



Power Automate workflow

Request of time-off Power Automate workflow guide

Microsoft, July 2020

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Contents

Power Automate workflow	0
Intro	3
Prerequisites.....	3
Power Automate Sample.....	3
Diagram.....	3
Connectors	4
Power Automate Flow deployment.....	6
Import Package	6
Customize Power Automate flow	11

Intro

This document is intended to explain the Power Automate portion of this hackathon and guide the attendee in importing the Power Automate sample provided along with the workshop.

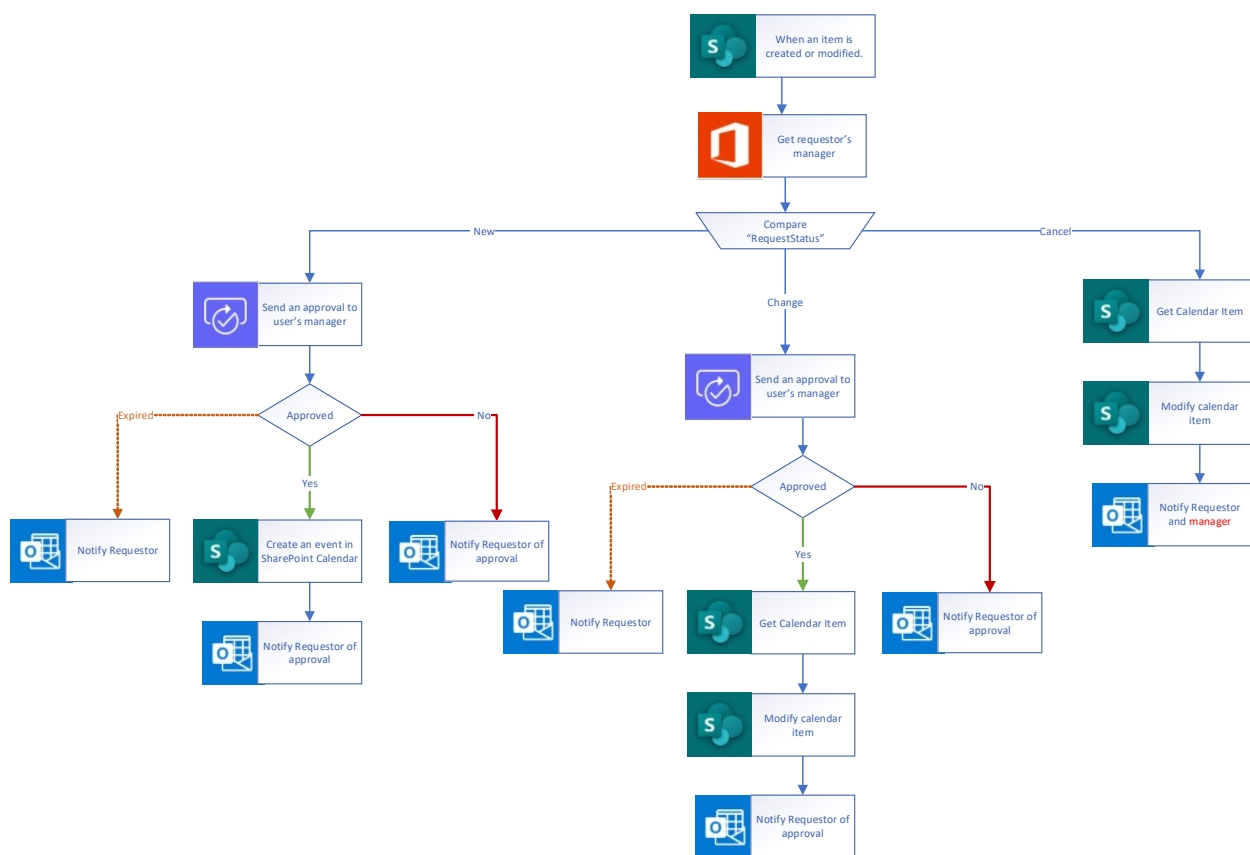
Prerequisites

Before continuing be sure that you have a test tenant with the **/hrweb/** site template and the SharePoint 2010 deployed.

Power Automate Sample

The power automate sample provided is meant to replace the SharePoint 2010 workflow deployed in the test tenant. Following, a description of the connectors used and the reasons behind.

Diagram



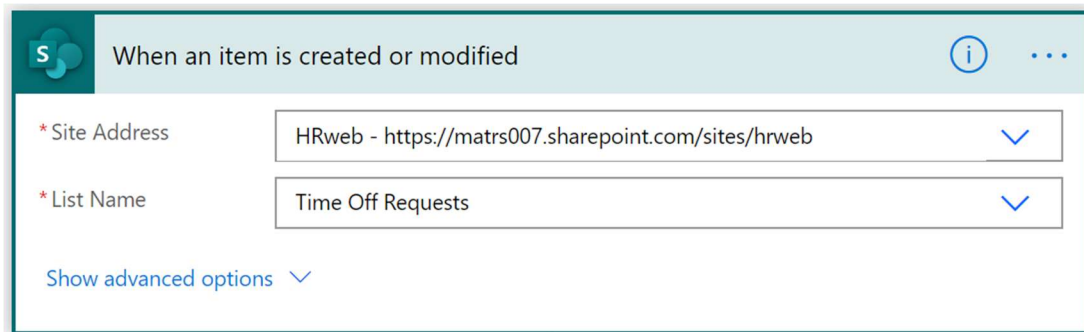
Connectors

SharePoint connector

- **Trigger:**

Power Automate workflow will be triggered when a new item is created or modified.

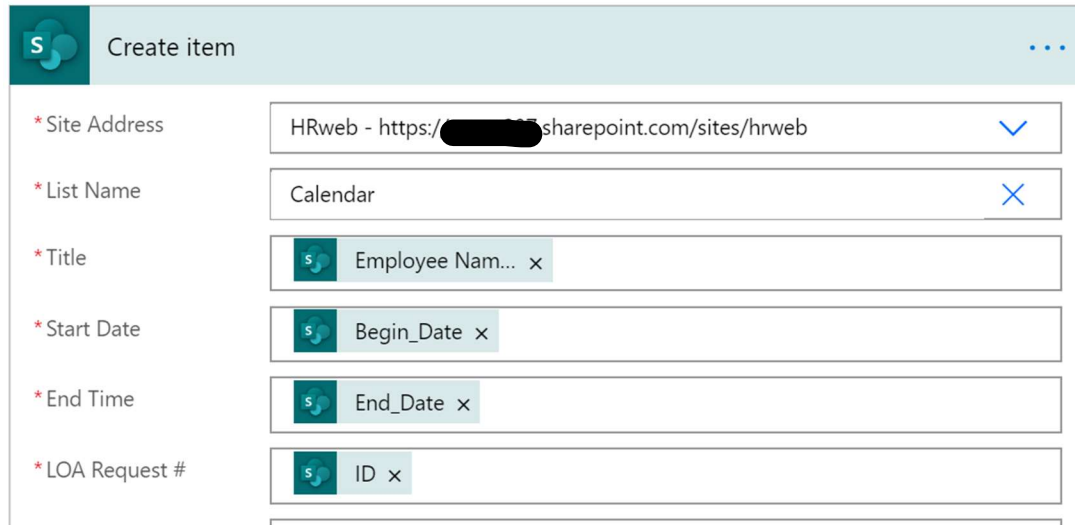
This way we will take action whether the person is creating a new time off request or asking a modification over an existing request.



The screenshot shows the configuration for the 'When an item is created or modified' trigger. The title bar includes the SharePoint icon, the text 'When an item is created or modified', an information icon, and a menu icon. Below the title bar, there are two required fields: '* Site Address' with the value 'HRweb - https://matrs007.sharepoint.com/sites/hrweb' and a dropdown arrow, and '* List Name' with the value 'Time Off Requests' and a dropdown arrow. At the bottom, there is a link 'Show advanced options' with a dropdown arrow.

- **Actions:**

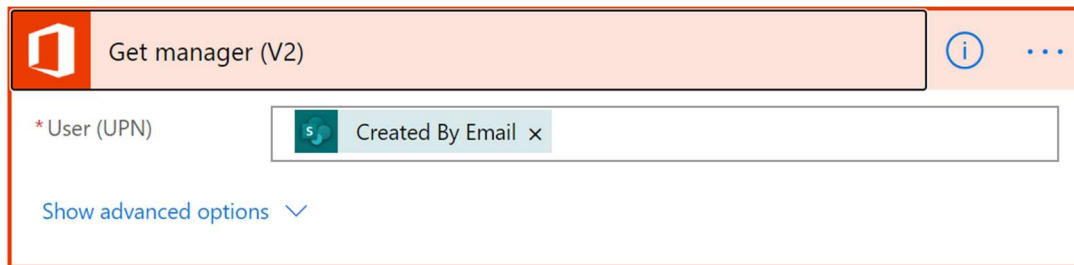
Once the request is approved, the SharePoint connector is utilized to create, modify, or cancel an event in the Site's Calendar depending on "Request Status".



The screenshot shows the configuration for the 'Create item' action. The title bar includes the SharePoint icon, the text 'Create item', and a menu icon. Below the title bar, there are six required fields: '* Site Address' with the value 'HRweb - https://[redacted].sharepoint.com/sites/hrweb' and a dropdown arrow, '* List Name' with the value 'Calendar' and a dropdown arrow, '* Title' with the value 'Employee Nam...' and a dropdown arrow, '* Start Date' with the value 'Begin_Date' and a dropdown arrow, '* End Time' with the value 'End_Date' and a dropdown arrow, and '* LOA Request #' with the value 'ID' and a dropdown arrow.

Microsoft 365 Users

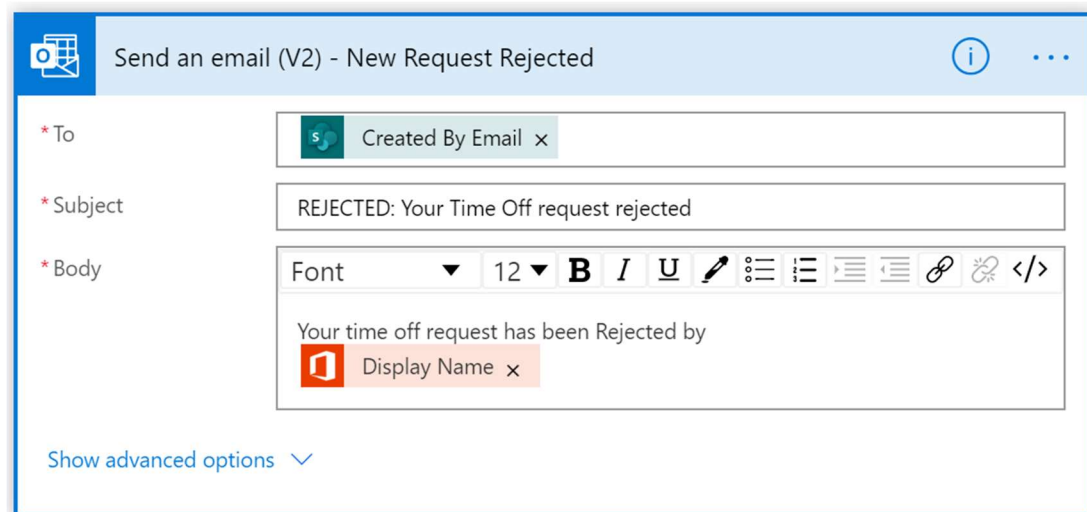
This connector is used to get the manager of the user that created or modified the item in SharePoint and use in the approvals and notifications.



The screenshot shows the 'Get manager (V2)' connector interface. It has a title bar with the Microsoft 365 icon and the text 'Get manager (V2)'. Below the title bar, there is a field for '* User (UPN)' which contains a selection box with 'Created By Email' and a close button 'x'. At the bottom, there is a link 'Show advanced options' with a downward arrow.

Outlook connector

The Outlook connector is used to notify the different stakeholders of the various states of the Time Off requests.



The screenshot shows the 'Send an email (V2) - New Request Rejected' connector interface. It has a title bar with the Outlook icon and the text 'Send an email (V2) - New Request Rejected'. Below the title bar, there are three fields: '* To' with a selection box containing 'Created By Email' and a close button 'x'; '* Subject' with the text 'REJECTED: Your Time Off request rejected'; and '* Body' with a rich text editor. The rich text editor has a toolbar with options for font, size (12), bold, italic, underline, link, unlink, and code. The body text is 'Your time off request has been Rejected by' followed by a selection box containing 'Display Name' and a close button 'x'. At the bottom, there is a link 'Show advanced options' with a downward arrow.

Approvals Connector

With this connector we will start an approval process, send the request to the Manager, and wait for the manager to respond. Once Power Automate captures the response from the manager, it will use a condition control to direct the flow to the next step.

Start and wait for an approval

* Approval type

Approve/Reject - First to respond

* Title

New Time Off Request

* Assigned to

Mail x

Details

Markdown supported (see <https://aka.ms/approvaldetails>)

Item link

Add a link to the item to approve

Item link description

Describe the link to the item

[Show advanced options](#)

Power Automate Flow deployment

Import Package

1. Open an internet browser and go to <https://flow.microsoft.com>
2. Sign in with the credentials provided by the trainer:

Power Automate
Templates
Connectors
Learn
Search templates ...
Sign in
Try free
Buy now

Take care of what's important. Automate the rest.

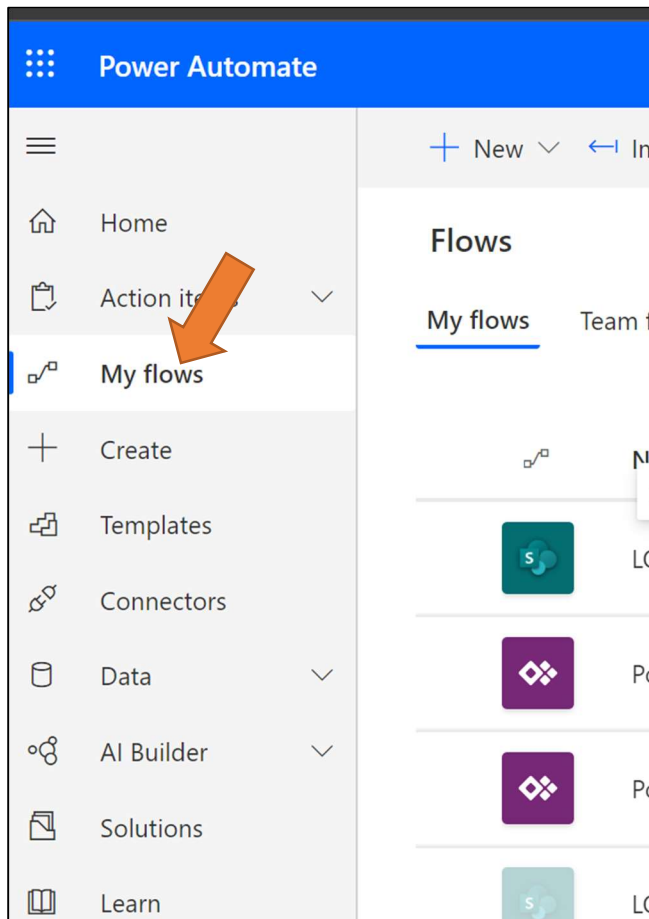
Sign in
onmicrosoft.com
No account? [Create one!](#)
Can't access your account?
Sign-in options
Back
Next

Enter password
onmicrosoft.com
.....
Forgot my password
Sign in

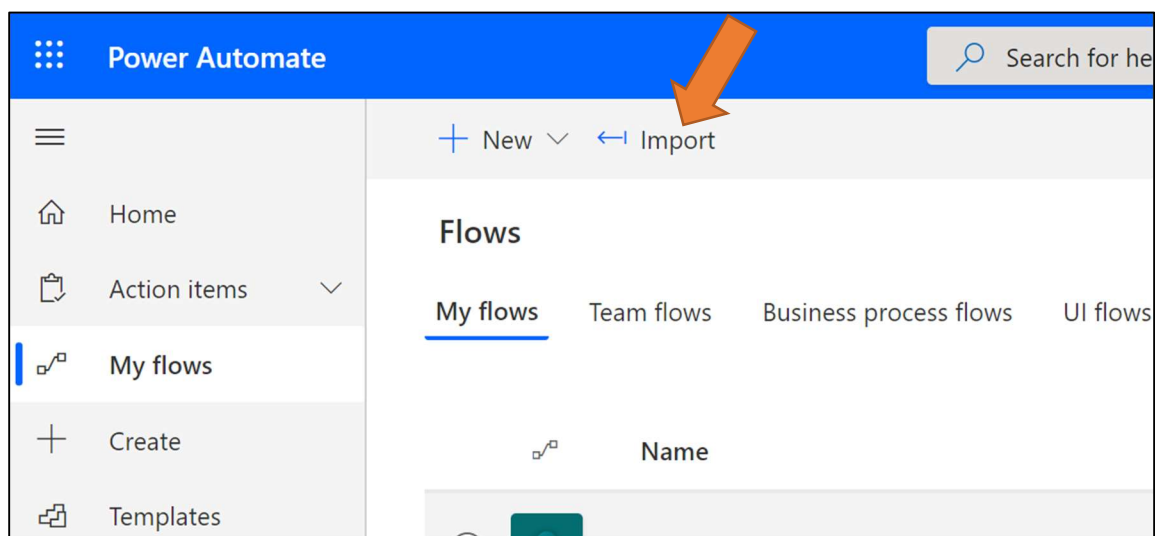
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6

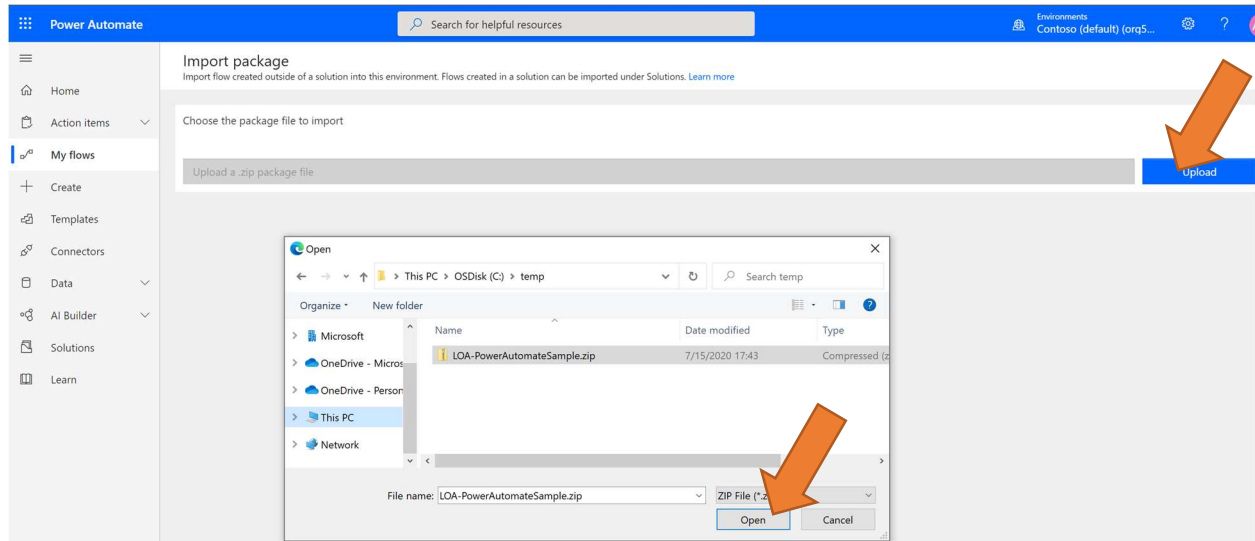
3. Once Authenticated. Go to "My flows" on the left menu bar:



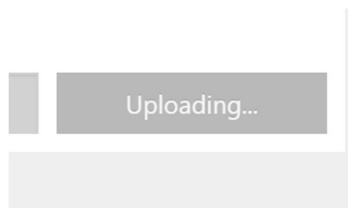
4. Next click on Import on the menu bar:



5. On the next screen select the upload button and browse for the Power Automate Sample ZIP file.







6. Click open and wait for the Power Automate definition to load. The upload will be disabled while is working:

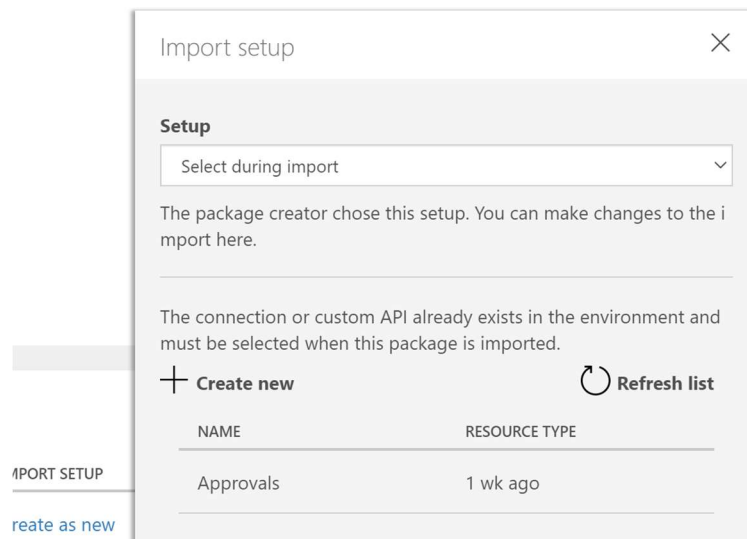


7. Once the Import package page has finished loading, change each of the connectors with red warnings. For each of them:
 - a. Open the link "Select during import":

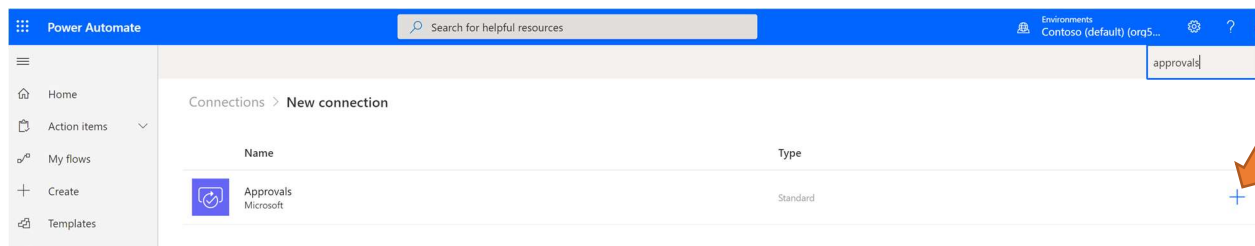
Related resources

NAME	RESOURCE TYPE	IMPORT SETUP
 Approvals	Approvals Connection	Select during import
 AlexW@matrs007.OnMicrosoft.com	Office 365 Users Connection	Select during import
 AlexW@matrs007.OnMicrosoft.com	Office 365 Outlook Connection	Select during import
 AlexW@matrs007.OnMicrosoft.com	SharePoint Connection	Select during import

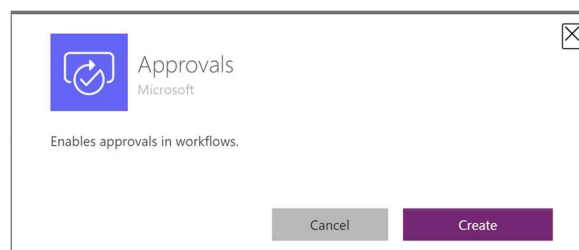
- b. On the Import Setup panel that appears, select “+ Create new”, a new tab will show up in the browser:



- c. Select “New Connection” and look for the connector you are fixing. In this case “Approvals” and click the Plus Sign:



- d. In the pop-up select “Create”.



- e. Go back to the other tab in the browser and refresh the connections list, select the one you just created and hit “Save”

Import setup

Setup

Select during import

The package creator chose this setup. You can make changes to the i mport here.

The connection or custom API already exists in the environment and must be selected when this package is imported.

+ Create new

Refresh list

NAME	RESOURCE TYPE
Approvals	1 min ago
Approvals	1 wk ago

Save

Cancel

8. Repeat from steps **a.** to **e.** for all the connectors until the Import Button is enabled, then hit import:

Review Package Content

Choose your import options.

NAME	RESOURCE TYPE	IMPORT SETUP	ACTION
LOA-PowerAutomate	Flow	Create as new	

Related resources

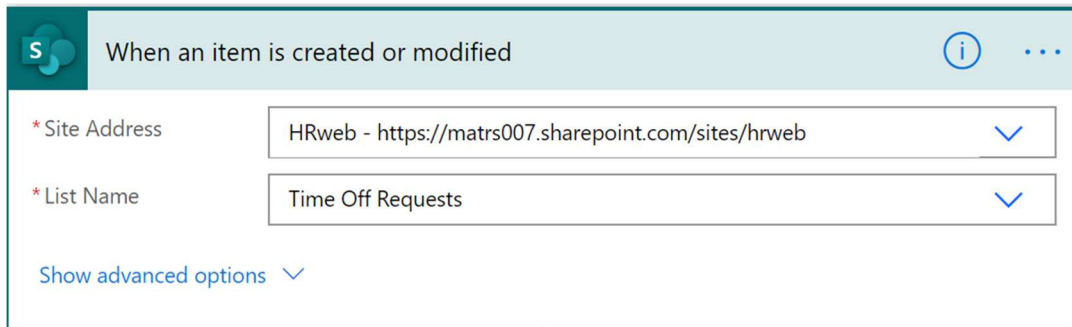
NAME	RESOURCE TYPE	IMPORT SETUP	ACTION
Approvals	Approvals Connection	Select during import Approvals	
AlexW@matrs007.OnMicrosoft.com	Office 365 Users Connection	Select during import AlexW@matrs007.OnMicrosoft.com	
AlexW@matrs007.OnMicrosoft.com	Office 365 Outlook Connection	Select during import AlexW@matrs007.OnMicrosoft.com	
AlexW@matrs007.OnMicrosoft.com	SharePoint Connection	Select during import AlexW@matrs007.OnMicrosoft.com	

import

Customize Power Automate flow

As the Flow was created in a different tenant and/or for a different list, we need to edit it in order to make it work in the new environment.

1. Expand the **trigger** and select the corresponding site and the list.
 - a. Site: `https://<TENANT NAME>.sharepoint.com/sites/hrweb`
 - b. List Name: Time Off Requests



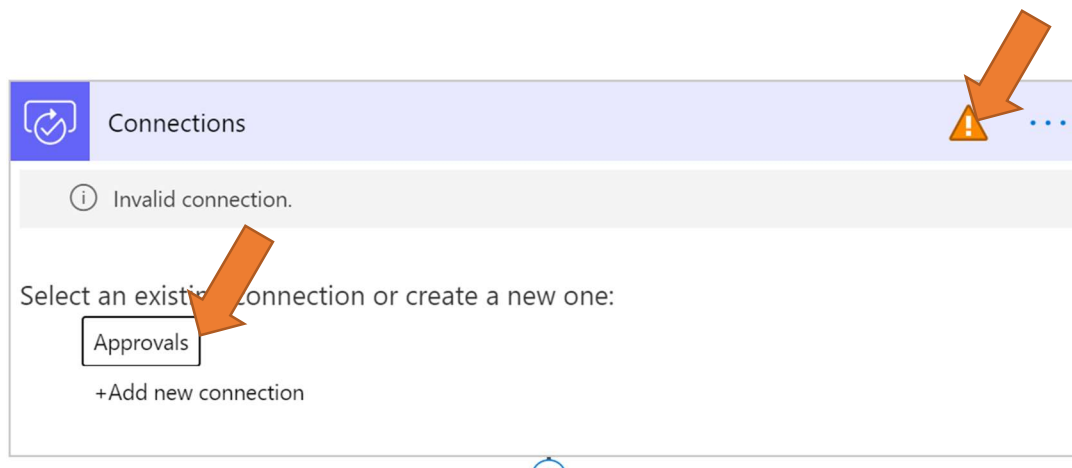
When an item is created or modified

* Site Address: HRweb - https://matrs007.sharepoint.com/sites/hrweb

* List Name: Time Off Requests

Show advanced options

2. Do the same for all the SharePoint Actions you find in the workflow that requires a Site and a List.
3. Expand all the actions and if you find a warning sign select the connection you created during import.



Connections

Invalid connection.

Select an existing connection or create a new one:

Approvals

+Add new connection

Once you finish, save the flow, and check any errors popping up when saving.

The flow now is ready to test.