Contracts Workflow

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Tools Involved:

1. Power Automate
2. Excel Online
3. Approvals
4. Forms

Flow:

1. Whenever a new project arrives, Ronnah needs to fill a small form indicating Name of Project, Department and Date.
2. This is noted in an online Excel File and 4 Approvals are sent on Ronnah’s Microsoft Teams.
3. Each approval belongs to i. Technical Department ii. Legal Department, iii. Insurance Department and the final one being iv. Approval from Neil or Jim
4. As soon as the project is given a Nod from the department, Ronnah will mark the approval as complete indicating it in the Excel.
5. Once all the departments and Neil or Jim gives the approval, the flow is complete and its reflected on the dashboard giving a clear display of the project update.

Steps: (Images)

1. Filling the form <https://forms.office.com/r/tK1LEEDEaR>

A screenshot of a computer

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1. Giving Approvals when Project Proposals arrive

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1. Approvals reflected on Excel online

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The whole system is explained to Ronnah and is expected to be working from 11-11-2024