



Power Platform COMMUNITY CONFERENCE

Jumpstart your Automations with the Power CAT Approvals Kit

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Code: PPCConf2024**



Power Platform COMMUNITY CONFERENCE



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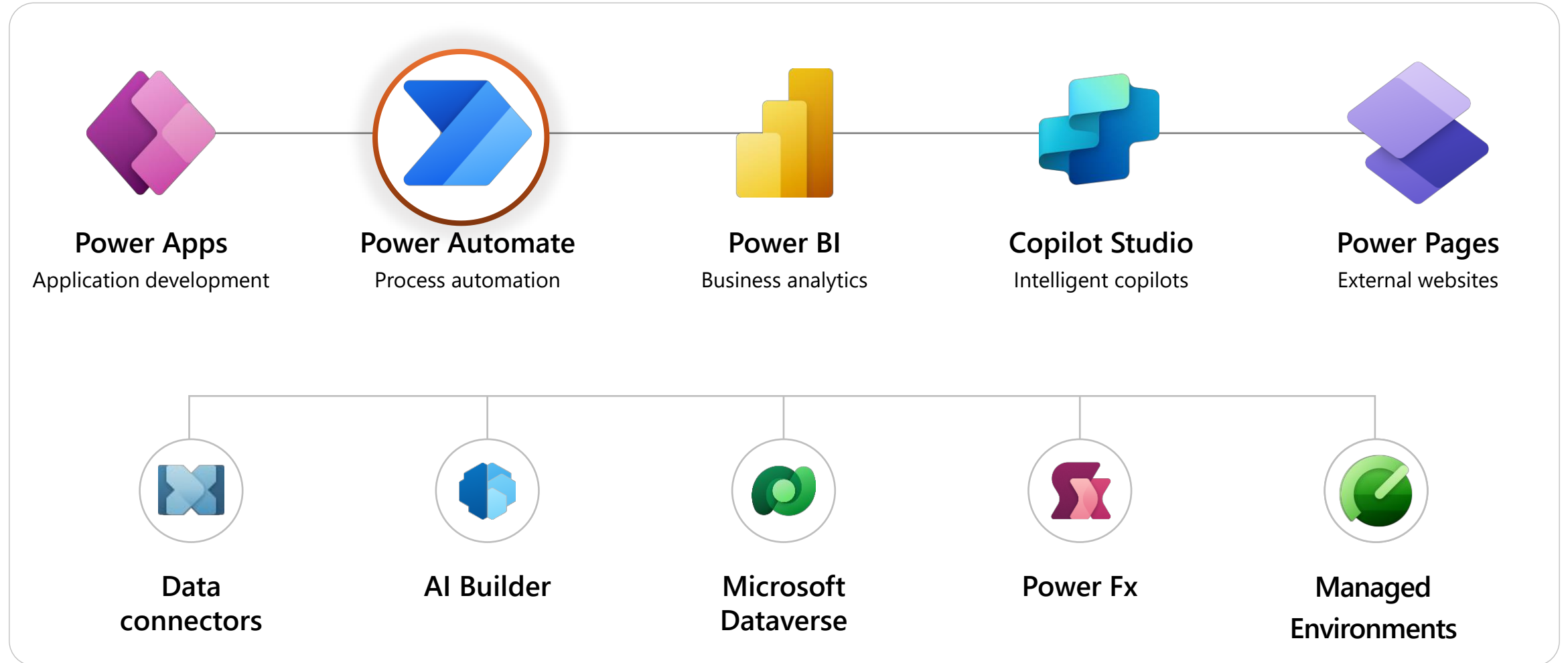
Agenda

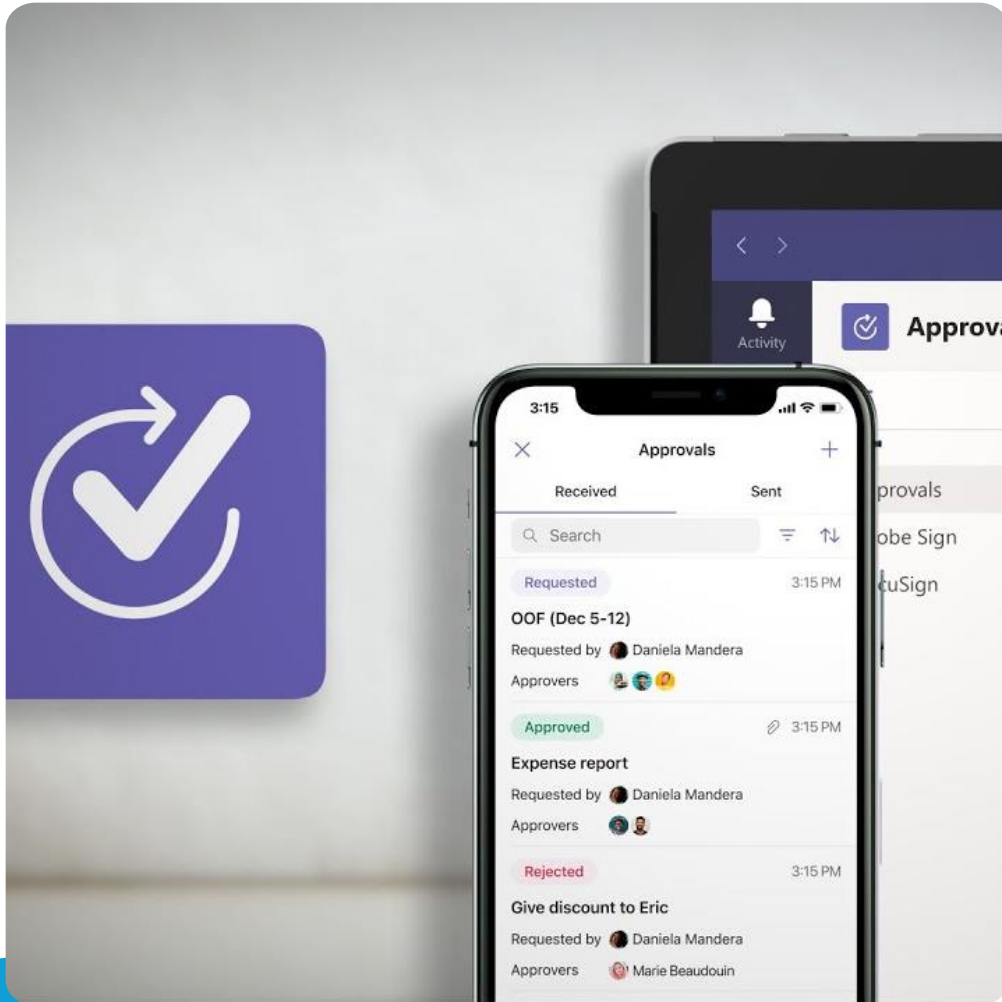
- Approvals in Power Platform
- Why the Approvals Kit?
- Installation Overview
- Demo: Overview of the Approvals Kit
- Demo: Build a multi-stage workflow
- Demo: Out of office delegation
- Demo: Build a custom copilot to interact with Approvals
- Resources

Approvals in Power Platform

Microsoft Power Platform

An all software development platform across Microsoft 365, Azure, Dynamics 365, and standalone applications

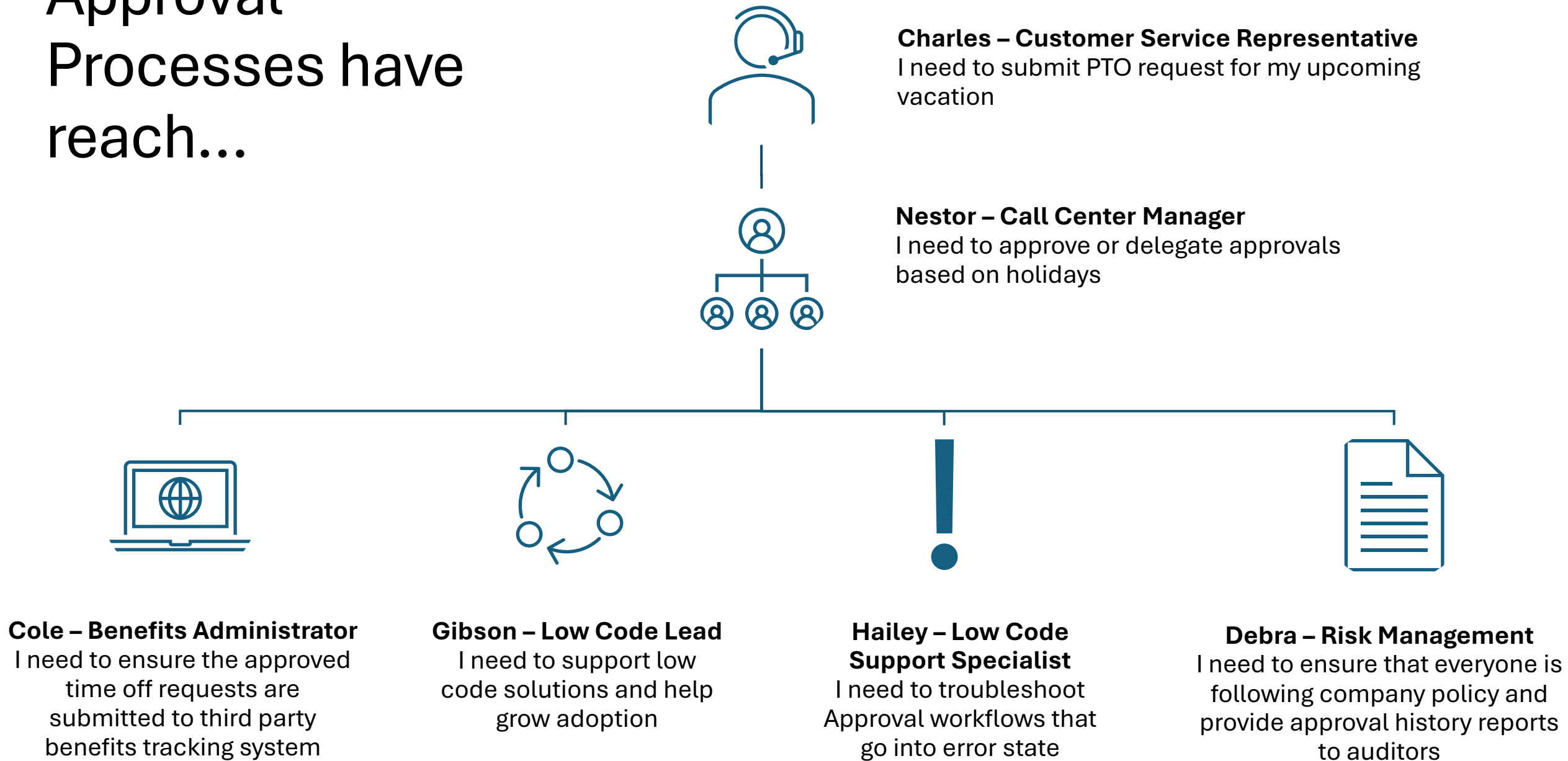




What is an Approval?

- An approval is an electronic means of signing off on something
- The Approvals app provides a simple way to bring auditing, compliance, accountability, and workflows to both structured and unstructured processes
- App that integrates with Microsoft 365 applications and across the Power Platform
- Approvals created from the Approvals app are stored in the default Microsoft Dataverse environment.
- Common examples include expenses, travel requests, document reviews

Approval Processes have reach...



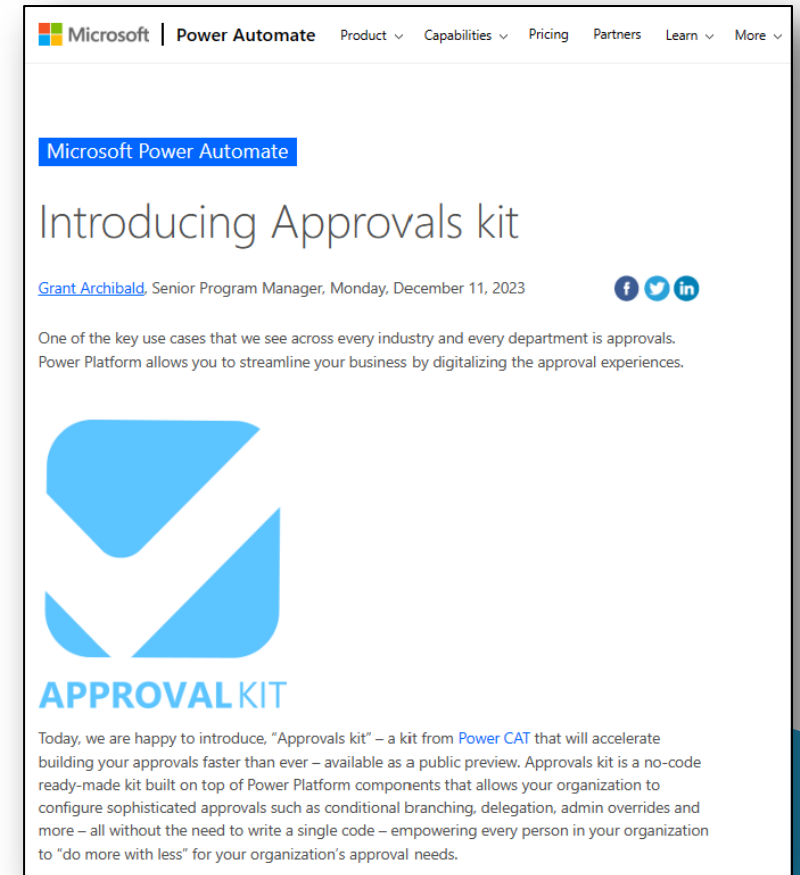
Introducing the Approvals Kit

The Power CAT Approvals Kit is a no-code ready-made kit built on top of Power Platform components that allows an organization to configure sophisticated approvals such as conditional branching, delegation, admin overrides and more – all without the need to write code.



APPROVAL KIT

Public Preview – Dec 2023



So why Approvals Kit?



Current approvals connector provides basic scenarios. Users need to create their own solutions for more complicated scenarios



APPROVALKIT

Approval History -----	Custom -----	Yes
Multi-Stage Approvals -----	Custom -----	Yes
Delegated approvals -----	Custom -----	Yes
Out of office -----	Custom -----	Yes
Workdays and Holidays -----	Custom -----	Yes
Standard Connector -----	Yes -----	Premium

Installation Overview

- Requires a Microsoft Dataverse Environment – recommend creating a new one
 - Approvals Kit is provided as a managed solution
- Power Apps Premium for users who will create & configure approvals, approve requests, check status, and administer approval processes
- Power Automate Premium for users who will create workflows
- Data Loss Prevention policy categorized for the following connectors in the same grouping
 - Approvals
 - Microsoft Dataverse
 - Office 365 Users
 - Custom connectors with allowed pattern https://*.crm.dynamics.com
 - Approvals Kit custom connector
- Must have Power Automate Approvals connector enabled

The Power Platform Creator Kit is a collection of tools and components designed to help developers create Power Apps experiences more efficiently.

Key features:

- **Component Library:** Includes a variety of Power Apps component framework controls and canvas components.
- **Templates:** Provides starter apps and templates for both canvas and model-driven apps, making it easier to create responsive, Fluent UI-based applications.
- **Utilities:** Offers tools like a theme editor to help maintain consistent design across apps.
- **Reference Apps:** Contains model-driven and canvas reference apps to demonstrate best practices and component usage.

The Creator Kit aims to streamline the development process, allowing you to build modern, seamless user experiences with less effort.

- Once the approvals kit solution is imported to an environment successfully, you must update the Approvals kit custom connector to point to the target tenant Identity provider and turn on cloud flows.
- You must have an app registration to interact with Dataverse table and Custom API. By registering your app, you establish a trusted relationship, enabling features like authentication and access control.
- App Registrations are created in Microsoft Entra Admin Center.

Request API permissions

Select an API

Microsoft APIs

APIs my organization uses

My APIs

Commonly used Microsoft APIs



Microsoft Graph

Take advantage of the tremendous amount of data in Office 365, Enterprise Mobility + Security, and Windows 10. Access Microsoft Entra ID, Excel, Intune, Outlook/Exchange, OneDrive, OneNote, SharePoint, Planner, and more through a single endpoint.



Azure Rights Management Services

Allow validated users to read and write protected content



Azure Service Management

Programmatic access to much of the functionality available through the Azure portal



Dynamics CRM

Access the capabilities of CRM business software and ERP systems

Request API permissions

< All APIs



Dynamics CRM

<https://admin.services.crm.dynamics.com/> [Docs](#)

What type of permissions does your application require?

Delegated permissions

Your application needs to access the API as the signed-in user.

Application permissions

Your application runs as a background service or daemon without a signed-in user.

Select permissions

expand all

Start typing a permission to filter these results



The "Admin consent required" column shows the default value for an organization. However, user consent can be customized per permission, user, or app. This column may not reflect the value in your organization, or in organizations where this app will be used. [Learn more](#)

Permission

Admin consent required

Permissions (1)



user_impersonation

Access Common Data Service as organization users

No

Demo: Approvals Center


Overview


1. Launch Business Approval Management App
2. Home Page
 1. Configure a Workflow
 2. Link a Workflow
 3. Configure Basic Settings
3. My Submitted Workflows
4. Received Approval Requests


Approvals Kit

Welcome to the approvals portal

Learn how to use the kit

**Configure a Workflow**
Learn how to configure a new workflow with Approvals kit

**Link a workflow**
Learn how to link your workflow with another workflow using Approvals kit

**Configure basic settings**
Learn how to configure a new workflow with Approvals kit

My Submitted workflows

Name	Process	Process Version Number	Requested By	Created On
WF-001015	Machine Request - 20240612	2	admin@M365x59840310.onmicrosoft.com	7/17/2024 9:30:05 PM
WF-001014	Manager Approval	3	admin@M365x59840310.onmicrosoft.com	7/17/2024 9:30:00 PM
WF-001013	Manager Approval	3	NestorW@M365x59840310.OnMicrosoft.com	7/15/2024 2:47:06 PM
WF-001012	Machine Request - 20240612	2	NestorW@M365x59840310.OnMicrosoft.com	7/15/2024 2:47:04 PM
WF-001011	Manager Approval	3	NestorW@M365x59840310.OnMicrosoft.com	7/15/2024 2:44:00 PM

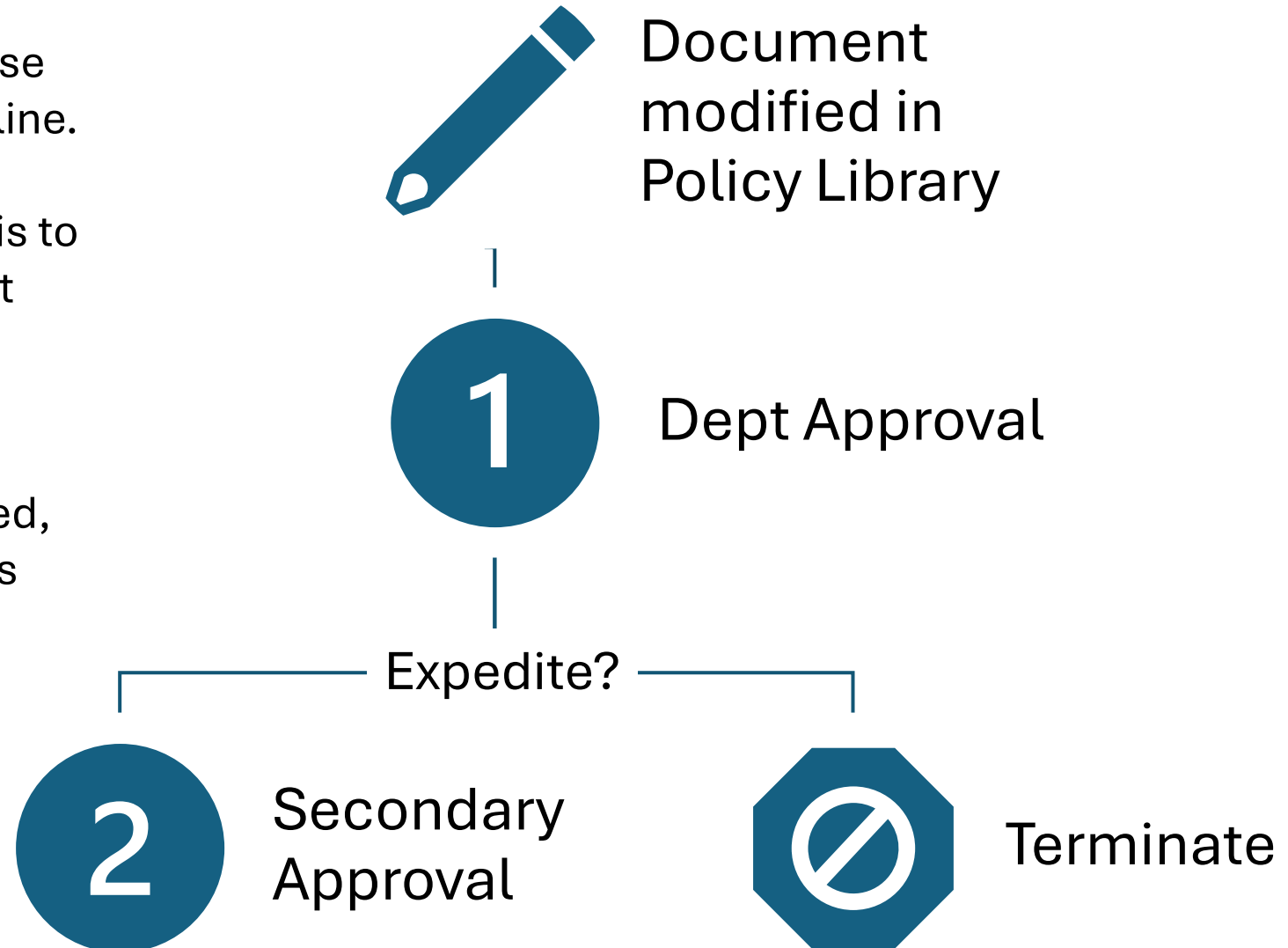
Received approval requests

Instance No.	Approver	Stage	Node	Additional Information	Instance Status	Created On
20240719-001017	Adele Vance	Determine if machine is greater than \$400	Approve machine over \$400		Running	7/18/2024 10:16:19 PM
20240718-001016	Adele Vance	Determine if machine is greater than \$400	Approve machine over \$400		Running	7/17/2024 9:31:17 PM
20240718-001015	MOD Administrator	Machine request	Submit for self approval		Completed	7/17/2024 9:30:18 PM
20240715-001014	MOD Administrator	Machine request	Submit for self approval		Running	7/15/2024 2:47:13 PM
20240715-001013	MOD Administrator	Machine request	Submit for self approval		Running	7/15/2024 2:44:07 PM

Demo: Rapid creation of a multi-level approval process

Demo: Create a multi-stage approval workflow

- To illustrate, we will look at a business use case of a policy library in SharePoint Online.
- If a document is modified, the first step is to send an approval task to the department approver to ensure they approve of the edits.
- Furthermore, if the changes are expedited, we need to ensure secondary approval is collected.



Demo: Create a multi-stage approval workflow

1. Rapid creation of a multi-level approval process
 1. Show how to change to the Designer
 2. Start a new process
 3. Note the fields we are filling out
 4. Definitions of terms
 - a. Workflow Instance
 - b. Stage
 - c. Node

Demo: Out of Office Delegation & Holiday Calendar

Demo: Out of Office Delegation & Holiday Calendar

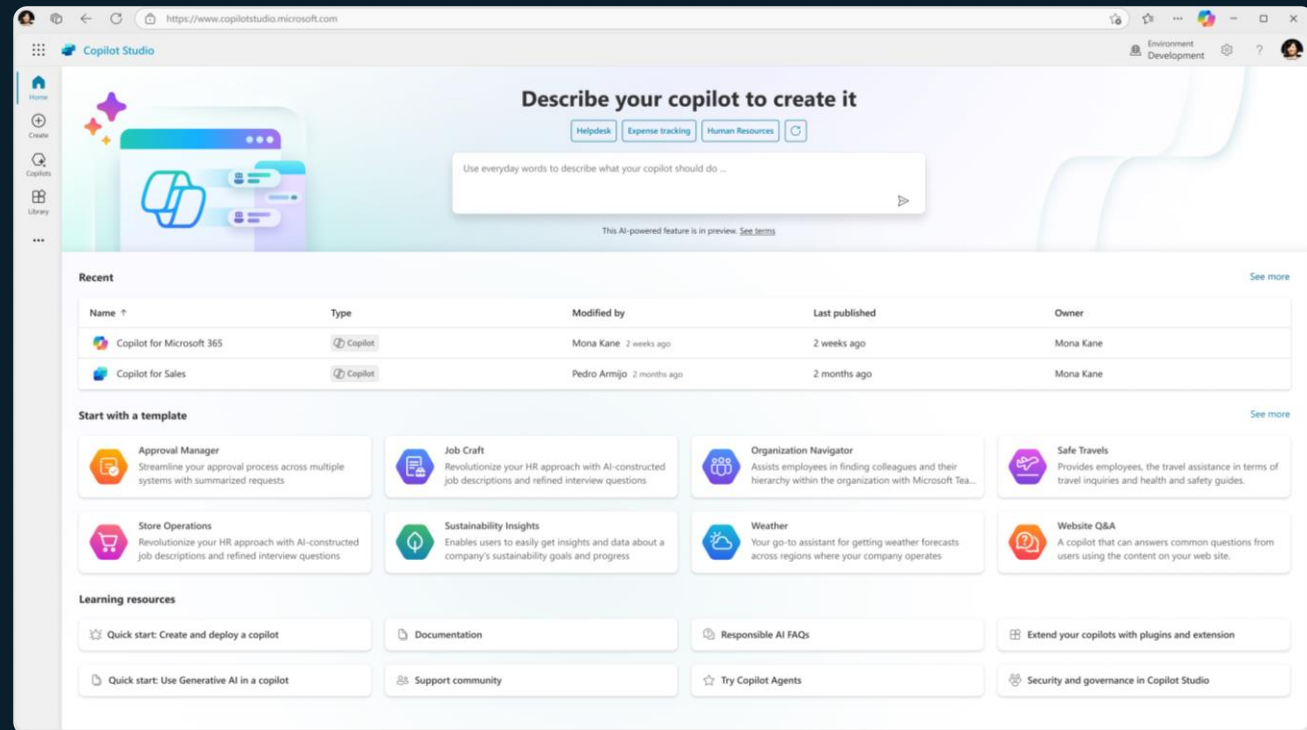
1. Setup
 1. Setup Public Holidays & Holiday Calendars\
 1. How do I create and assign holidays to calendars?
 2. Setup Active Business Profile
 3. Define working days
 4. Assign Holiday Calendar
 5. Design the Workflow
 6. Home page – basic settings
 1. Set Approval Delegate, Backup Delegate, Out of Office
 2. Select work profile which will import holiday calendar
 7. Set out of office for user and send an approval task

Extending the Approvals Kit with Copilot Studio to provide visibility and action follow-up on approvals

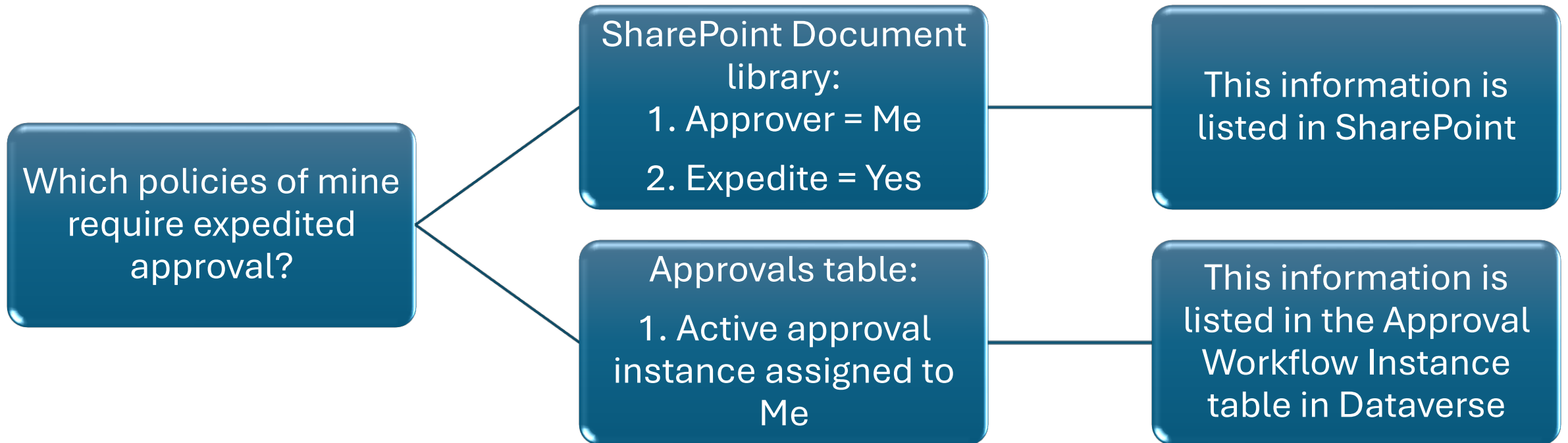
Microsoft Copilot Studio

Your copilot, your way

Copilot Studio is an end-to-end conversational AI product for **building your own copilots** or **extending Microsoft Copilot** with generative AI, large language models and **your data**.



Demo: Use Copilot Studio to build a custom copilot to interact with Approvals



and see what I have to
talk about. So I'm gonna

Building your own copilot

Create copilot with E2E SaaS and single pane of glass

Conversational Services
Integrate with Azure AI Studio,
Azure Cognitive Services, Bot
Framework and more

Monitor and Improve
with Rich out-of-the-
box telemetry and
analytics

**Publish the copilot to
multiple channels, live
instantly on the SaaS service**

Copilot Studio
The fastest way to build
powerful generative AI
copilots

**Chat over knowledge with
Generative AI**
Use generative answers and custom
GPTs to provide enterprise specific
answers over your files, websites,
and internal shares

Create specific topics
Supplement generative answers
with specific, curated topics. Build
them easily with the powerful
graphical studio

Actions & Plugins
Create actions, plugins, or use
pre-built Power Platform and
OpenAI connectors to call your
backends and APIs



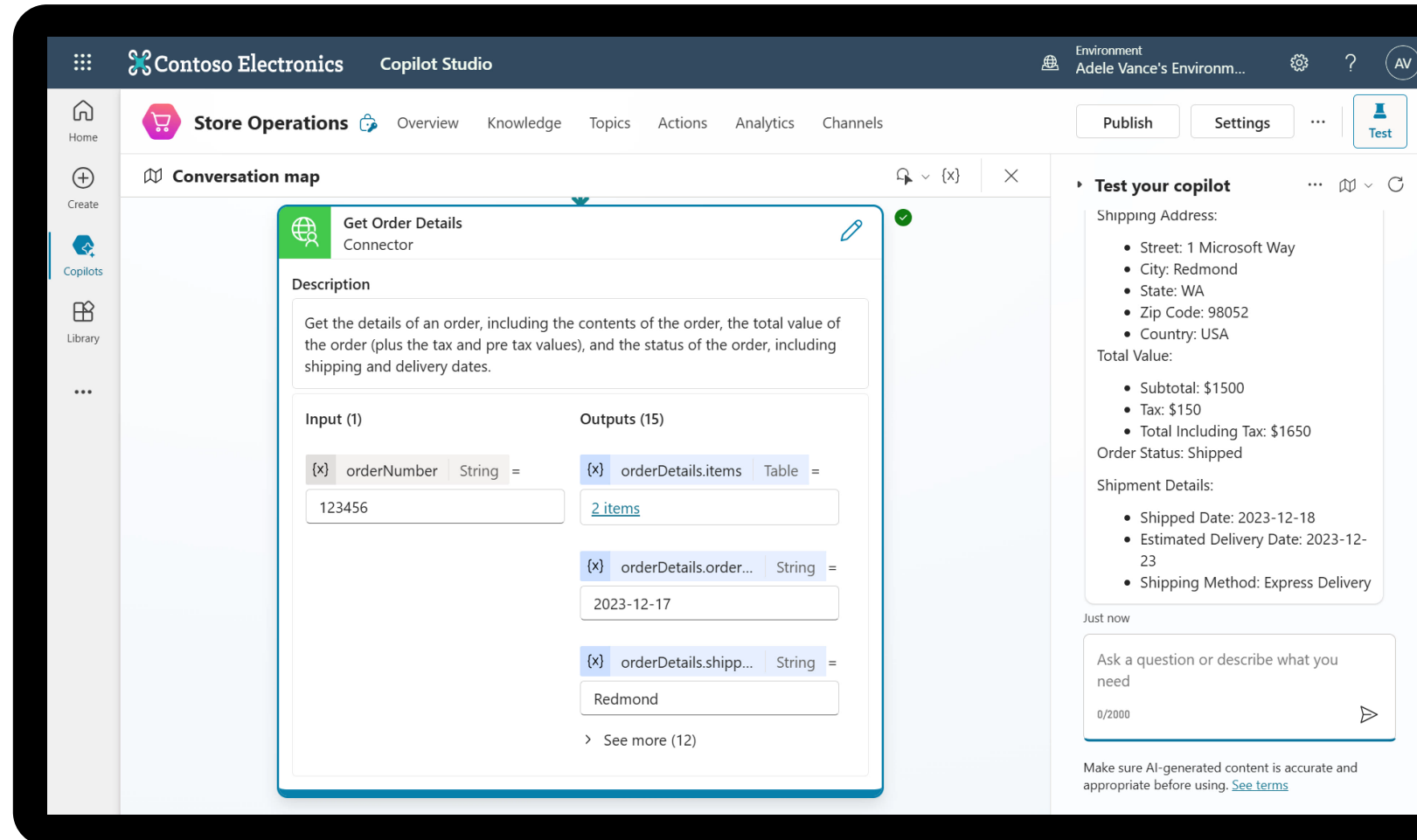
aka.ms/ai-in-action/building-with-mcs

Build agents

Developer experiences

AI capabilities

... and more



Feedback Form

- <https://aka.ms/approvalsfeedback>

Help us shape the future of approvals in the Power Platform



Resources

Setup: <https://learn.microsoft.com/en-us/power-automate/guidance/business-approvals-templates/setup>

Creator Kit: <https://learn.microsoft.com/en-us/power-platform/guidance/creator-kit/setup>

GitHub Repository: <https://github.com/microsoft/powercat-business-approvals-kit>

Approvals Kit Workshop: <https://learn.microsoft.com/en-us/training/modules/approvals-kit-workshop/>