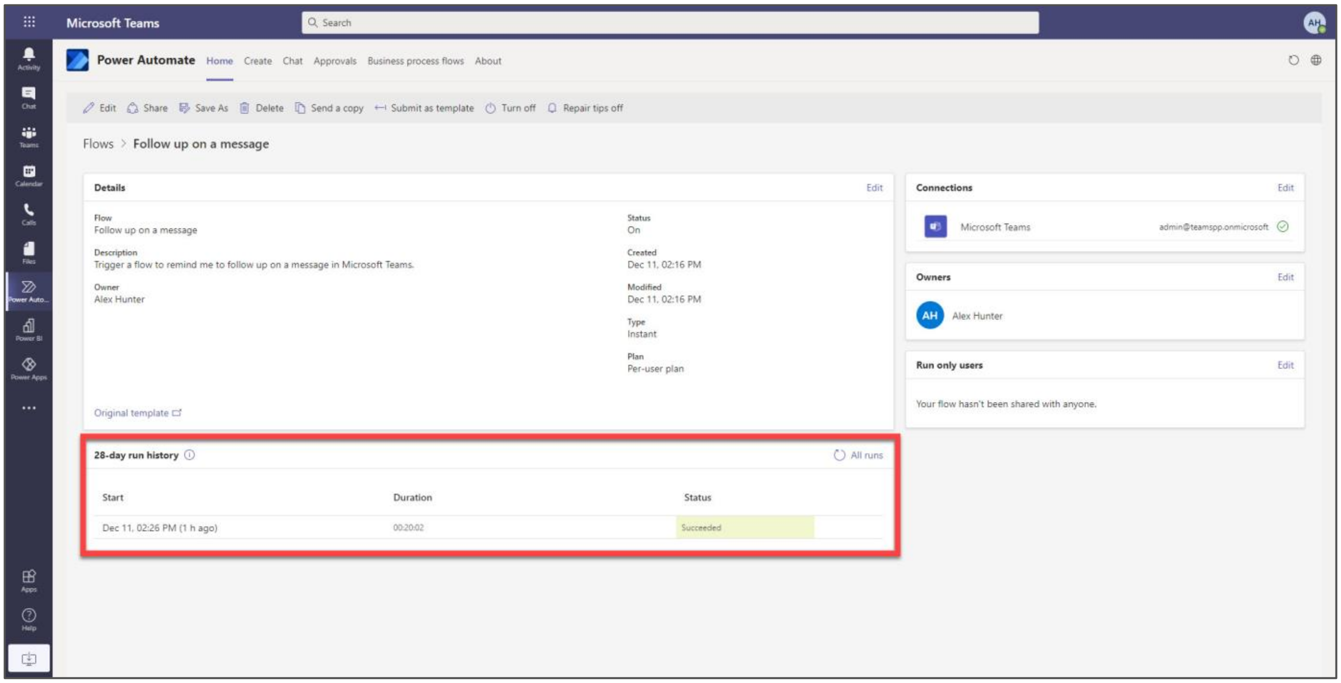
5. **You can move on to Exercise 2 and continue the rest of this lab while waiting for this flow to run.** In 20 minutes, you will see a notification in the chat. Open the chat to view the reminder message triggered by your flow.



6. Now return to the Power Automte app using the icon on the left hand menu bar that you pinned earlier. Open your flow by clicking on the name.



7. You will see the run history shows your flow ran successfully.

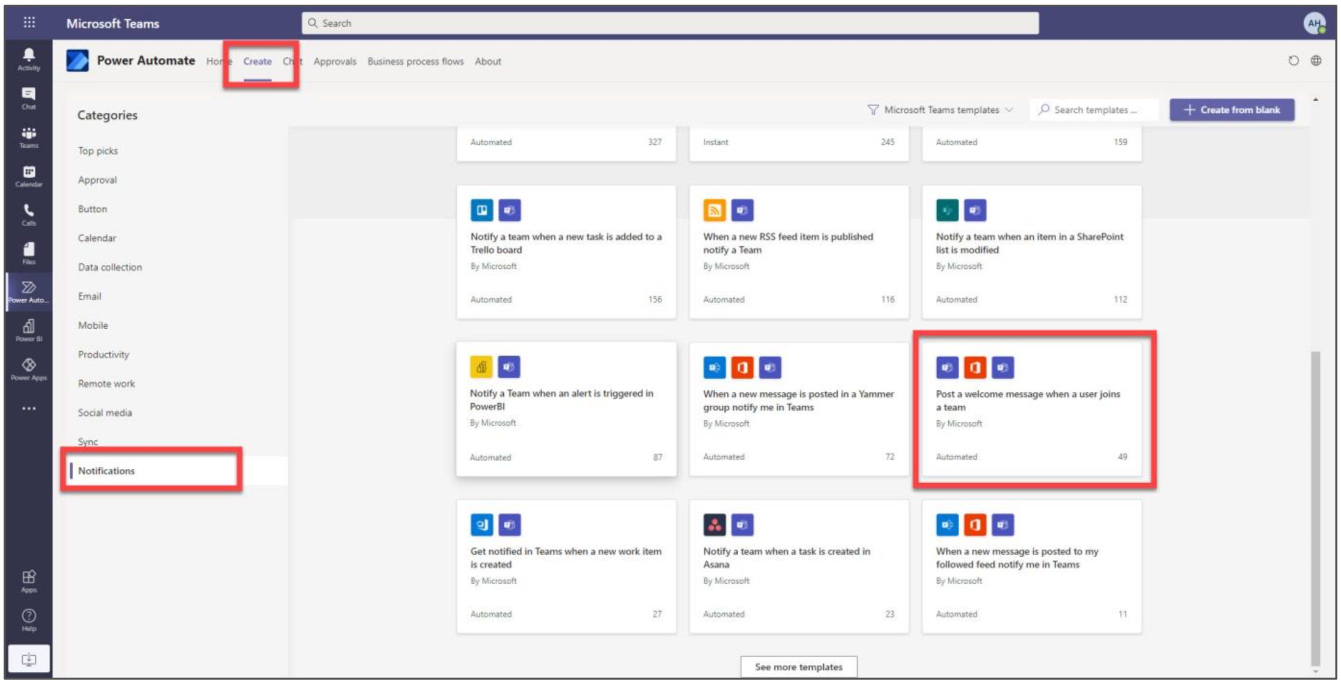


Exercise 2: Collaboration

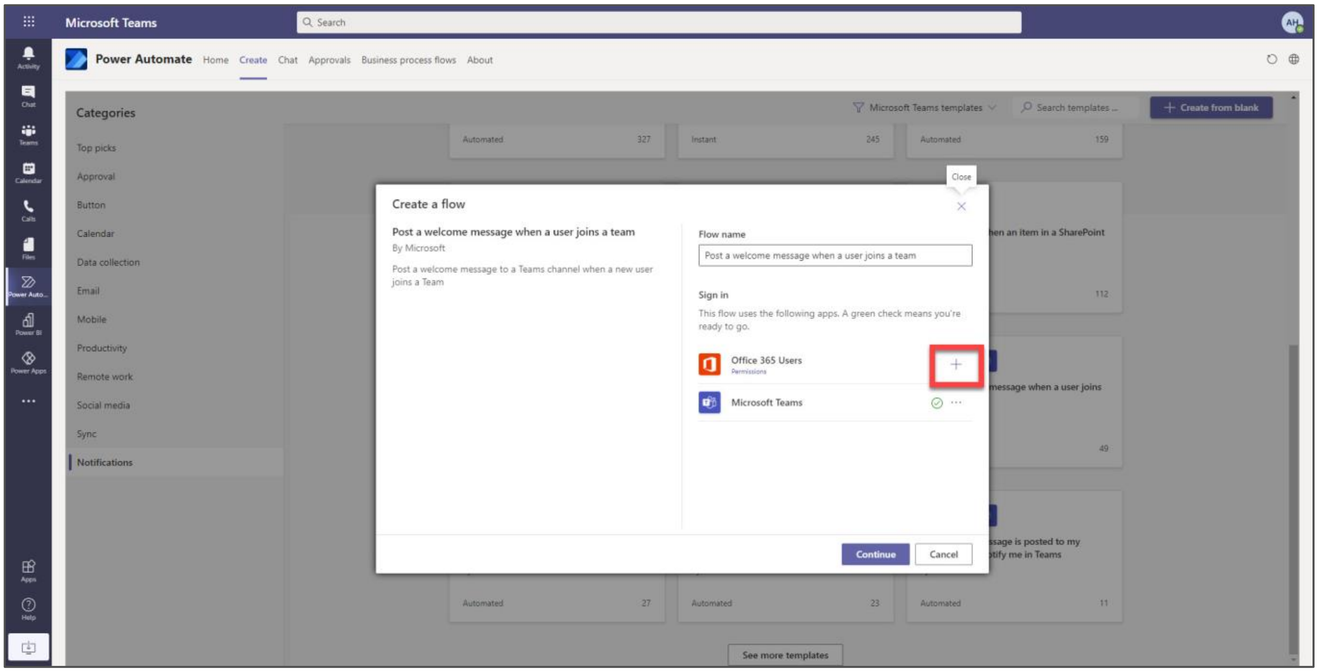
In this exercise you create a flow that will post a welcome message when someone joins your team. In this flow someone being added to your team is the trigger. You will add other people from your lab group into your team during this exercise (and you will continue to collaborate in these teams throughout the later labs), to get the experience of using Teams for collaboration with colleagues.

Task 1: Post a welcome message when a user joins a team [Optional]

1. Click on the **Create** tab in the Power Automate app, select the **Notifications** category, and then scroll down (you may need to click on See more templates) to find the template called **Post a welcome messge when a user joins a team** and select it.

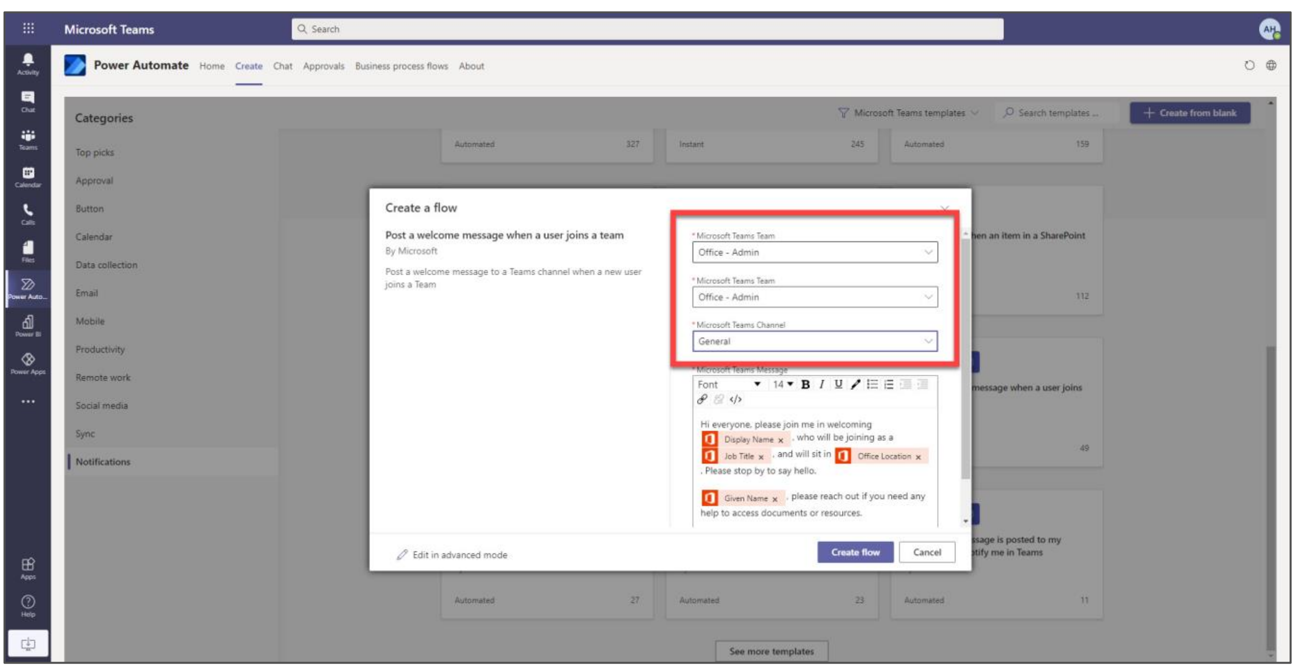


2. This flow uses 2 connectors. You are already signed in to the Microsoft Teams connector, so now you need to sign in to use the Office365 Users connector. Click on the + icon.

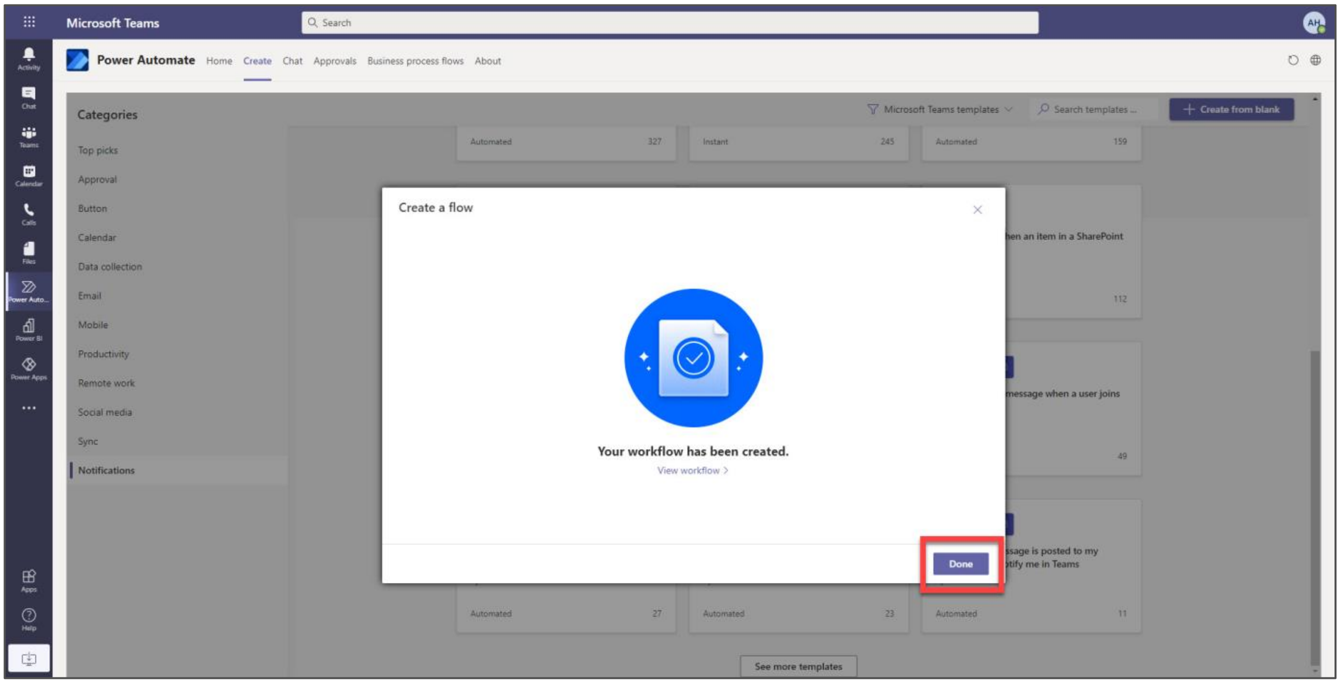


3. When you see the green check confirming sign in, click **Continue**.

4. The next step in the template asks you to select some options.
   - In both boxes labelled **Microsoft Teams Team**, choose the Team you have created for the lab. (In a real business scenario, you may have someone joining one team and want to make a welcome announcement in another team, which is why there are 2 options here)
   - In the Microsoft Teams Channel, choose the General channel

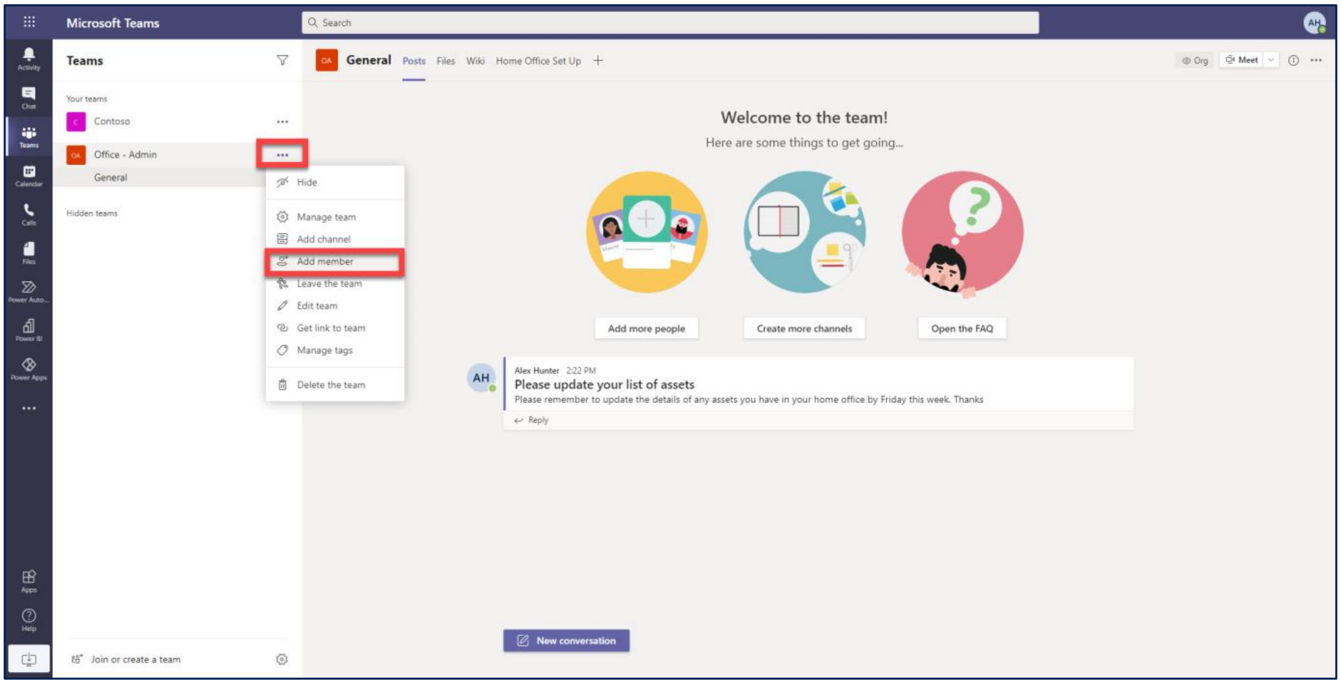


5. Under these options you will see the message that will be posted, which brings in dynamic content from the Office 365 user record. You could edit this content if you wish. For now we will leave it as it is. Click on **Create flow**. You will see a confirmation message that your workflow has been created. Click **Done**.

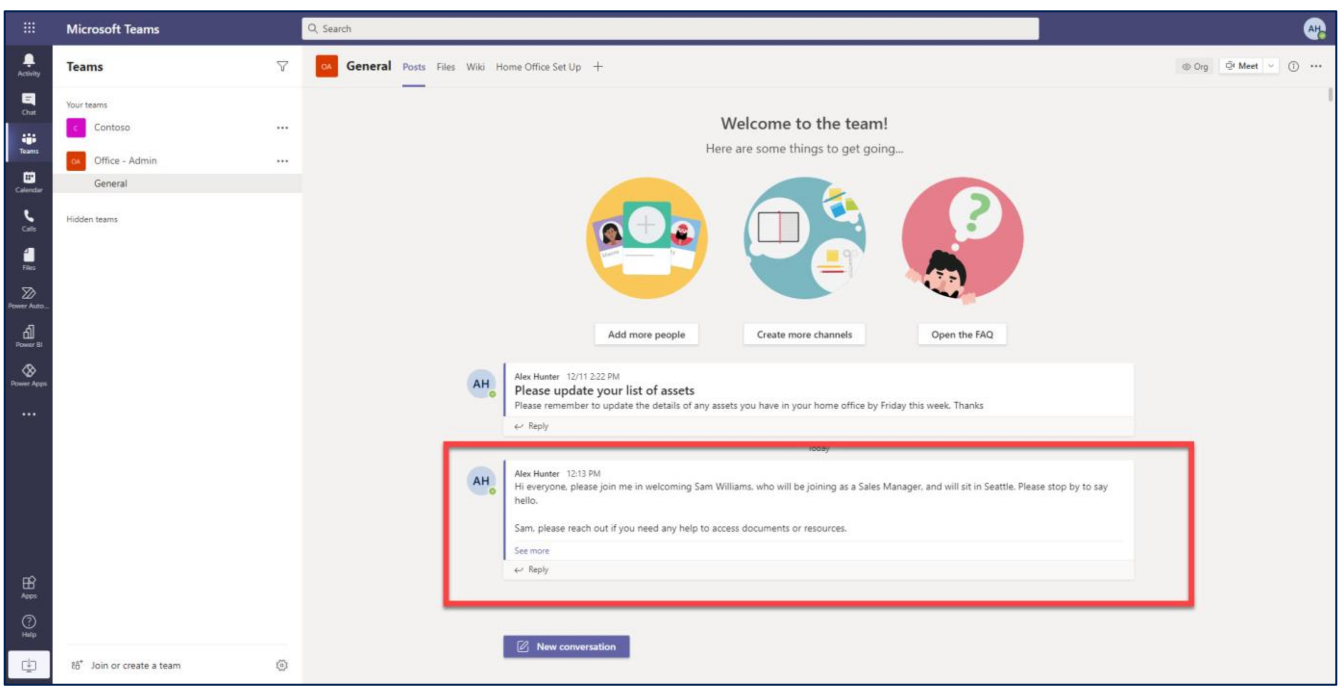


Task 2: Add a member to your team to trigger the flow [Optional]

1. Go back to your Team (via the main Teams icon on the left navigation menu) and add another user from your lab group to your team. Click on … next to the Team name and select **Add member**. Then search for their name and click **Add**. You can then close the dialogue box.



2. You will then see a notification message in your channel. Note there can be a delay the first time this runs. If you don't see the message appear immediately, give it 5-10 minutes and check again.

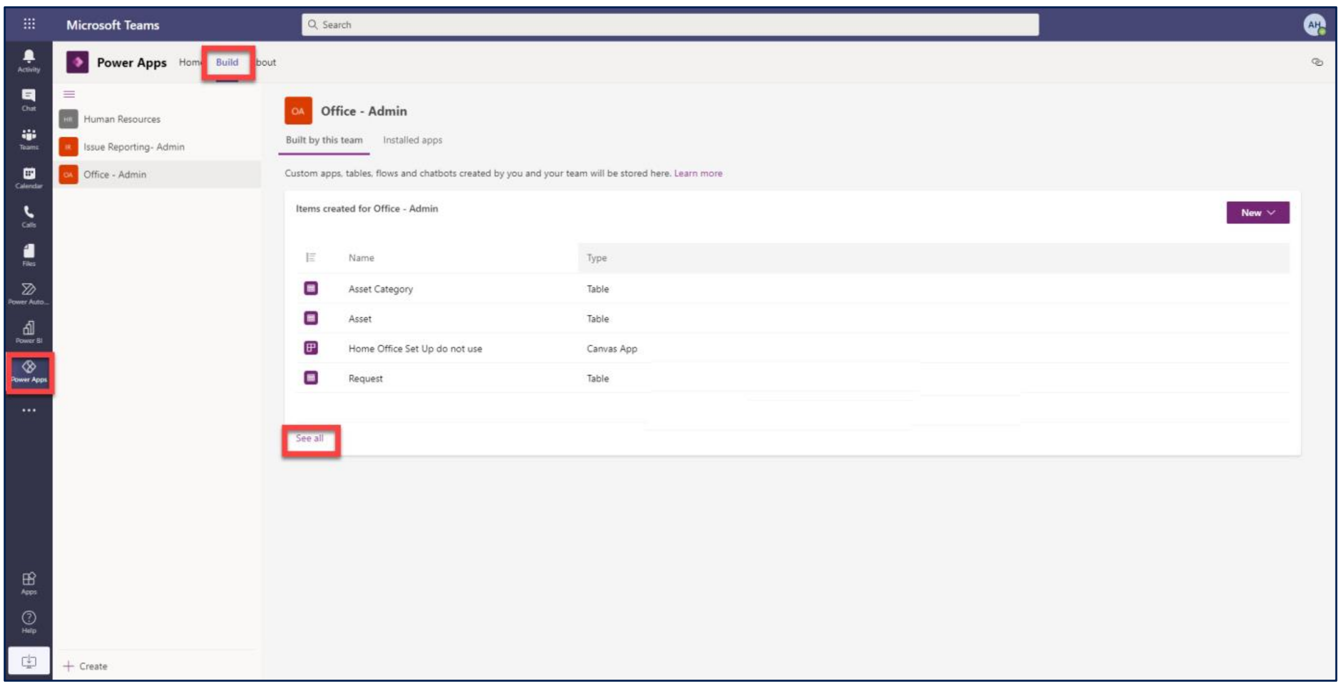


Exercise 3: Create an approval flow

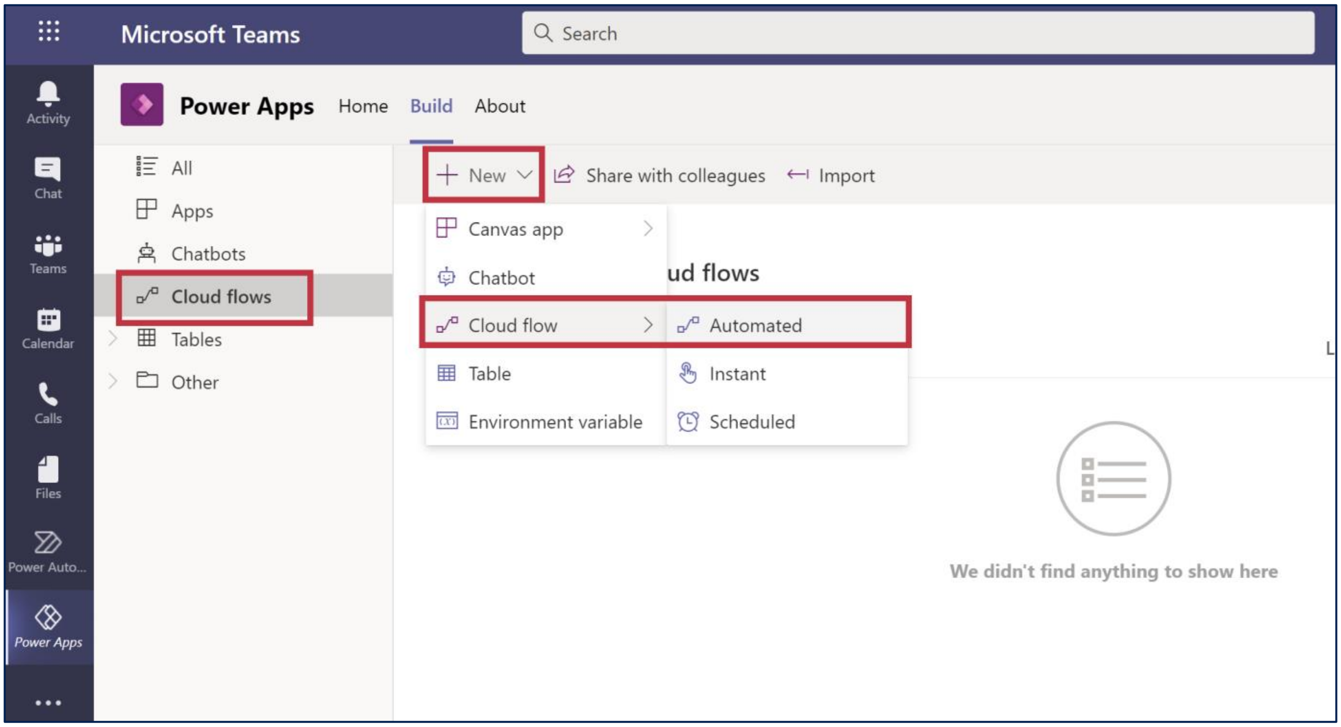
You can also create your own flows from blank, and use them to connect with your Dataverse for Teams tables. To do this, you need to work in the Power Apps app. In this exercise we will build a flow that will trigger an approval process when a new request for home office equipment is submitted via the app you built in the previous lab.

Task 1: Create a flow from blank

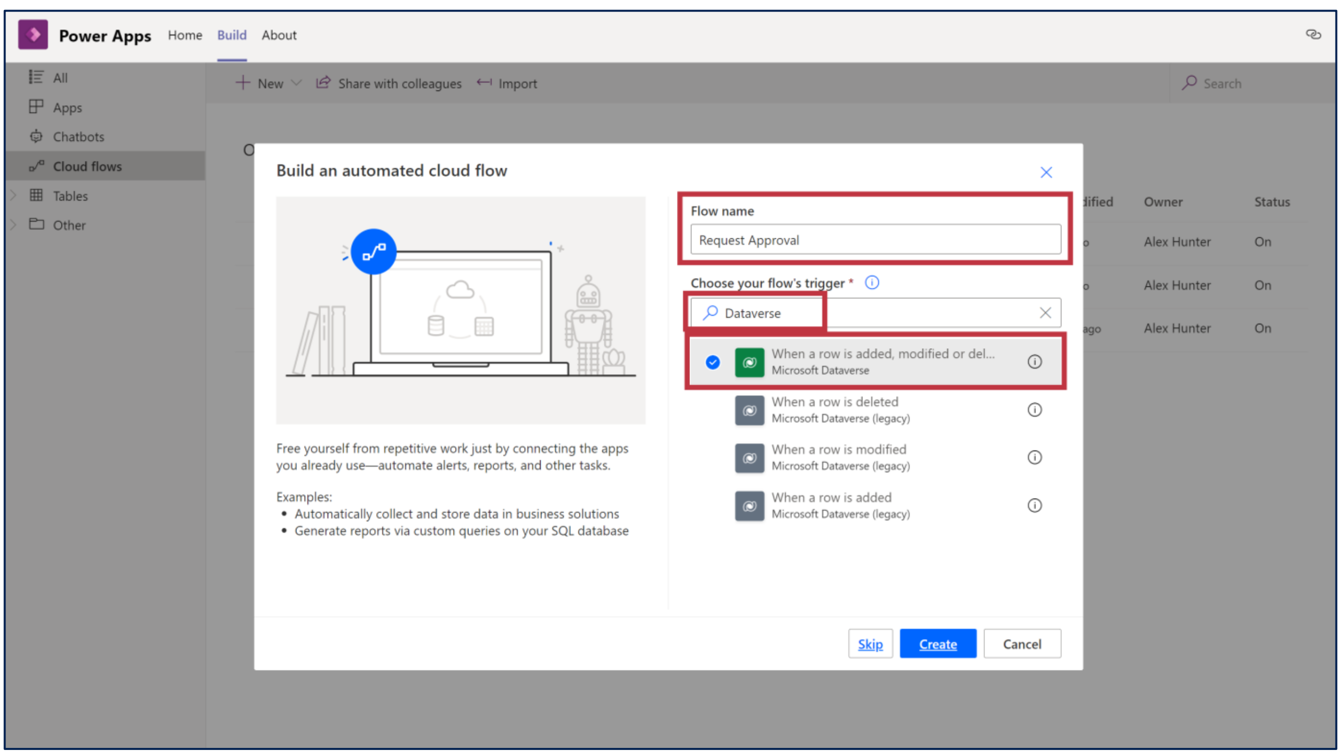
1. Navigate to the Power Apps app using the left hand navigation bar, and go to the **Build** tab. Select your Team and then select **See all** at the bottom of the list of Items created.



2. Select **Cloud Flows** from the left hand menu, then **+New** > **Cloud Flow** > **Automated**.

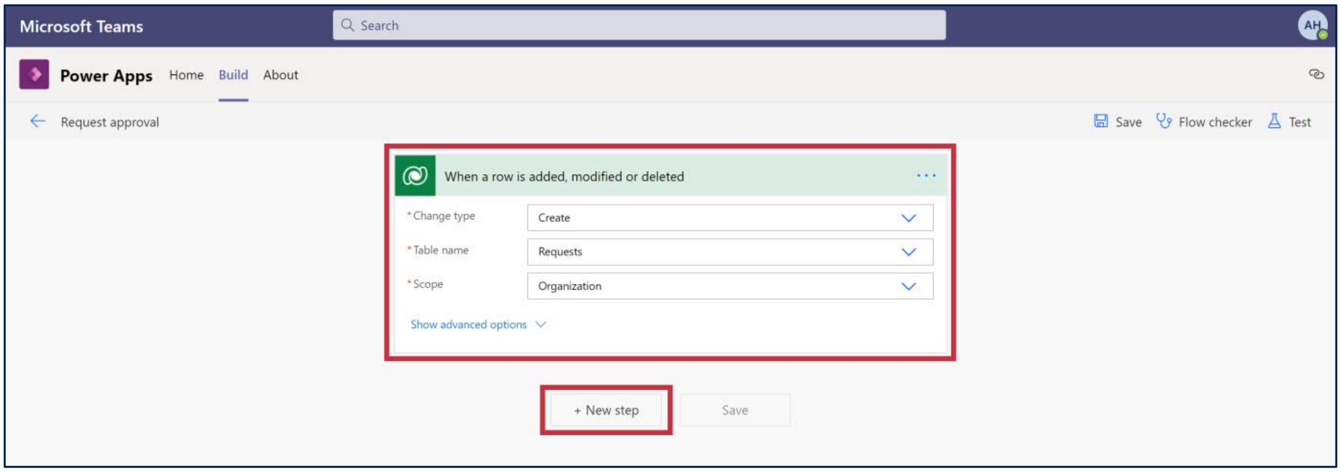


3. Give your flow a name: **Request approval**
Search for: **Dataverse** in the flow's trigger box and select **When a row is added, modified or deleted**. The action should have the green Microsoft Dataverse logo. Then click **Create**.

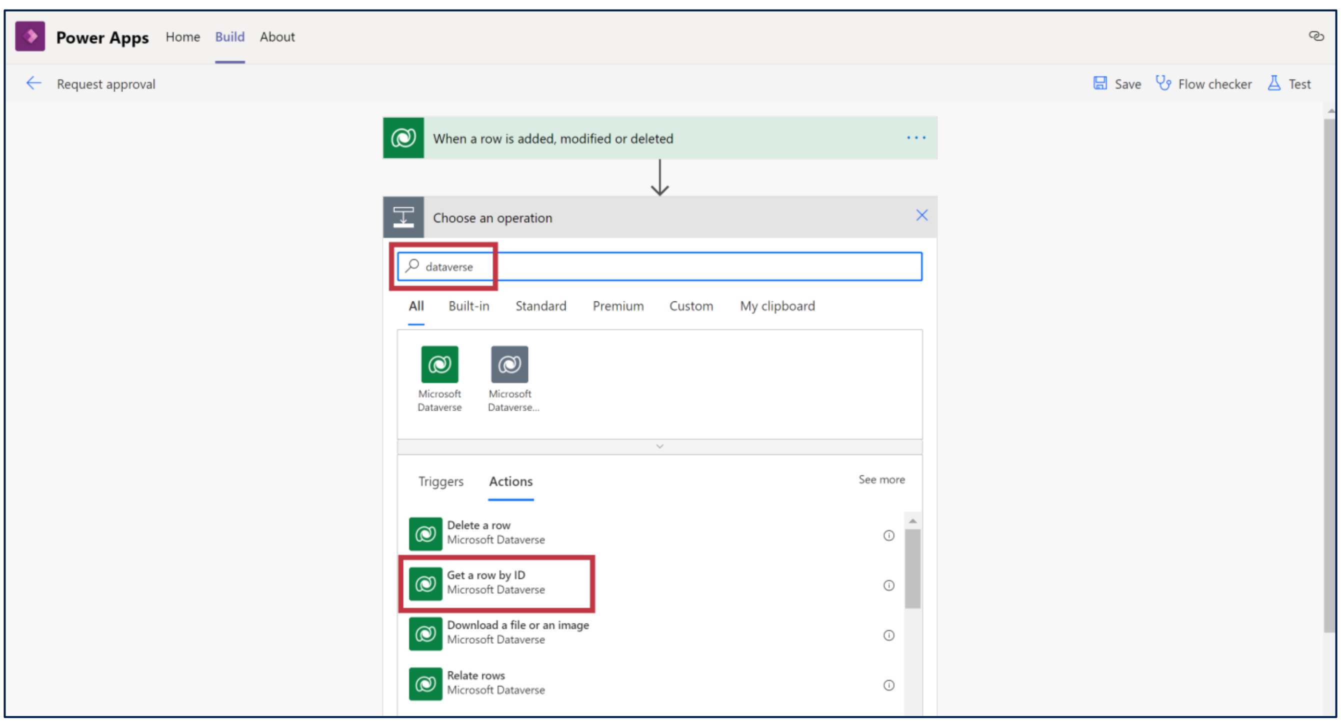


4. You are now in the full Power Automate editor that allows you to build your own flow. The flow starts with a trigger, which in this case is that a Request is created in your Dataverse for Teams table. In the trigger action select the following options.
   Change type: Create
   Table Name: Requests
   Scope: Organization

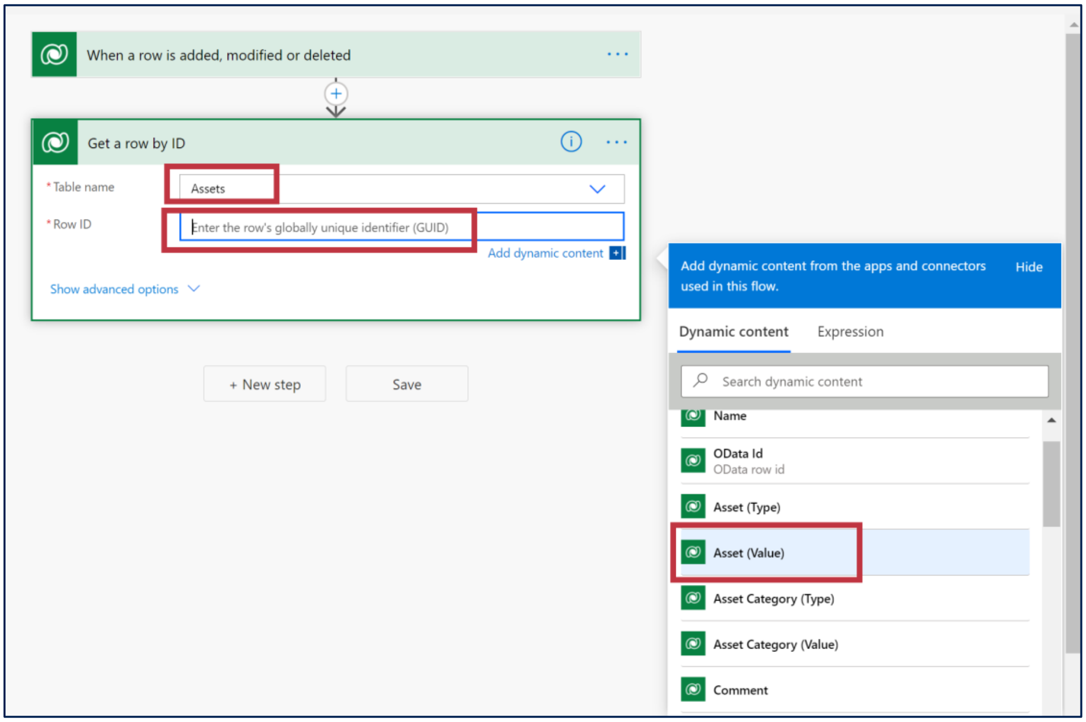
   Then click on **+ New step**.



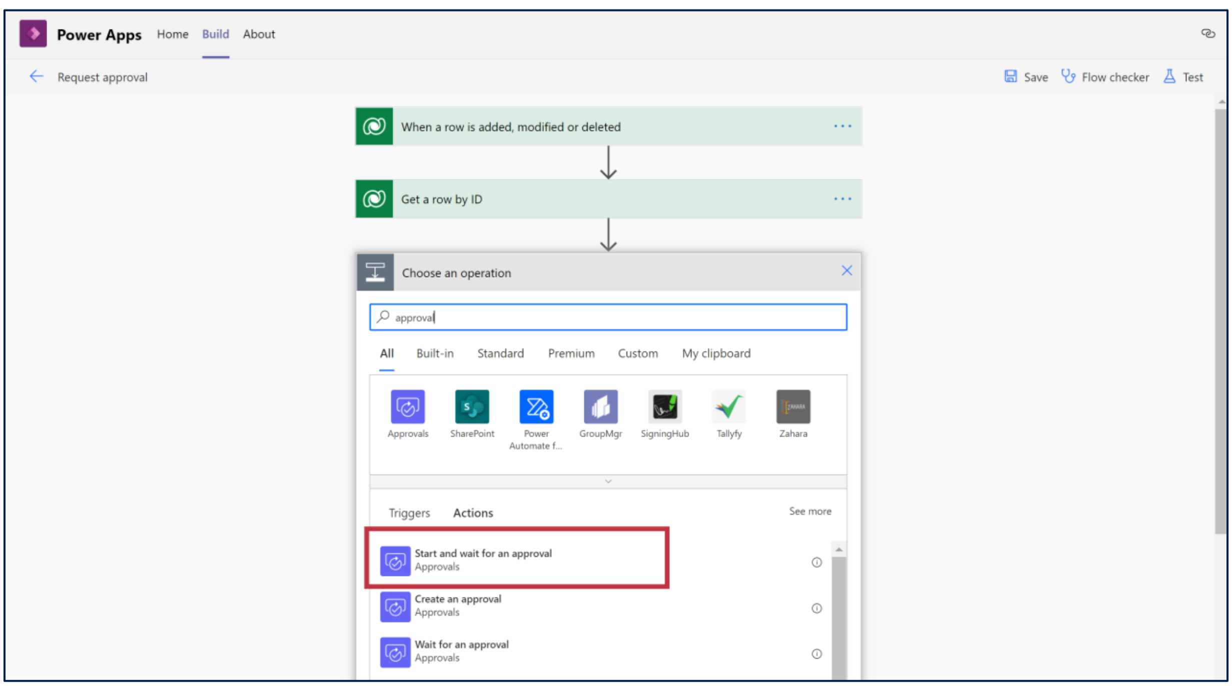
5. Now we are going to add a step to get the name of the asset that the person requested. The asset is in a related table, so we need to use a Get row by ID action to retrieve all the details of that asset. Search for and select the Dataverse connector and select the **Get a row by ID** action.



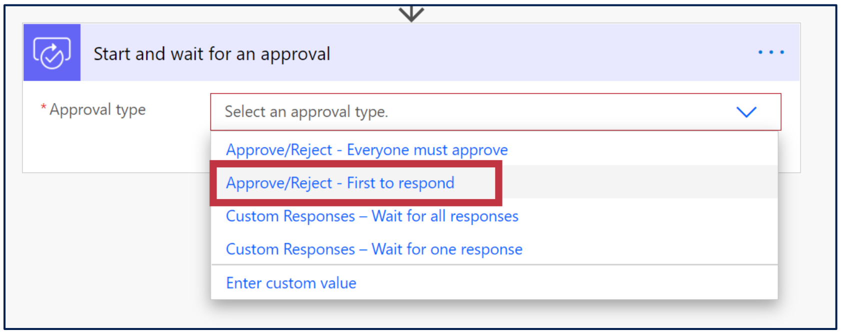
6. In the Table name dropdown choose **Assets**. In the Row ID section, select **Asset (Value)** from the Dynamic content pop out box.



7. Click on **+ New Step**. In Choose an operation search for **approval** and select **Start and wait for an approval**.

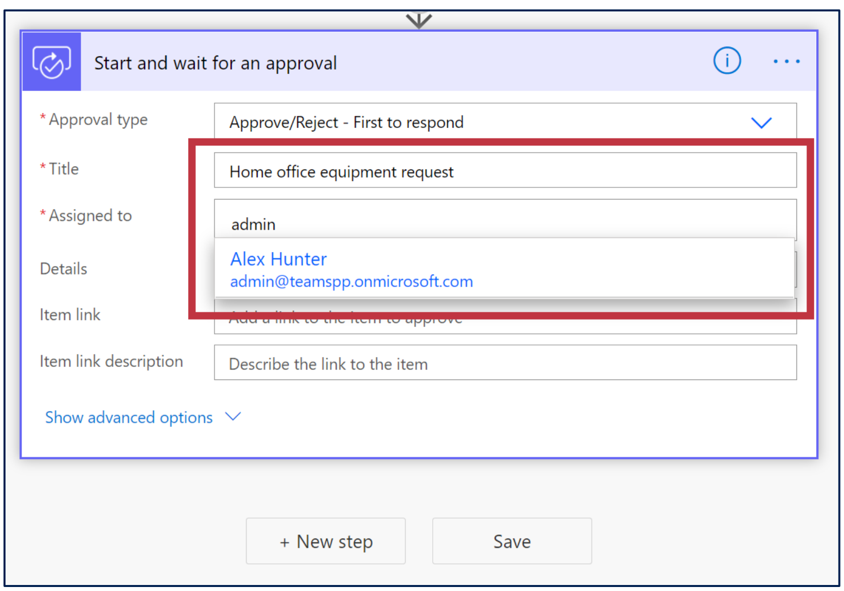


8. You will see a brief message while the connection to the Approvals connector is established. When this is done, select **Approve/Reject – First to respond** in the Approval type dropdown.



9. Fill in the rest of the **Start and wait for an approval** action as follows:
   Title: Home office equipment request
   In the **Assigned to** box, start typing the email address you used to log in for the lab, and then select the name of the user when it appears.

Note: For training purposes here, you are approving or rejecting your own requests. In a real world scenario, you would either enter the name of the approving manager here, or you would use the Office 365 Connector to dynamically retrieve the name of the manager of the person making the request).

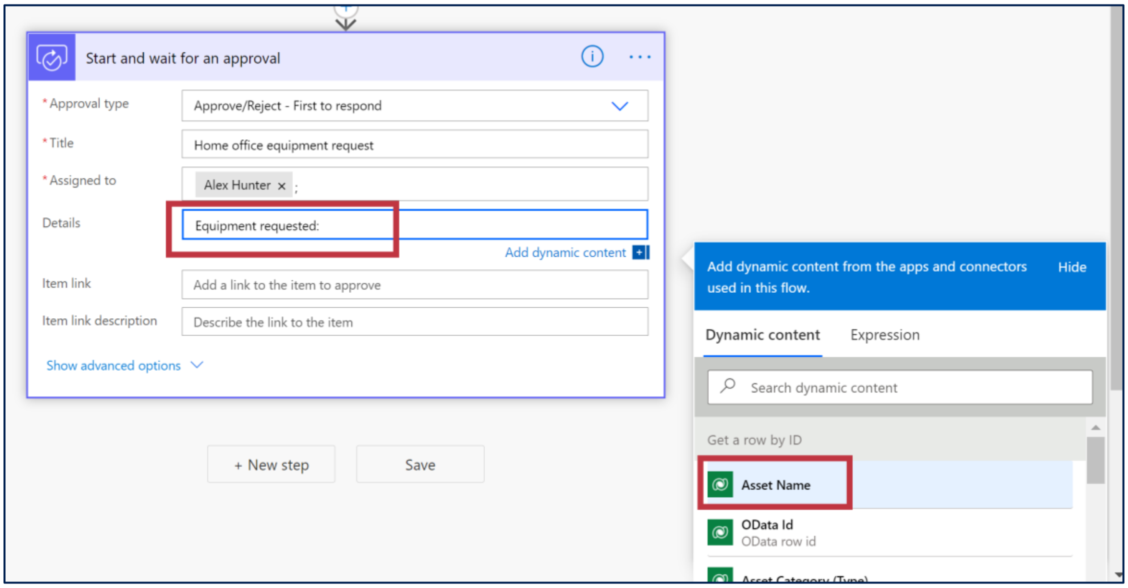


10. In the Details box, type:

    Equipment requested:

    Then go into the dynamic content pane and select **Asset Name**.

    Note (grey shaded label just above the list of columns) that this is coming from the previous step, Get a row by ID.



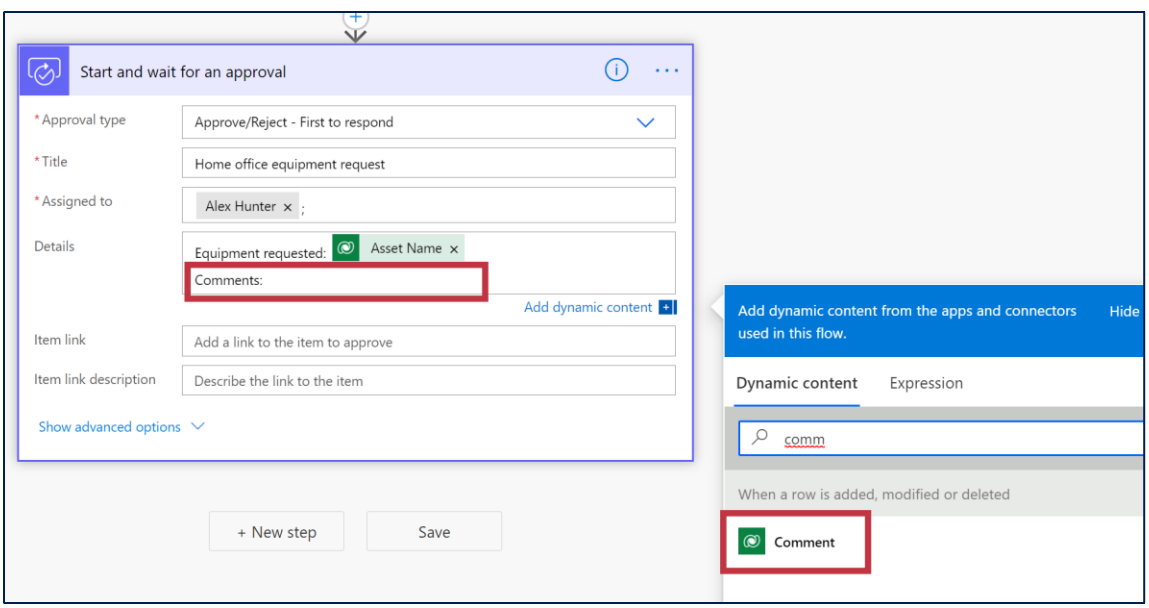
11. Press enter to add a new line and type:

    Comments:

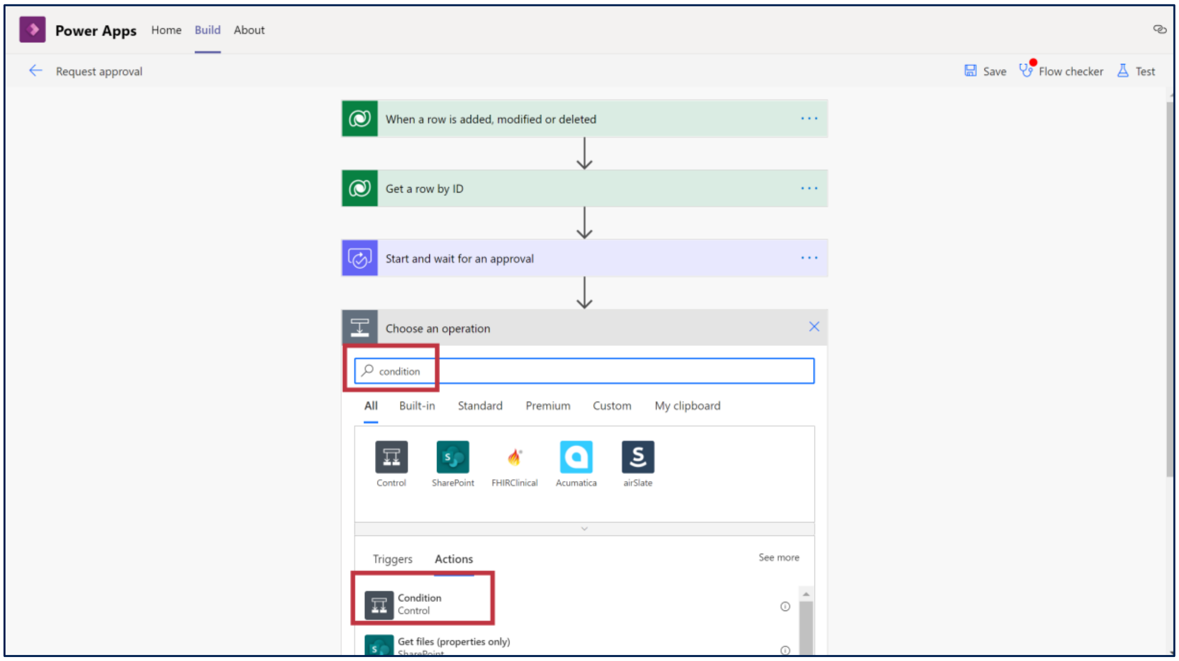
    Then go into the dynamic content pane and search: comment

    You will see the Comment column in the list. Click on it.

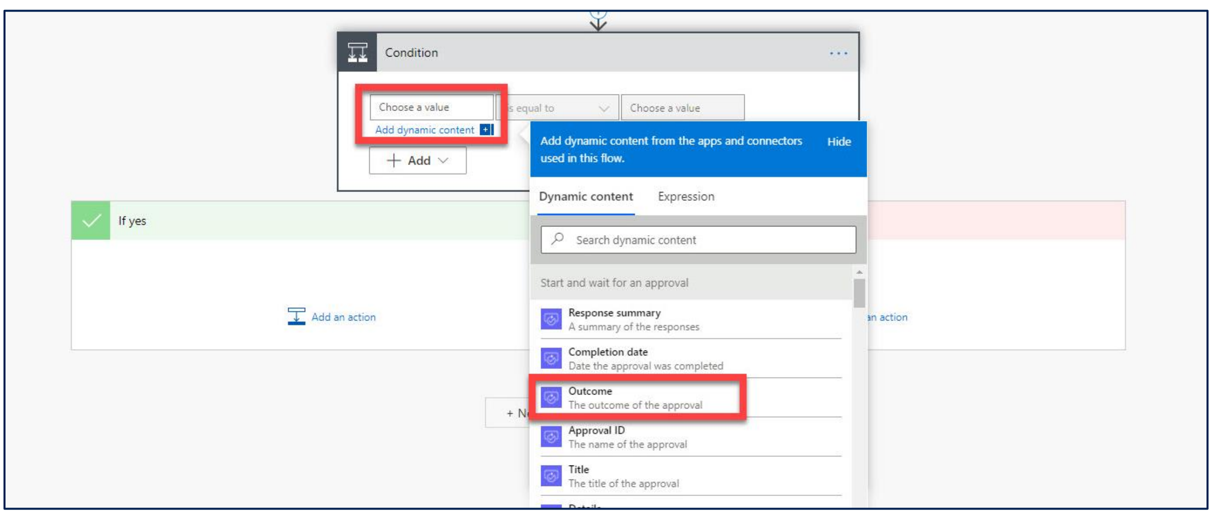
    Note (grey shaded label just above the list of columns) that this is coming from the first step, When a row is added, modified or deleted (because the comments are from the Request table).



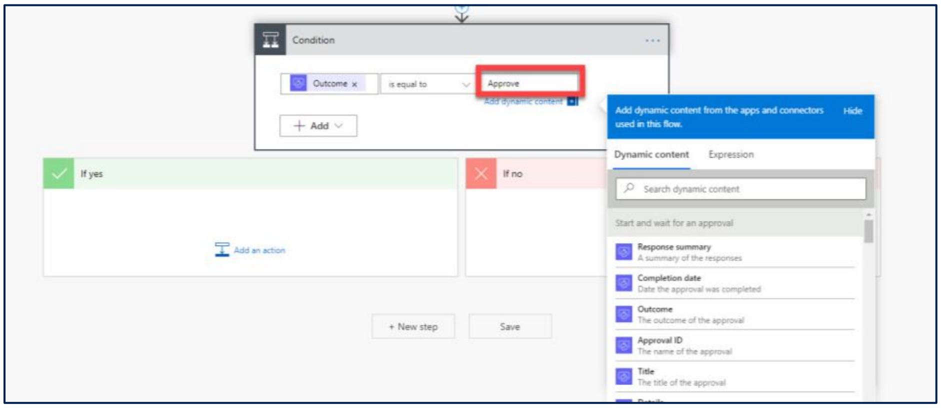
12. Now you will set up a condition to check the outcome of the approval. Click on +New step and search for Condition. Select the **Condition** Control.



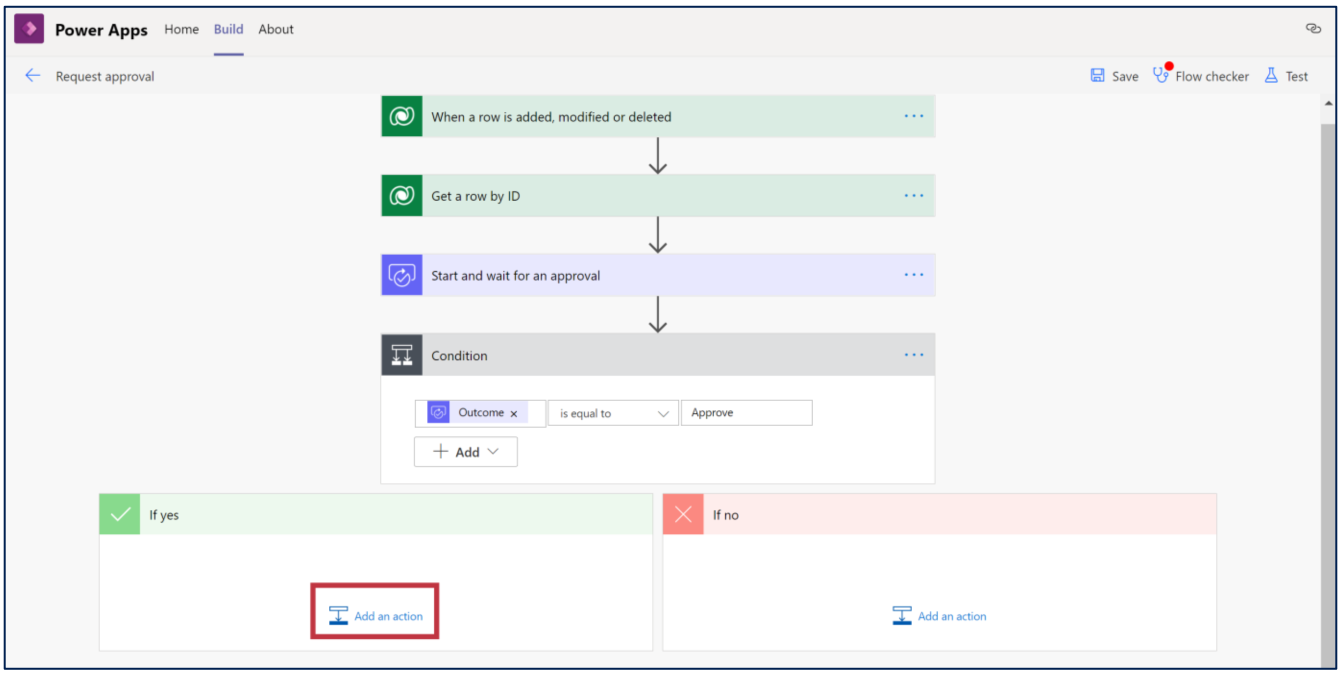
13. In the left box where you are asked to Choose a value, select **Outcome** from the dynamic content pane.



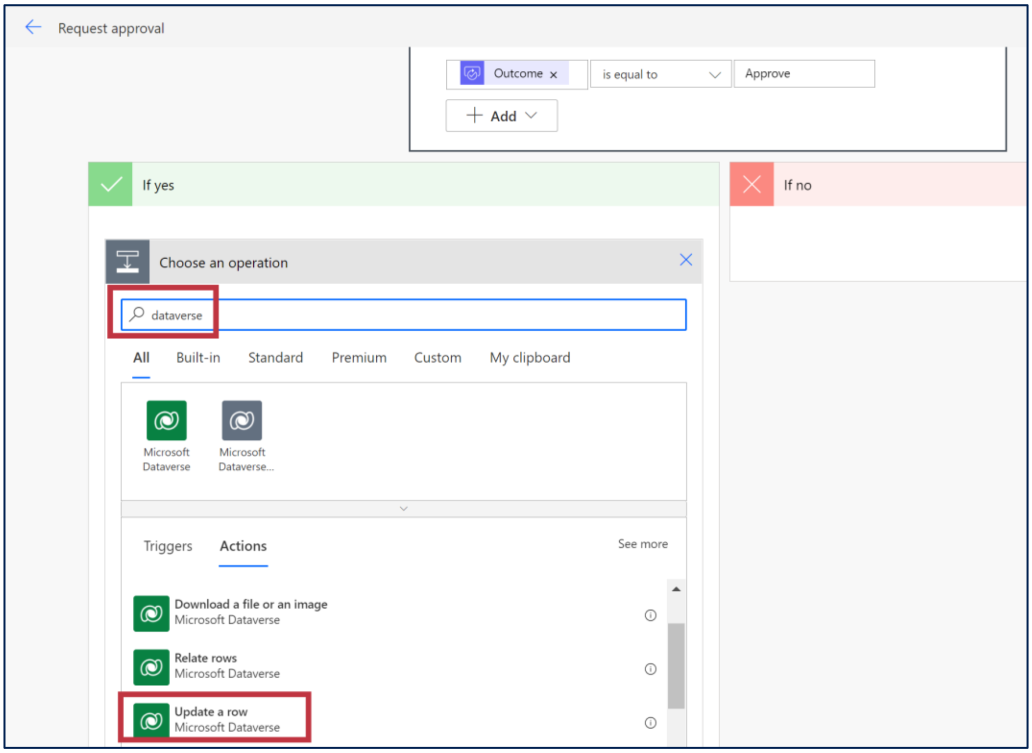
14. In the right hand box, type: **Approve**



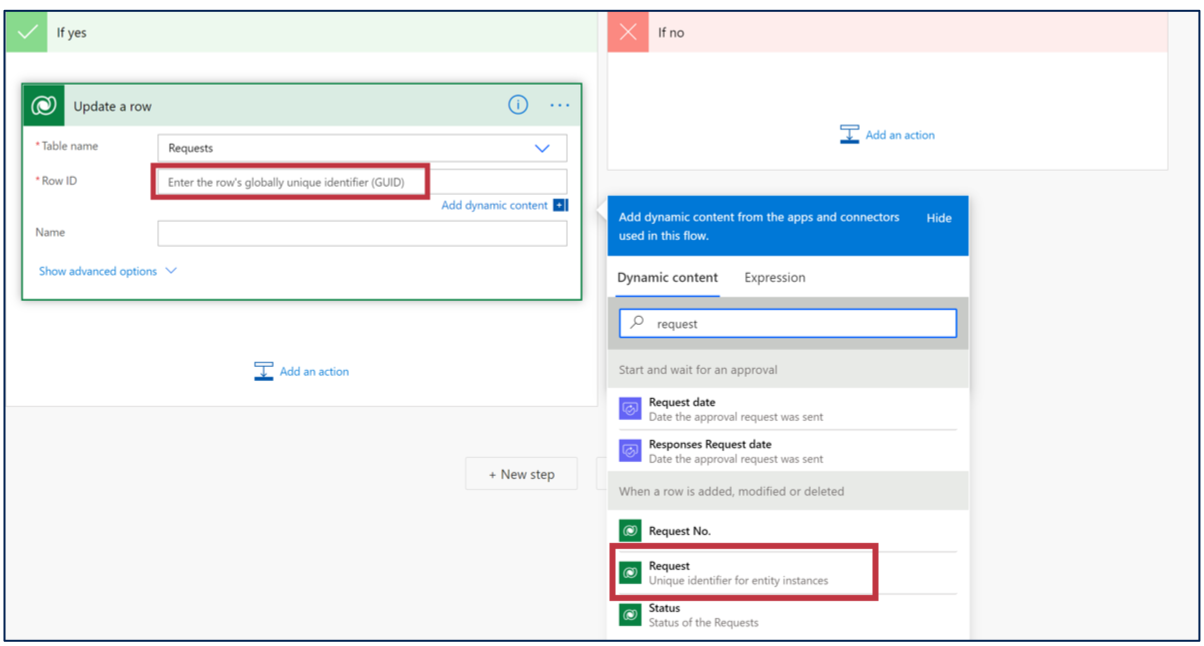
15. In the **If yes / If no** steps under the condition, you will update the request in your Dataverse for Teams table as approved or rejected, depending on the outcome of the approval. In the **If yes** box, click **Add an action**.



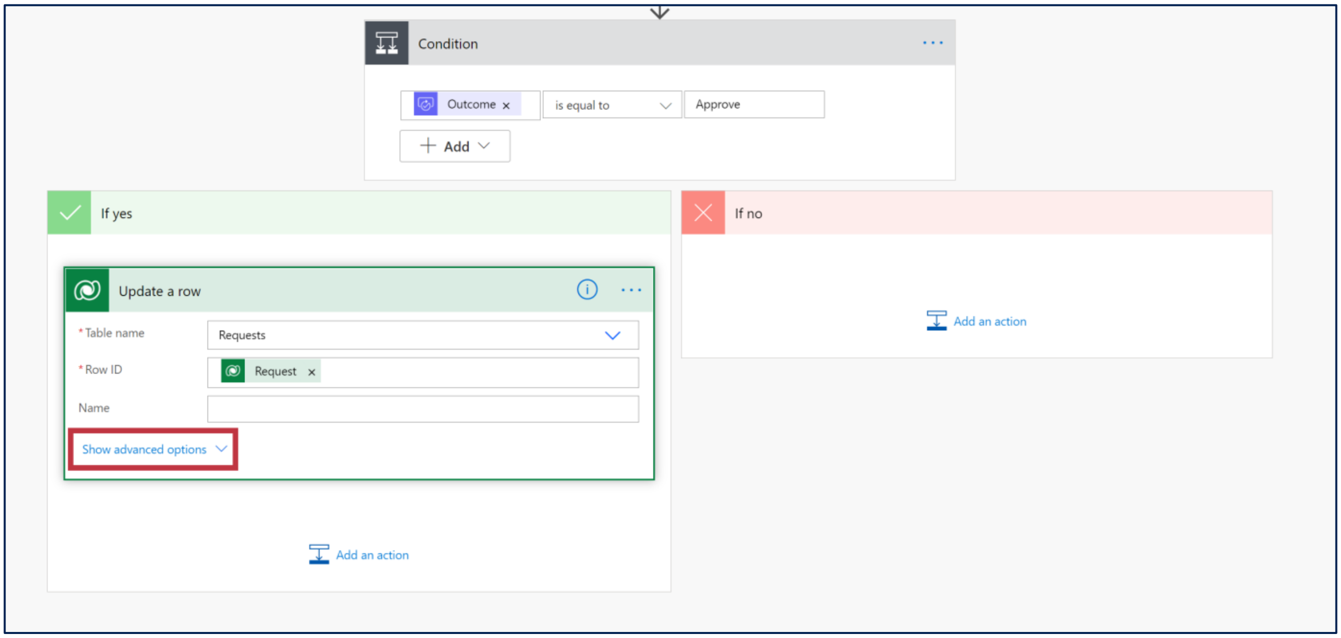
16. Search for the Dataverse connector, and select **Update a row**. (you may need to scroll down the list to find it)



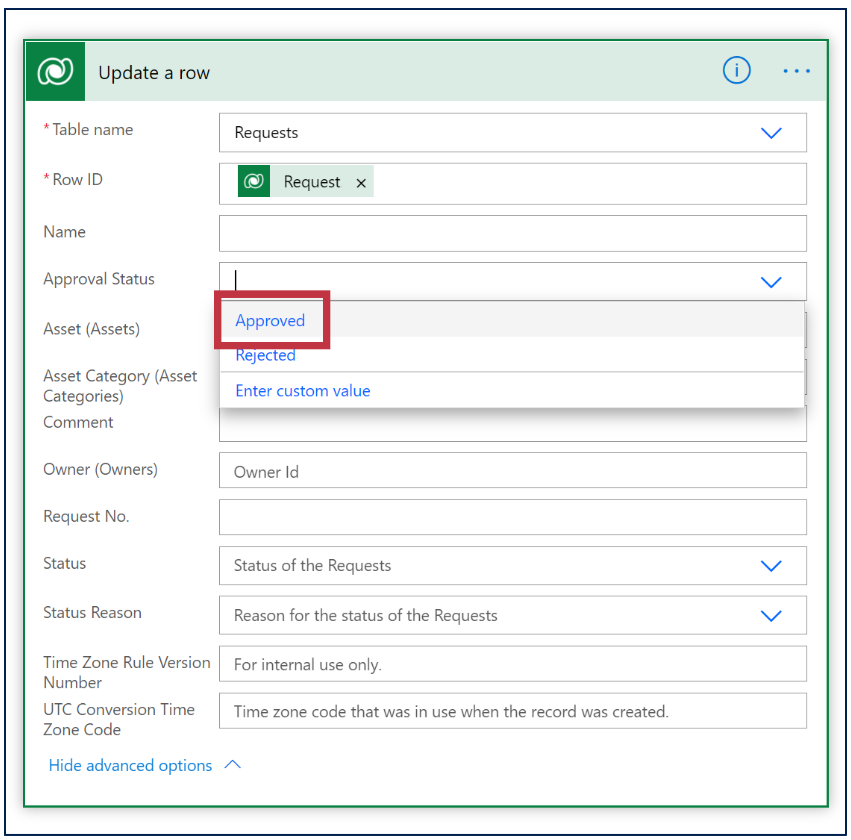
17. We are updating the request record from the first step (the one that triggered the approval process). In the Table name box, select **Requests**, and in the Row ID, go to the dynamic content pane and search for requests. Select **Request** which has come from the When a row is added, modified or deleted step.



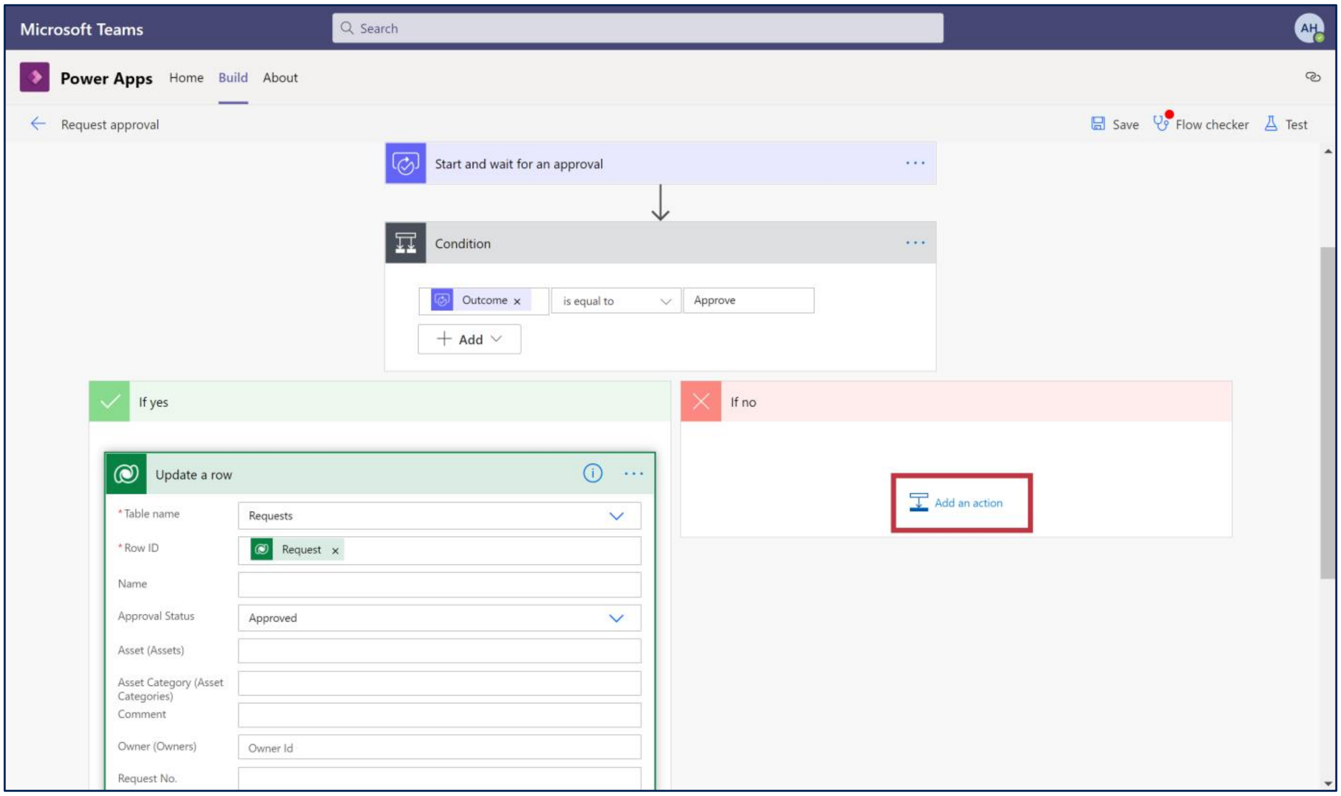
18. Now click on **Show advanced options** to see the rest of what you can update in this record.



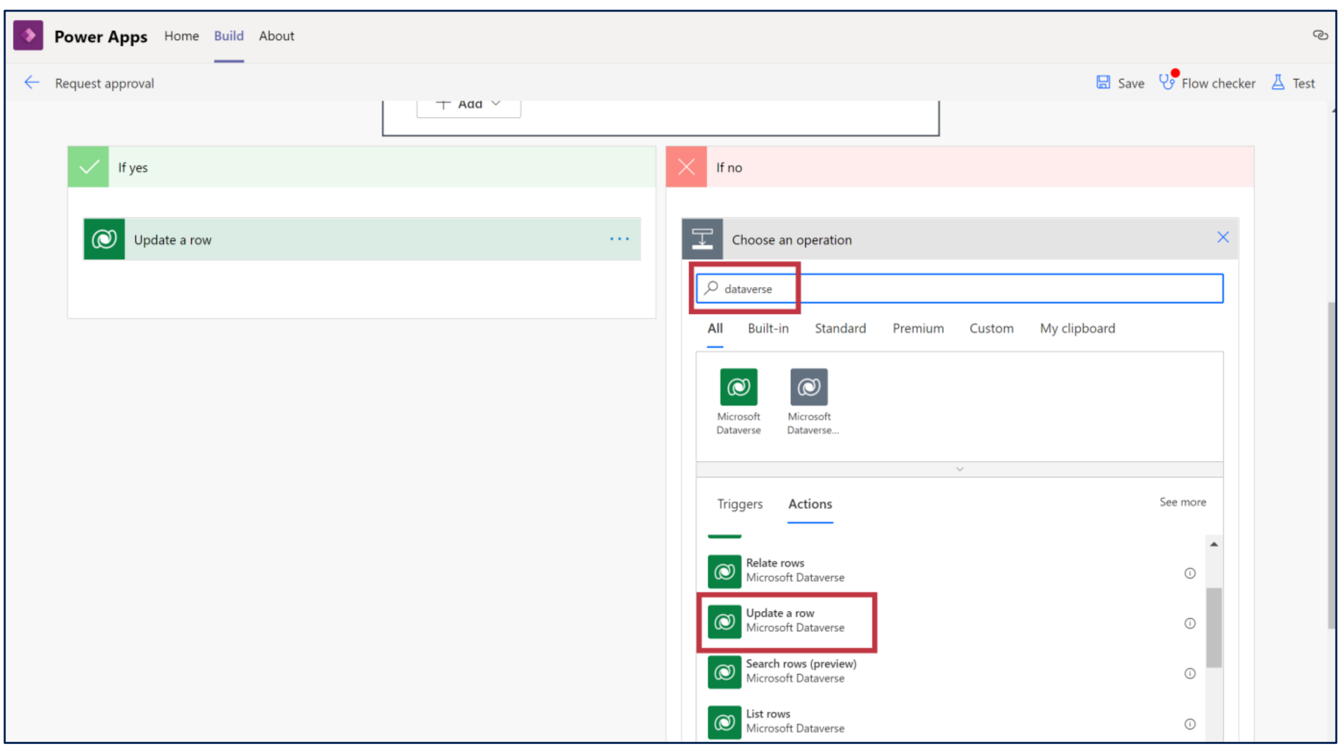
19. In the **Approval Status** box, select **Approved**.



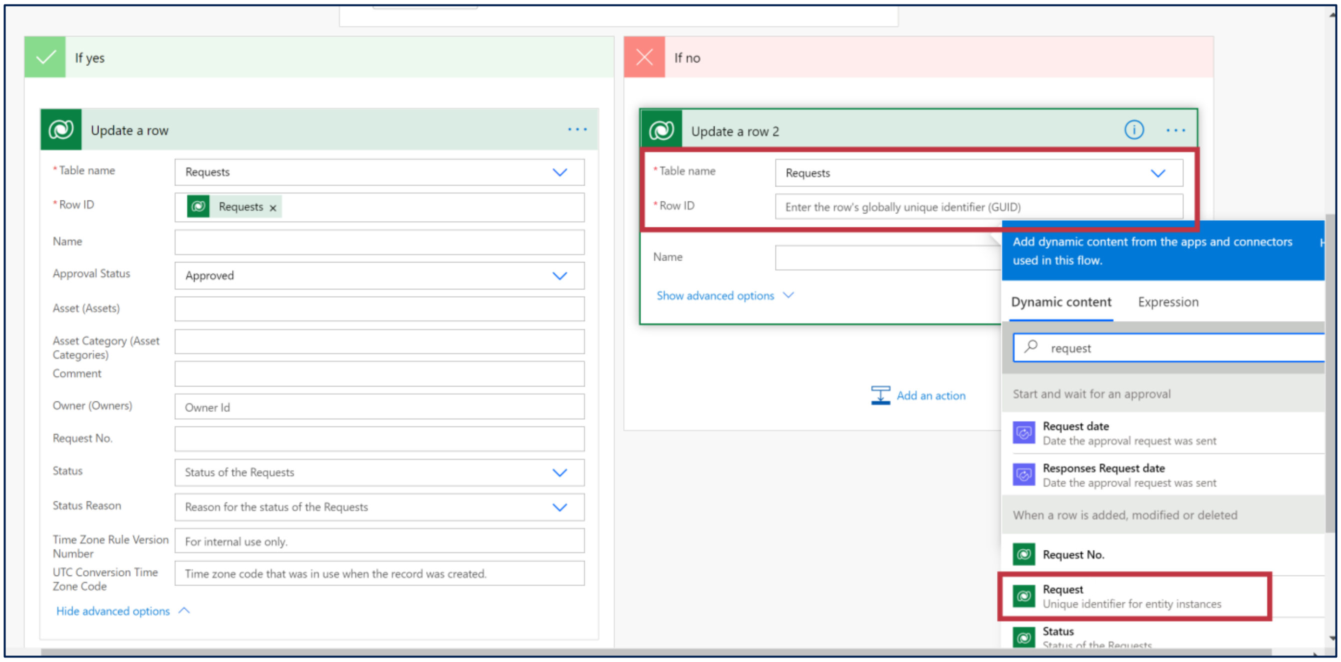
20. We will now repeat these steps for the **If no path**. In the **If no** box, click Add an action.



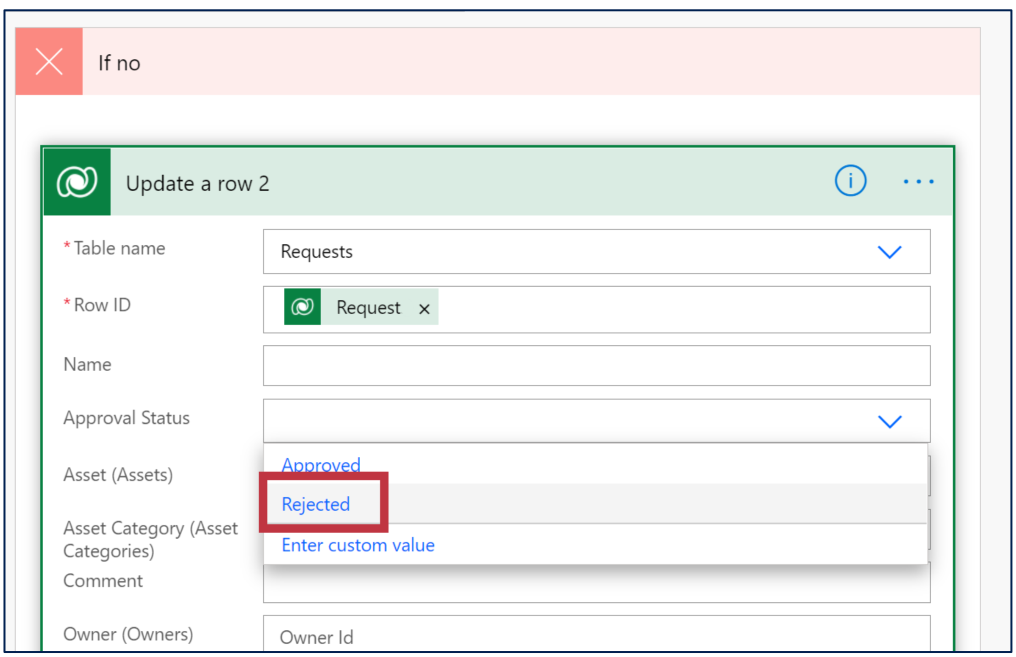
21. Search for the Dataverse connector, and select **Update a row** (you may need to scroll down the list to find it).



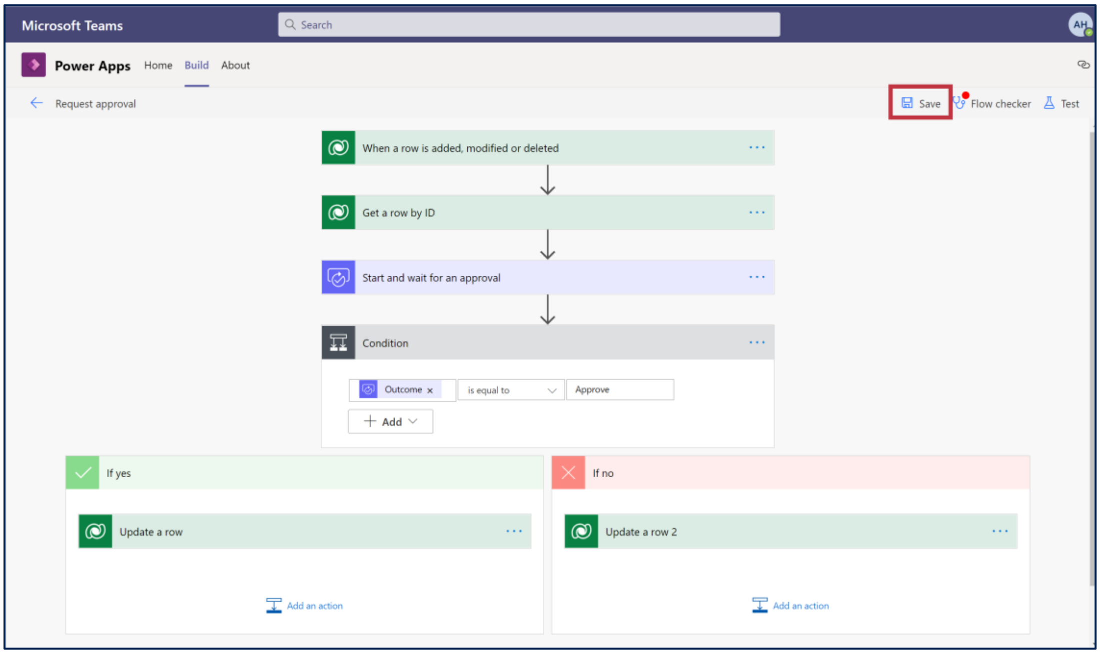
22. In the Table name box, select **Requests**, and in the Row ID, go to the dynamic content pane and search for requests. Select **Request** which has come from the When a row is added, modified or deleted step.



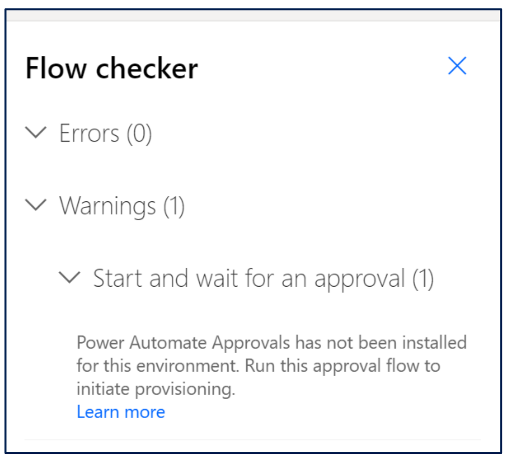
23. Click on **Show advanced options** to see the rest of what you can update in this record. In the **Approval Status** box, select **Rejected**.



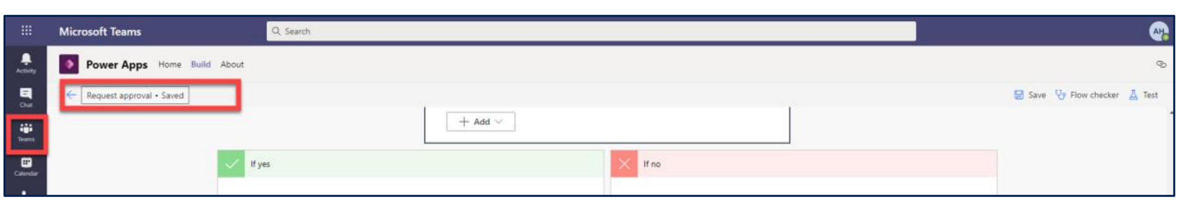
24. Save your flow by clicking on the **save** button.



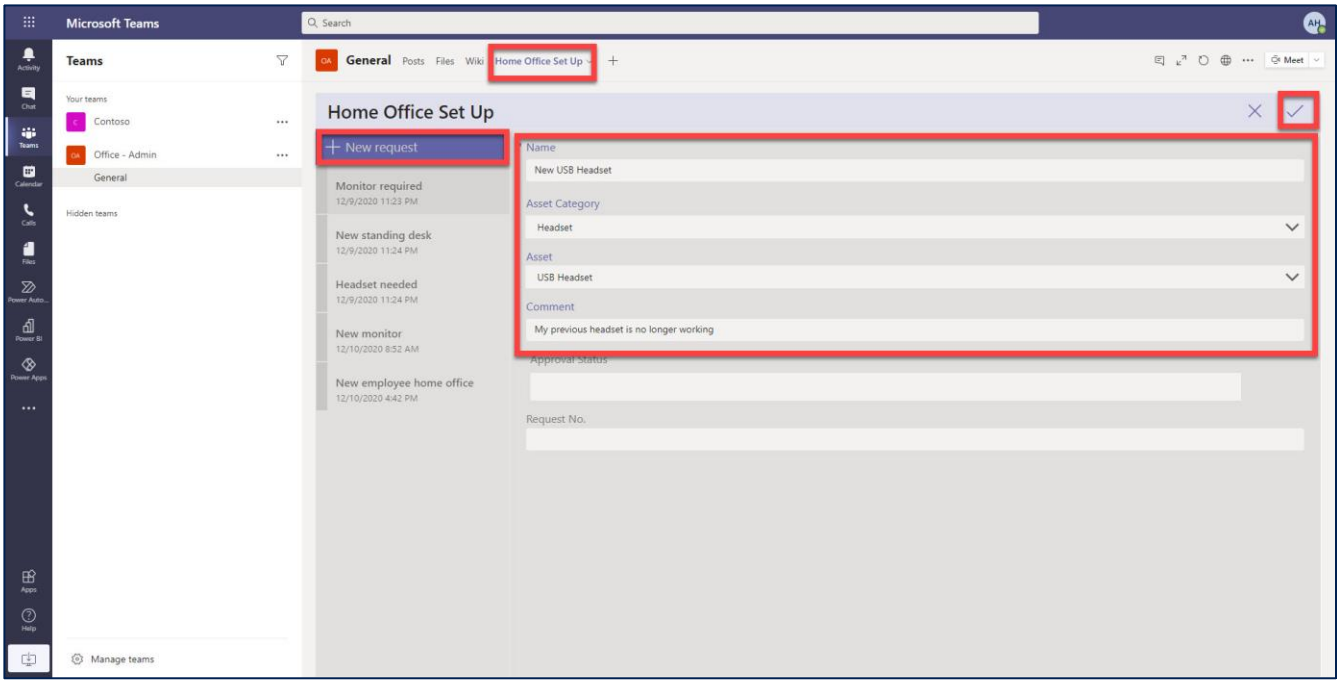
Note: You may get the following warning message appear. This is just letting you know that the functionality for approvals needs to be provisioned – this will happen automatically in the background, and is a one of process the first time you create an approval flow. You can ignore this and move on to the next step.



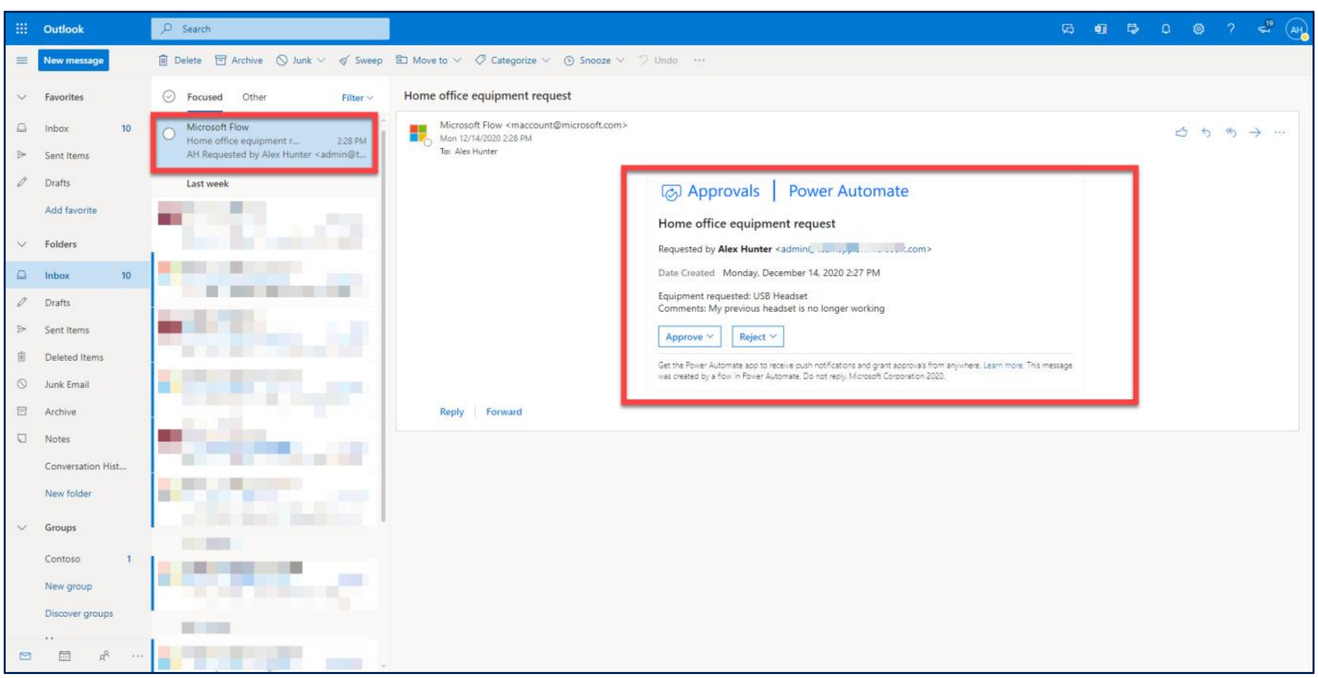
25. Congratulations! You have now finished building your first flow from scratch. Let's see it in action. Once you can see that your flow has saved (confirmation message next to the name of the flow), navigate back to the team you have been working by clicking on the main Teams icon in the left hand navigation bar.



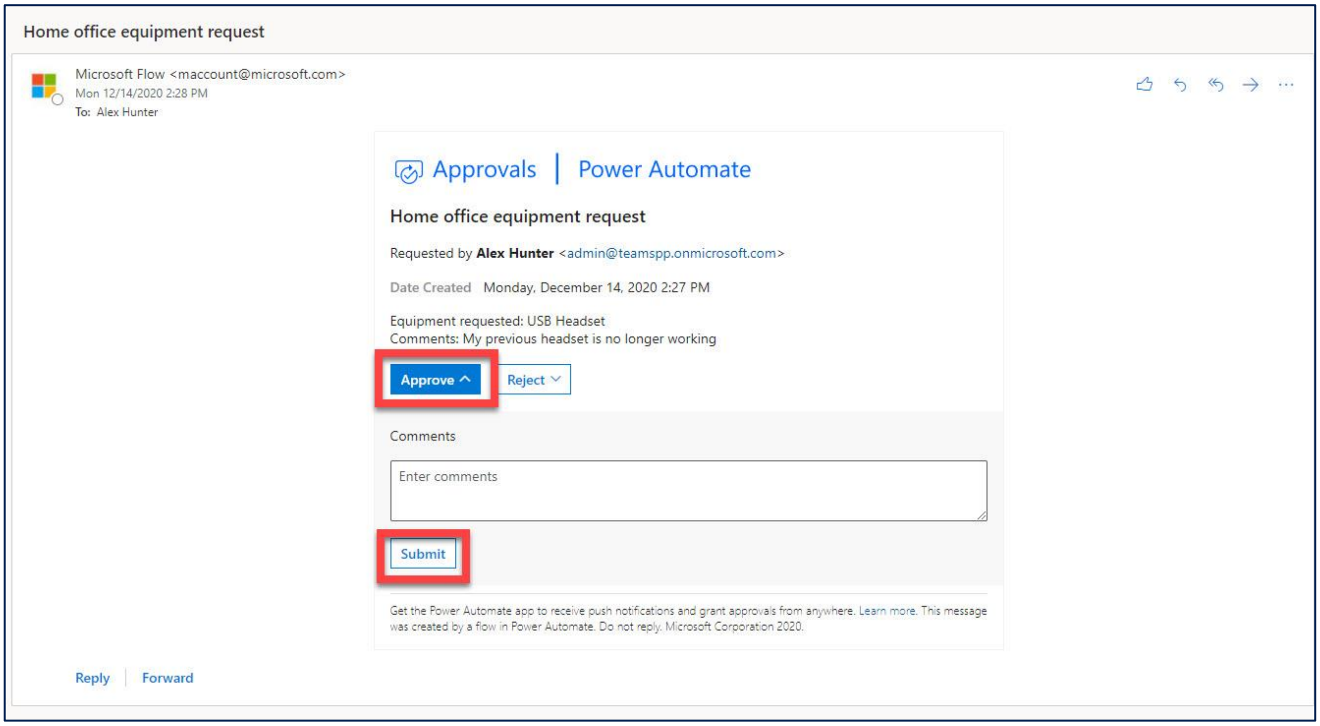
26. Open your **Home Office Set Up** app in the tab and submit a new request



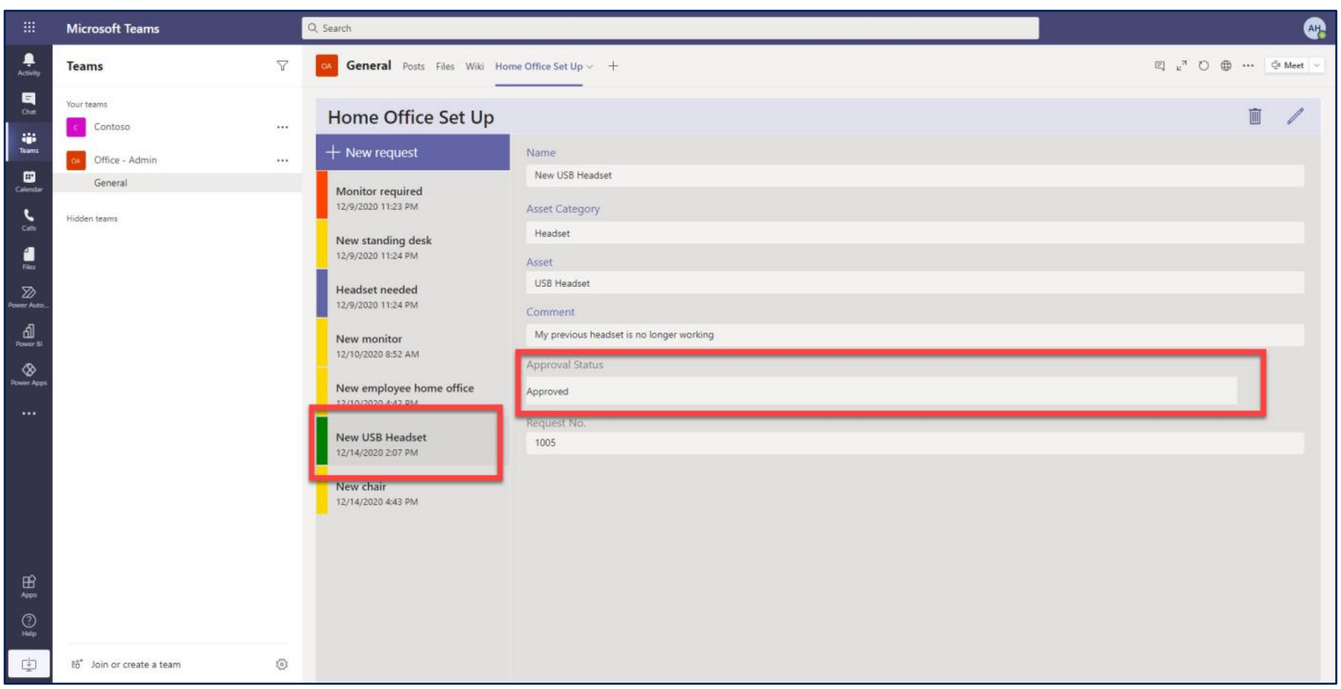
27. Open a new tab in your browser and navigate to https://outlook.office365.com/ . This will open Outlook for your lab user account. You will see an email with the approval request.
Note: The approval connector can take up to 15 minutes to work the first time, because it installs a solution behind the scenes. If you don't see the email straight away, have a break for 15 minutes here and come back to it. Once this first installation is done, any other approvals will come through almost instantly.



28. Click **Approve** to approve the request.



29. Go back to Teams in the other browser tab. Refresh the app by clicking on the reload tab button. You will see the request has been updated to show that the Approval Status is now Approved.



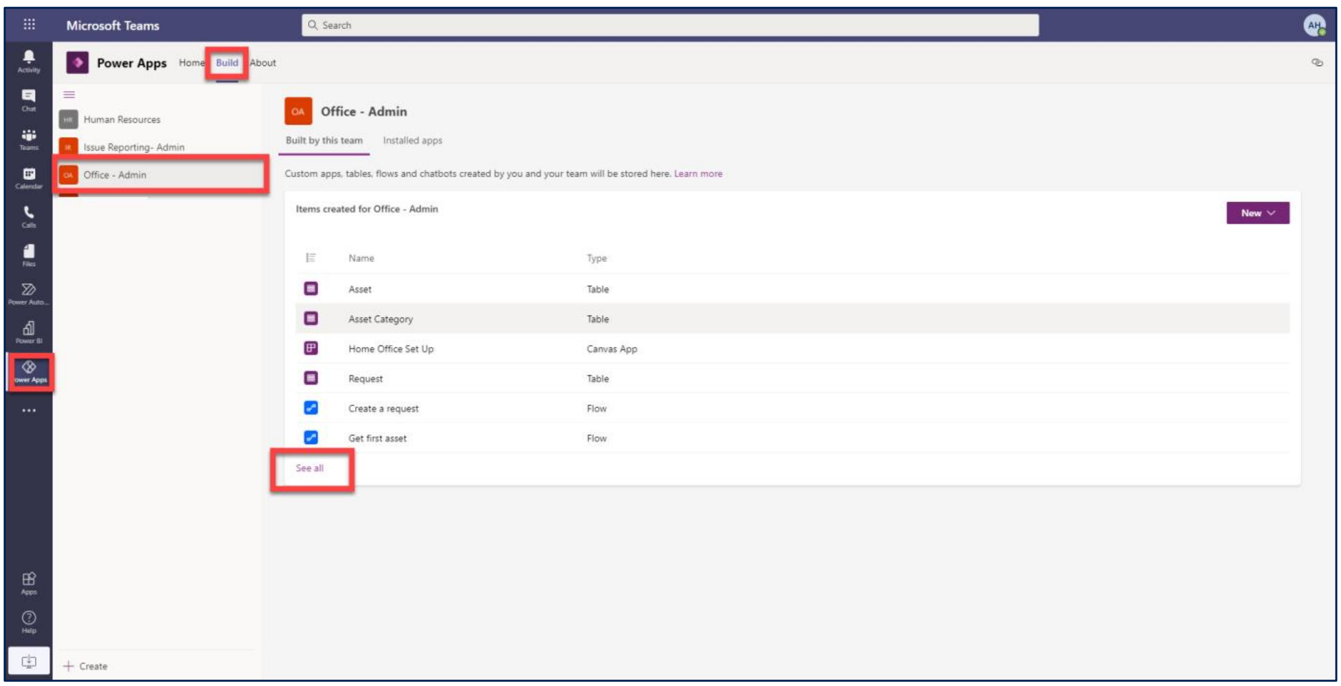
Exercise 4: Create an approval notification

In this exercise we will extend the flow to send an Adaptive Card to the user to let them know whether their request has been approved or rejected. Adaptive Cards can be used across any platform, and allow you to design a UI snippet using JSON, allowing you to design cards that bring in images, actions, and more. In this exercise we will create an Adaptive Card to show an approval notification. You do not need any prior knowledge of either Adaptive Cards or JSON – everything is provided for you.

You can learn more about Adaptive Cards at https://adaptivecards.io

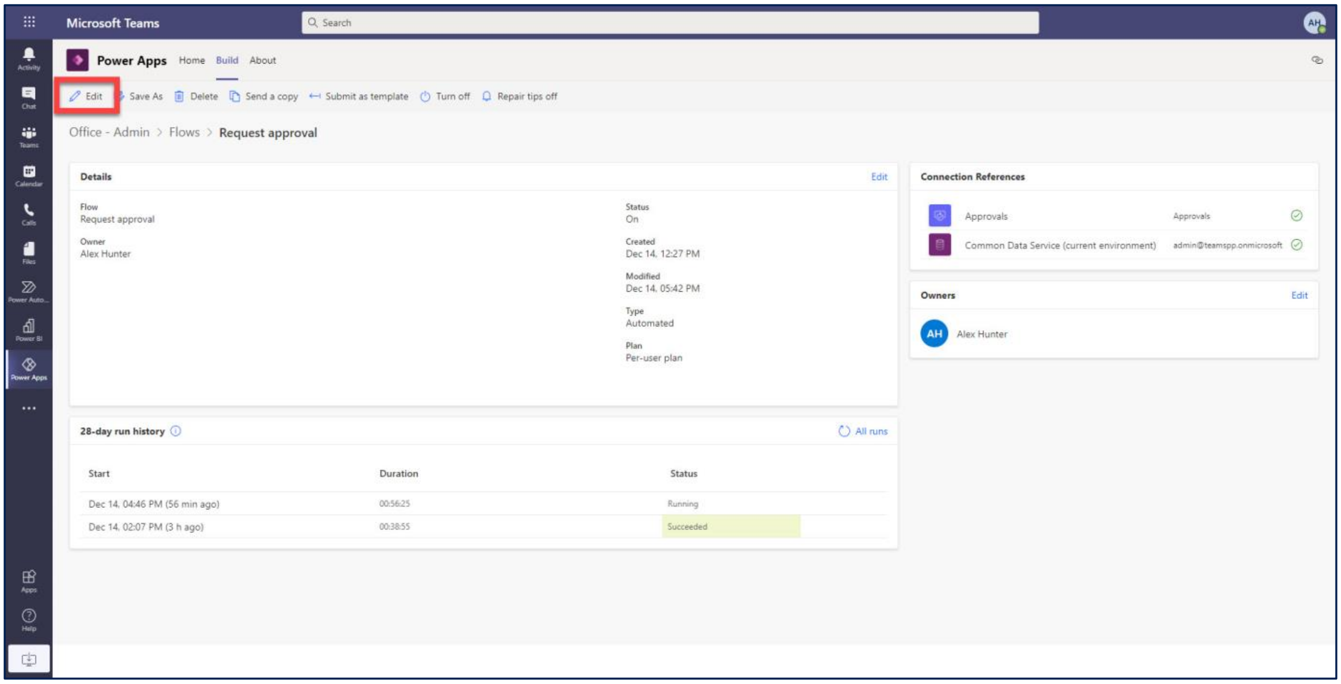
Task 1: Edit your flow

1. Navigate back to Power Apps using the icon on the left menu bar of Teams. Click on the **Build** tab, select your team and click on **See all**.

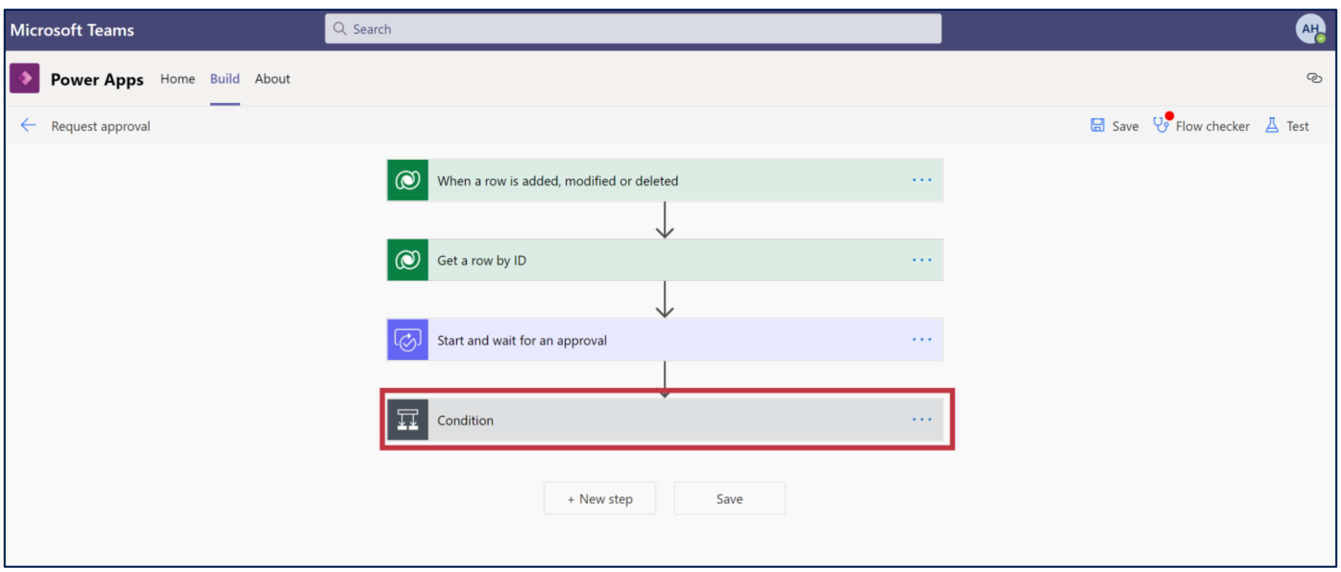


2. Click on the **Request approval** flow in the list to open it for editing.

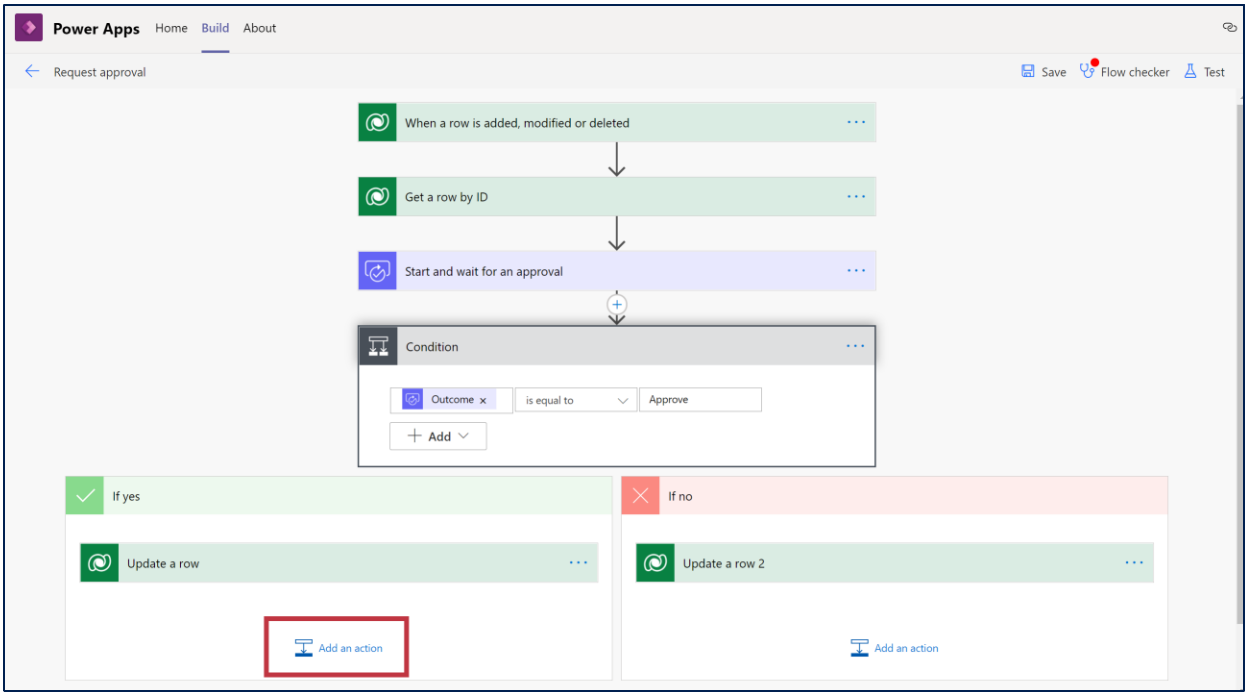
3. Click on **Edit** to open your flow.



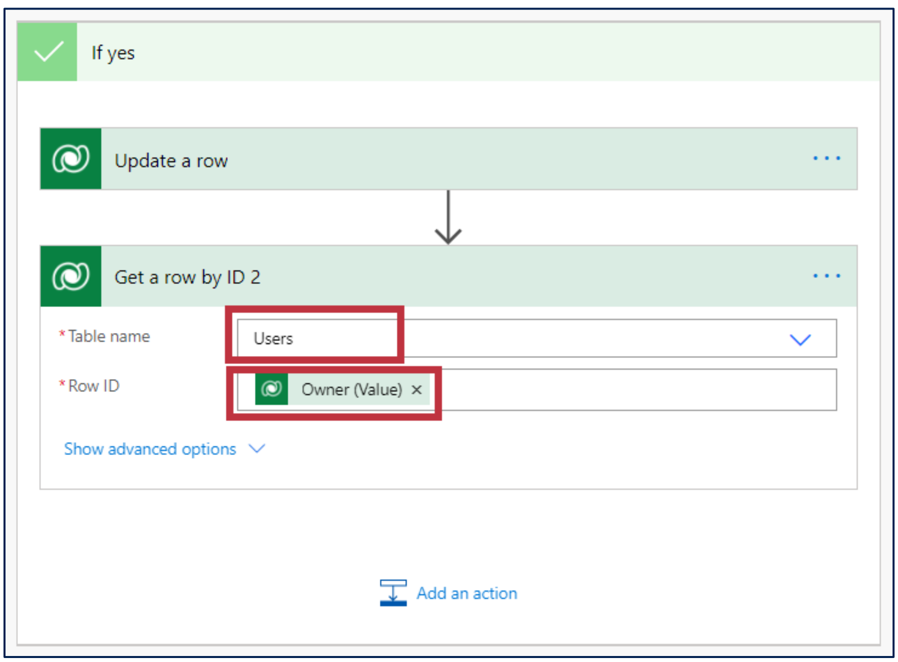
4. Click on the **Condition** step to open it.



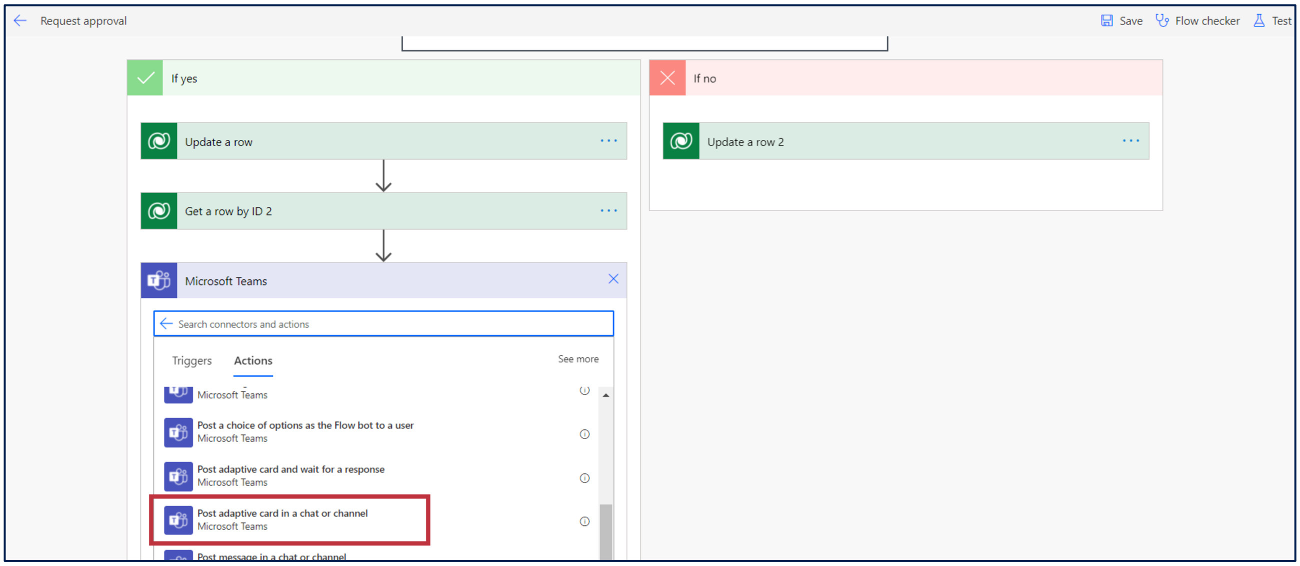
5. In the **If yes** path, under the Update a row action, click on **Add an action**.



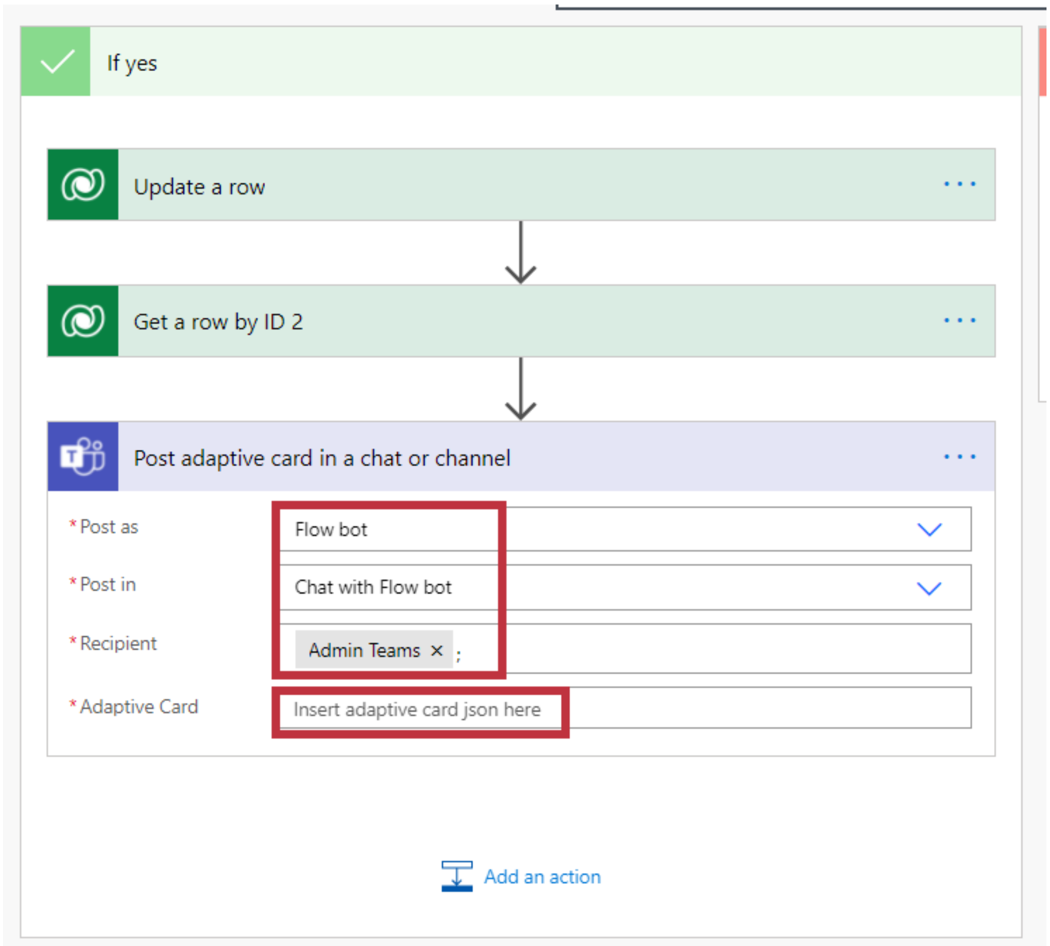
6. Search for the Dataverse connector, and select **Get a row by ID.** Select Users as the Table name. In the Row ID field, add the dynamic content **Owner (Value)** from the Dataverse When a row is added, modified or deleted action.



7. Add a new action underneath. Search for Teams, and then scroll down to find and select the action called **Post adaptive card in a chat or channel**. You may have to wait a moment for the connection with the Microsoft Teams connector to be established and for the sign in process to complete.



8. Fill in the details as follows:
    - **Post as:** Flow bot
    - **Post in:** Chat with Flow bot
    - **Recipient:** Email address you are using for the labs
    - **Adaptive Card:** In your Lab Material folder, open the text file **Adaptive Card- Lab 2.txt** Copy and paste all the JSON text from the **Adaptive Card- Lab 2.txt** file (make sure you copy everything in the file, including the brackets at the start and the end)



For reference, the JSON text you have copied and pasted into the **Message** field has been noted below as well. *Note the yellow highlights in the JSON below. These are the parts you will replace with dynamic content. Follow the instructions from step 8 below for each highlighted section.*

- *Delete the highlighted words and then open the dynamic content pane to find the right columns to put in*
- *Be careful to only replace the highlighted words – you should always be putting your dynamic content inside the punctuation.*
- *Make sure your cursor is in the right place before you select your dynamic content – otherwise it ends up at the end.*


```
{
    "type": "AdaptiveCard",
    "$schema": "https://adaptivecards.io/schemas/adaptive-card.json",
    "padding": "none",
    "body": [
        {
            "type": "Container",
            "style": "emphasis",
            "items": [
                {
                    "type": "ColumnSet",
                    "columns": [
                        {
                            "type": "Column",
                            "items": [
                                {
                                    "type": "TextBlock",
                                    "size": "large",
                                    "text": "**APPROVED**"
                                }
                            ],
                            "width": "stretch"
                        },
                        {

                        }
                    ]
                }
            ]
        },
        {
            "type": "Container",
            "padding": "default",
            "spacing": "None",
            "items": [
                {
                    "type": "ColumnSet",
                    "columns": [
                        {
                            "type": "Column",
                            "verticalContentAlignment": "center",
                            "items": [
                                {
                                    "type": "Image",
                                    "style": "Logo",
                                    "url": "https://logodix.com/logo/842610.jpg",
                                    "width": "40px",
                                    "altText": "Contoso Logo"
                                }
                            ],
                            "width": "auto"
```

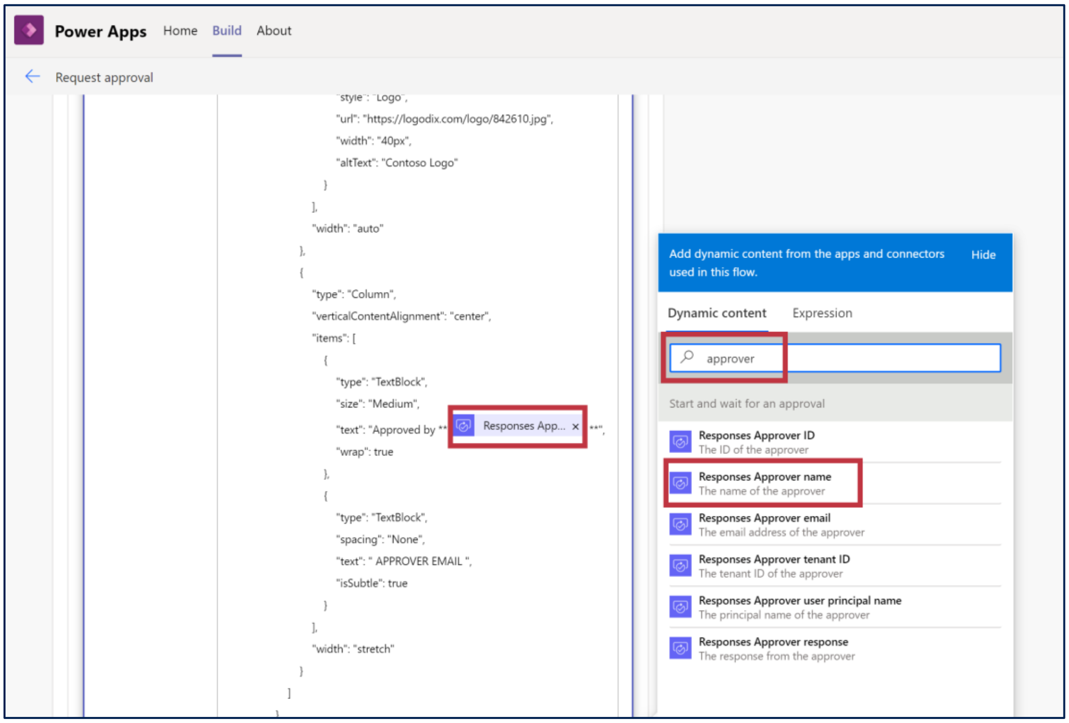


```
                        },
                        {
                            "type": "Column",
                            "verticalContentAlignment": "center",
                            "items": [
                                {
                                    "type": "TextBlock",
                                    "size": "Medium",
                                    "text": "Approved by **APPROVER NAME**",
                                    "wrap": true
                                },
                                {
                                    "type": "TextBlock",
                                    "spacing": "None",
                                    "text": " APPROVER EMAIL ",
                                    "isSubtle": true
                                }
                            ],
                            "width": "stretch"
                        }
                    ]
                },
                {
                    "type": "Container",
                    "spacing": "large",
                    "items": [
                        {
                            "type": "ColumnSet",
                            "columns": [
                                {
                                    "type": "Column",
                                    "items": [
                                        {
                                            "type": "Image",
                                            "url": "https://emojipedia-
us.s3.dualstack.us-west-1.amazonaws.com/thumbs/120/microsoft/209/white-heavy-check-
mark_2705.png",
                                            "altText": "Green check mark"
                                        }
                                    ],
                                    "width": 1
                                },
                                {
                                    "type": "Column",
                                    "items": [
                                        {
                                            "type": "TextBlock",
                                            "size": "Medium",
                                            "weight": "Bolder",
                                            "wrap": true,
                                            "text": " REQUEST NAME "
```

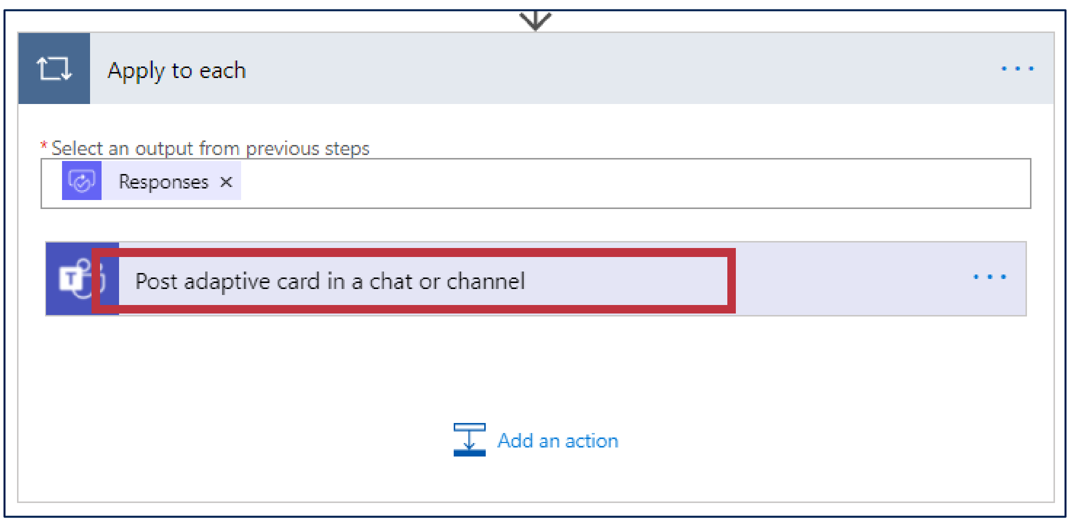


```
                                        },
                                        {
                                            "type": "TextBlock",
                                            "spacing": "None",
                                            "color": "accent",
                                            "size": "Medium",
                                            "text": " ASSET NAME "
                                        },
                                        {
                                            "type": "TextBlock",
                                            "wrap": true,
                                            "text": "Request id: REQUEST NUMBER"
                                        },
                                        {
                                            "type": "TextBlock",
                                            "spacing": "None",
                                            "wrap": true,
                                            "text": "Approver comments: APPROVER
COMMENTS "

                                        }
                                    ],
                                    "width": 5
                                }
                            ]
                        }

                    ]
                }
            ]
        }
    ],
    "version": "1.0"
}
```

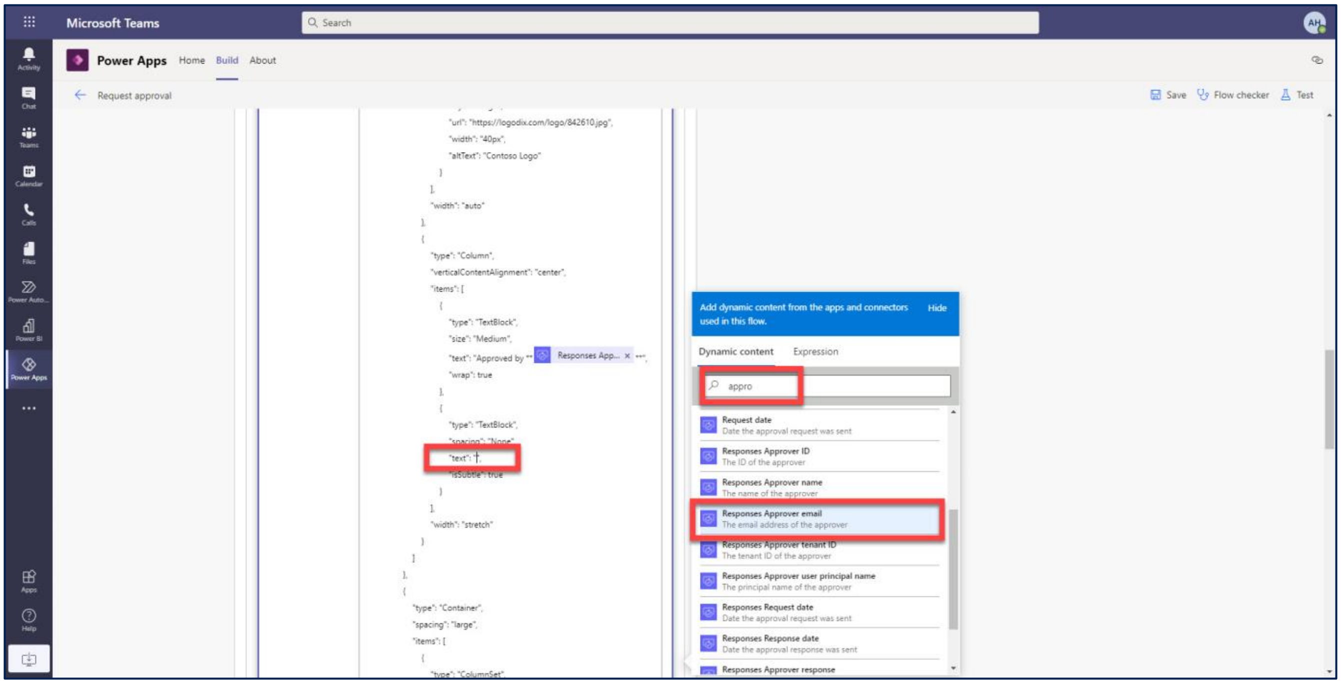
9. APROVER NAME. Search for **approver** and select **Responses Approver name.** (Note this is coming from the Start and wait for approval action).



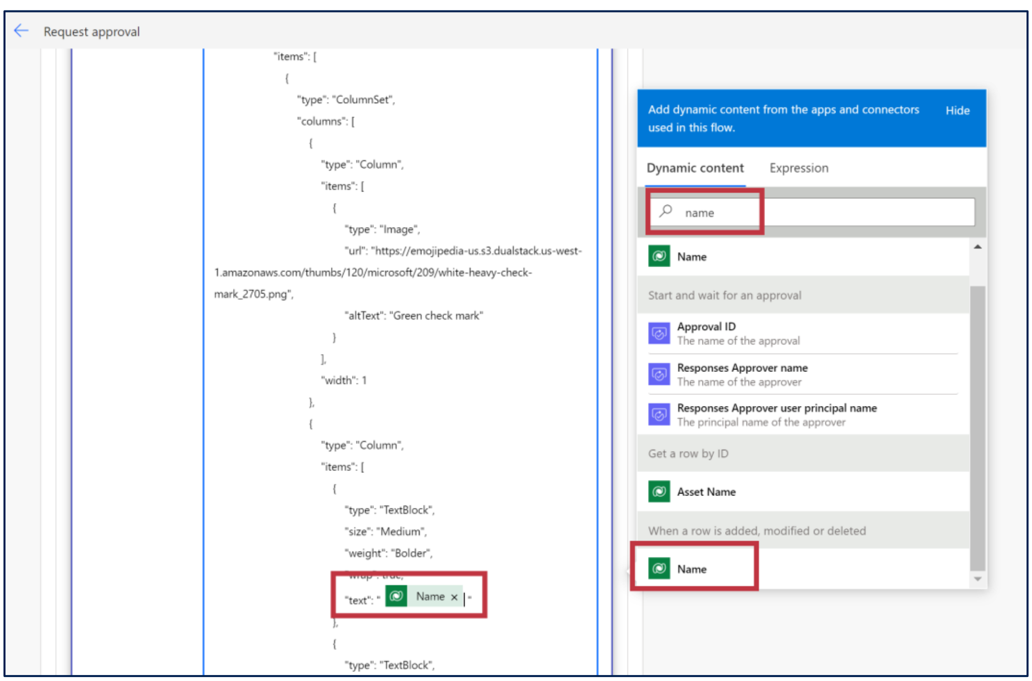
10. As soon as you select this, Power Automate immediately adds an Apply to each container. This is to allow for the fact that there can be more than one approver. You don't need to do anything about this. Just click on the Post your own Adaptive Card action step to open it and keep working.



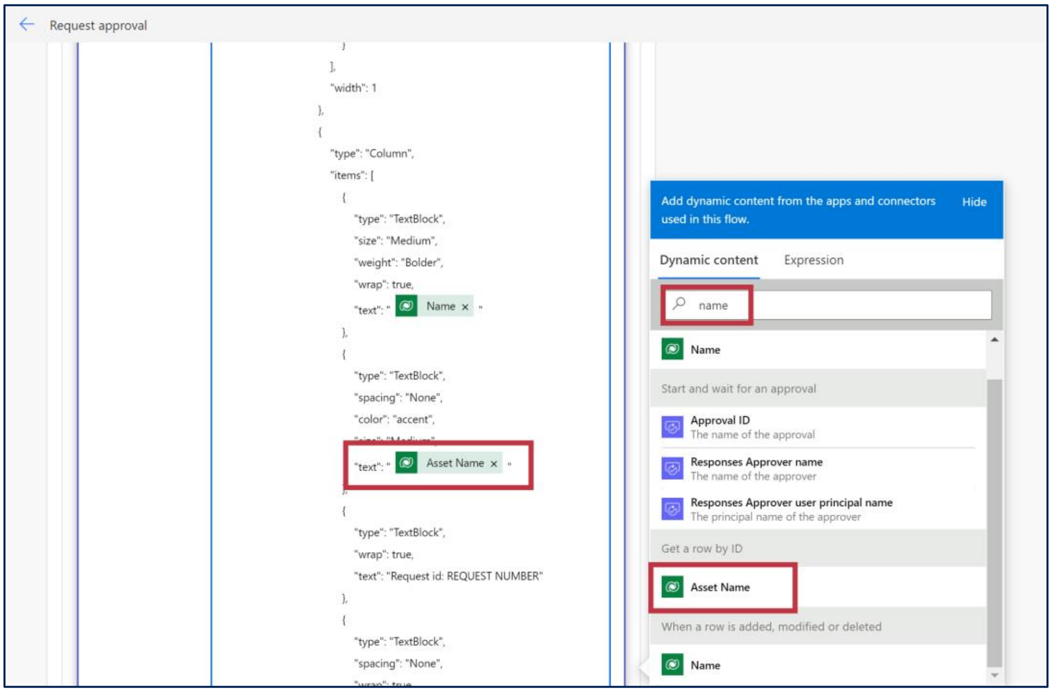
11. APROVER EMAIL. Search for **approver** and select **Responses Approver email.** (Note this is coming from the Start and wait for approval action).



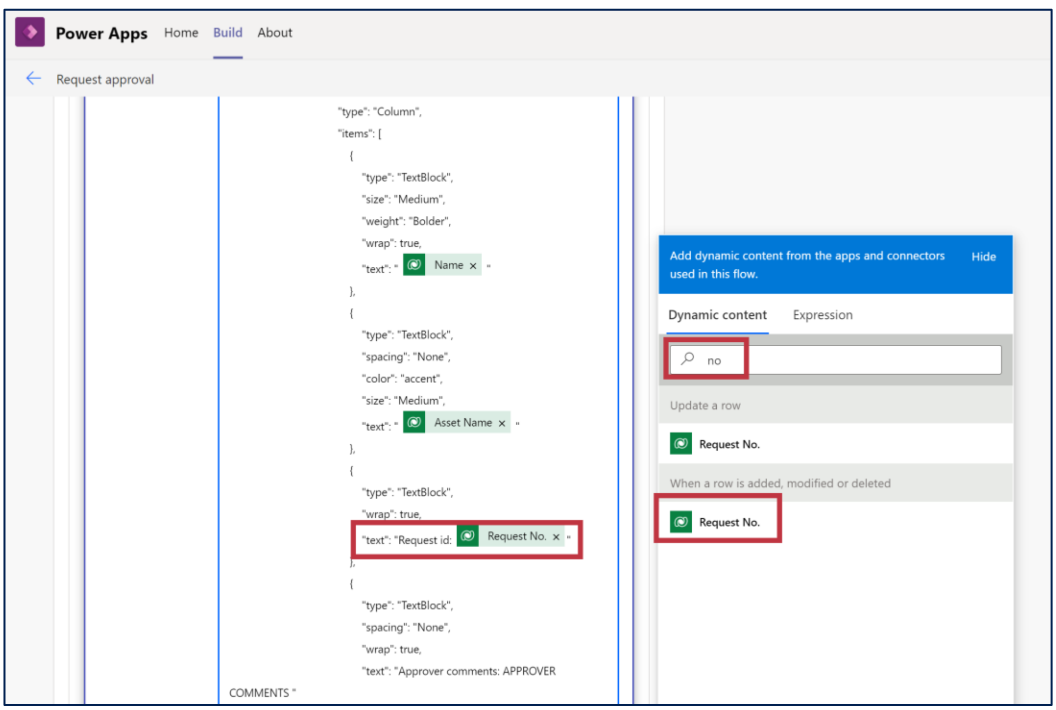
12. REQUEST NAME. Search for **name** and scroll down until you find **Name** in the **When a row is added, modified or deleted** section (Note there are multiple colunms in your flow now called name – here we want to find the name of the request record, which triggered the flow).



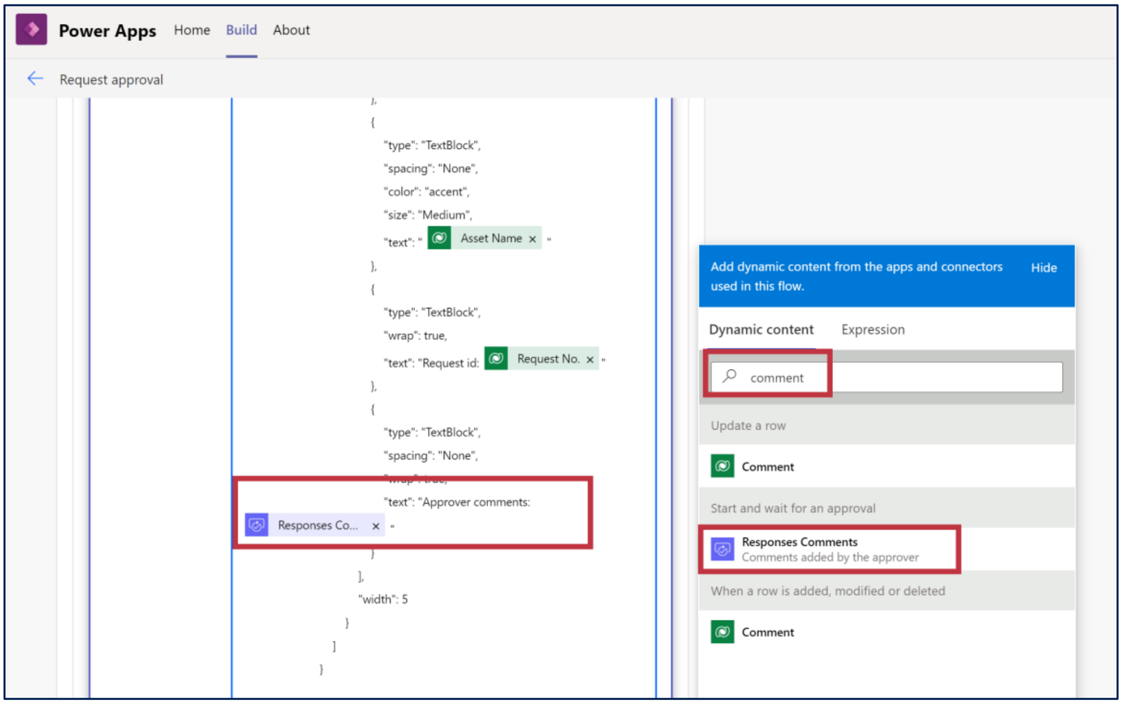
13. ASSET NAME. Search for **name** and scroll down until you find **Asset Name** in the **Get a row by ID** section (Note there are multiple columns in your flow now called name – here we want to find the name of the asset).



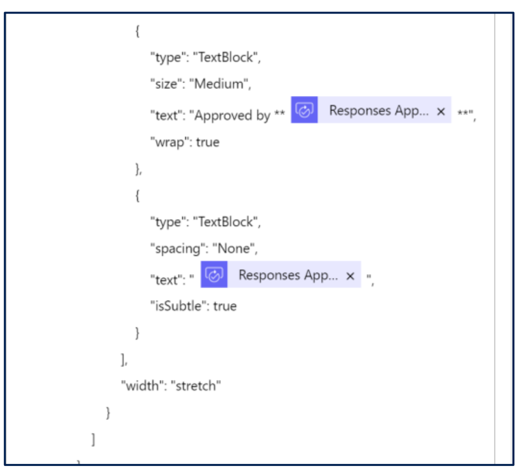
14. REQUEST NUMBER. Search for **No** and select **Request No.** in the **When a row is added, modified or deleted** section.

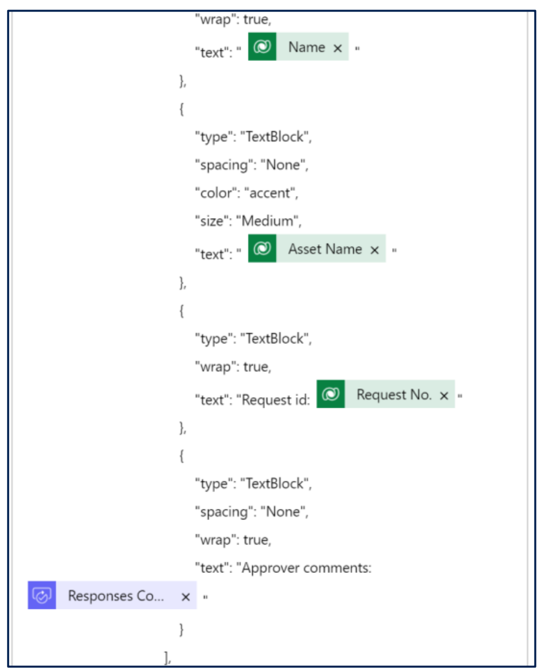


15. APPROVER COMMENTS. Search for **comment** and select **Response Comments** in the **Start and wait for an approval** section. This will bring in the comments the approver adds when they approve the request.



16. Scroll through and make sure you have all these highlighted sections now replaced. You should see 3 pieces of dynamic content from the approval action and 3 from the Dataverse actions.

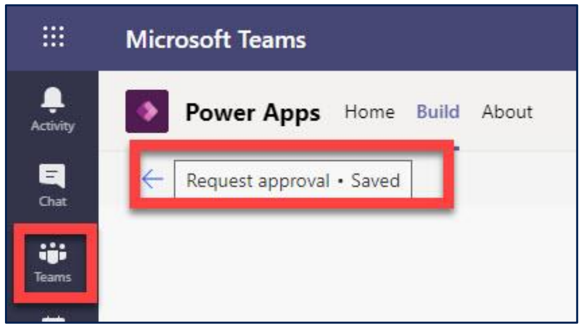




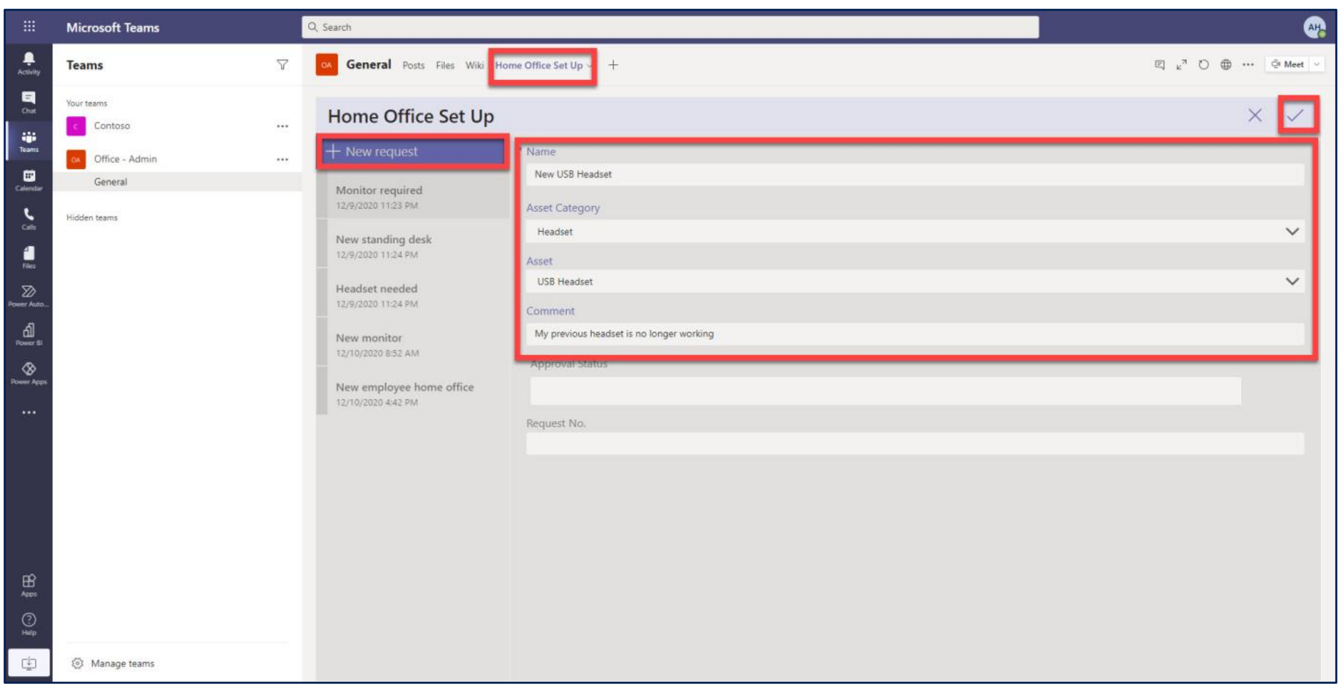
17. Save your flow using the **Save** button in the top right. Now it's time to test it.

Task 2: Test your flow

1. Once you can see that your flow has saved (confirmation message next to the name of the flow), navigate back to the team you have been working by clicking on the main Teams icon in the left hand navigation bar.

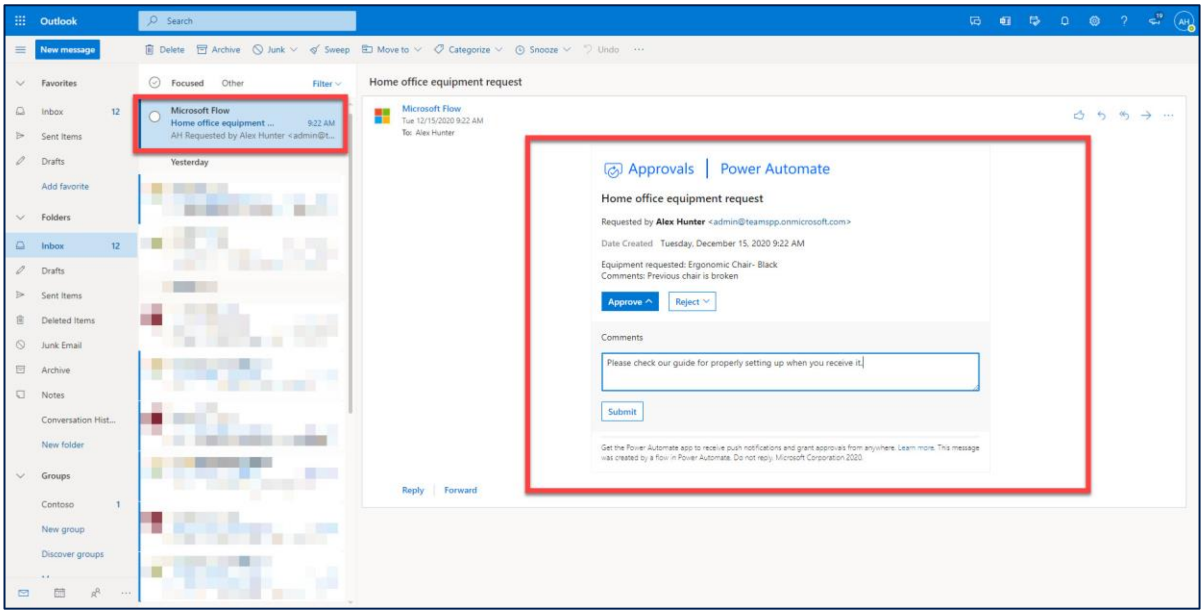


2. Open your **Home Office Set Up** app in the tab and submit a new request.

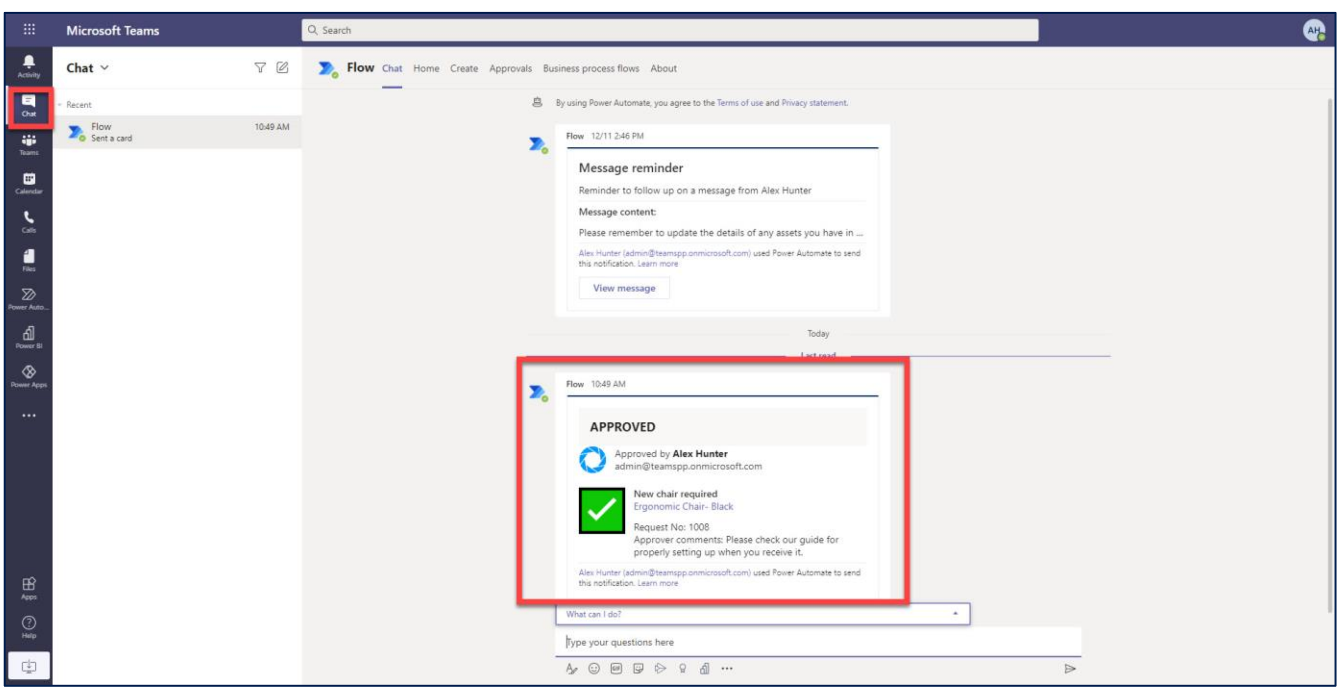


3. Go to your other browser tab where you had email open in the previous exercise (or if you closed it, open a new tab in your browser and navigate to https://outlook.office365.com/ .You will see an email with the approval request. (It may take a minute to come through). You will also get the same approval request as a notification in Teams.

4. Approve the request and add a comment. You can approve it from either the email or Teams.



5. Go back to Teams. You should see a notification in the chat. Open the chat to see your Adaptive Card notification that your request has been approved.



Summary

In this lab you have explored the templated flows available for you to use quickly and easily with Power Automate embedded in Teams. You have also built your own flow from scratch, connected to your Dataverse for Teams table, to trigger an approval process, and to send an Adaptive Card.

Lab Survey

We would appreciate your feedback on this hands-on-lab, such as the quality of documentation and the usefulness of the learning experience. Please use the survey at https://aka.ms/TeamsPPSurvey to share your feedback. You may provide feedback for each module as you complete it or at the end once you've completed all the modules. Thank you!

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