

Module 9: Build business process flows

Scenario

You have been building automations to support your client Fabrikam's knowledge assessment process. The client is concerned that their users won't be able to create new knowledge assessments without your help. You need to create a guided process to interact with the user and support their configuration of new assessments. In this lab, you will enable the knowledge assessment entity for business process flows and then build a business process flow.

Exercise 1 – Prepare the Solution

Task 1 – Add Columns to Knowledge Assessment

1. Navigate to <https://make.powerapps.com>.
2. Make sure you are in the **Practice** environment you created.
3. Select **Solutions**.
4. Click to open the **Common Data Services Default Solution**.
5. Click to open the **Knowledge Assessment** table.
6. Click **+ Add Column**.
7. Enter **Passing Score (%)** for **Display Name**, select **Whole Number** for **Data Type** and click **Done**.
8. Click **+ Add Column**.
9. Enter **Create Questions** for **Display Name** and select **Yes/No** for **Data Type**.
10. Click **Done**.
11. Click **Save Table**.
12. Navigate back to the solution.
13. Click **Publish all customizations**.

Task 2 – Add Column to Knowledge Assessment Form

1. Make sure you still have the **Knowledge Assessment** table selected.
2. Select the **Forms** tab and click on the **Main** form.
3. Add the **Passing Score (%)** column to the form.
4. Click **Save**.
5. Click **Publish**.
6. Click the back button.

7. Navigate back to the solution.
8. Click **Publish all customizations**.

Exercise 2 – Create Business Process Flow

Task 1 – Create Business Process Flow

1. Navigate to <https://make.powerapps.com> and make sure you are in your **Practice** environment.
2. Click **Flows**.
3. Switch to the **Business process flows** tab.
4. Click **+ New**.
5. Enter **Assessment Process** for Flow Name and choose **Knowledge Assessment** for table.
6. Click **Create**.
7. Select the stage and on **Properties** tab, enter **Knowledge Assessment** for **Display Name** and click **Apply**.
8. Click the **Details** on the **Knowledge Assessment** stage.
9. Select **Data Step #1**.
10. Select **Passing Score (%)** for **Data Field** and click **Apply**.
11. Click **+ Add** and select **Add Data Step**.
12. Click on the **+** below the **Passing Score (%)** step.
13. Select the **New Step**, select **Total Points** for **Data Field**, and click **Apply**.
14. Select the **Components** tab, drag **Data Step** from the **Components** tab, and drop it below the **Total Points** step.
15. Select **Notify Manager** for **Data Field** and click **Apply**.
16. Drag **Data Step** from the **Components** tab and place it below the **Notify Manager** step.
17. Select **Create Questions** for **Data Field**, check the **Required** checkbox, and click **Apply**.
18. Add a new stage to the right of the **Knowledge Assessment** stage by dragging from the components tab.
19. Select the new stage, go to the **Properties** tab, enter **Activate** for **Display Name**, and click **Apply**.
20. Click **Details** of the **Activate** stage.
21. Select the **Data Step** inside the **Activate** stage.

22. Select **Status** for **Data Field** and click **Apply**.
23. Select the **Components** tab, drag **Data Step** from the **Components** tab, and drop it below the **Status** step.
24. Select **Approval Status** for **Data Field** and click **Apply**.
25. Click **Save this process** to save the **Business Process Flow**.
26. Click **Activate**.
27. Confirm activation.
28. Close the process editor.

Task 2 – Test Business Process Flow

1. Navigate to <https://make.powerapps.com>.
2. Make sure you are in your **Practice** environment.
3. Select **Apps** and click to open the **Knowledge Admin** application.
4. Navigate to **Knowledge Assessments** and open **Test Assessment Four**.
5. Existing records will not pick up the Business Process Flow you created. Click **Process** on the command bar and select **Switch Process** (you may have to click the ellipses (...) to see this option).
6. Select the **Assessment Process** you created and click **OK**.
7. The **Assessment Process** should now be visible on the form.
8. Click **+ New**.
9. New rows should show the new Business Process Flow immediately.
10. Enter **BPF Test Assessment** for **Title** and click **Save**.
11. Select the **Questions** tab and click **+ New Knowledge Question**.
12. Select **Simple** for **Question Type**.
13. Enter **Process Test Question One** for **Question**.
14. Enter **Answer One** for **Answer 1** and **50** for **Answer 1 Points**.
15. Enter **Answer Two** for **Answer 2** and **80** for **Answer 2 Points**.
16. Enter **Answer Three** for **Answer 3** and **0** for **Answer 3 Points**.
17. Enter **Answer Four** for **Answer 4** and **0** for **Answer 4 Points**.
18. Click **Save**.
19. Click on the browser back button.

20. Click on the **Knowledge Assessment** stage of the Business Process Flow. The steps for this stage will come into view in a pop-up from the Business Process Flow bar.
21. In the window for the Knowledge Assessment stage, enter **80** for **Passing Score**.
22. Click on the **Total Points** calculator icon.
23. Click **Recalculate**.
24. The **Total Points** should get recalculated.
25. Select **Yes** for **Notify Manager**.
26. Select **Yes** for **Create Questions**. Then click **Next stage**.
27. The process should move to the **Activate** stage.
28. Start a new browser window and navigate to <https://flow.microsoft.com>.
29. Expand **Action Items** and select **Approvals**.
30. You should have one new approval waiting for you. Click on the approval.
31. The Approval pane will open. Select **Approve** in **Choose your response**.
32. Provide **Comments** and click **Confirm**.
33. Go back to **Knowledge Admin** application and click on the **Refresh** button.
34. Click on the **Activate** stage of the Business Process Flow.
35. The Approval Flow should complete the approval and set the **Approval Status** to **Approved**.