



Microsoft 365 Saturday Bangalore

Dec 12, 2020





Marcin Siewnicki

Office 365 Consultant/Architect, ISCG

SharePoint Saturday Warsaw Organizer

Office 365 | Teams | SharePoint Online |

Modern Workplace | Automation

 @MarcinSiewnicki

 /marcinsiewnicki



Thank you Sponsors !



Agenda



- Introduction to Approvals
- Approvals Engine
- Basic Approvals
- How to integrate Approvals with Teams
- Coming soon



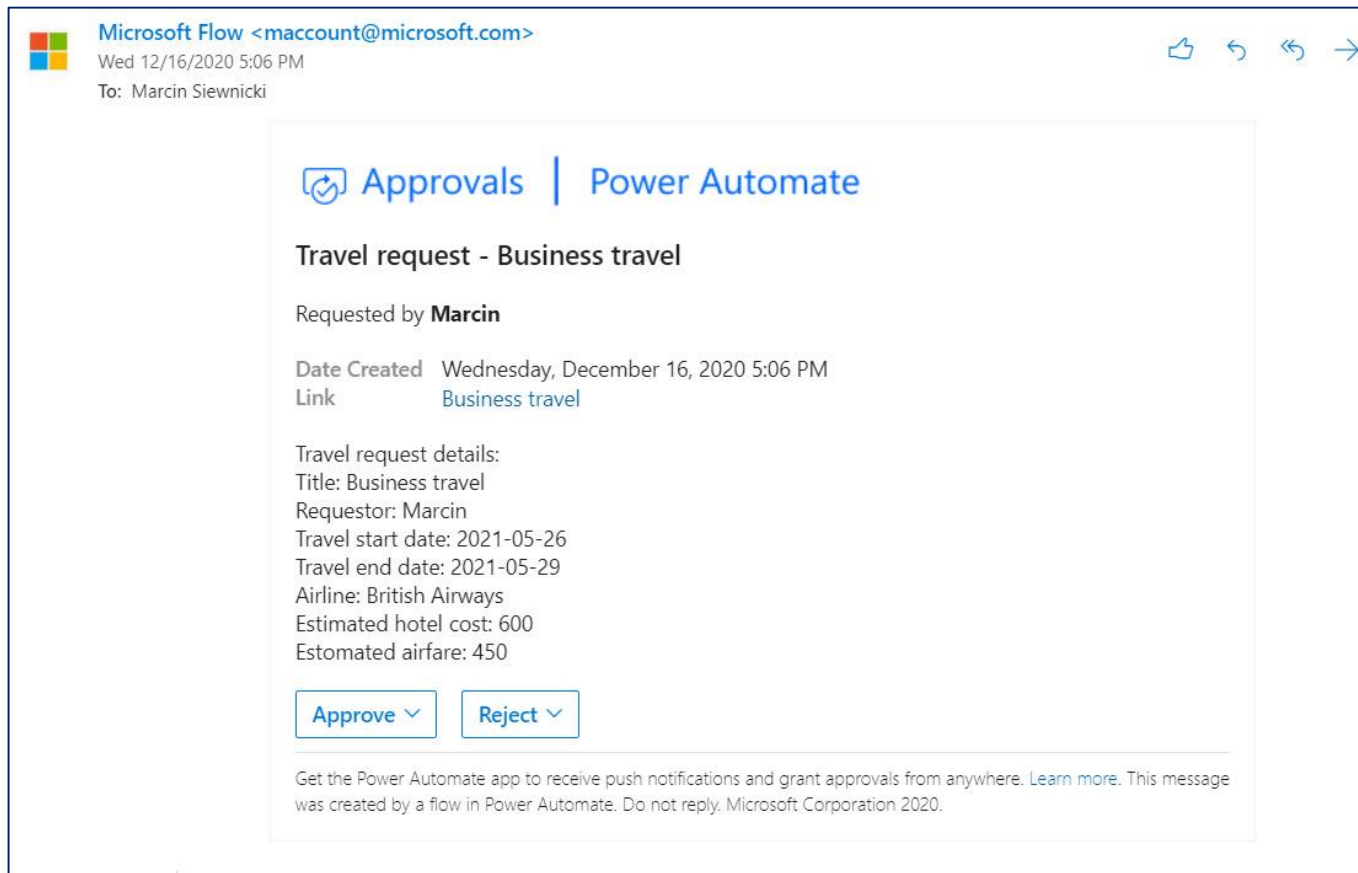
Approvals

- Critical part of most workflows (e.g. document approval system, management acceptance process, official signature from management)
- Based on Power Automate
- Ready to use templates for quick start
- Approvals action via e-mail or Power Automate page

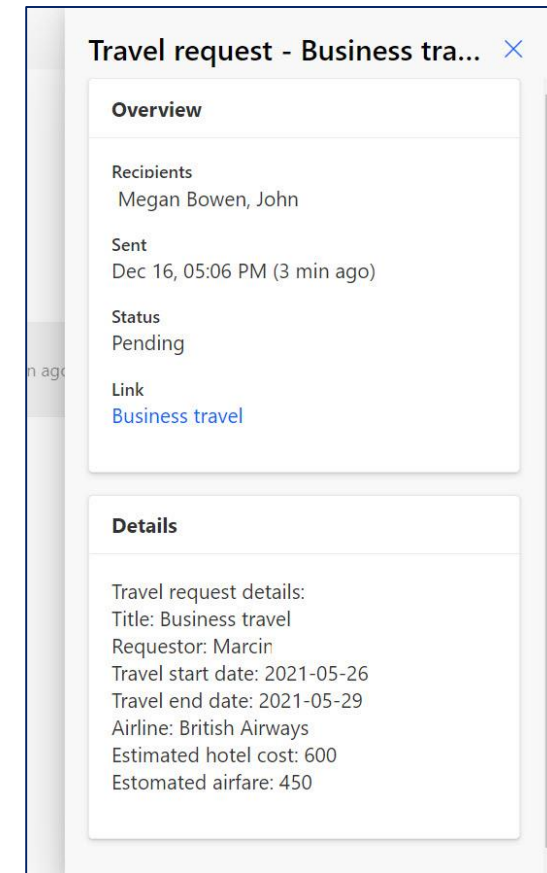
Approvals



Approval in e-mail



Approval in portal





Basic Approvals

- Based on SharePoint/Microsoft List item or document
- Approve process via email/Power Automate panel
- Quick start from templates
- Start Approval or monitor progress from Teams

Basic Approvals



Start Approval from Teams

Search

General Posts Files Power Automate **New** Content scheduler **Travel requests** 1 more **New** + Meet

+ New item Edit in grid view ... All Items

Trip title	Reason for travel	Requester	Destination	Travel start date	Travel end date
Travel to Ignite 2020	Travel to Ignite 2020	Marcin Siewnicki	Port lotniczy Orlando	April 1, 2022	April 6, 2022
Business travel	Travel to Teams conference	Marcin Siewnicki	Port lotniczy Miami	May 26, 2021	May 29, 2021

Basic Approvals



Templates

Navigation tabs: All flows, Featured, Shared with me, Remote work, **Approval**, Button, Visio, Data collection, Email, Events and calendar, Mobile, Notifications, ...

Template Title	By	Type	Count
Start approval when a new item is added	By Microsoft	Automated	292193
Request manager approval for a selected file	By Microsoft	Instant	129913
Send form responses for approval	By Microsoft	Automated	118070
Send approval and follow up via email	By Microsoft	Instant	97436
Request manager approval for a selected item	By Microsoft	Instant	57666
Start approval for new documents and notify via Teams	By Microsoft	Automated	28198
When an item is created in SharePoint List, send approval and create item	By Microsoft Power Automate Community	Automated	26333
When a file is added, approve file using SharePoint Content Approval	By Microsoft	Automated	20245
Request approval in Teams for a selected item in SharePoint	By Microsoft	Instant	18727
Post a message to Microsoft Teams for a selected file	By Microsoft	Instant	16187
Post a message to Microsoft Teams for a selected file	By Microsoft	Instant	14902
Approve a Microsoft Forms response to add a row to an Excel spreadsheet	By Microsoft Power Automate Community	Automated	13442
Start an approval process and send an email on Microsoft Form submission	By Microsoft Power Automate Community	Automated	12919
Start an approval for new file to move it to a different folder	By Microsoft	Automated	10848
Create a Planner task when a Microsoft Forms is submitted	By Microsoft Power Automate Community	Automated	10146
Click PowerApps button to start approval of SharePoint items and send email	By Microsoft Power Automate Community	Instant	7322



Integration with Teams

- Approval request can be send to a chat or a channel
- Messages sends via Adaptive cards
- Assigned to specific people (Team members)
- Available to every member of a team (without strict assignment)
- Adaptive cards designer
<https://www.adaptivecards.io/designer/>

Approvals in Teams



Approval message in a channel (built in)

The screenshot shows a Microsoft Teams channel interface. At the top, there's a search bar and a navigation bar with tabs: General, Posts, Files, Power Automate, Content scheduler, Travel requests, and 1 more. Below the navigation bar, there's a 'Reply' button. The main content area shows a message from the 'Flow' bot at 5:06 PM. The message is titled 'Approvals | Power Automate' and 'Travel request - Business travel'. It states 'Requested by Marcin' and 'Date Created Wednesday, December 16, 2020 5:06 PM'. Below this, it says 'Link Business travel'. The message details are: 'Travel request details: Title: Business travel Requestor: Marcin Siewnicki Travel start date: 2021-05-26 Travel end date: 2021-05-29 Airline: British Airways Estimated hotel cost: 600 Estimated airfare: 450'. At the bottom of the message, there are 'Approve' and 'Reject' buttons. Below the message, there's a 'Reply' button and a 'New conversation' button.

Approval definition

The screenshot shows the 'Create an approval' dialog in Power Automate. The dialog has a title bar 'Create an approval' and a close button. It contains the following fields:

- * Approval type: Approve/Reject - First to respond
- * Title: Travel request - Title x
- * Assigned to: {x} var_TeamMem... x ;
- Details: Travel request details: Title: Title x, Requestor: Requester Disp... x, Travel start date: Travel start date x, Travel end date: Travel end date x, Airline: Airline Value x, Estimated hotel cost: Estimated hote... x, Estimated airfare: Estimated airfare x
- Item link: Link to item x
- Item link description: Title x
- Show advanced options: Show advanced options v

Below the dialog, there's a 'Post your own adaptive card as the Flow bot to a channel (Preview)' section. It contains the following fields:

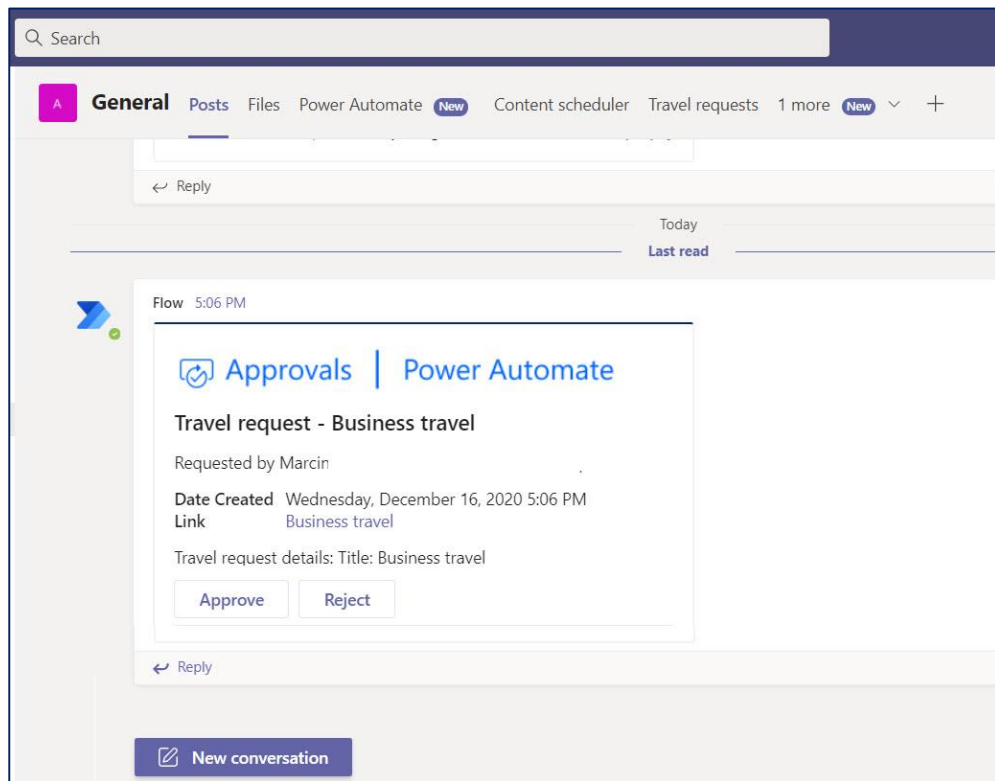
- * Team: Approvals
- * Channel: General
- Message: Teams Adaptiv... x
- Headline: New Travel request

At the bottom, there's a 'Wait for an approval' section.

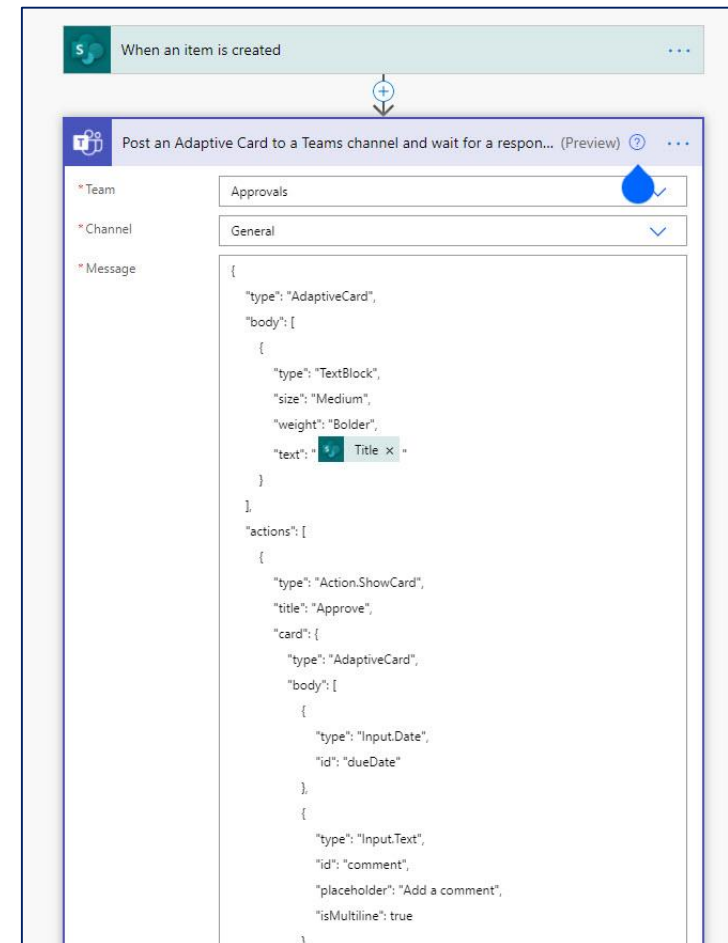
Approvals in Teams



Approval message in a channel (custom Adaptive card)



Adaptive card definition

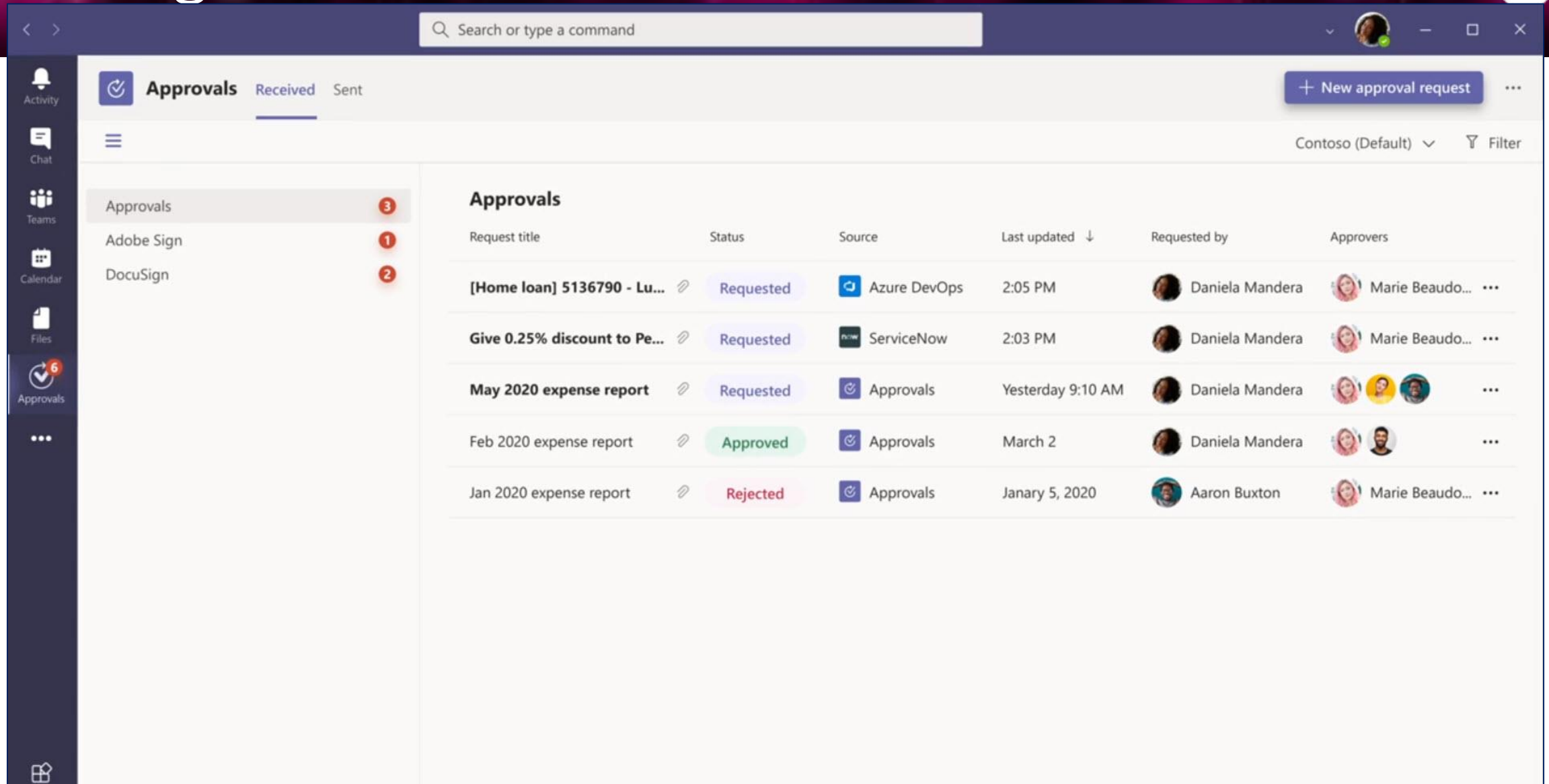




Coming soon

- Dedicated app for Approvals (personal app)
- Central place for all approvals (not only from Power Automate)
- Start Approval from a chat
- Work directly from a chat (Adaptive Cards)
- Capture electronic signature (Adobe Sign, DocuSign etc.)

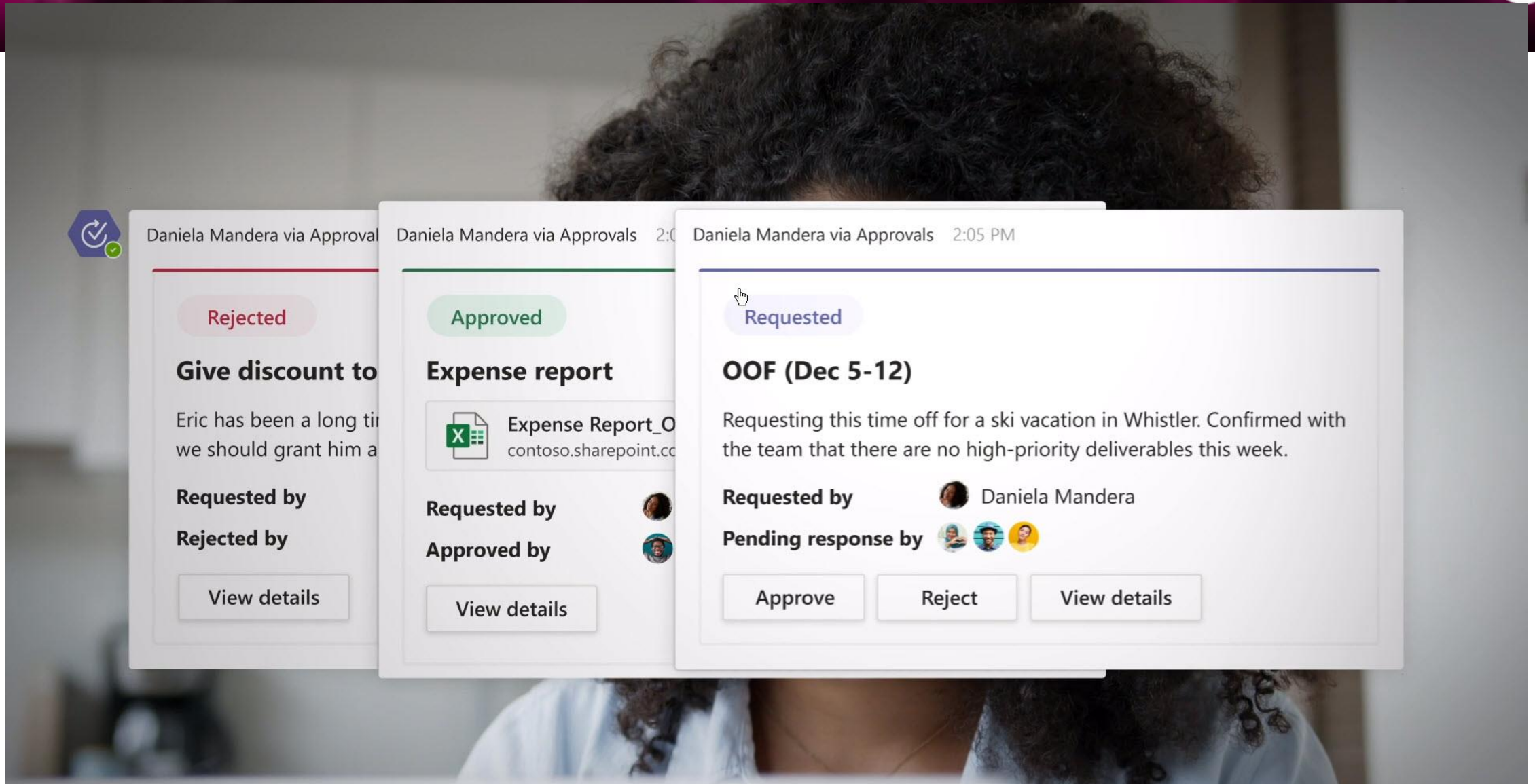
Coming soon



The screenshot displays the Microsoft 365 Approvals interface. At the top, there's a search bar and a user profile. The main header shows 'Approvals' with tabs for 'Received' and 'Sent'. A '+ New approval request' button is on the right. Below the header, a sidebar on the left lists 'Approvals' (3), 'Adobe Sign' (1), and 'DocuSign' (2). The main content area is titled 'Approvals' and contains a table of requests.

Request title	Status	Source	Last updated ↓	Requested by	Approvers
[Home loan] 5136790 - Lu...	Requested	Azure DevOps	2:05 PM	Daniela Mander	Marie Beaud...
Give 0.25% discount to Pe...	Requested	ServiceNow	2:03 PM	Daniela Mander	Marie Beaud...
May 2020 expense report	Requested	Approvals	Yesterday 9:10 AM	Daniela Mander	Marie Beaud..., [User], [User]
Feb 2020 expense report	Approved	Approvals	March 2	Daniela Mander	Marie Beaud..., [User]
Jan 2020 expense report	Rejected	Approvals	January 5, 2020	Aaron Buxton	Marie Beaud...

Coming soon



Coming soon

The screenshot displays the Microsoft Teams application window. On the left is a dark sidebar with navigation icons for Activity, Chat (with a red notification badge), Teams, Calendar, Files, Approvals, and Apps. The main area is divided into a left pane for chat history and a right pane for the active chat. The active chat is with 'Daniela Mandra' and shows a message from 2:00 PM: 'We haven't gotten lunch together in awhile'. Below this, a modal window titled 'Daniela Mandra via Approvals' is open, dated 2:05 PM. The modal contains a 'Requested' section with the title 'Give discount to Pete' and the text: 'Pete has been a long time customer and due to our history with him, we should grant him a discount to keep the relationship strong.' It also lists 'Requested by' as Daniela Mandra and 'Pending response by' as Marie Beaudouin. At the bottom of the modal are three buttons: 'Approve' (which a mouse cursor is pointing at), 'Reject', and 'View details'. The chat history on the left shows several messages from various users, including a pinned message from Will, Kayo, and Eric.



Thank You !

