



# Power Platform COMMUNITY CONFERENCE

SEPTEMBER 18–20, 2024 • Workshops: Sept 16, 17 & 21

MGM GRAND • Las Vegas, NV



# Power Platform COMMUNITY CONFERENCE

## Seeking Your Approval: **Using Approvals in Power Automate and Teams**

Lindsay Shelton

[lindsayTshelton@gmail.com](mailto:lindsayTshelton@gmail.com)



The official event app for the **Power Platform Community Conference**



Join the event app to access:

- ➔ Event announcements
- ➔ Personalized agenda, session details
- ➔ Speaker & attendee profiles
- ➔ Networking, meet-ups, messages
- ➔ Event documents

**Event Invitation Code:  
PPCConf2024**

# **Seeking Your Approval: Using Approvals in Power Automate and Teams**





# Lindsay Shelton

## MVP/MCT/Application Programmer (she/her)



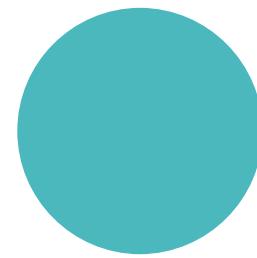
- Born and raised in Kansas City metro area
- Hobbies include staring at my cats and being an expert on Bravo reality television shows
- Spent 10 years as a middle school teacher before switching careers
- Works with everything from Power Platform adoption/governance to SPFx web parts to Azure APIM to Power Automate



# Agenda for Today

- What Are Microsoft Approvals?
- What Types of Approvals Are There?
- Ways to Configure Basic Approvals
- Getting Fancier with Approvals – approvals in Power Automate, Sequential Approvals, Group Approvals, and the Business Approvals Kit

# What are Microsoft Approvals?

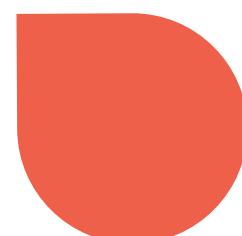


## OOB Microsoft feature

Doesn't require any additional licensing to use



Can be created in a variety of ways



Can be responded to and tracked in a variety of ways



**Let's go on a TOUUUUUUUR of  
Approvals in Teams!**



[This Photo by Unknown Author is licensed under CC BY-ND](#)

Microsoft Fo | Edit your flo | PPCC Attend | Mail - Linda | Approvals | Clipchamp | Video Pr | sequential a | Easiest Powe | Apps | Micro | Neurodiverg | SharePoint F | +

teams.microsoft.com/v2/?clientexperience=t2

Search (Ctrl+Alt+E)

Stay in the know. Turn on desktop notifications. Turn on

**Approvals** Received Sent **+ New approval request**

Activity Chat Teams Calendar Calls OneDrive Approvals ... Apps

Approvals Adobe Sign

Search for apps

Stream Meet People

Shifts Help Visio

Word Excel PowerPoint

Get more apps

Create or manage templates

Priority Request title Status Source Created Sent by Sent to

Priority	Request title	Status	Source	Created	Sent by	Sent to
	PPCC Attendance	Requested		9/1/2024, 10:39:13 AM	Lindsay Shelton	Lindsay Shelton

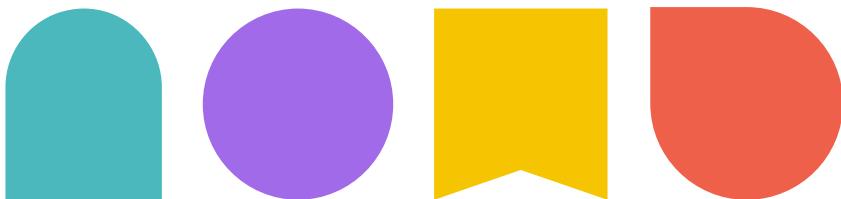
Requested X Filter (1) Power Automate Approvals Export

**“Lindsay, what are the  
absolute easiest ways  
to get started with  
Approvals?”**



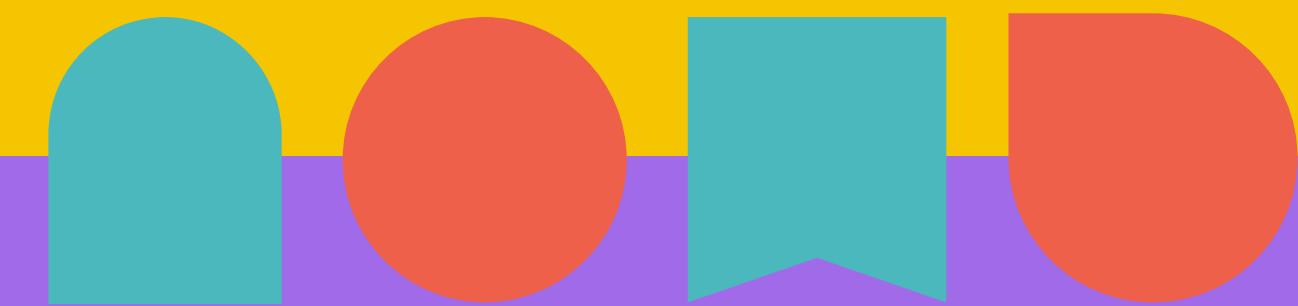
- A tired business user who has no time for Lindsay’s Power Automate shenanigans that are coming up later

# **Option 1: Embedded Approvals in Microsoft Lists, SharePoint Lists, or SharePoint Doc Libraries**



- Go to one of these three places (the instructions are the same in each)
- Select an item
- Click the Automate button in the top ribbon
- Click “Request sign-off”

# Demo 1 – Request Sign Off



SharePoint

Search this library



## NeurodivergentBossBabe

Public group ★ Following 2 members

Home

+ New Upload Edit in grid view Sync Add shortcut to OneDrive Pin to Quick access Export to Excel Automate Integrate ... All Documents\*

Conversations

Documents

Shared with us

Notebook

Pages

Site contents

InspirationalImages

CatPics

OCDPositiveAffirmations

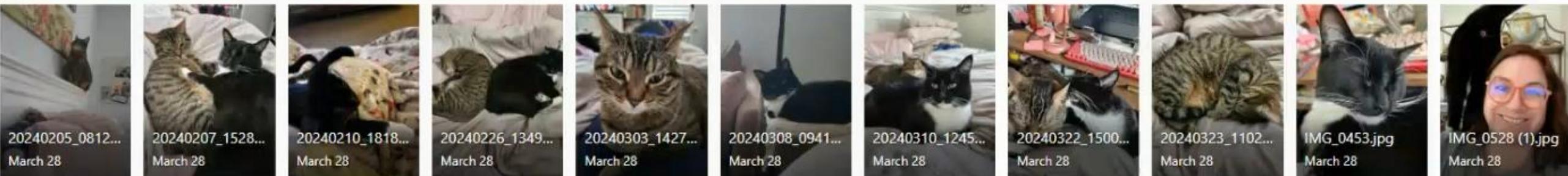
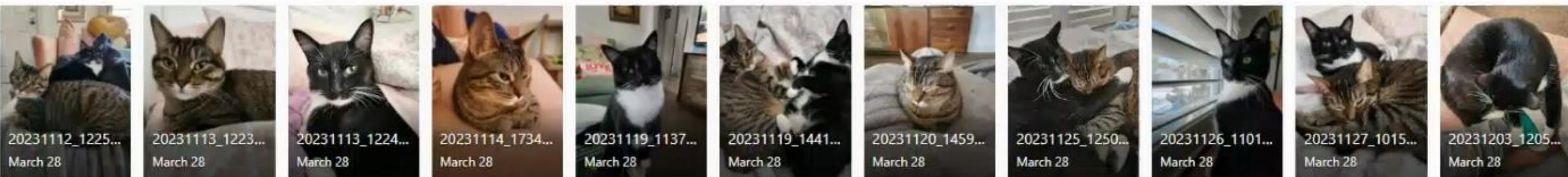
TimesToLeave

GoHomeOrStopSomewh...

Recycle bin

Edit

CatPics



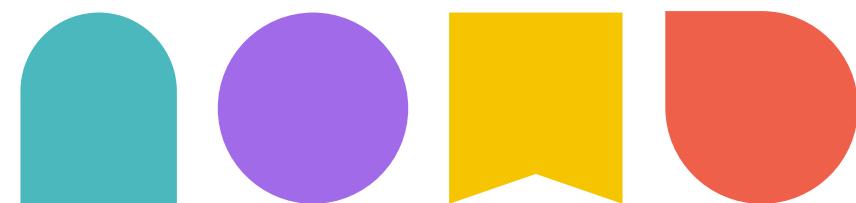
Add real-time chat

Add Microsoft Teams to collaborate in real-time and share resources across Microsoft 365 with your team.

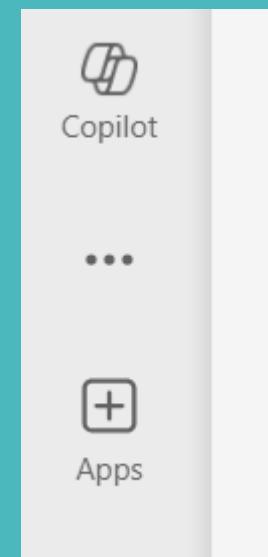
Add Microsoft Teams

Return to classic SharePoint

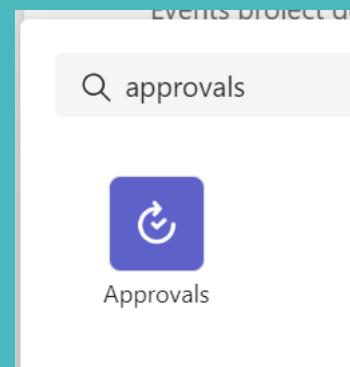
# Option 2: Use the Approvals app in Teams and create one right from there



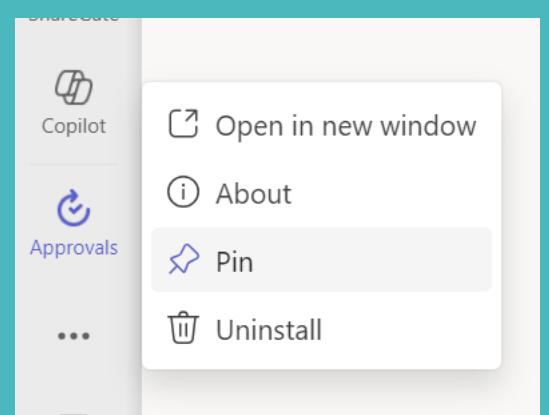
Click the three dots on the left in Teams



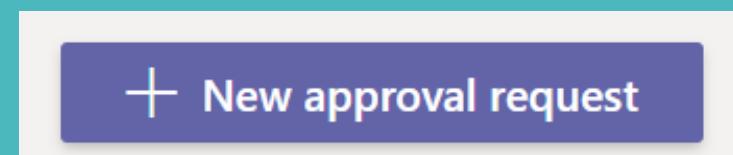
Search for and click on “Approvals”



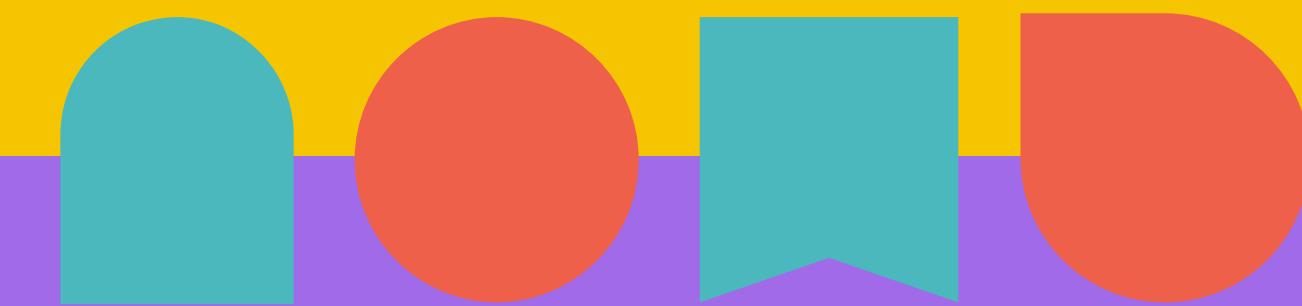
Right-click on the Approvals app icon and click “Pin”



In the top right-hand corner, click “+ New approval request”



# Demo 2 – New approval request





Search (Ctrl+E)



Stowers Institut...



...



Apps

# Copilot

For Microsoft 365

## What's new?

What's the latest from person, organized by emails, chats, and files?

## Start the conversation

Suggest common questions that can be asked to get retrospective started with my colleagues.

## Track your tasks

What should be on my radar from emails last week?

## Track what's important

Summarize messages from my manager in the last 48 hours.

## Don't miss out

Summarize Teams messages where I was @mentioned this week.

## Catch up fast

What's new in my inbox?

View prompts

Use / to insert people, files and more

Add people, files, and more for better results

0 / 2000



**Wait, wait, wait...**

**did I see**

**Approvals**

**Templates in**

**there?**



# Boy Howdy, did you! Here are just a few examples...

## Maintenance

Used for item maintenance request

## Business Trip

Request for business trip

## Leave

Request for leave

## Purchase Order

Supply and inventory purchase

## Overtime

Request for Overtime

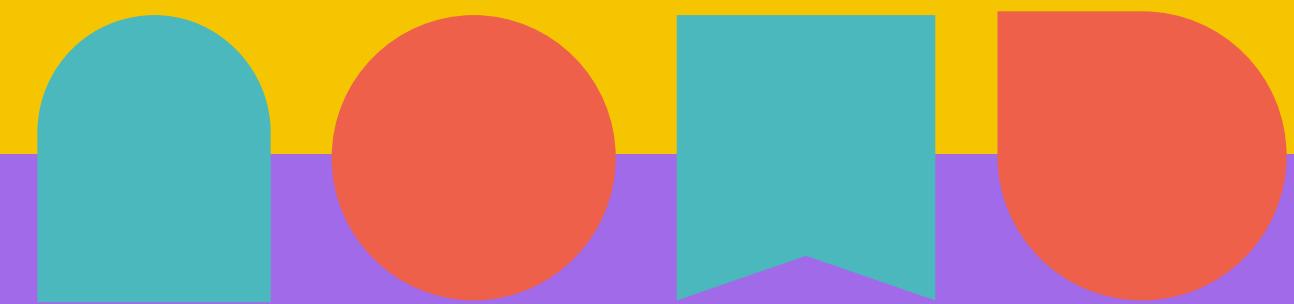
## Create from scratch

Make your own business templates, based on a team!



“Global admins and Teams admins can create templates for individual users or the whole organization.  
Team owners can create templates for their teams.”

# Demo 3 - Teams Approvals Templates





Search (Ctrl+E)



Stowers Institut...



Approvals

Received

Sent

+ New approval request



Filter

Personal Productivity

Export

## Approvals

Adobe Sign

DocuSign

SharePoint eSignature

## Approvals

Priority

Request title

Status

Source

Created

Sent by

Sent to

Please Approve this Cute Cat Pic!

So SO Cutel

Approvals

8/12/2024 1:08:52 PM

Shelton, Lindsay

Shelton, Lindsay

...

Veterinary Review: Test SOP 2

Approved

8/10/2024 6:22:28 PM

Shelton, Lindsay

Shelton, Lindsay

...

Member Review: Test SOP 2

Approved



8/10/2024 6:21:32 PM

Shelton, Lindsay

Shelton, Lindsay

...

Veterinary Review: Test SOP 2

Approved

8/10/2024 6:10:11 PM

Shelton, Lindsay

Shelton, Lindsay

...

Member Review: Test SOP 2

Approved

8/10/2024 6:09:06 PM

Shelton, Lindsay

Shelton, Lindsay

...

Member Review: Test SOP 1

Approved

8/10/2024 5:59:41 PM

Shelton, Lindsay

Shelton, Lindsay

...

Member Review: Test SOP 1

Approved

8/10/2024 5:57:05 PM

Shelton, Lindsay

Shelton, Lindsay

...

Veterinary Review: Test SOP 1

Approved

6/27/2024 3:17:42 PM

Shelton, Lindsay

Shelton, Lindsay

...

Member Review: Test SOP 1

Approved

6/27/2024 3:08:54 PM

Shelton, Lindsay



...

Member Review: Test SOP 2

Approved

6/27/2024 2:55:02 PM

Kupronis, Richard

Shelton, Lindsay

...

Member Review: Test SOP 2

Approved

6/27/2024 2:43:05 PM

Shelton, Lindsay



...

Supervisor Review: Test SOP 2

Approved

6/27/2024 2:39:09 PM

Shelton, Lindsay

Shelton, Lindsay

...

Veterinary Review: Test SOP 2

Approved

6/26/2024 3:50:30 PM

Shelton, Lindsay

Shelton, Lindsay

...

Member Review: Test SOP 2

Approved

6/26/2024 3:48:58 PM

Shelton, Lindsay

Shelton, Lindsay

...

Veterinary Review: Test SOP 1

Approved

6/25/2024 11:09:49 AM

Shelton, Lindsay

Shelton, Lindsay

...

Member Review: Test SOP 1

Approved

6/25/2024 11:08:42 AM

Shelton, Lindsay

Shelton, Lindsay

...

Supervisor Review: Test SOP 1

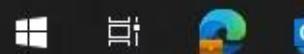
Approved

6/25/2024 11:04:17 AM

Shelton, Lindsay

Shelton, Lindsay

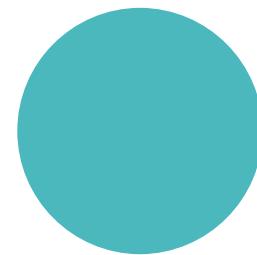
...

1:42 PM  
8/12/2024

**But Lindsay,  
what if I want to  
do some fancier  
stuff?**



# Enter... POWER AUTOMATE!!

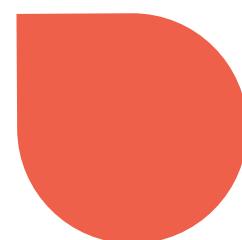


## **Non-premium connector**

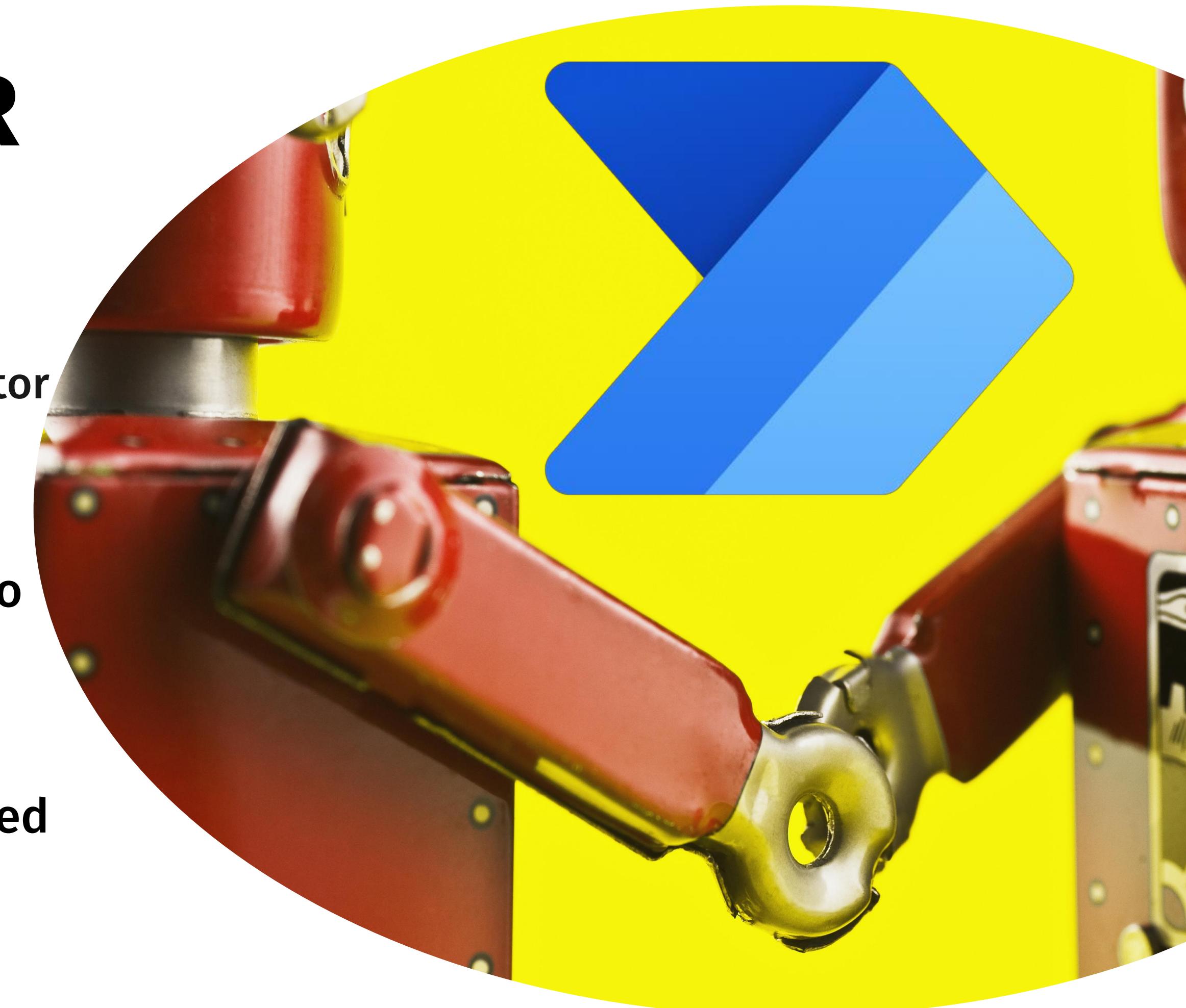
Doesn't require any additional licensing to use



**Can add approvals to  
any workflow you  
want**



**Can still be configured  
in a variety of ways**



# Use Cases are only limited by what you can dream up!

## Document Approvals

Used these for 3 years for SOP SharePoint document library processes

## Featured Events

Allow an event to be on a “featured” calendar address or not that shows up on digital signage

## Featured News

Users submit items for our Hero web part and digital signage

## Project Proposals

If project is a Go, creates a Planner task and a project charter document

## Request New Connectors

For environments locked down with DLP policies, users can request new connectors with a Microsoft Form and approval

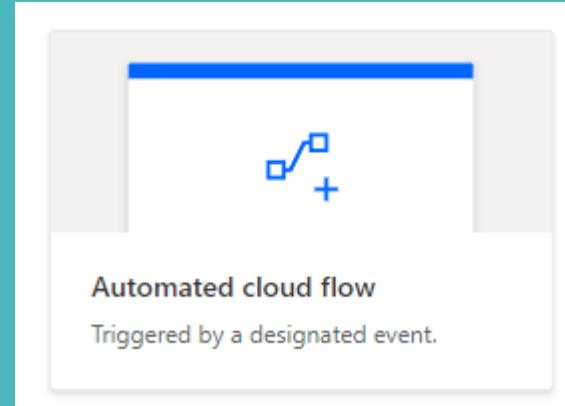
## Dev Environment Request

Request your own Power Platform development environment via Form

# Common Use Case Tips

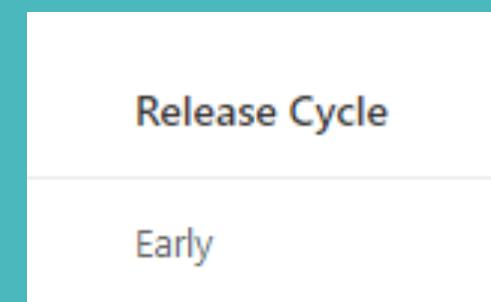


Typically you will use this with an “automated” trigger type



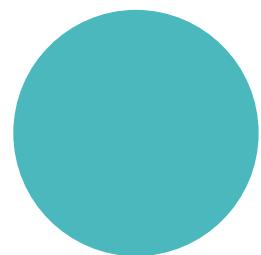
For most use cases, use the “Start and wait for approval” action

As of the end of Aug, have to create a new environment to get sequential approvals



Most common triggers (in my org): Forms, SharePoint “when an item is created”, but any trigger (or API) works

# Are There Any Gotchas?

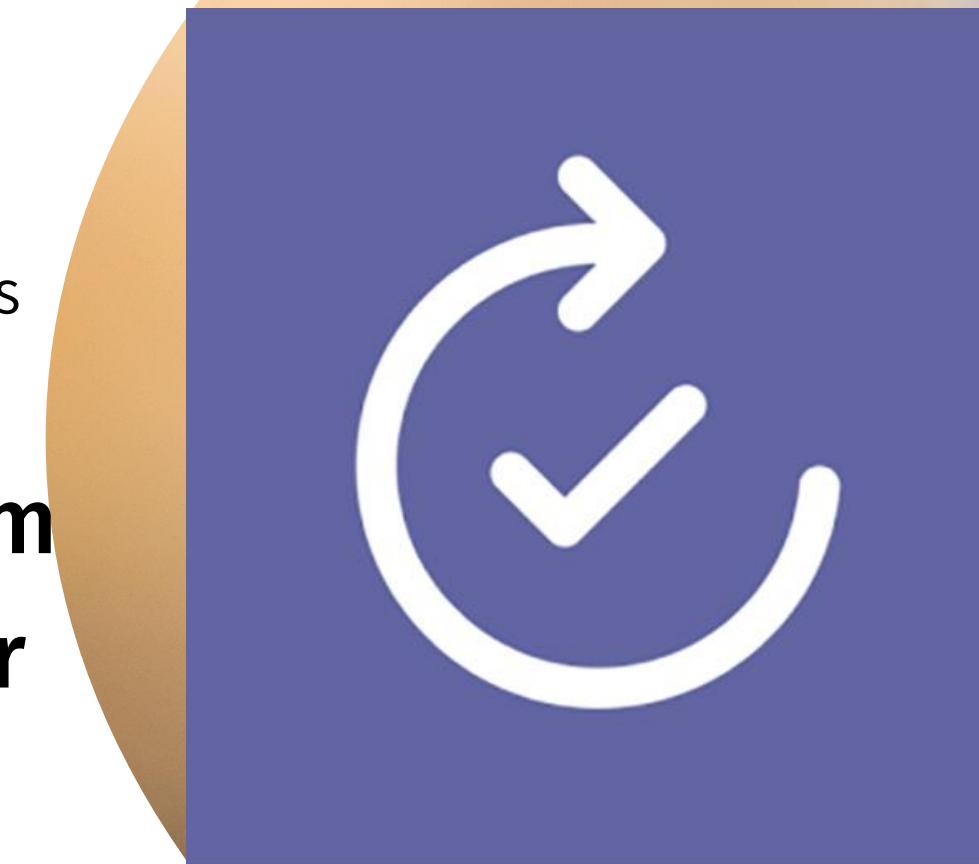
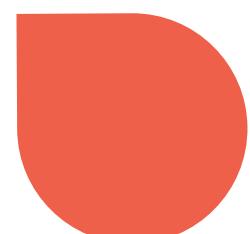


**30 Day Limit when in PA!!**

...unless you use Matt Devaney's workaround in his blog!



**If you send them from a service acct, harder to see what's done and what isn't  
Can't funnel to just one place i.e. just Teams**



# 30 Day Limit is by far the most common approvals error I see

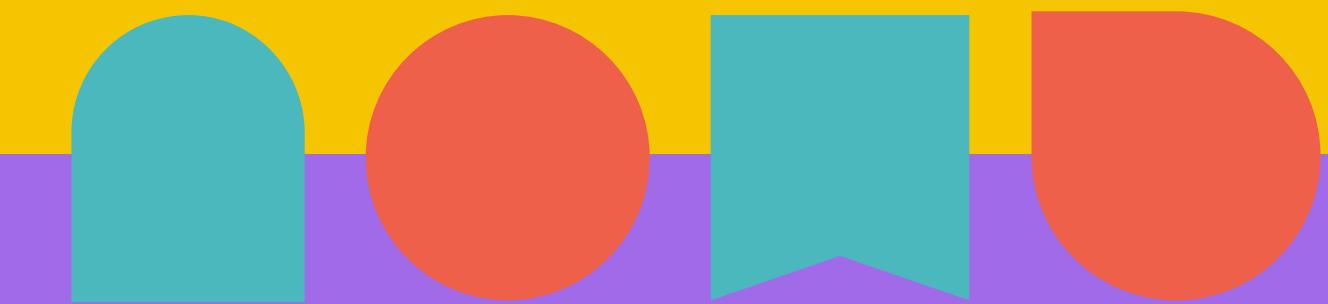
Extend A Power Automate Approval Over  
The 30 Day Limit

Posted by - Matthew Devaney • on - May 26, 2024 23 Comments

[https://www.  
matthewdevaney.com](https://www.matthewdevaney.com)



# Demo 4 – Power Automate Approvals



Power Automate

Search

When a new response is submitted -> Get response details,Condition,...

Unde Redo Comments Save Flow checker Test New designer

Your flow is ready to go. We recommend you test it.

Start and wait for an approval

\* Approval type: Approve/Reject - First to respond

\* Title: PPCC Attendance

\* Assigned to: Lindsay Shelton

Details: The following person wants to attend PPCC:  
[Responder's Email]

Item link: Add a link to the item to approve

Item link description: Describe the link to the item

Requestor: [Responder's Email]

Enable notifications: Yes

Enable reassignment: Yes

Attachments Name - 1: Attachment name

Attachments Content - 1: Attachment content

+ Add new item

Add an action

Hide advanced options



Ask a chatbot

+ New step

Save

Microsoft Forms | Edit your flow | Power Automate | PPCC Attendee Inter... | Mail - Lindsay Shelton | (2) Activity | Approval | Clipchamp | Microsoft | Video Project.clip | sequential approval p... | Easiest Power Automat... | +

make.power automate.com/environments/248c3b11-5dae-e4cc-8711-f7efaeba8b11/flows/f0e3567a-e2c3-4b9e-b3bb-e4ce099ed2b3?v3=false&backUrl=%2Fenvironments%2F248c3b11-5dae-e4cc-8711-f7efaeba8b11%2Fflows%2Ff0e3567a-e2c3-4b9e-b3bb-e4ce...

## Power Automate

Search

Environments Power Automate Appro...

When a new response is submitted -> Get response details, Condition,...

Home Create Templates Learn My flows Approvals Solutions Process mining AI hub Desktop flow activity Custom connectors Connections More Power Platform

When a new response is submitted

Get response details

Condition

Would you like to receive an email? is equal to Heck Yes!

If yes

Start and wait for an approval

Send an email (V2) 2

If no

Add an action

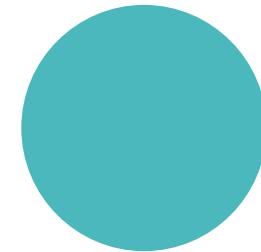
Add an action

+ New step Save

Ask a chatbot

The screenshot shows the Microsoft Power Automate designer interface. A flow is being edited, starting with the 'When a new response is submitted' trigger. This triggers the 'Get response details' action. Following this, a 'Condition' step checks if the response value 'Would you like to receive an email?' is equal to 'Heck Yes!'. If the condition is true ('If yes'), the flow continues with the 'Start and wait for an approval' action, which then leads to the 'Send an email (V2) 2' action. If the condition is false ('If no'), there is an option to 'Add an action'.

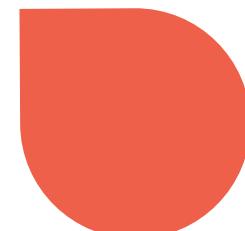
# Group Approvals



**Can use M365 Groups...**  
...with some caveats



**Recommend using  
SharePoint groups**



**Create them from Site  
Permissions –  
Advanced – Create  
Group**



But Lindsay,  
using SharePoint  
groups is harder!

I don't  
wanna!



**PPCC Attendees**

Private team

Email Open in Teams View site Delete

PPCC Attendees

General Membership Channels **Settings**

Email

Let people outside the organization email this team

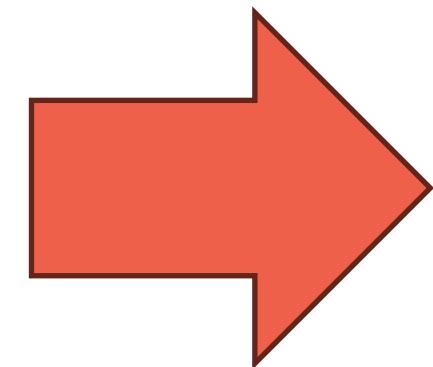
Send copies of team emails and events to team members' inboxes

Don't show team email address in Outlook

Privacy

Private

Public

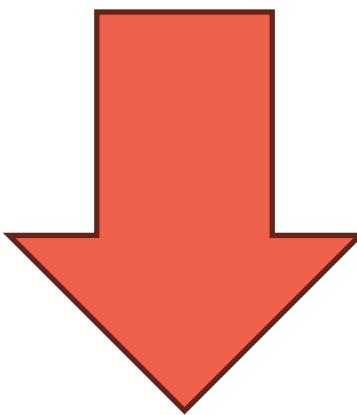


**Start and wait for an approval**

\* Approval type: Approve/Reject - Everyone must approve

\* Title: PPAC Attendee Request

\* Assigned to: ppacattendees@lindsayshelton.onmicrosoft.com;



**Approvals**

Approval request details

**Approved**

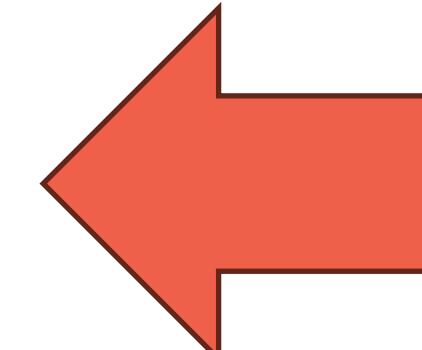
**PPAC Attendee Request**

Should we let this new person join us?  
[lindsayshelton@lindsayshelton.onmicrosoft.com](mailto:lindsayshelton@lindsayshelton.onmicrosoft.com)

▼ Final status: Approved

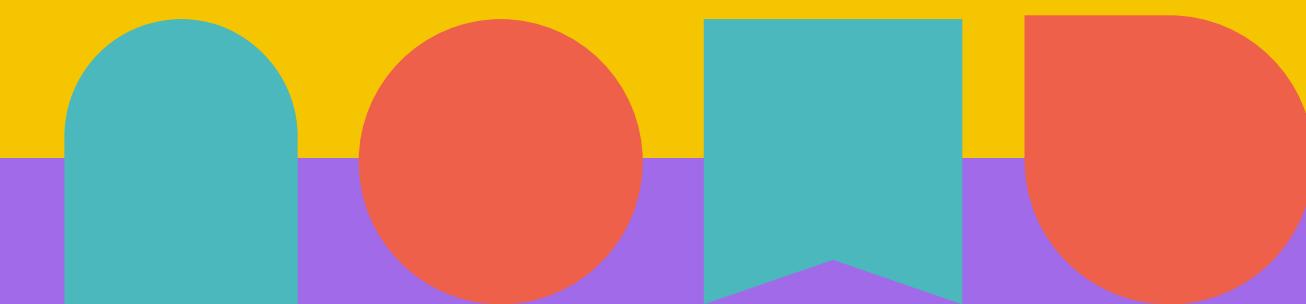
Approved by Megan Bowen 9/2/2024, 8:48:17 AM

Requested by Lindsay Shelton 9/2/2024, 8:41:58 AM



Request title	Status	Source	Created	Sent by	Sent to
PPAC Attendee Request	Approved		9/2/2024, 8:41:58 AM	Lindsay Shelton	PPCC Attendees

# Demo 5 – Group Approvals with SharePoint Groups

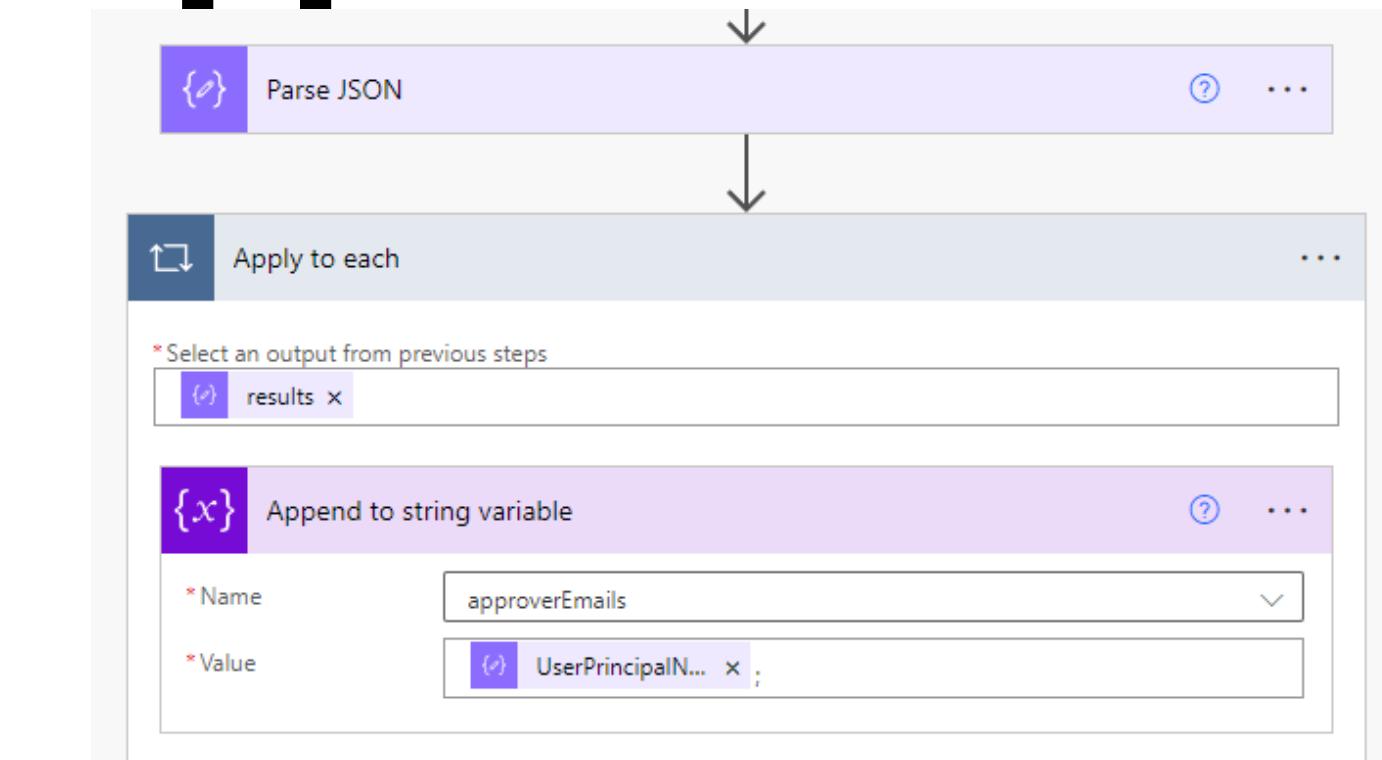
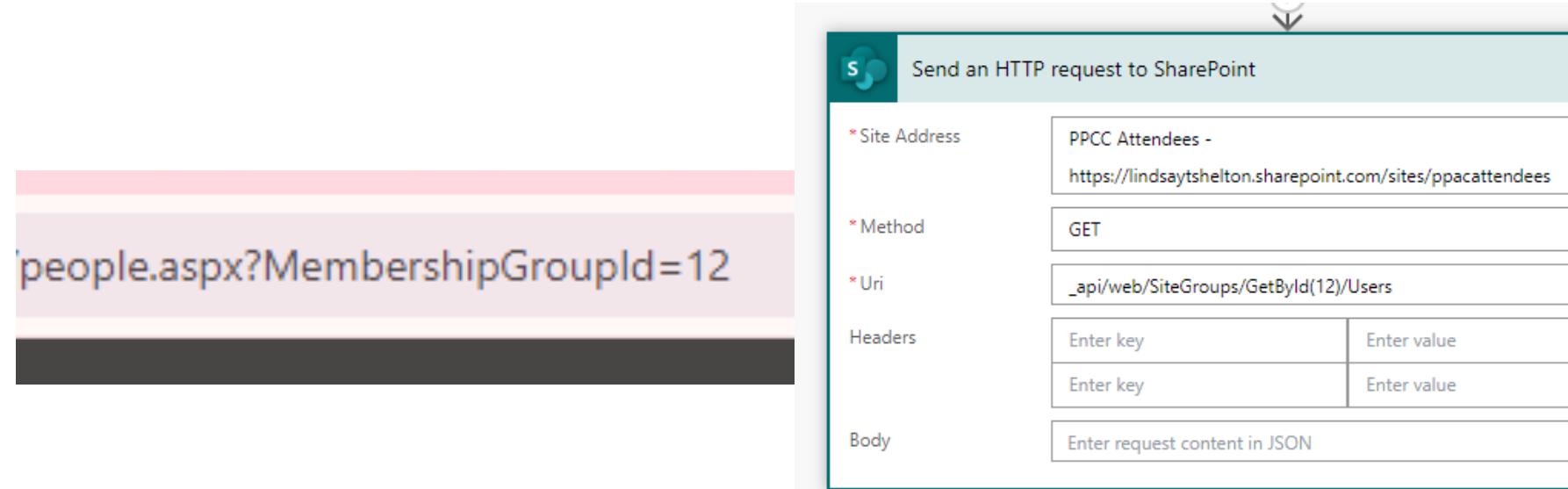


▼ Status: Requested



Pending response (requires everyone)  
Lindsay Shelton, Megan Bowen

# SharePoint Group Approval Flow



Make the SharePoint group and add members. Note the group # in the URL

Use a SharePoint HTTP call (non-premium).  
URI:  
`_api/web/SiteGroups/GetById(12)/Users`

Initialize a string variable, parse the JSON you get from the HTTP call, then append User Principal Name to that string variable

Use the string variable as your “Assigned To” value in the “Everyone must approve”-type Approval

**But Lindsay,  
what if I want to  
do REALLY fancy  
pants stuff?**



# Enter the Business Approvals Kit!



An app built by the Microsoft Power CAT team

Things it can do that OOB can't?

- Conditional approvals
- Delegation
- Out of office
- Organizational calendar

Requires both Power Apps and Power Automate premium licenses at minimum for those building approvals (check their page, it's complicated)  
- Go see [@heidi\\_jordan14](#) for questions!

## Create Node

Node Type

Approval     Go to Stage

Name

Submit

Description

### Approval Configuration

Approval Type

Approve/Reject - Everyone must approve

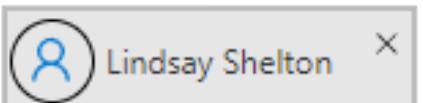
User     Dynamic

Approver

Manager of Initiator



Add



Notification

Default



Delegation Rule

Time-out or Out of Office



Delegate is configured as an Approver setting. If no delegate is configured, delegation rules will be ignored for the approver.

Time Out: Delegation will be triggered upon a specified time period. Out of office: Delegation will be triggered if the approver is out of office at the time the approval is received.

Time Out Setting

3

Actual Days



Business Days will use the Approver's Work Profile and Holiday settings.

**Save**

**Cancel**

Yeah, there's no  
demo of this, it's  
too complicated for  
a 100-level session



PREMIER BR 315

Jumpstart Your  
Automations with  
the Power CAT  
Approvals Kit

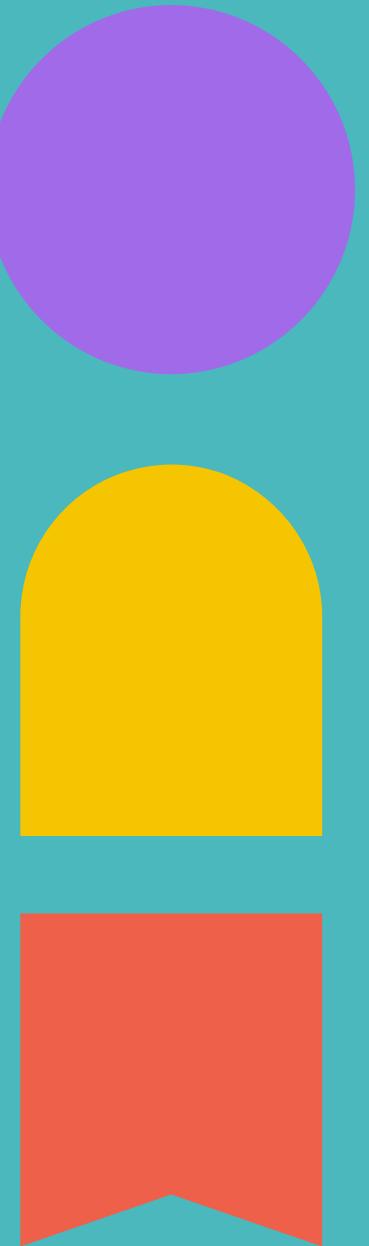
Ankita Chopra  
& Heidi Jordan

Want to share  
some  
opinions with  
Microsoft  
themselves??

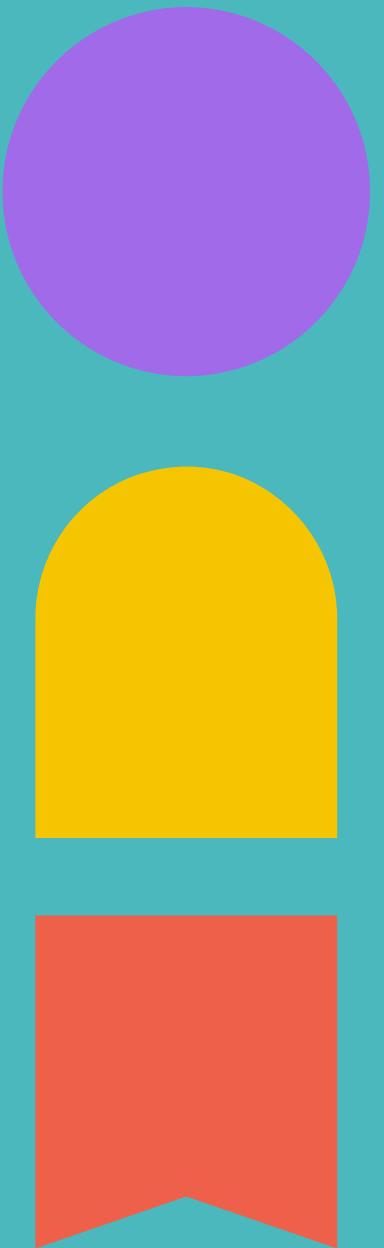
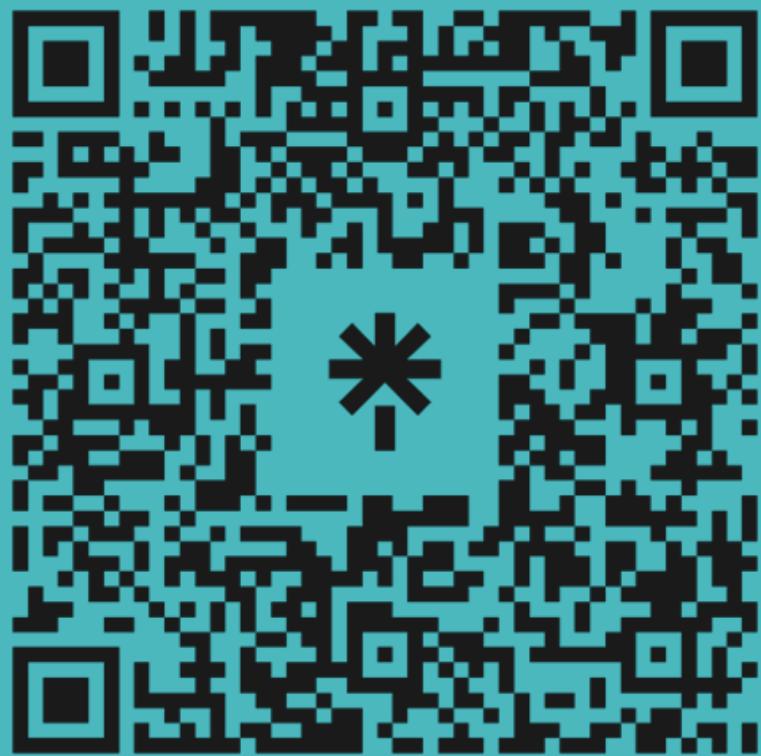
Help us shape the future of app  
rovers in the Power Platform



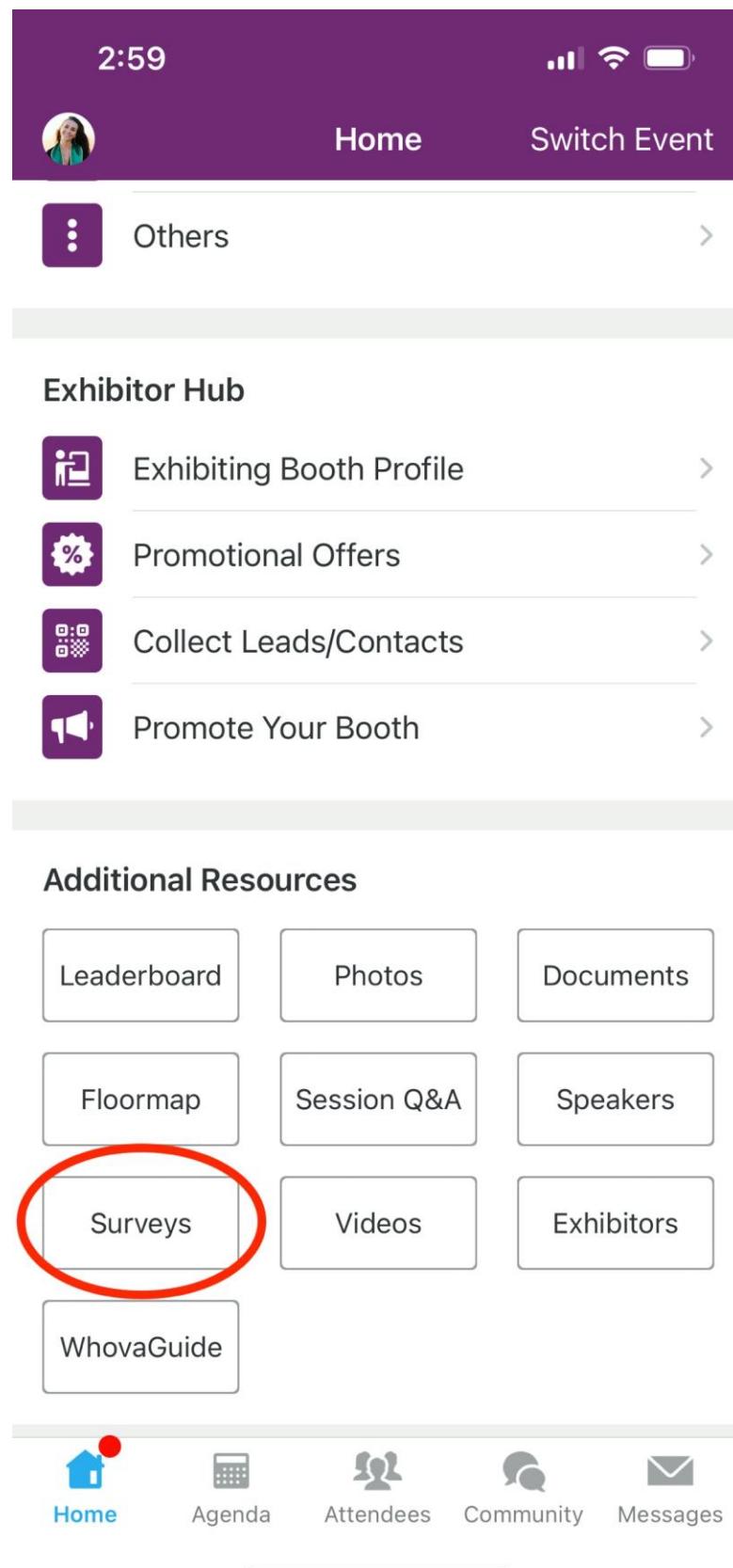
<http://aka.ms/approvalsfeedback>



Come see  
me for  
**GLITTER  
STICKERZZZ**



# Session Feedback Surveys



*We really want to hear from YOU!*

*In the pursuit of making next year's Power Platform Community Conference even better, we want to hear your feedback about this session.*

***Here's How -***

- *Simply go to the Whova App on your smartphone*
- *Scroll down on the Power Platform Community Conference Homepage to 'Additional Resources' to click "Surveys".*
- *Click Session Feedback.*
- *Scroll down to find this session title.*
- *Complete the session feedback survey.*
- *Finally, click 'Submit'*

*It's just that easy!*