

Power Apps and Power Automate Champion Training

Module 2: Triggers and Actions in Power Automate

Student Lab Manual

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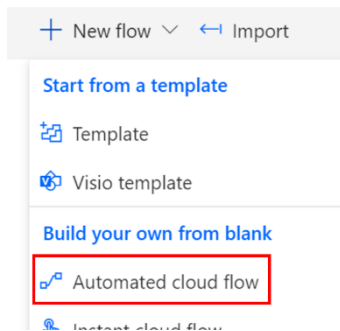
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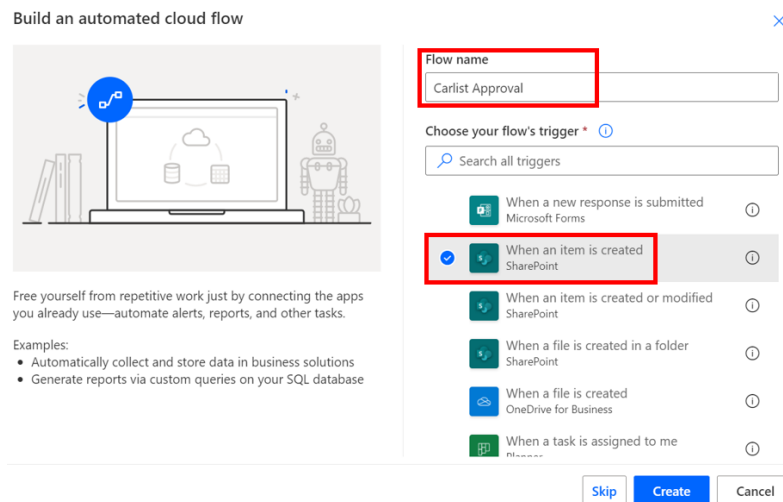
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Lab 1 - Use Approval flows to send and manage approvals

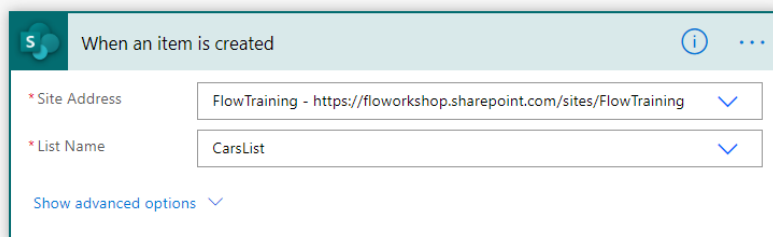
1. Open <https://flow.microsoft.com> and login with your account
2. Click **My Flows**
3. Create new Flow using “**Automated cloud flow**” option



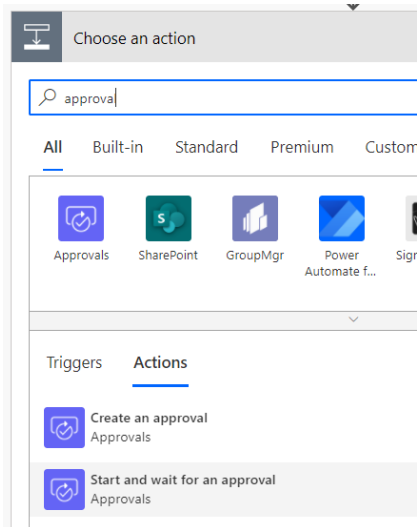
4. Name it “**Carlist Approval**”, choose “**When an item is created**” (SharePoint) and click **Create**



5. In Site Address, click on dropdown to select your site and in List Name select **CarsList**



6. Click **New Step**, type **Approval** and then select **Start and wait for an approval**



7. Set action settings as below using Dynamic content from “**When an item is created**” trigger
- Title: **[Title]** (dynamic content from “When an item is created”)
 - Assigned to: *Your O365 account*
 - Details: **[Created by Display Name]** at **[Created]** (dynamic content from “When an item is created”)
 - Item link: **[Link to item]** (dynamic content from “When an item is created”)
 - Item link description: **[Name]** (dynamic content from “When an item is created”)

* Approval type: Approve/Reject - First to respond

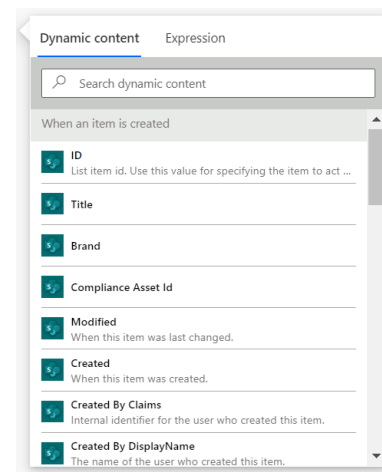
* Title: Please review: [Title]

* Assigned to: Flow Workshop ;

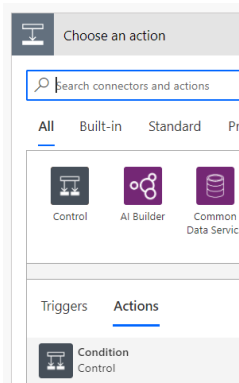
Details: [Created By Display Name] as [Created]

Item link: [Link to item]

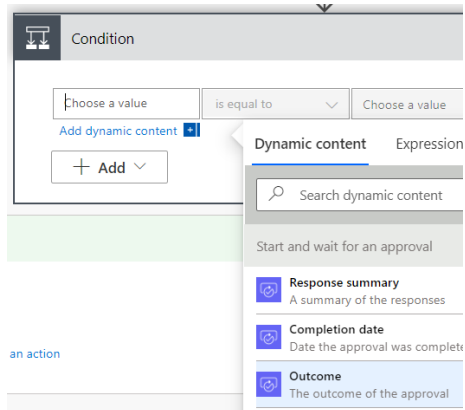
Item link description: [Name]



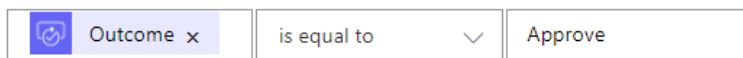
8. Click New Step and select **Condition**



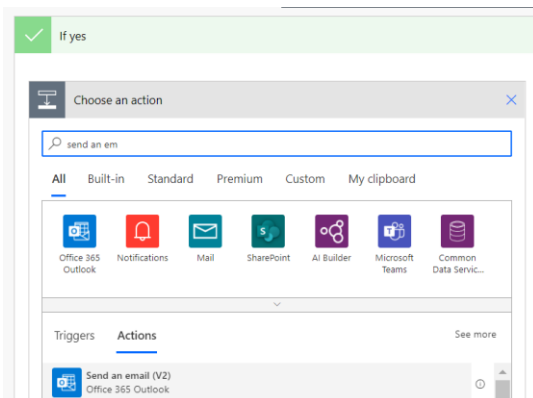
9. Choose **Outcome** from “Start and wait for an approval” action’s dynamic content



10. Set condition like below



11. Add new step “Send an email (V2)” action to condition’s “If yes” branch



12. Add following text and dynamic content for action settings

Send an email (V2)

* To: Created By Email x

* Subject: Title x

* Body: Font 12 B I U [Rich text editor icons] Your request for Title x has been approved by Responses Approver name x . Comments if any Responses Comments x

Notice that when you select “**Responses Approver Name**” from the dynamic content Flow will automatically add **Apply to each** step to your Flow because we are referencing collection type of parameters which will cause looping values of the collection even if there is just one item

Apply to each

* Select an output from previous steps: Responses x

13. Click Send an email (V2) action’s three dots menu and click **Copy to my clipboard (preview)** option

Send an email (V2)

* To: Created By Email x

Copy to my clipboard (Preview)
Rename
Add a comment

14. Add new step to “If no” branch, click **My Clipboard** and select copied **Send an email (V2)** action

If no

Choose an action

All Built-in Standard Premium Custom **My clipboard**

Send an email (V2)
Office 365 Outlook

15. Change the email subject and body texts like below and **remove** wrong **responder/displayName** and **comments** dynamic content fields

* Subject: Title x is rejected

* Body:

Font 12 B I U [icons]

Your request for Title x has been rejected by

responder/displayName x

Comments if any comments x

16. Add correct dynamic content fields **Responses Approver Name** and **Responses Comments**

* Subject: Title x is rejected

* Body:

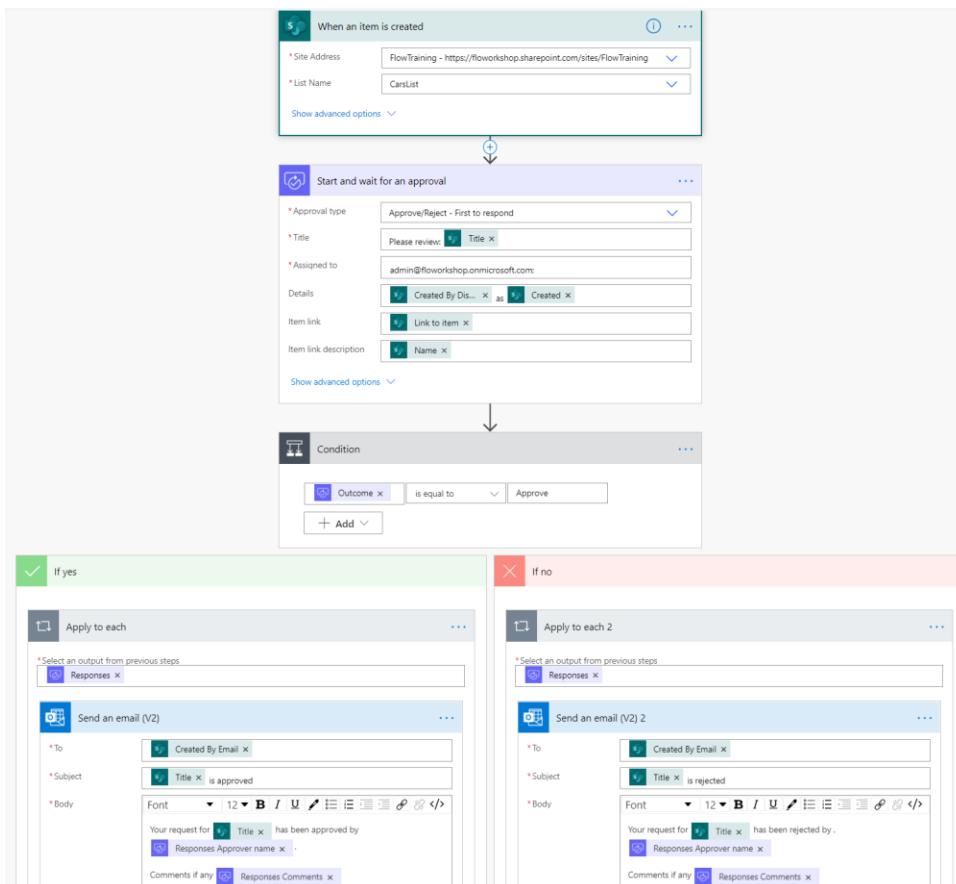
Font 12 B I U [icons]

Your request for Title x has been rejected by

Responses Approver name x

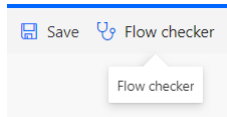
Comments if any Responses Comments x

17. Flow should now look like below. Take a minute to review the logic of this Flow

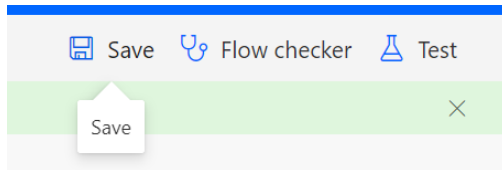


Now you are ready to test the Flow

1. First click **Flow Checker** at top right to ensure no errors and all required fields have been filled out



2. Click **Save**



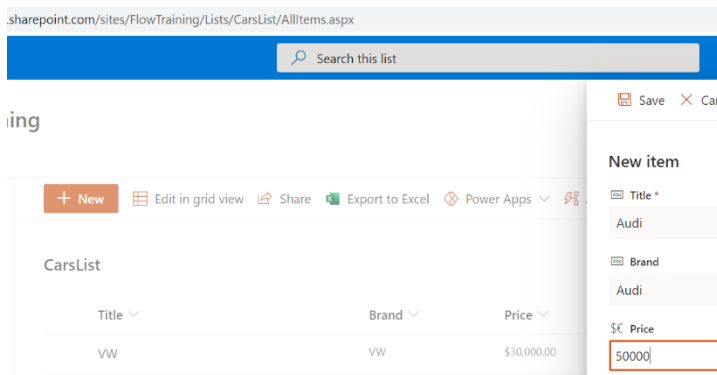
3. Click **Test** and select **Manually Test Flow**

☒ Manually
Perform the starting action to trigger it.

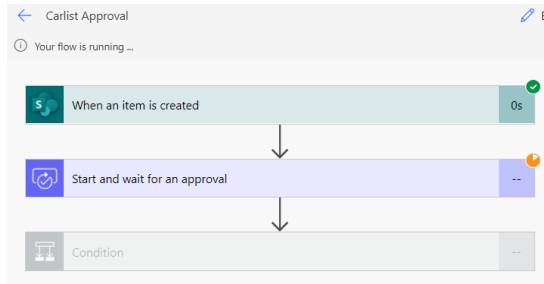
☐ Automatically

4. Go to your SharePoint site
[https://\[InsertYourTenantPrefix\].sharepoint.com/sites/\[InsertFirstandLastName\]](https://[InsertYourTenantPrefix].sharepoint.com/sites/[InsertFirstandLastName])

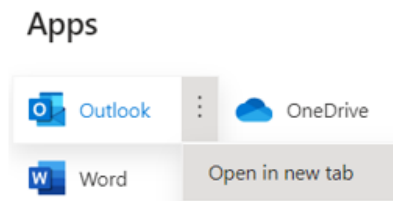
5. Open CarsList and add new item to the list



6. Come back to Flow and check that it is triggered. At this point you should be waiting for approval



7. Open your mail at <https://outlook.office.com> in another tab of the browser and approve the new item in the list that you just created



8. Approve the new item you just created to CarsList. Notice that there is also a link to SharePoint list item in the Approval email

Please review: Audi

Approvals | Power Automate

Please review: Audi

Requested by **Flow Workshop** <admin@flowworkshop.onmicrosoft.com>

Date Created Sunday, November 8, 2020 2:28 PM GMT

Link [Audi](#)

Flow Workshop as Sunday, November 8, 2020 2:28 PM GMT

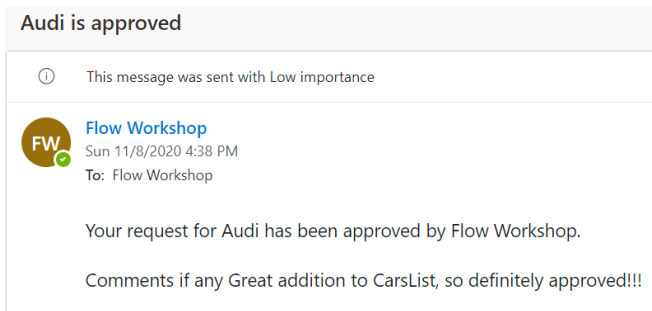
Approve ^ **Reject** v

Comments

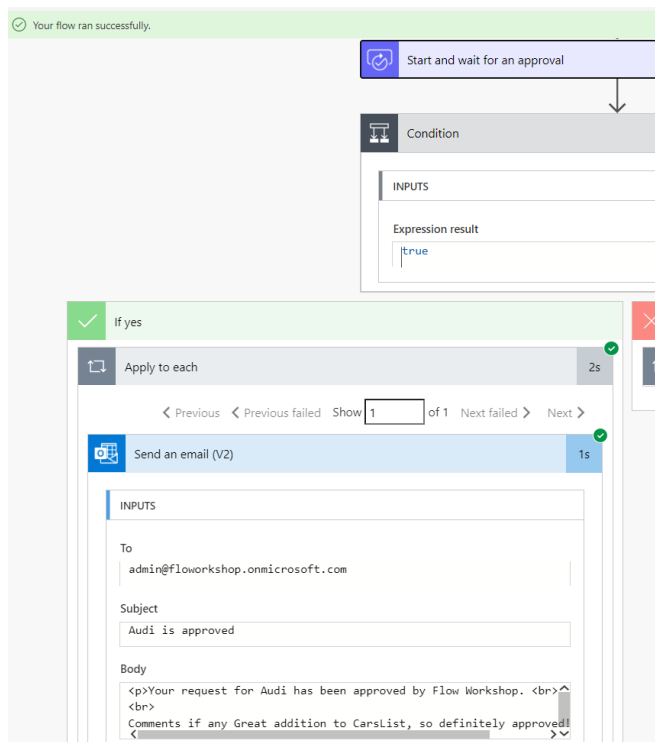
Great addition to CarsList, so definitely approved!!!

Submit

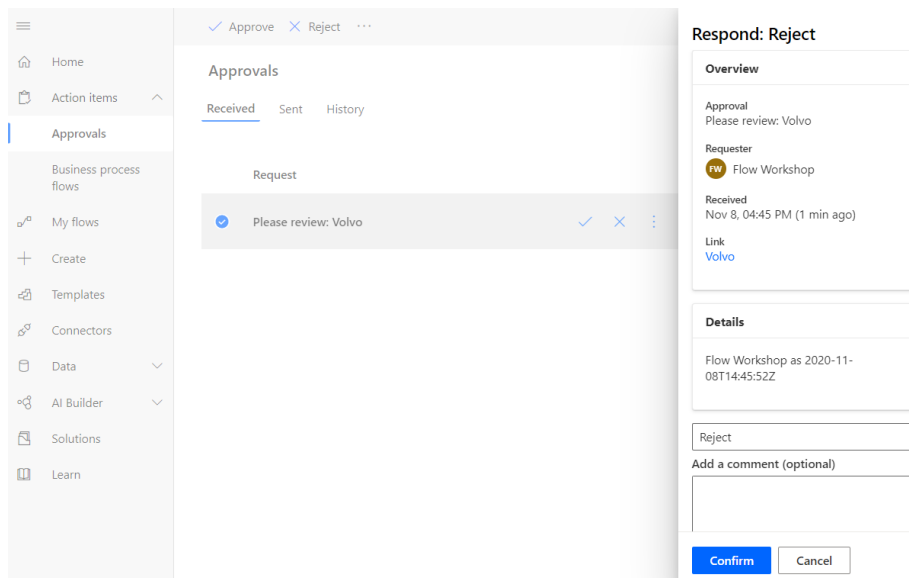
9. You should receive an email notifying you that the item has been approved



10. Go back to Flow and you should see that Flow was triggered successfully



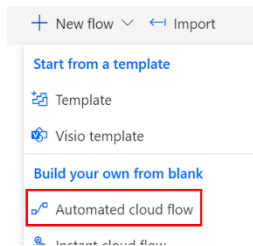
11. You can test the same by rejecting the approval and if you want test the approval in Flow **Action items**



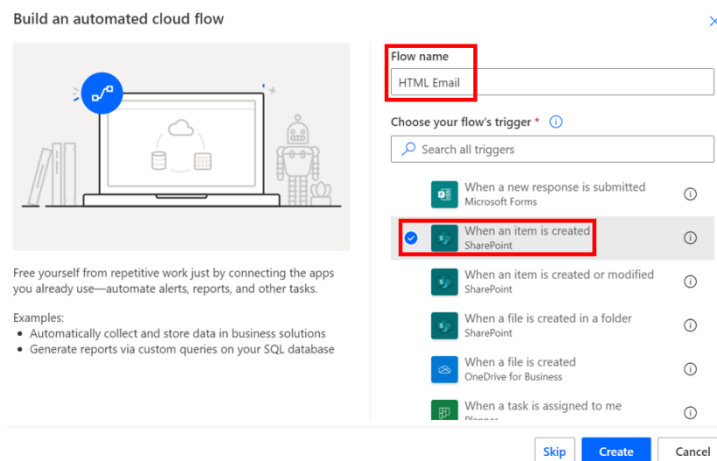
Documentation : <https://docs.microsoft.com/en-us/flow/modern-approvals>

Lab 2 - Use HTML option in mail actions (SharePoint)

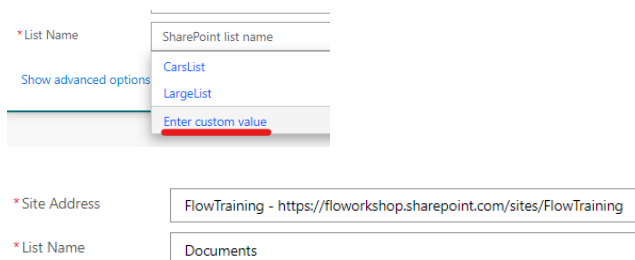
1. Open <https://flow.microsoft.com> and login with your account
2. Click **My Flows**
3. Create new Flow using “**Automated cloud flow**” option



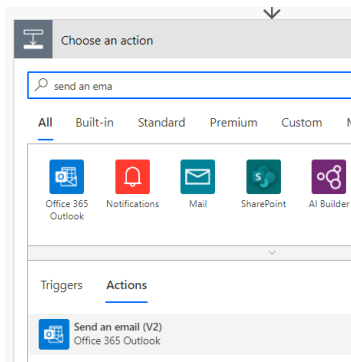
4. Name it “**HTML Email**”, choose “**When an item is created**” (SharePoint) and click **Create**



5. In Site Address, click on dropdown to select **FlowTraining** site and enter custom value **Documents** to List Name

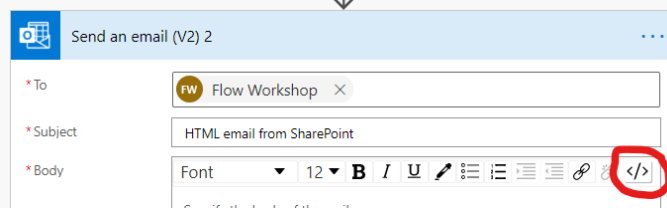


6. Add new step and select “Send an email (V2)” action



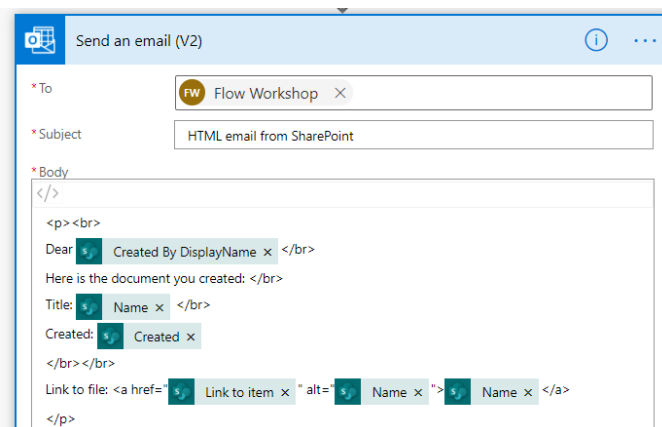
7. Configure **Send an email** action using following values

- To: *Your O365 email address*
- Subject: **“HTML email from SharePoint”**
- Body -> open the code view by clicking “</>” button

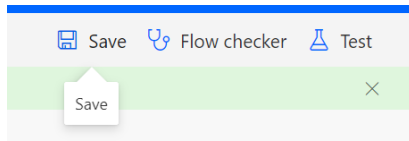


- Add following HTML code snippet to body field and replace all **red text** with dynamic content values **Created By DisplayName** and **Link to item** like below:

Dear [Created by DisplayName]</br>
Here is the document you created:</br>
Title: [Name]</br>
[Name]
</br></br>
Link to file: [Link to Item]

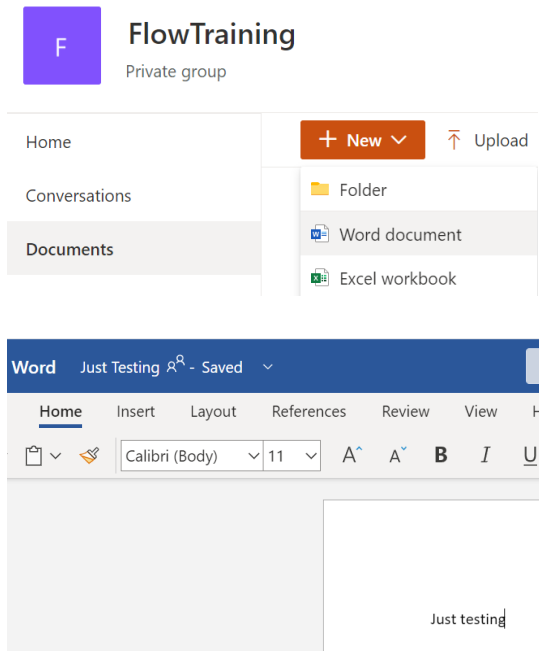


8. Save the flow

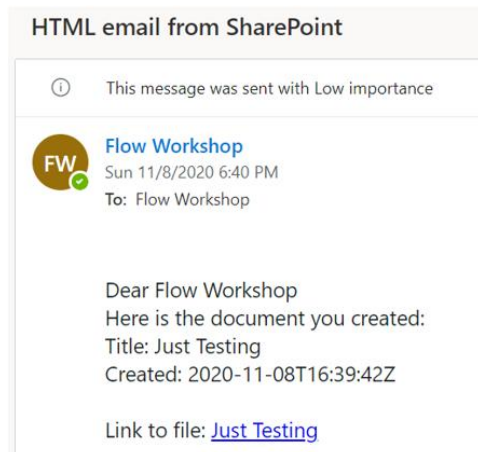


9. Test the flow by browsing to the **Documents** library of your site.

10. Create new file to document library

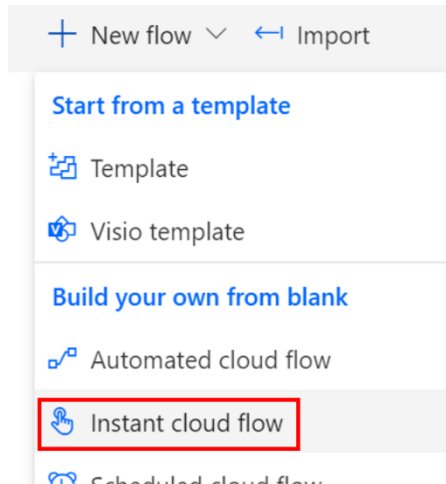


11. Open your O365 Outlook mail and in few seconds you should receive email from Flow

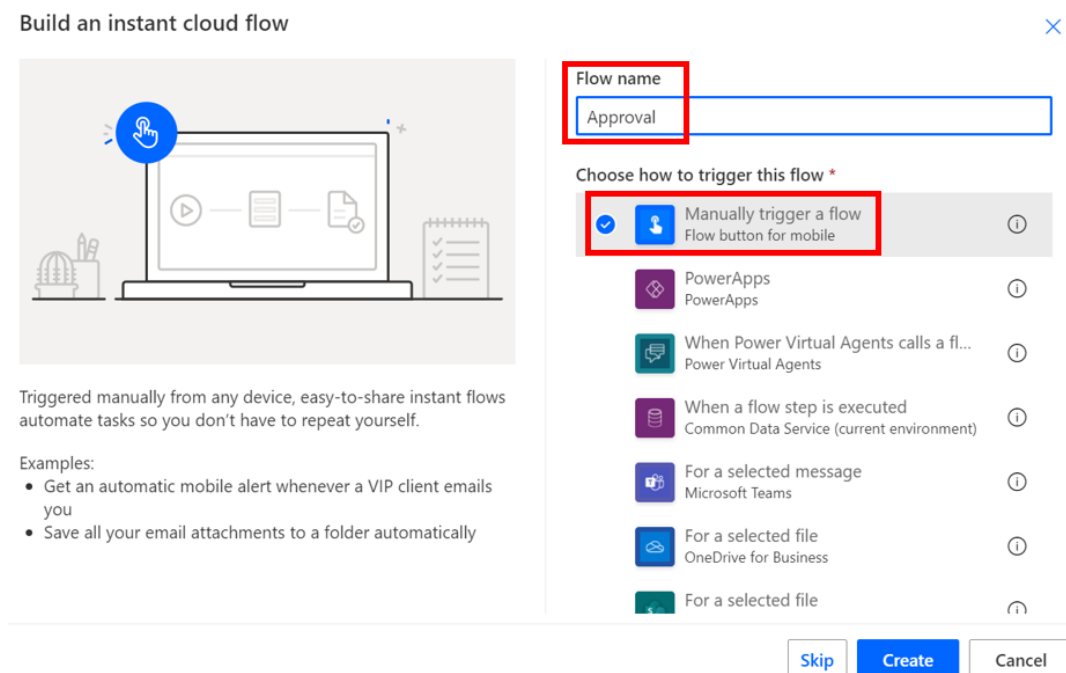


Lab 3 - Power Automate Approvals and Email with Options

1. Open <https://flow.microsoft.com> and login with your account
2. Click **My Flows**
3. Create new Flow using “Instant cloud flow” option



4. Name it “**Approval**” and choose “**Manually trigger a flow**”



5. Create new Step – "Start and wait for an approval"

- Approval type: **Approve/Reject – First to respond**
- Title: **Approval**
- Assigned To: *Your O365 account email address*
- Details: **# This is a H1 header - Please Approve**
This is a H2 header

- Item 1

- Item 2

- Item 3

Link: [Microsoft Flow](https://flow.microsoft.com)

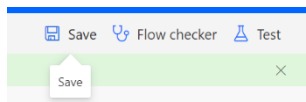
- Item link:
[https://\[InsertYourTenantPrefix\].sharepoint.com/sites/\[InsertFirstandLastName\]/Shared%20Documents/DeptHome.jpg](https://[InsertYourTenantPrefix].sharepoint.com/sites/[InsertFirstandLastName]/Shared%20Documents/DeptHome.jpg)
- Item link description: **Picture of a house**

The screenshot shows the configuration for a 'Start and wait for an approval' step. The fields are as follows:

- Approval type:** Approve/Reject - First to respond
- Title:** Approval
- Assigned to:** admin@flowworkshop.onmicrosoft.com
- Details:**
 - # This is a H1 header - Please Approve
 - ## This is a H2 header
 - Item 1
 - Item 2
 - Item 3
 - Link: [Microsoft Flow](https://flow.microsoft.com)
- Item link:** https://YOURTENANTNAME.sharepoint.com/sites/FlowTraining/Shared%20Documents/DeptHome.jpg (with an 'Add dynamic content' link)
- Item link description:** Picture of a house

At the bottom, there is a 'Show advanced options' link.

12. Click **Save**

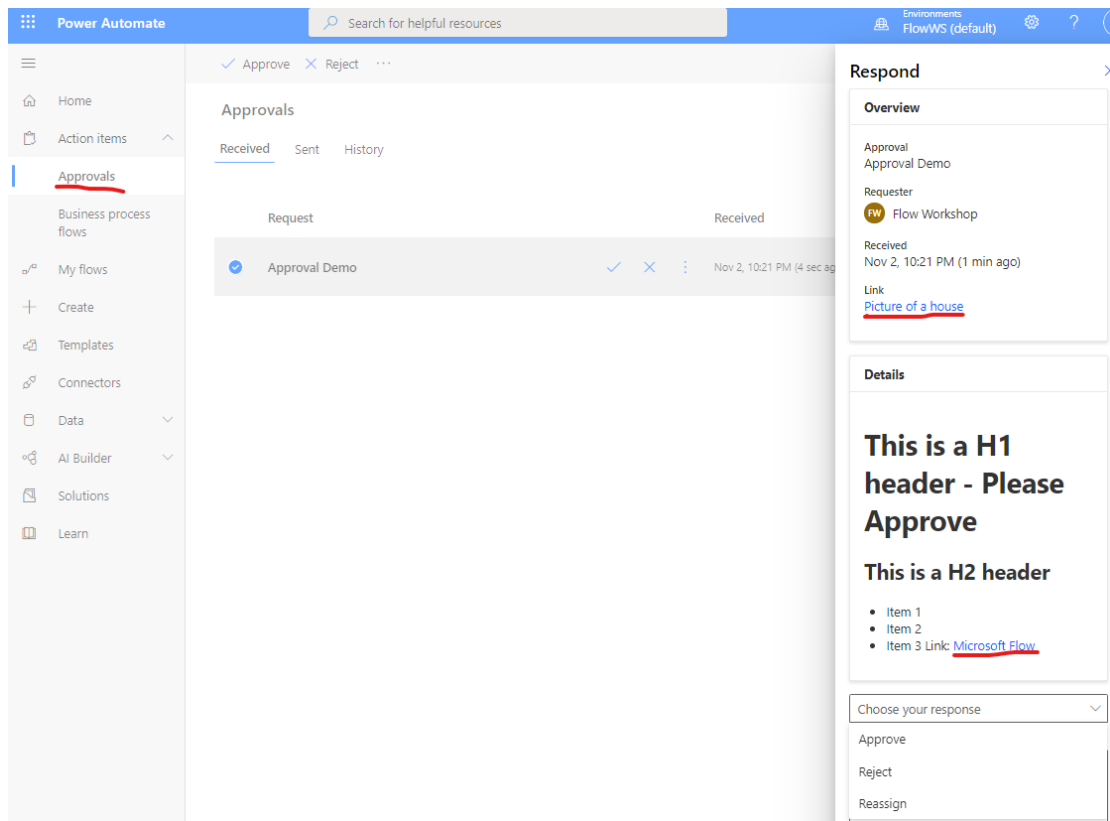
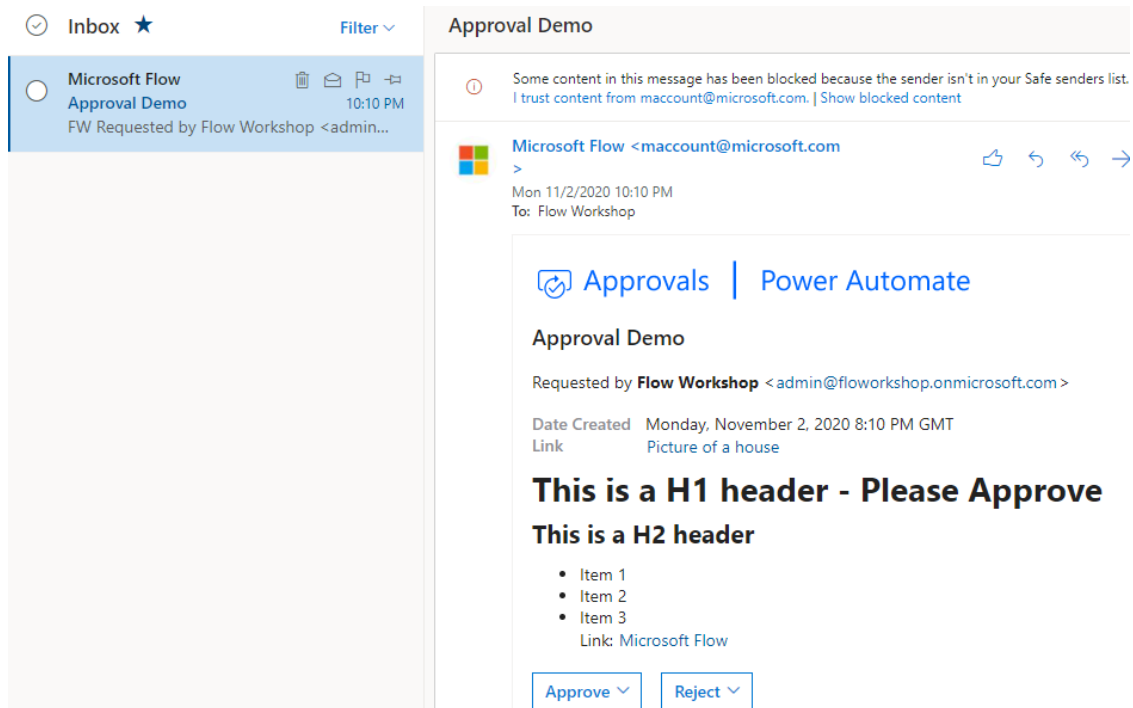


13. Click **Test** and select **Manually**

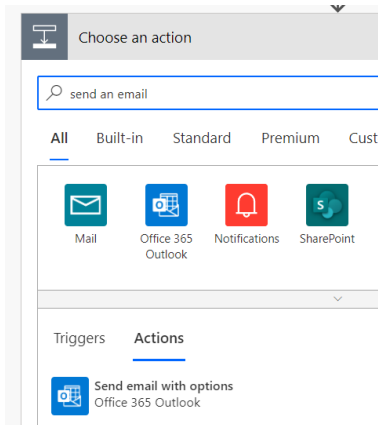
Test Flow

- ☒ **Manually**
Perform the starting action to trigger it.
- ☐ **Automatically**

6. Open Outlook or Flow Approvals to see and approve/reject the request. Also test links in the approval message



7. Add new action "Send email with options"



8. Configure action with following parameters

- To: *Your O365 account email address*
- Subject: **Approval 2**
- User Options: **Approve, Reject**
- Body:

<h1>This is H1 header</h1></br>

<h2>This is H2 header</h2></br>

</br>

Body text

</br>

link : Microsoft Flow

</br>

Resize Picture:

</br>

- **</br>**

- Use only HTML message: **Yes**

Send email with options

To: admin@flowworkshop.onmicrosoft.com

Subject: Approval 2

User Options: Approve, Reject

Header Text: Header text for email body

Selection Text: Header text for users options selection

Body:


```

    <h1>This is H1 header</h1></br>
    <h2>This is H2 header</h2></br>
    </br>
    Body text
    </br>
    link : <a href="https://flow.microsoft.com">Microsoft Flow</a>
    </br>
    Resize Picture:
    </br>
     </br>
    
```

Importance: Normal

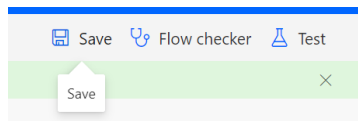
Attachments Name - 1: Attachment name

Attachments Content - : Attachment content

+ Add new item

Use only HTML message: Yes

9. Click **Save**



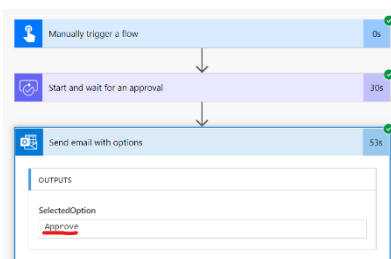
10. Click **Test** and select **Manually**

Test Flow

- ☒ Manually
Perform the starting action to trigger it.
- ☐ Automatically

11. Approve / Reject the Approval task and select either Approve or Reject in email send by **Send an email with options** action

12. See the value of **SelectedOption** which should be the choice you selected



Documentation : <https://docs.microsoft.com/en-us/flow/approvals-markdown-support>