A DYNAMICSCON PRESENTATION

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CloudFronts Technologies

Dynamics 365 CRM Consultant

Microsoft

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Document Management Using SharePoint Power Automate & Teams

SharePoint

Custom SharePoint Permissions levels to manage, Approvers, Publishers, Viewers (Content Approval & Site Customizations).

Power Automate Flow

Power Automate flow which will be used to send the published documents for approvals to the Approvers & Email Notification to other users. (Single Flow for Multiple Document Libraries).

MS Teams

View, Approve, Upload Documents based on user roles.

Power Automate Tips & Tricks

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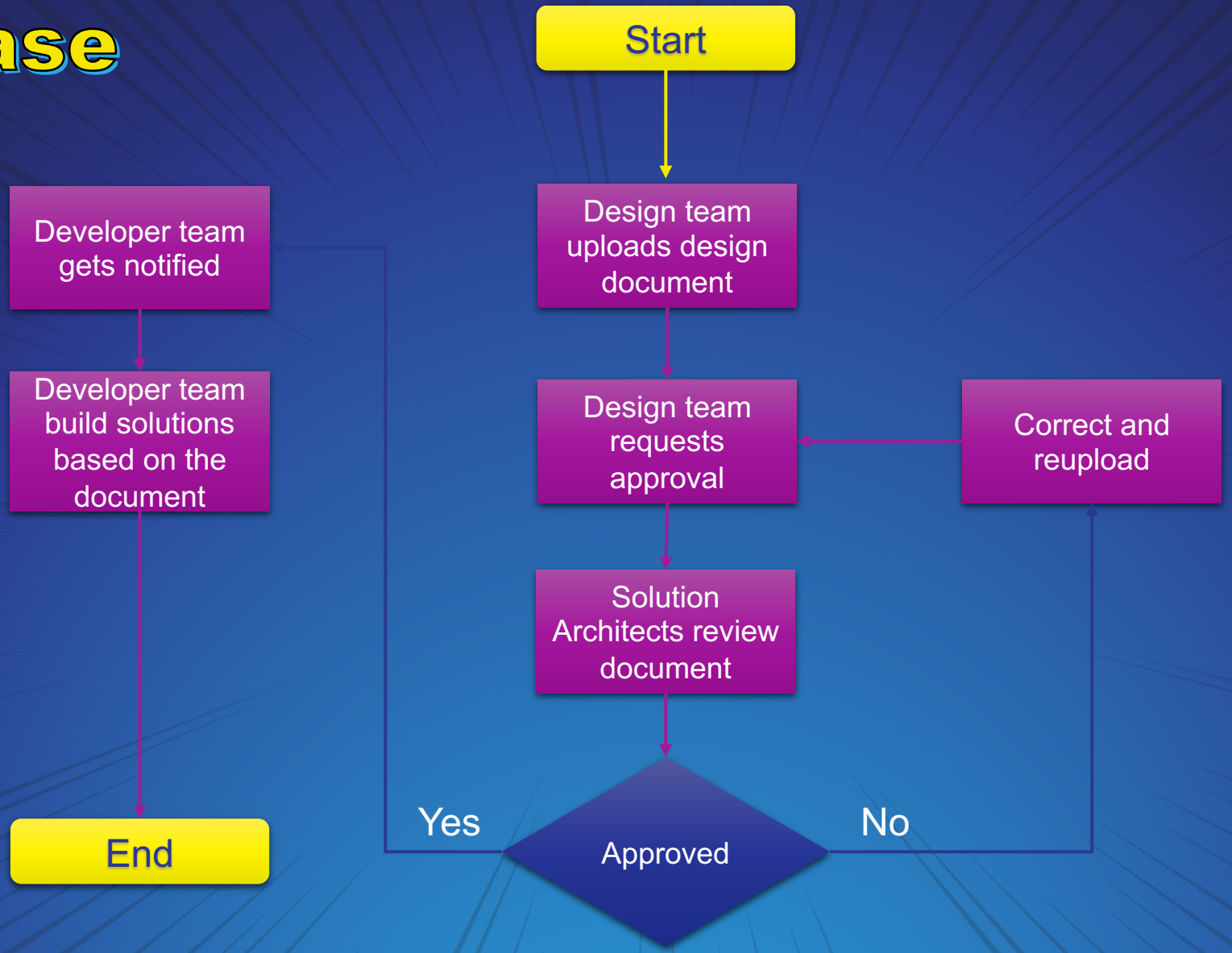
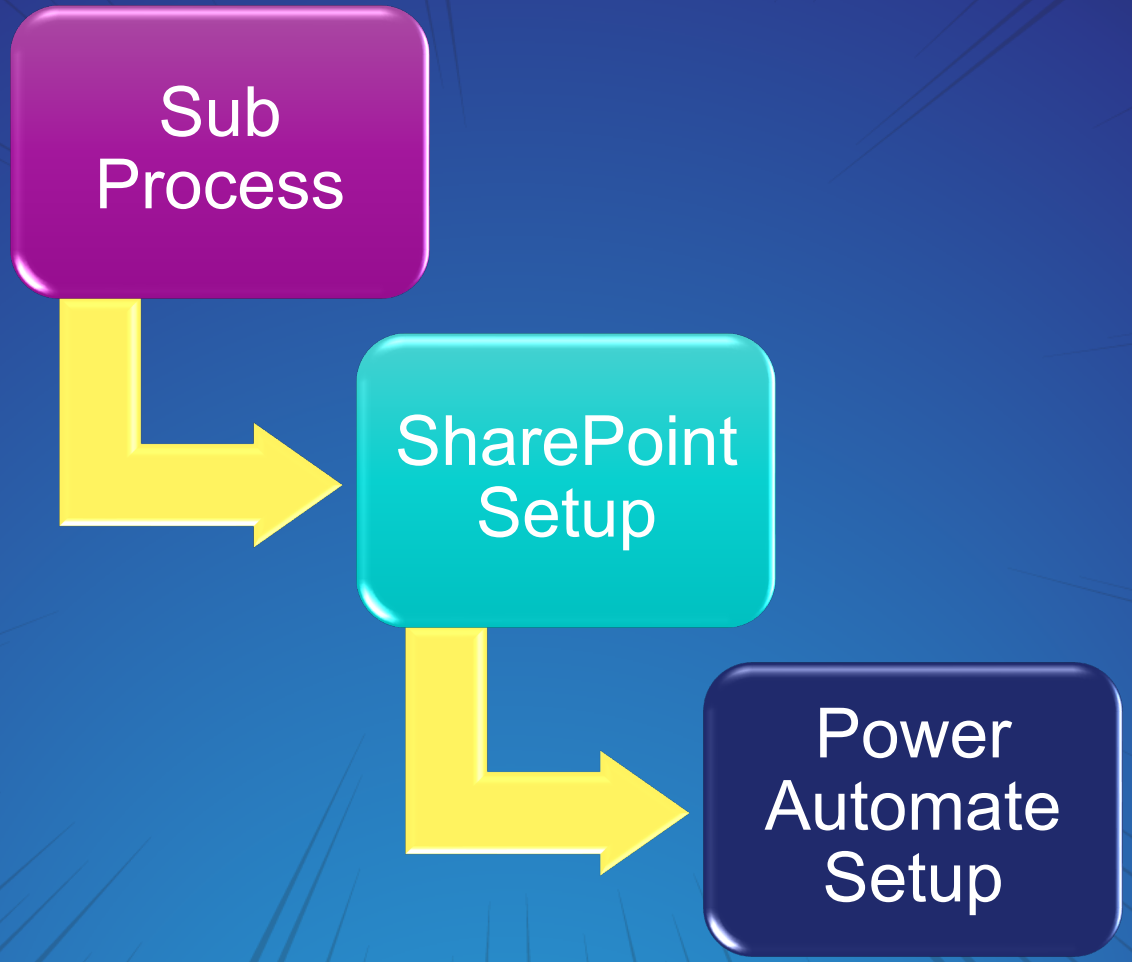
Use Case


Start
Design team uploads design document
Design team requests approval
Correct and reupload
Solution Architects review document
Approved
Yes
No
Developer team gets notified
Developer team build solutions based on the document
End

User Groups & Permissions

Permissions	Designers	Architects	Developers
Upload document	✓	✓	✗
Request approval	✓	✓	✗
Approve document	✗	✓	✗
Download document	✗	✓	✗
View document	✓	✓	✓
Delete document	✗	✓	✗

Process



SharePoint Setup

- Enabling content approval.
- Creating / updating site permissions.
- User group setup for the site.
- Some site customizations.
- Applying permission levels to the user groups.

SharePoint Setup

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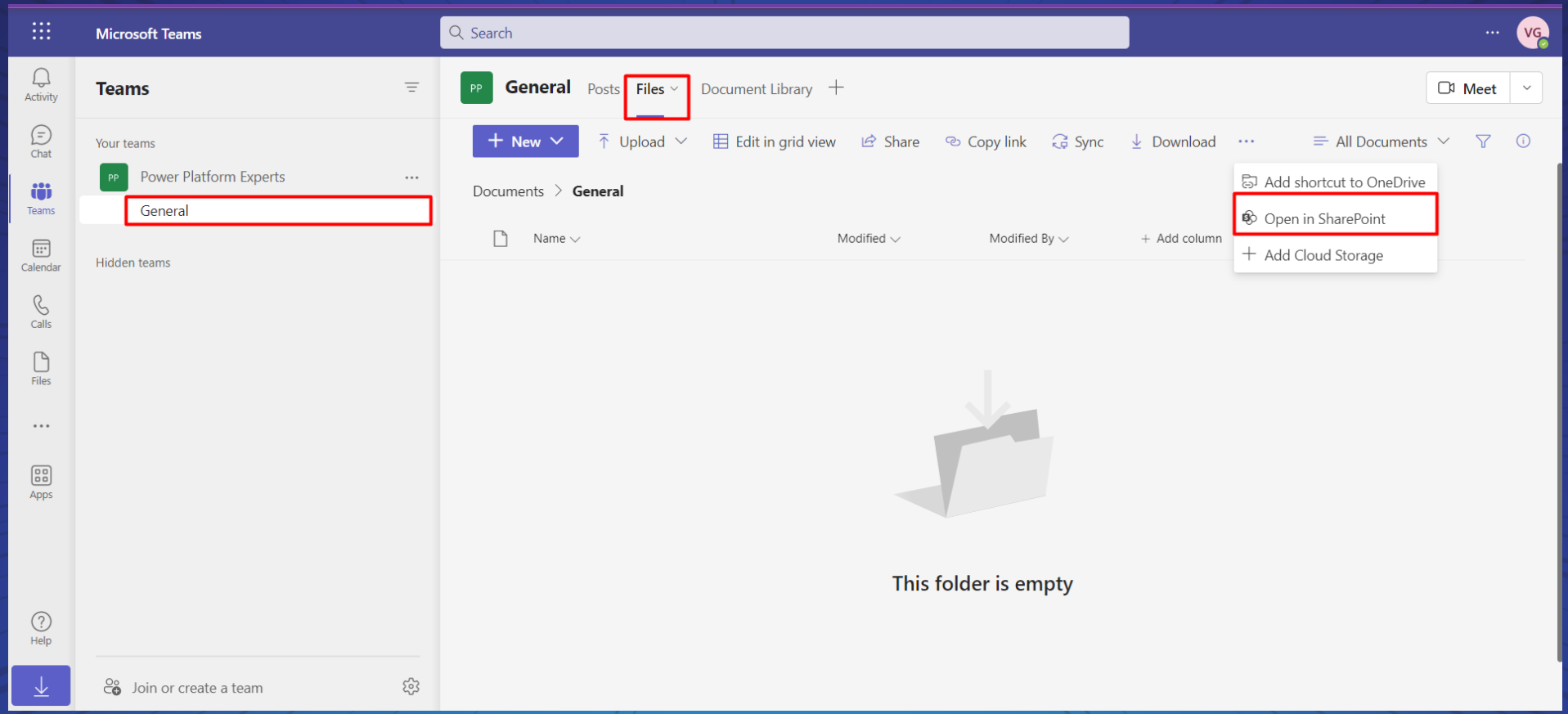
SharePoint Setup – Create Teams



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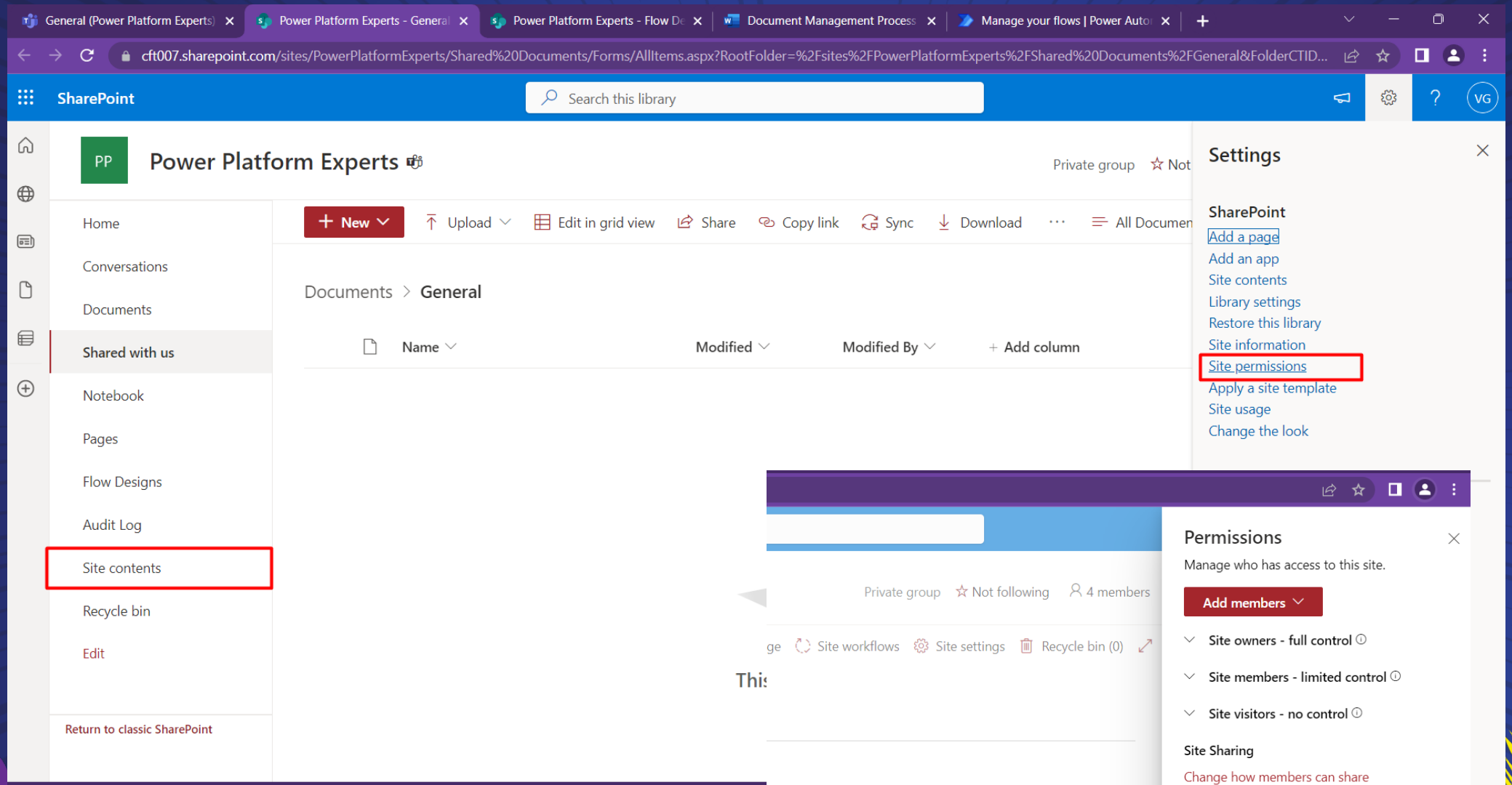
SharePoint Setup – Site Permissions



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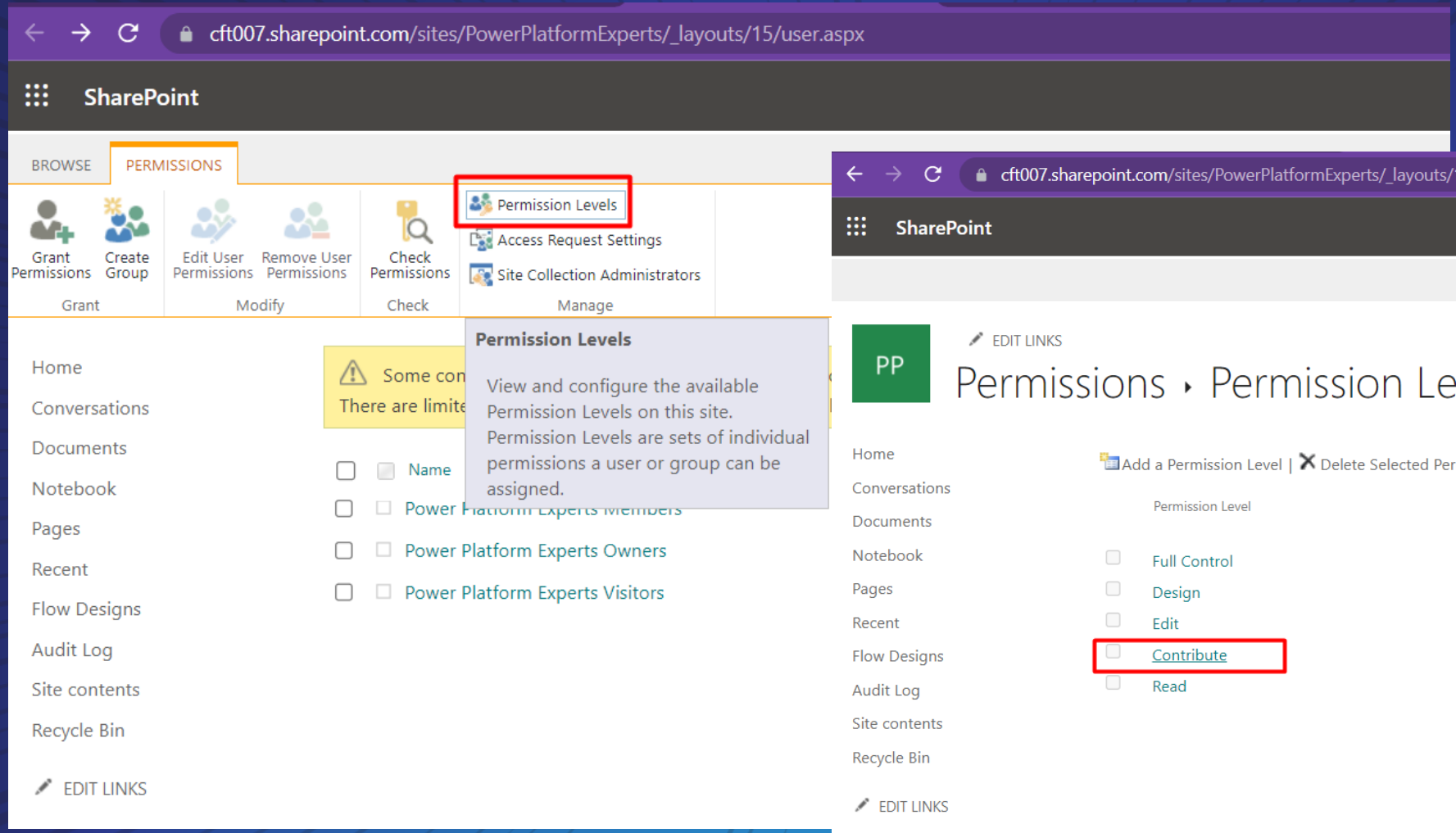
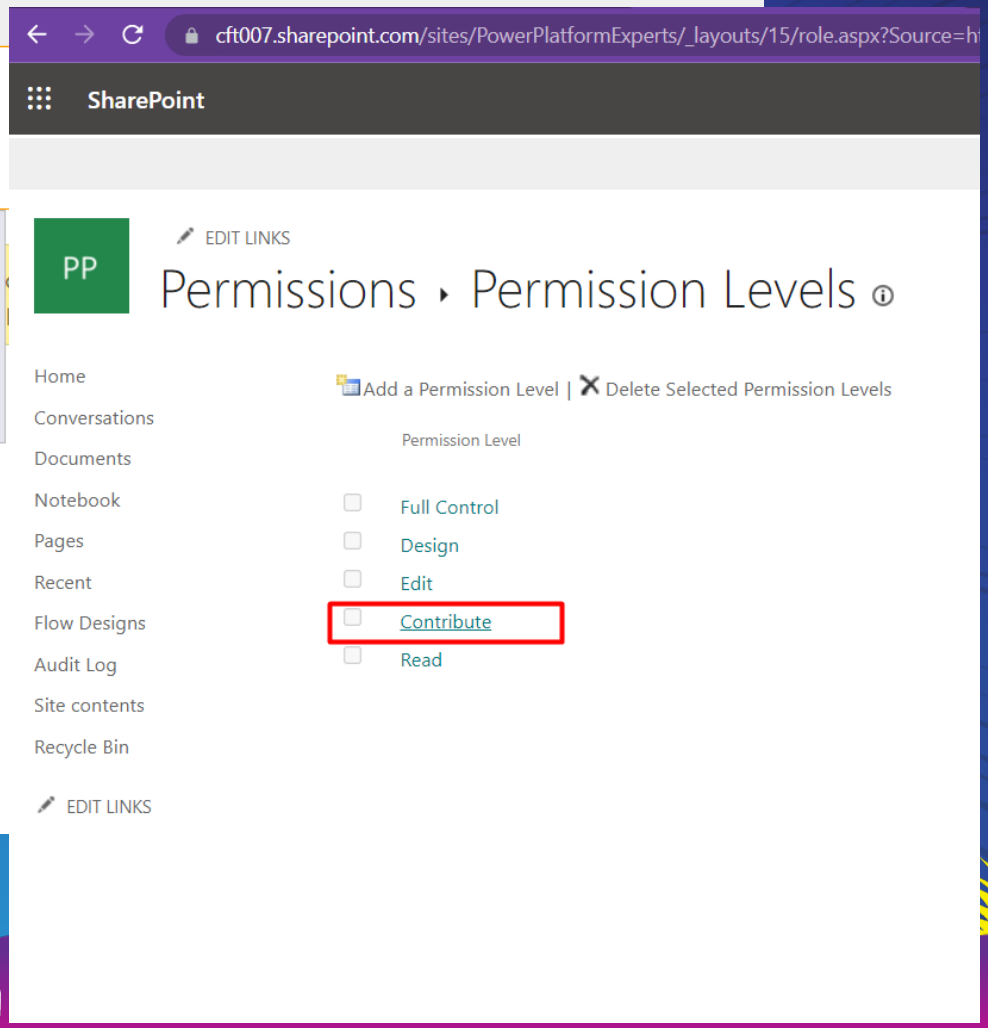
SharePoint Setup – Site Permission Levels





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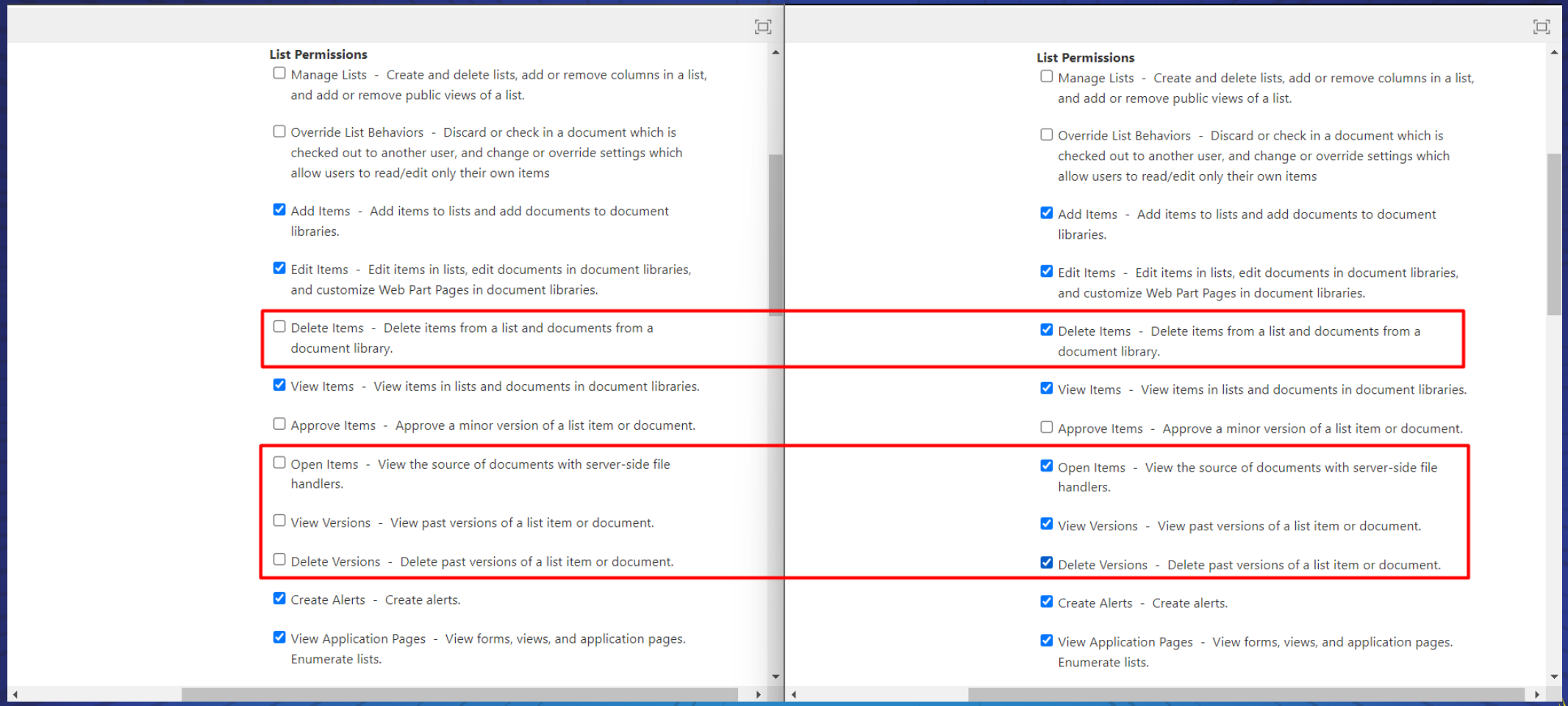
SharePoint Setup – Permission Levels
List Permissions



List Permissions

- [ ] Manage Lists - Create and delete lists, add or remove columns in a list, and add or remove public views of a list.
- [ ] Override List Behaviors - Discard or check in a document which is checked out to another user, and change or override settings which allow users to read/edit only their own items
- [x] Add Items - Add items to lists and add documents to document libraries.
- [x] Edit Items - Edit items in lists, edit documents in document libraries, and customize Web Part Pages in document libraries.
- [ ] Delete Items - Delete items from a list and documents from a document library.
- [x] View Items - View items in lists and documents in document libraries.
- [ ] Approve Items - Approve a minor version of a list item or document.
- [ ] Open Items - View the source of documents with server-side file handlers.
- [ ] View Versions - View past versions of a list item or document.
- [ ] Delete Versions - Delete past versions of a list item or document.
- [x] Create Alerts - Create alerts.
- [x] View Application Pages - View forms, views, and application pages. Enumerate lists.

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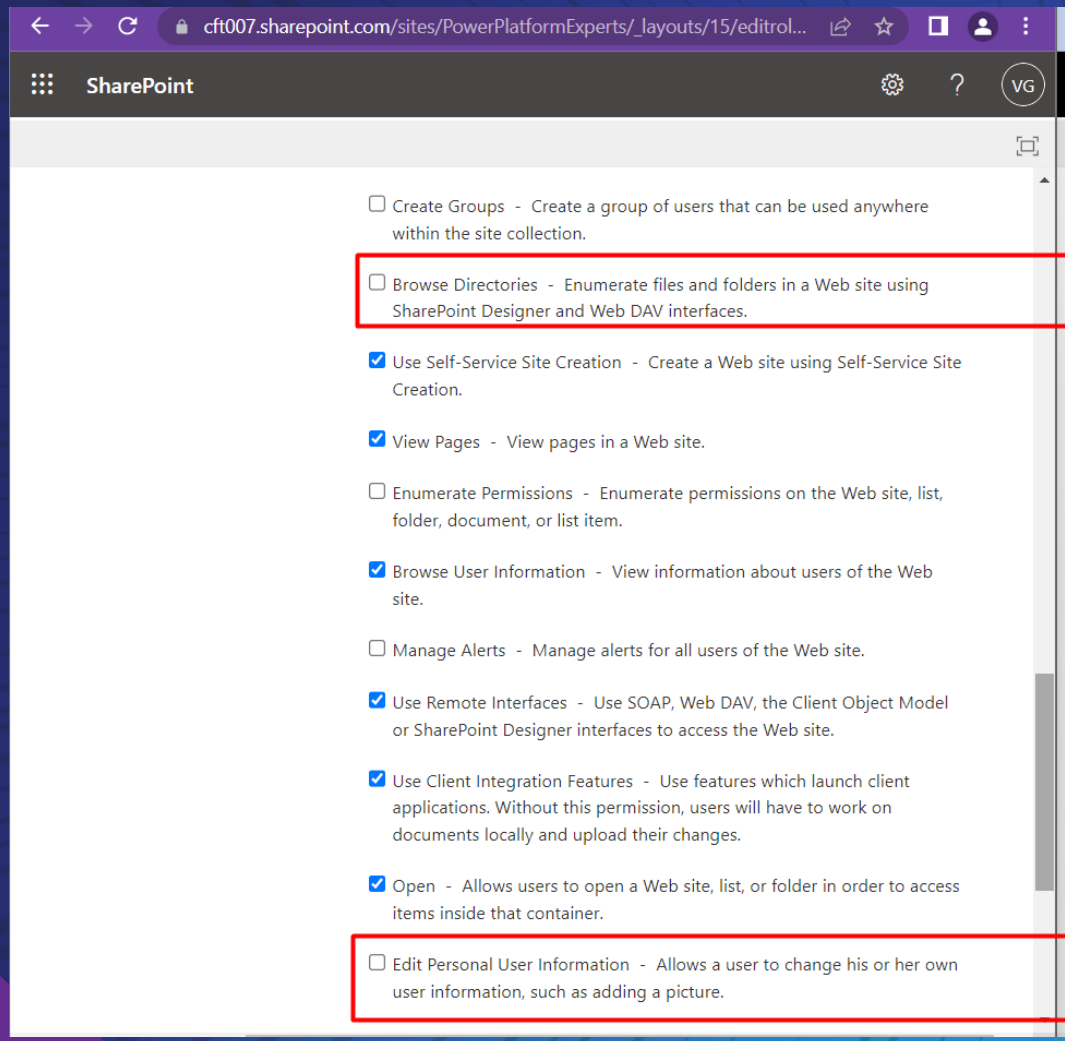
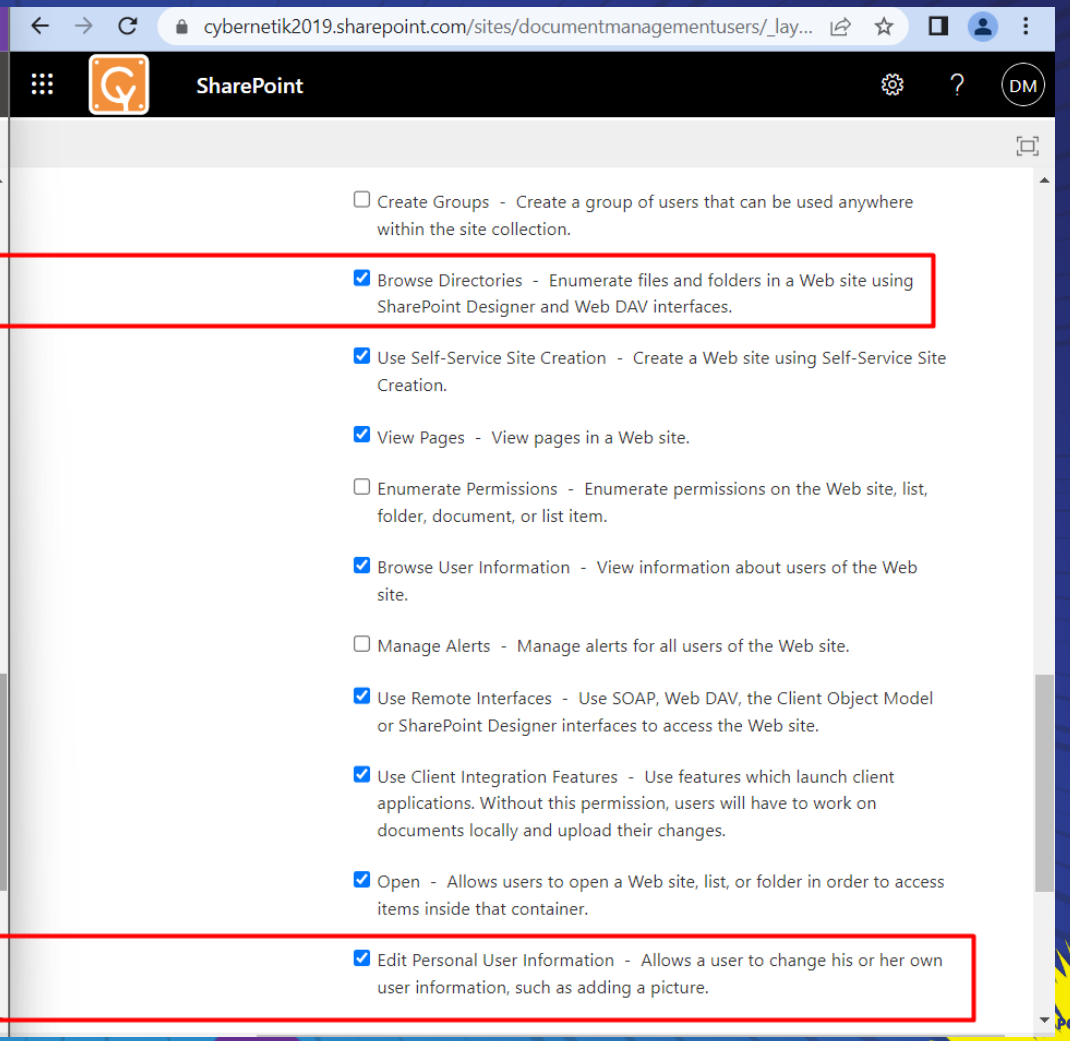
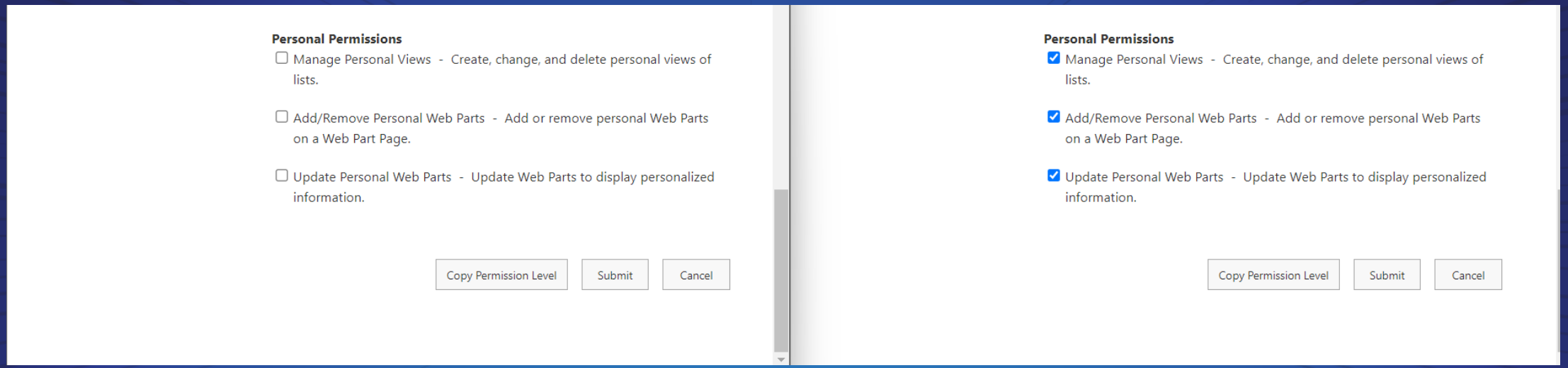
SharePoint Setup – Permission Levels
Site Permissions

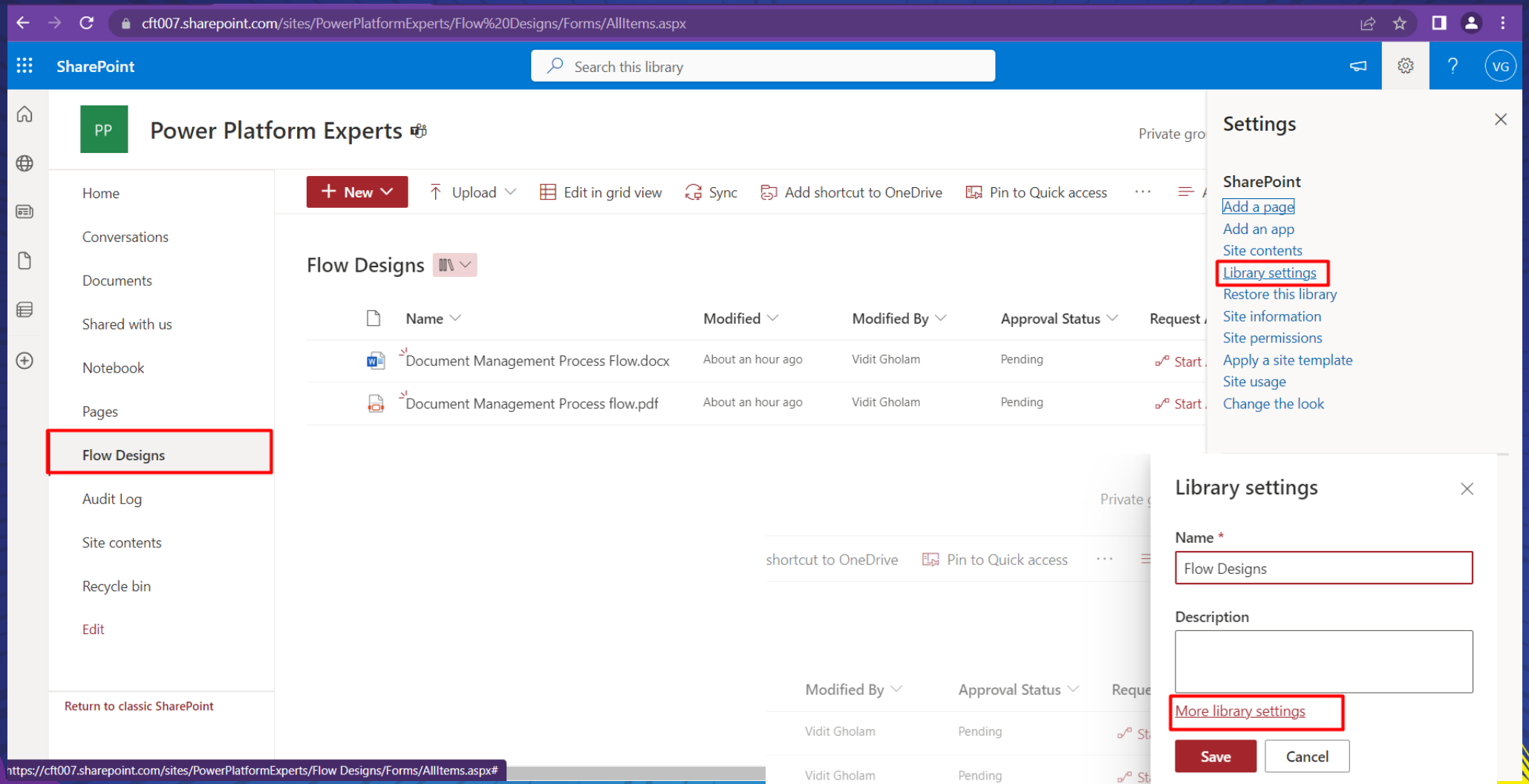




SharePoint Setup – Permission Levels
Personal Permissions



SharePoint Setup – Library Settings



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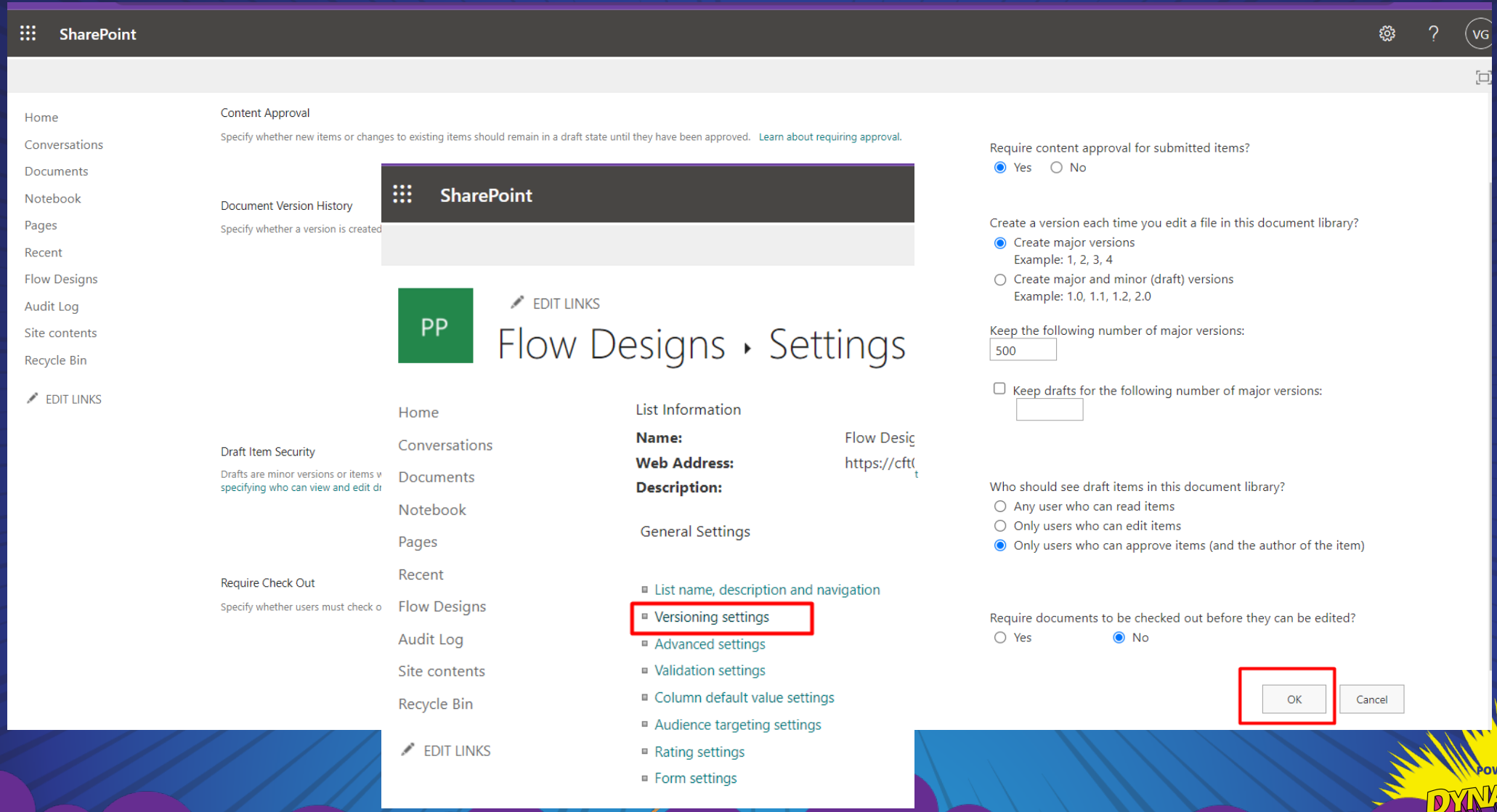
SharePoint Setup – Library Settings – Content Approval



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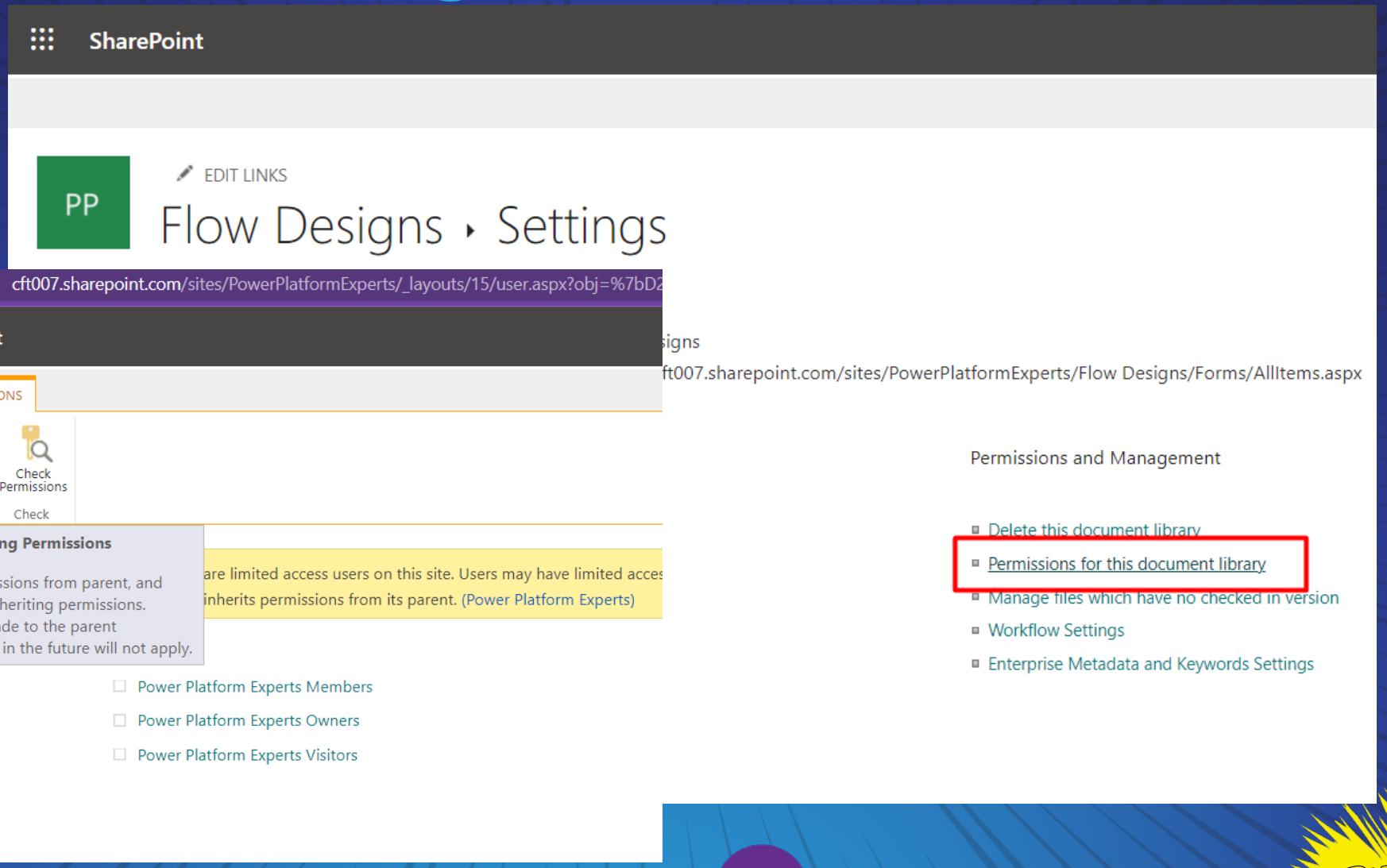
SharePoint Setup – Library Permissions – Stop Inheriting Permissions



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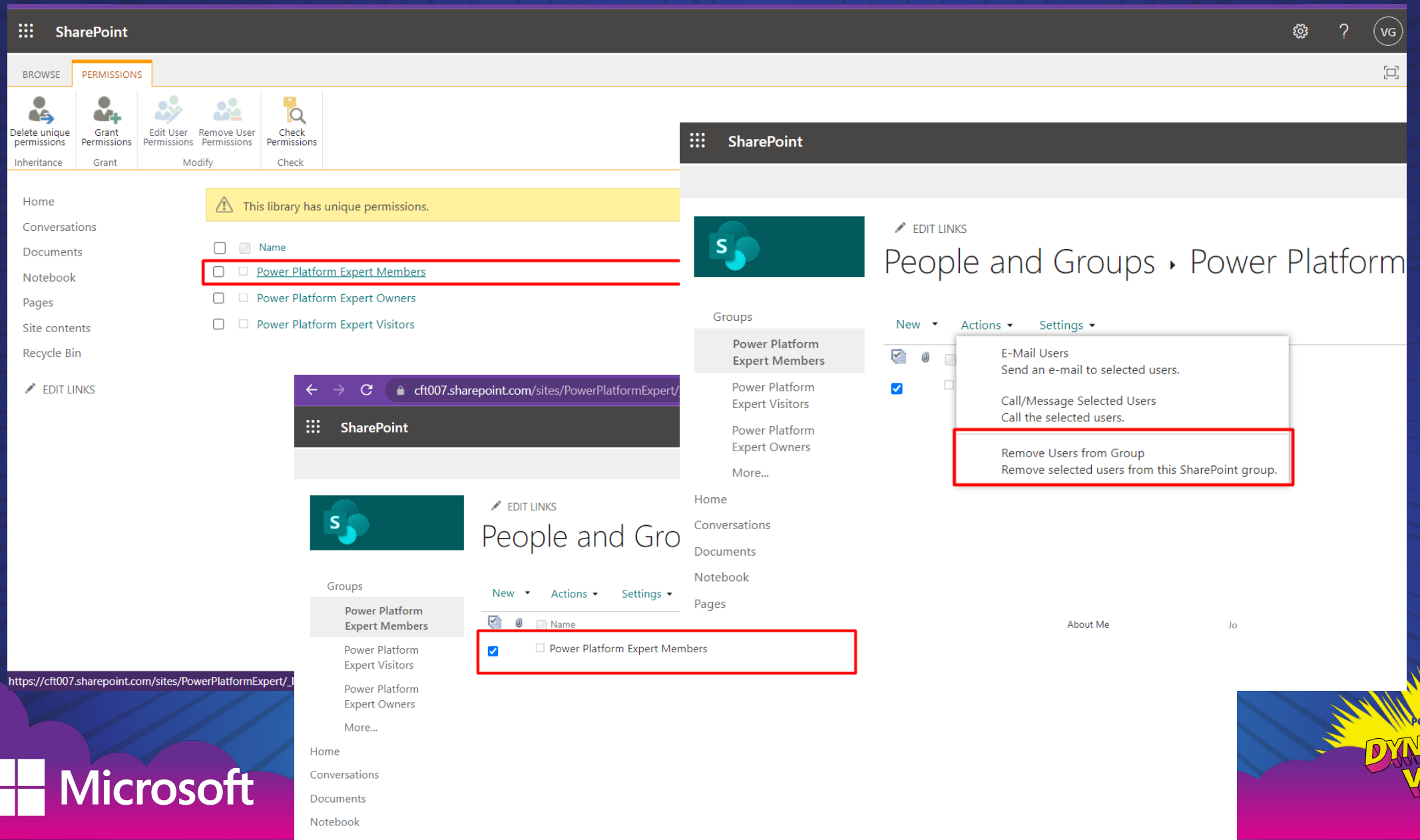
SharePoint Setup – Remove Teams Group



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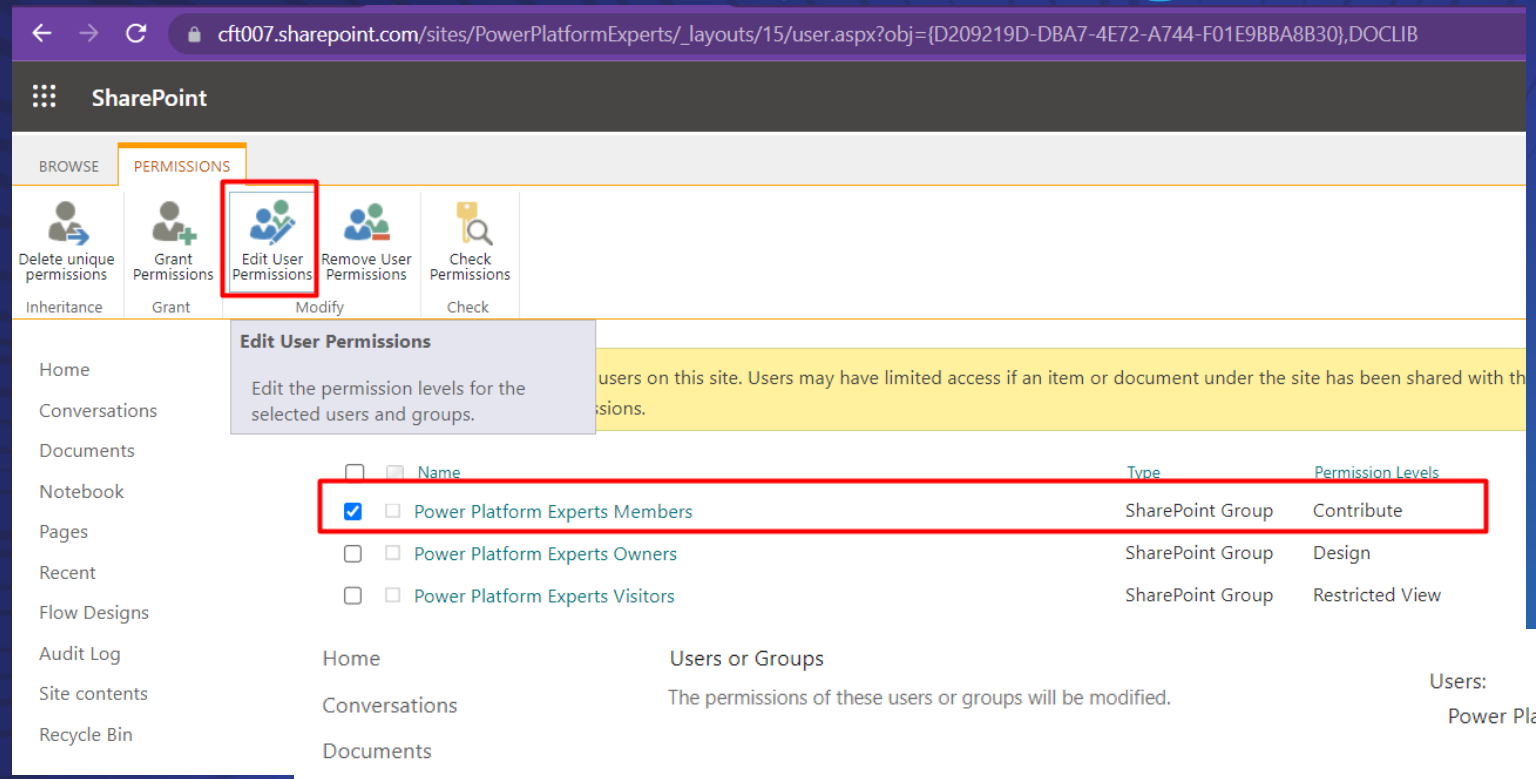
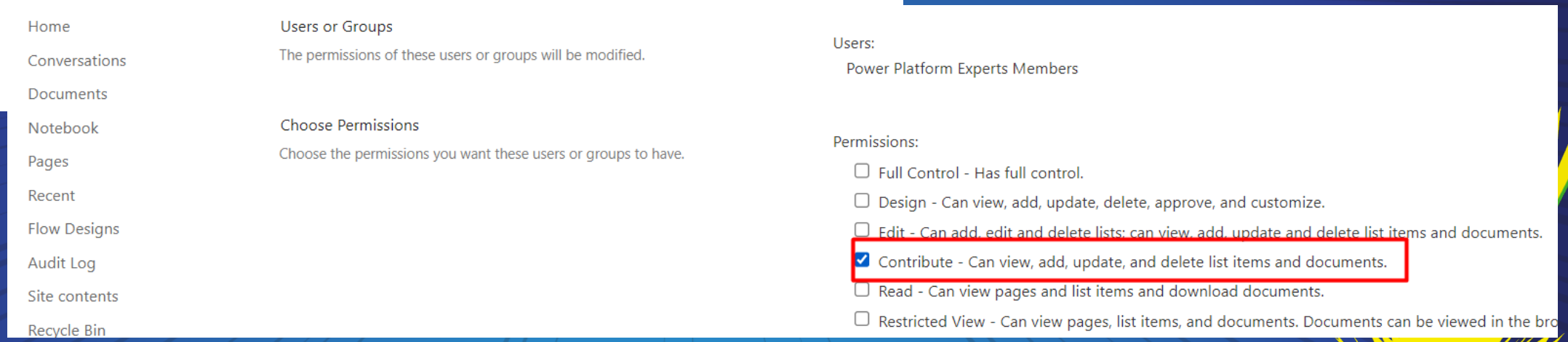
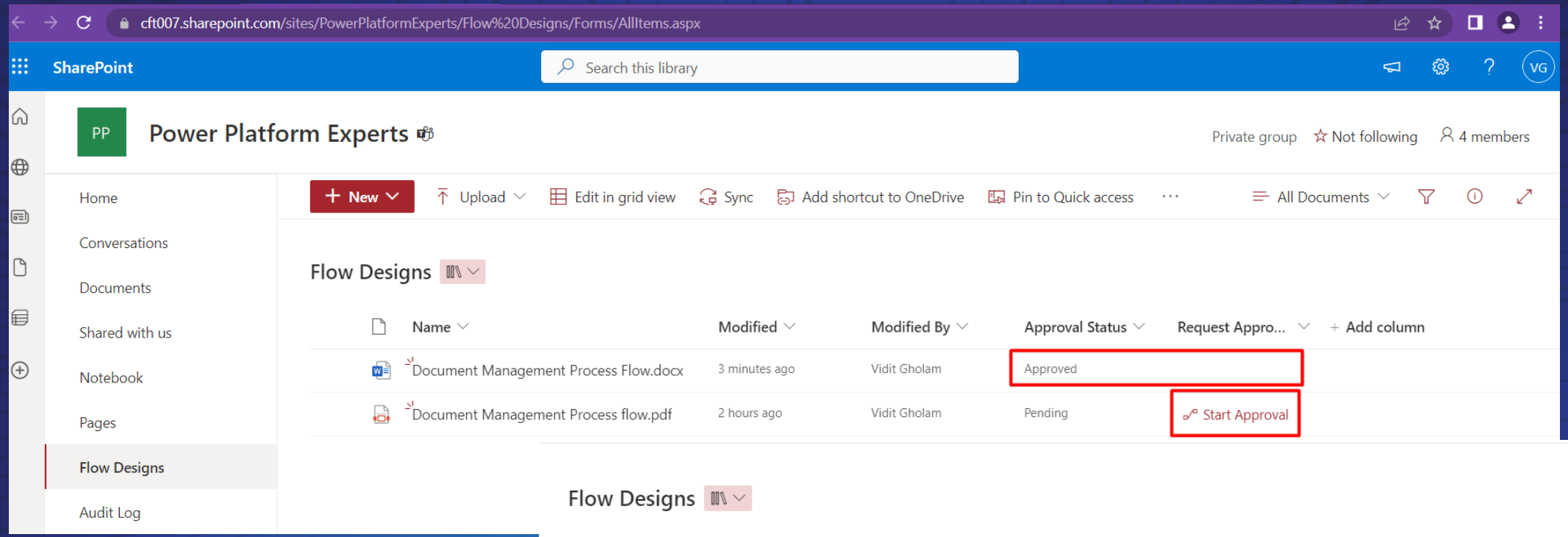
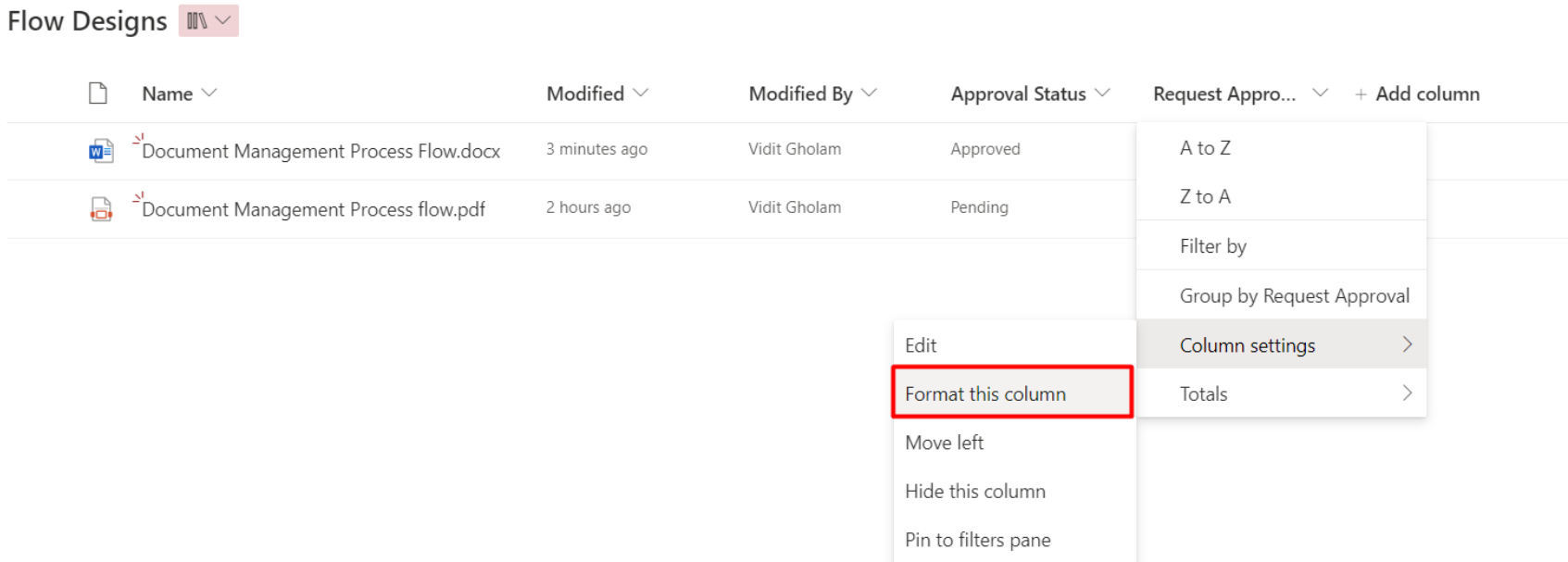
SharePoint Setup – Assign Permission Level





SharePoint Setup – Button to call flow





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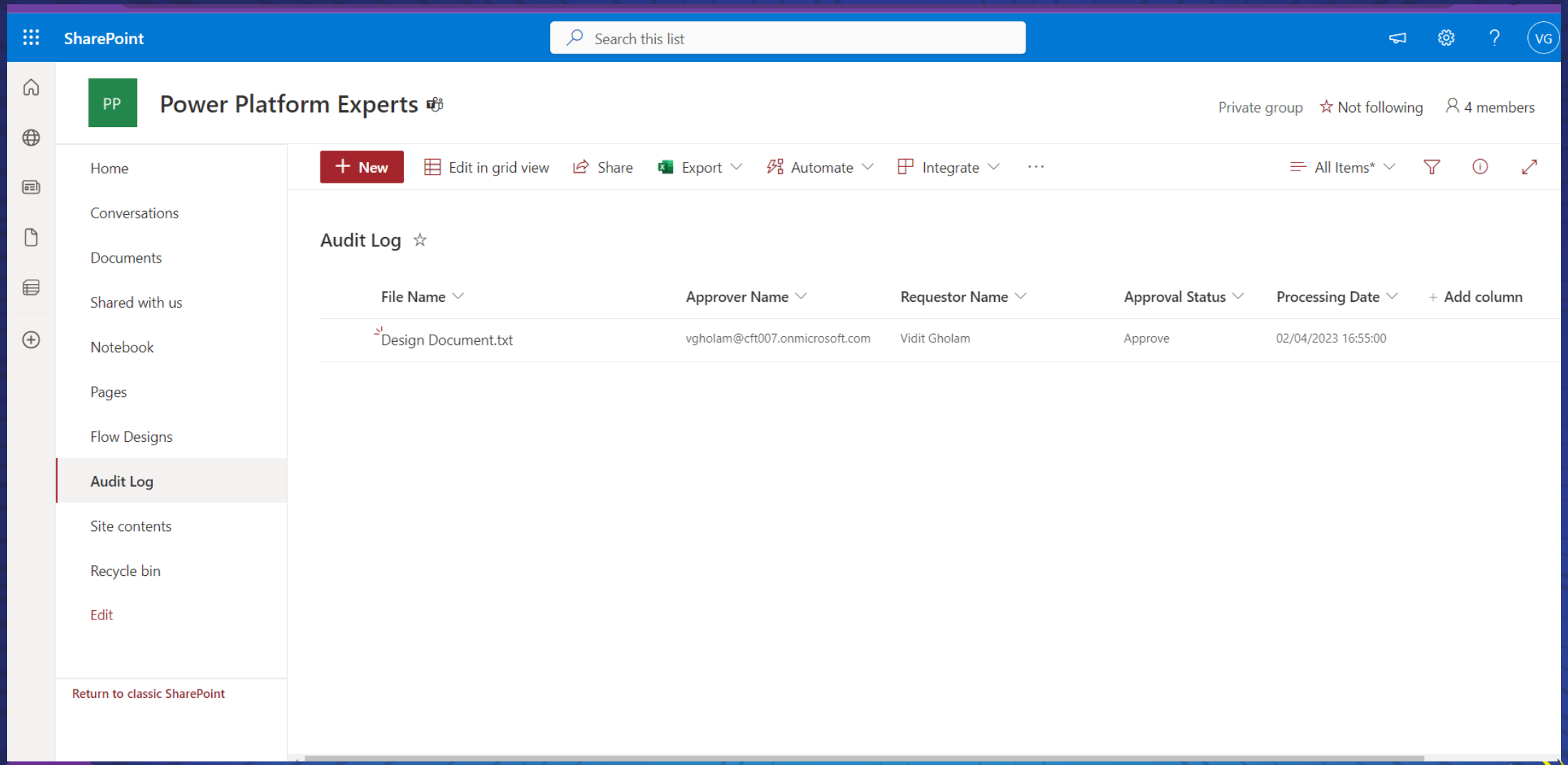
SharePoint Setup – Audit Log



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SharePoint Setup Demo

Power Automate Setup

Document Approval Flow

- Create a flow to trigger through a button on SharePoint Document Library.
- Set flow to run always with admins credentials.
- Share with Design Team.

Email notification of approved documents

- Set email notification time

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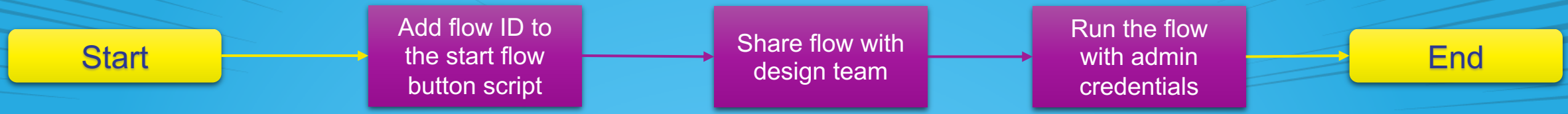
Process flow



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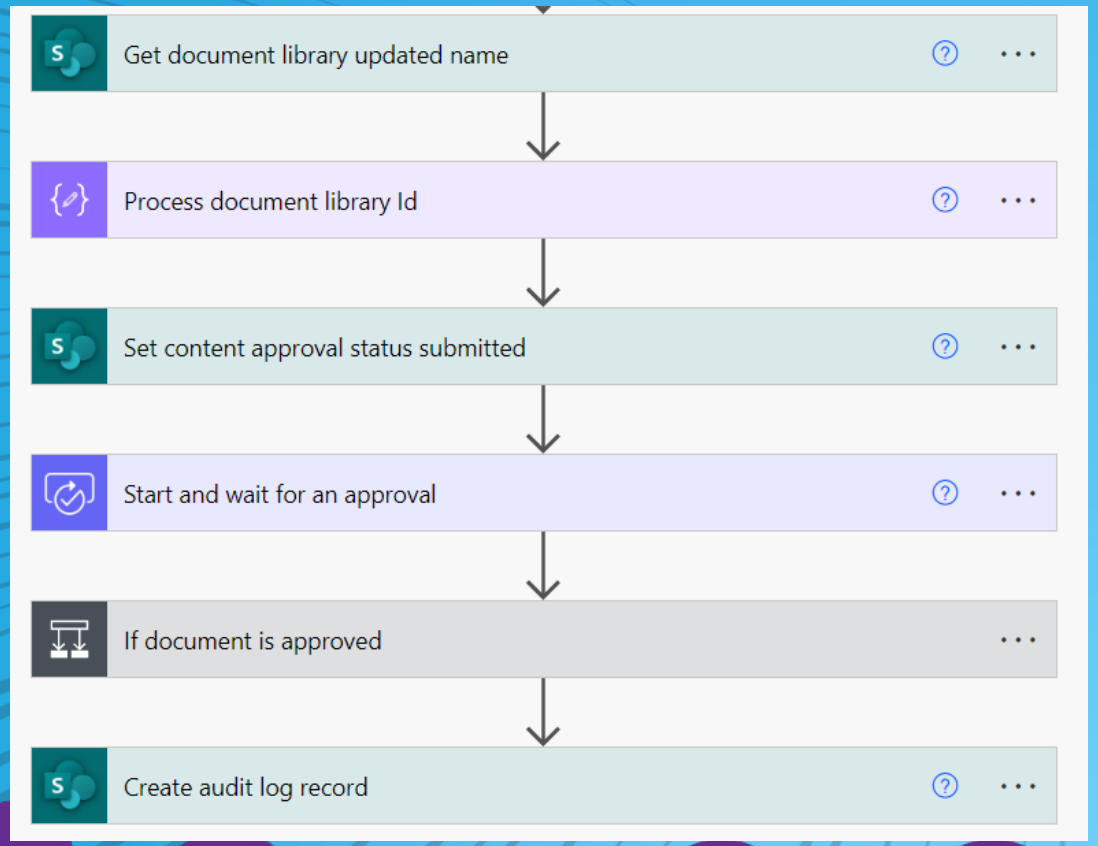
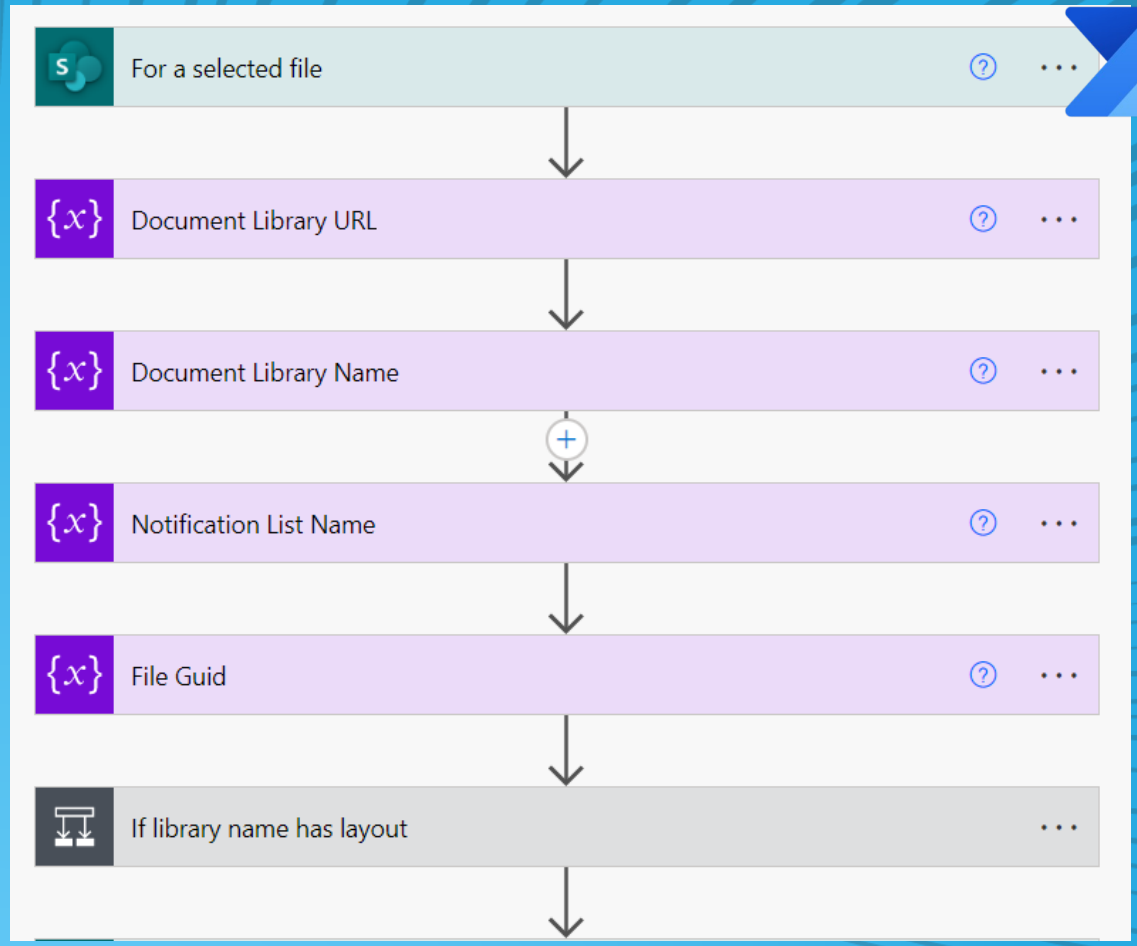
Document Approval flow





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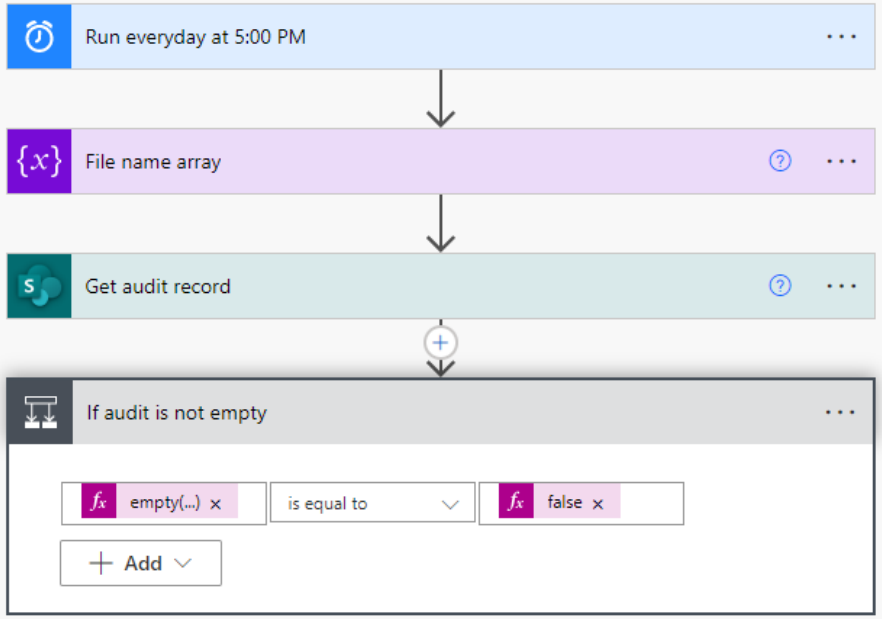
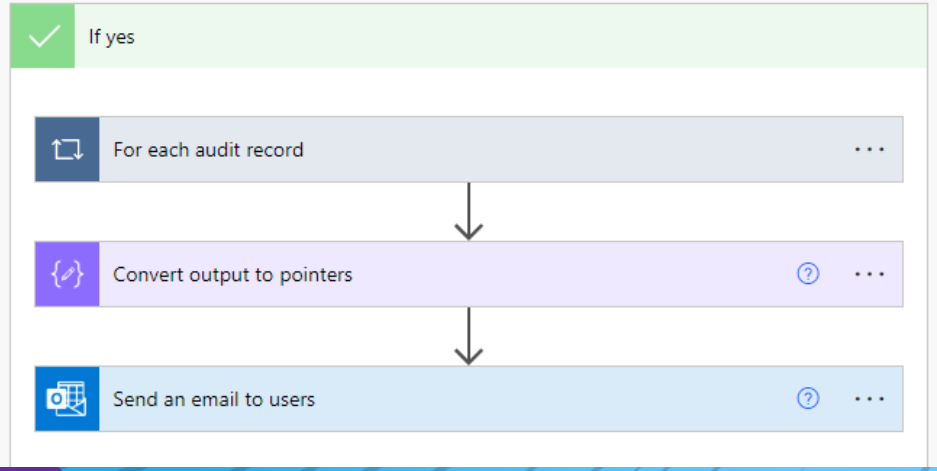
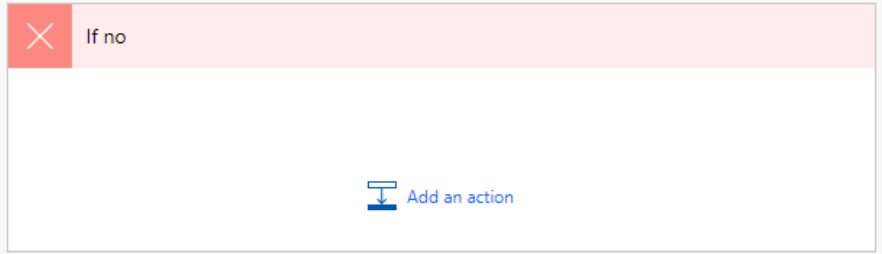
Email notification of approved documents







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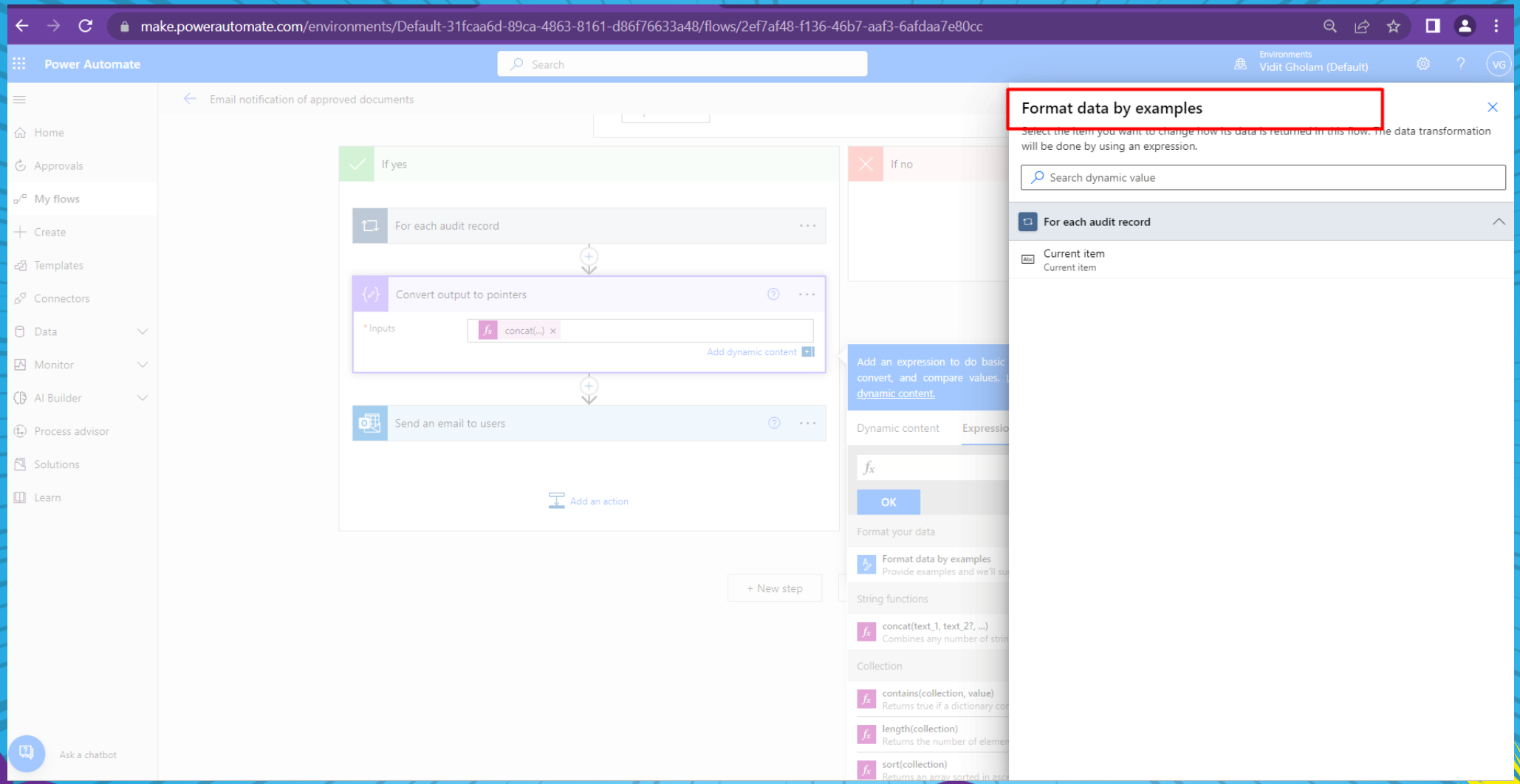
Common Questions & Issues

- Will the flow run for multiple document libraries.
- Flow not showing in the document library.
- What happens when document library name changes ?
- Will the flow handle all document types?
- Set Content Approval Status not Working or stuck.

Build Complex Expressions



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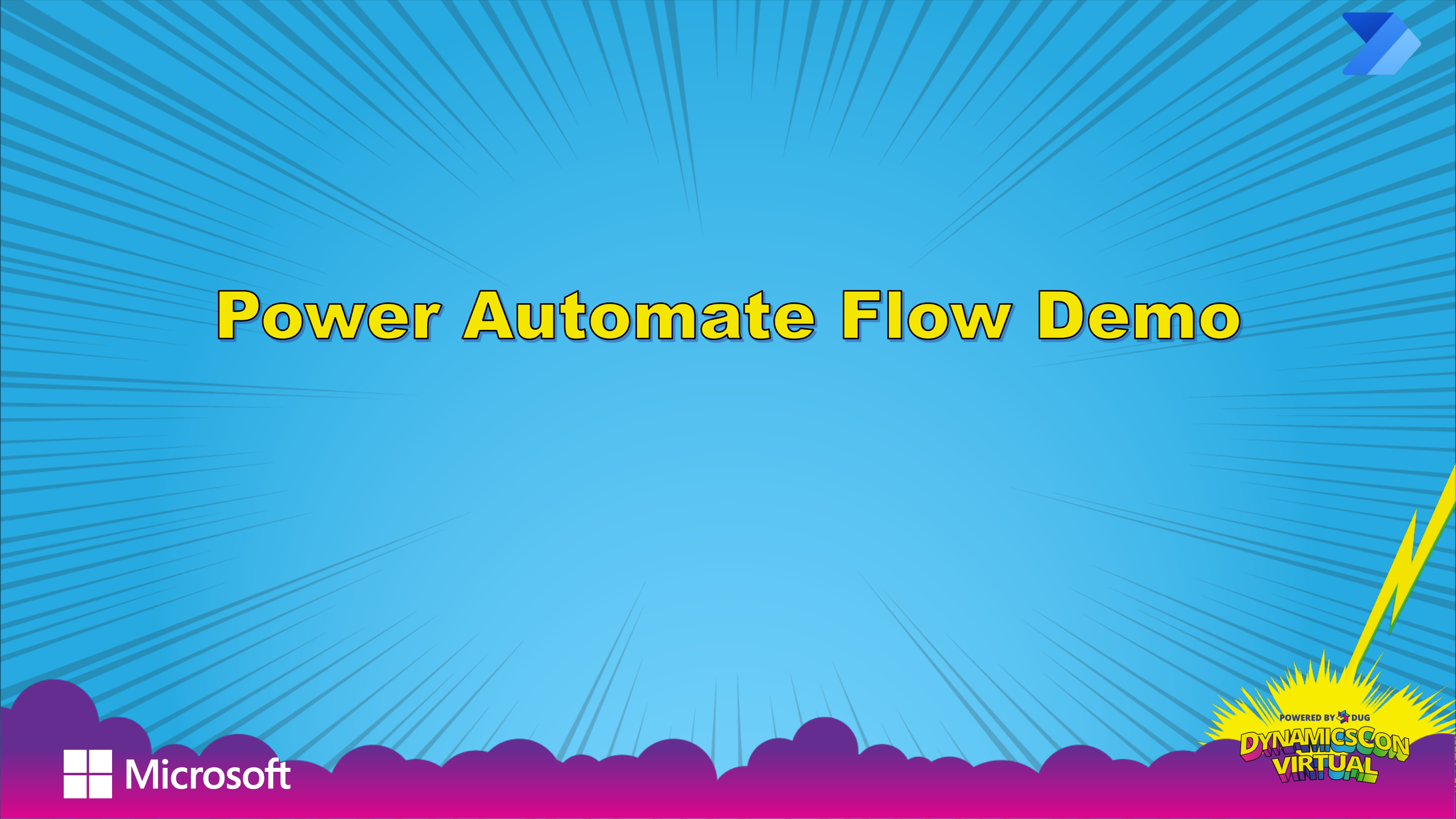
Power Automate Flow Demo



Thank You !!

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