

A DYNAMICSCON PRESENTATION

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DYNAMICSCON VIRTUAL

MARCH 2023

POWER
PLATFORM

DYNAMICSCON.COM



Vidit Gholam

CloudFronts Technologies

Dynamics 365 CRM Consultant



Document Management Using SharePoint Power Automate & Teams

SharePoint

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

Power Automate Flow

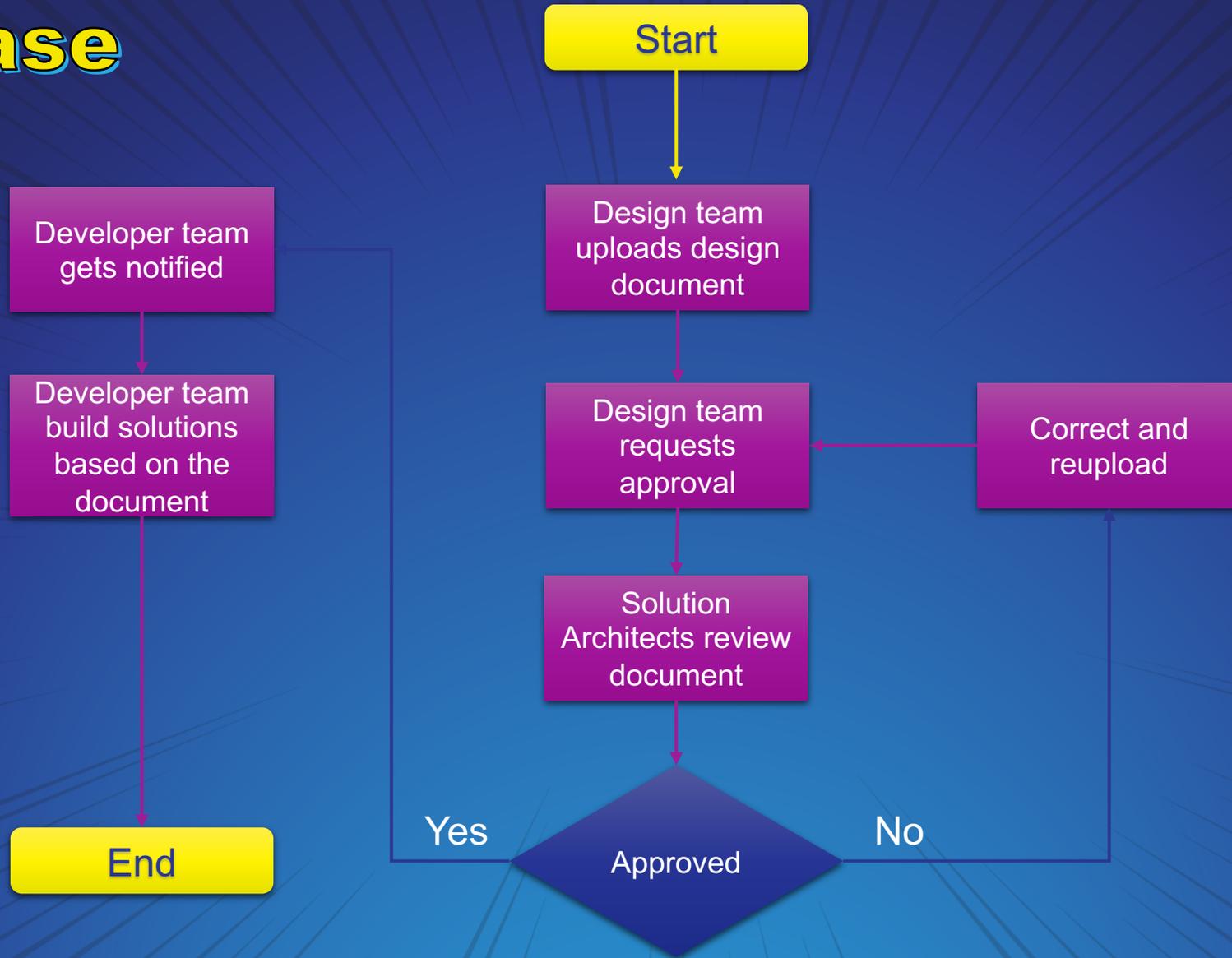
Power Automate flow which will be used to send the published documents for approvals to the Approvers & Email Notification to other users. (Single Flow for Multiple Document Libraries).

MS Teams

View, Approve, Upload Documents based on user roles.

Power Automate Tips & Tricks

Use Case

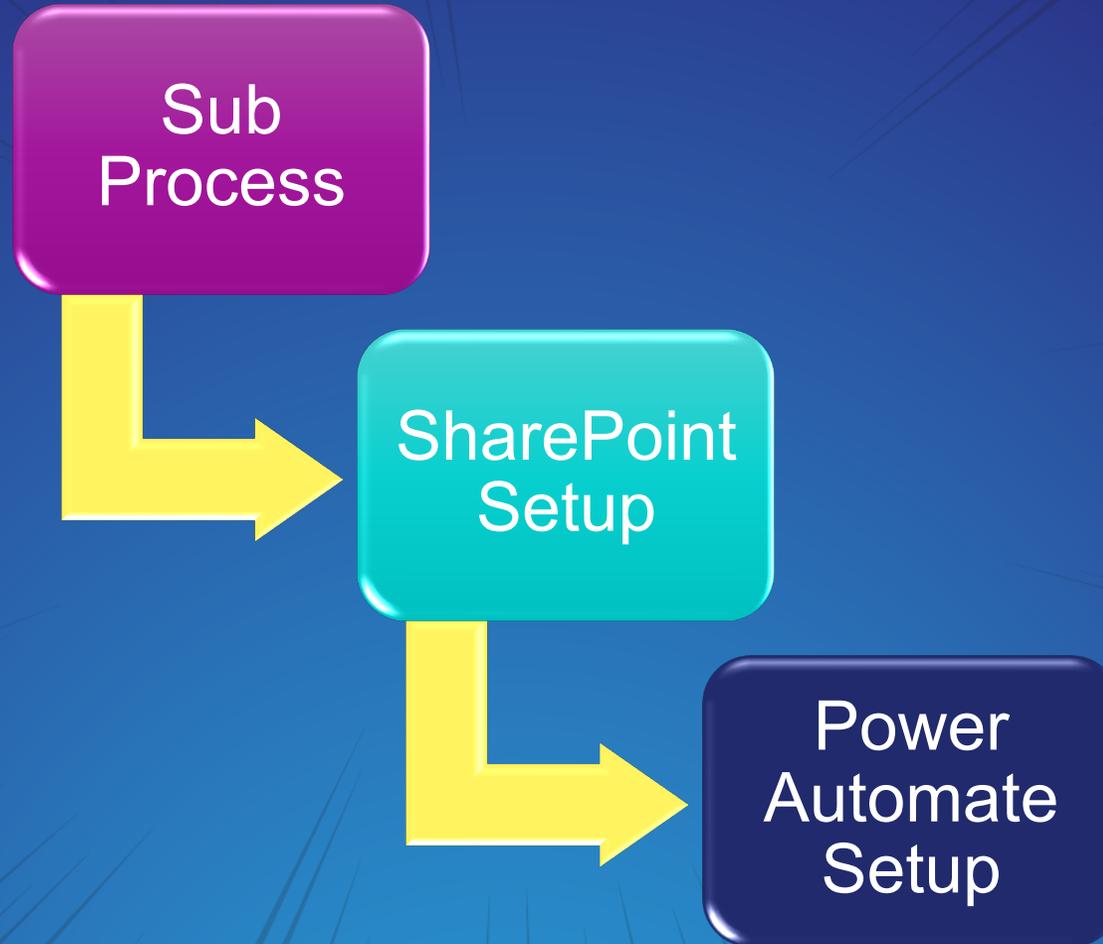


User Groups & Permissions

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



Process

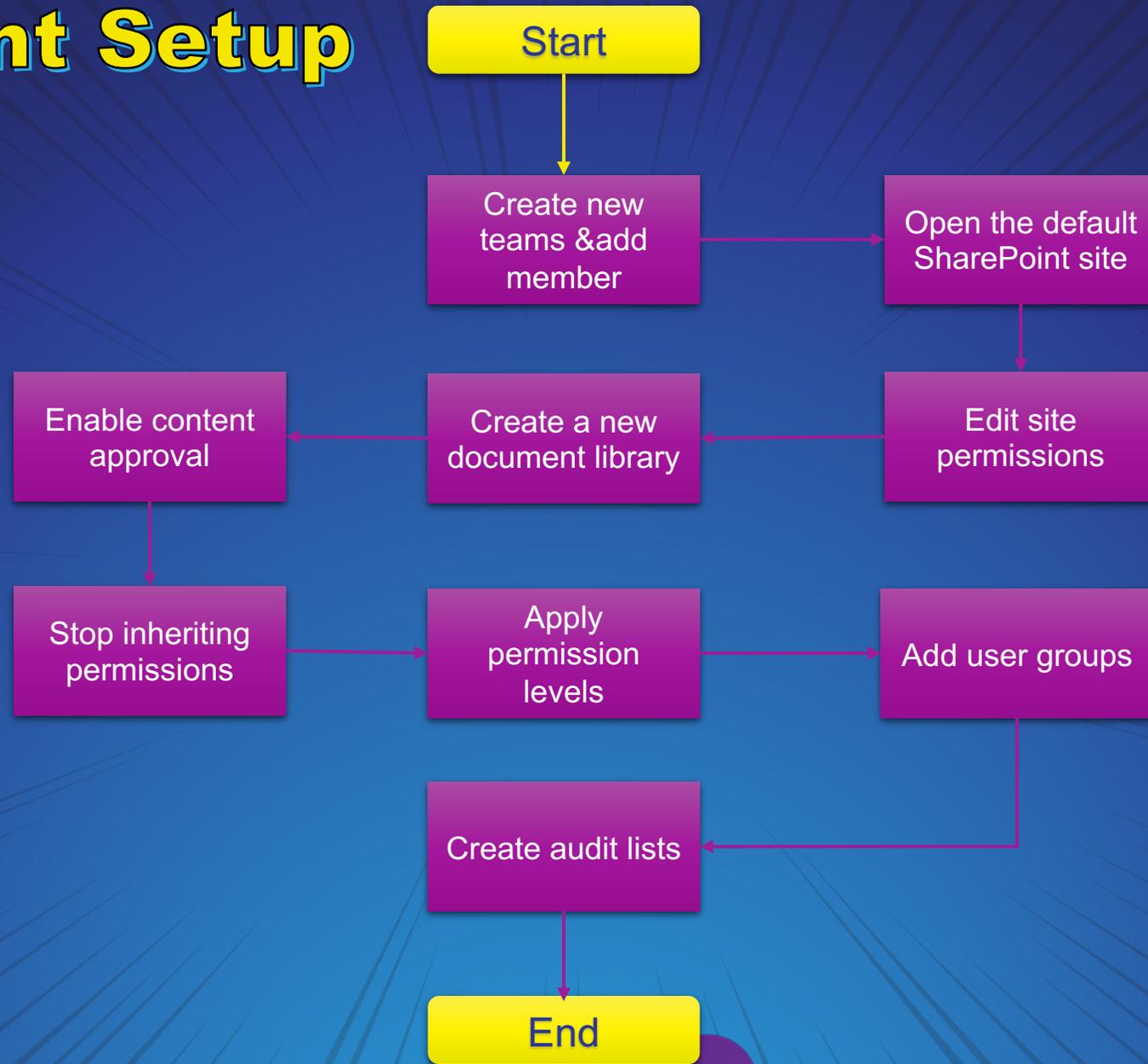


SharePoint Setup



- 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



SharePoint Setup – Create Teams



The screenshot shows the Microsoft Teams interface. On the left, the 'Teams' sidebar is visible with 'Power Platform Experts' and 'General' teams listed. The 'General' team is selected. The main area shows the 'Files' tab for the 'General' team. A context menu is open over the empty folder, with the 'Open in SharePoint' option highlighted. The menu also includes 'Add shortcut to OneDrive' and 'Add Cloud Storage'. The text 'This folder is empty' is displayed in the center of the document library.

SharePoint Setup – Site Permissions



The screenshot shows the SharePoint interface for a site named "Power Platform Experts". The left navigation pane has "Site contents" highlighted with a red box. The main content area shows a document library named "General" with columns for "Name", "Modified", and "Modified By". A "Settings" pane is open on the right, with "Site permissions" highlighted in a red box. Below this, a "Permissions" pane is open, showing a list of site members and their permissions. The "Site owners - full control" group is expanded, showing a list of members with their names and modification dates.

| Items | Modified |
|-------|-------------------|
| 1 | 2/4/2023 12:49 AM |
| 2 | 2/5/2023 5:02 AM |

https://cft007.sharepoint.com/sites/PowerPlatformExperts/Shared Documents/Forms/AllItems.aspx?RootFolder=%2Fsites%2FPowerPlatformExperts



SharePoint Setup – Site Permission Levels



The image shows two overlapping screenshots of a SharePoint site. The top screenshot shows the 'PERMISSIONS' ribbon with the 'Permission Levels' button highlighted by a red box. Below it, a tooltip explains that permission levels are sets of individual permissions assigned to users or groups. The bottom screenshot shows the 'Permission Levels' configuration page, where the 'Contribute' permission level is selected and highlighted with a red box. The page lists several permission levels: Full Control, Design, Edit, Contribute, and Read. The 'Contribute' level is the one being configured.

SharePoint

PERMISSIONS

Grant Permissions | Create Group | Edit User Permissions | Remove User Permissions | Check Permissions | Access Request Settings | Site Collection Administrators

Grant | Modify | Check | Manage

Home | Conversations | Documents | Notebook | Pages | Recent | Flow Designs | Audit Log | Site contents | Recycle Bin | EDIT LINKS

PP EDIT LINKS

Permissions ▶ Permission Levels ⓘ

Home | Conversations | Documents | Notebook | Pages | Recent | Flow Designs | Audit Log | Site contents | Recycle Bin | EDIT LINKS

Add a Permission Level | Delete Selected Permission Levels

Permission Level

- Full Control
- Design
- Edit
- Contribute
- Read



SharePoint Setup – Permission Levels

Site Permissions



| URL: cft007.sharepoint.com/sites/PowerPlatformExperts/_layouts/15/editrol... | URL: cybernetik2019.sharepoint.com/sites/documentmanagementusers/_lay... |
|--|--|
| <input type="checkbox"/> Create Groups - Create a group of users that can be used anywhere within the site collection. | <input type="checkbox"/> Create Groups - Create a group of users that can be used anywhere within the site collection. |
| <input type="checkbox"/> Browse Directories - Enumerate files and folders in a Web site using SharePoint Designer and Web DAV interfaces. | <input checked="" type="checkbox"/> Browse Directories - Enumerate files and folders in a Web site using SharePoint Designer and Web DAV interfaces. |
| <input checked="" type="checkbox"/> Use Self-Service Site Creation - Create a Web site using Self-Service Site Creation. | <input checked="" type="checkbox"/> Use Self-Service Site Creation - Create a Web site using Self-Service Site Creation. |
| <input checked="" type="checkbox"/> View Pages - View pages in a Web site. | <input checked="" type="checkbox"/> View Pages - View pages in a Web site. |
| <input type="checkbox"/> Enumerate Permissions - Enumerate permissions on the Web site, list, folder, document, or list item. | <input type="checkbox"/> Enumerate Permissions - Enumerate permissions on the Web site, list, folder, document, or list item. |
| <input checked="" type="checkbox"/> Browse User Information - View information about users of the Web site. | <input checked="" type="checkbox"/> Browse User Information - View information about users of the Web site. |
| <input type="checkbox"/> Manage Alerts - Manage alerts for all users of the Web site. | <input type="checkbox"/> Manage Alerts - Manage alerts for all users of the Web site. |
| <input checked="" type="checkbox"/> Use Remote Interfaces - Use SOAP, Web DAV, the Client Object Model or SharePoint Designer interfaces to access the Web site. | <input checked="" type="checkbox"/> Use Remote Interfaces - Use SOAP, Web DAV, the Client Object Model or SharePoint Designer interfaces to access the Web site. |
| <input checked="" type="checkbox"/> Use Client Integration Features - Use features which launch client applications. Without this permission, users will have to work on documents locally and upload their changes. | <input checked="" type="checkbox"/> Use Client Integration Features - Use features which launch client applications. Without this permission, users will have to work on documents locally and upload their changes. |
| <input checked="" type="checkbox"/> Open - Allows users to open a Web site, list, or folder in order to access items inside that container. | <input checked="" type="checkbox"/> Open - Allows users to open a Web site, list, or folder in order to access items inside that container. |
| <input type="checkbox"/> Edit Personal User Information - Allows a user to change his or her own user information, such as adding a picture. | <input checked="" type="checkbox"/> Edit Personal User Information - Allows a user to change his or her own user information, such as adding a picture. |

SharePoint Setup – Permission Levels

Personal Permissions



Personal Permissions

- Manage Personal Views - Create, change, and delete personal views of lists.
- Add/Remove Personal Web Parts - Add or remove personal Web Parts on a Web Part Page.
- Update Personal Web Parts - Update Web Parts to display personalized information.

Copy Permission Level

Submit

Cancel

Personal Permissions

- Manage Personal Views - Create, change, and delete personal views of lists.
- Add/Remove Personal Web Parts - Add or remove personal Web Parts on a Web Part Page.
- Update Personal Web Parts - Update Web Parts to display personalized information.

Copy Permission Level

Submit

Cancel

SharePoint Setup – Library Settings



SharePoint interface showing the 'Flow Designs' library settings. The 'Library settings' dialog is open, showing the 'Name' field set to 'Flow Designs' and the 'More library settings' link highlighted.

Settings

- SharePoint
 - Add a page
 - Add an app
 - Site contents
 - Library settings**
 - Restore this library
 - Site information
 - Site permissions
 - Apply a site template
 - Site usage
 - Change the look

Library settings

Name *
Flow Designs

Description

More library settings

Save Cancel

| Name | Modified | Modified By | Approval Status | Request |
|---------------------------------------|-------------------|--------------|-----------------|---------|
| Document Management Process Flow.docx | About an hour ago | Vidit Gholam | Pending | Start |
| Document Management Process flow.pdf | About an hour ago | Vidit Gholam | Pending | Start |

SharePoint Setup – Library Settings – Content Approval



The screenshot shows the SharePoint interface for configuring content approval for a document library. The page title is "Flow Designs Settings". The left sidebar contains navigation options: Home, Conversations, Documents, Notebook, Pages, Recent, Flow Designs, Audit Log, Site contents, and Recycle Bin. The main content area is divided into sections: "Content Approval" (with a sub-section for "Document Version History"), "Draft Item Security", "Require Check Out", "List Information" (with fields for Name, Web Address, and Description), and "General Settings". The "General Settings" section includes a list of options: "List name, description and navigation", "Versioning settings" (highlighted with a red box), "Advanced settings", "Validation settings", "Column default value settings", "Audience targeting settings", "Rating settings", and "Form settings". The "Versioning settings" section is expanded, showing options for "Require content approval for submitted items?" (Yes selected), "Create a version each time you edit a file in this document library?" (Create major versions selected), and "Keep the following number of major versions:" (500). The "Who should see draft items in this document library?" section has "Only users who can approve items (and the author of the item)" selected. The "Require documents to be checked out before they can be edited?" section has "No" selected. At the bottom right, there are "OK" and "Cancel" buttons, with the "OK" button highlighted by a red box.

SharePoint Setup – Library Permissions – Stop Inheriting Permissions



The screenshot shows the SharePoint interface for a document library named 'Flow Designs'. The 'PERMISSIONS' tab is active, and the 'Stop Inheriting Permissions' dialog box is open. The dialog box contains the following text: 'Copy permissions from parent, and then stop inheriting permissions. Changes made to the parent permissions in the future will not apply.' Below this text are three checkboxes: 'Power Platform Experts Members', 'Power Platform Experts Owners', and 'Power Platform Experts Visitors'. In the 'Permissions and Management' section on the right, the option 'Permissions for this document library' is highlighted with a red box.

SharePoint

PP EDIT LINKS

Flow Designs ▸ Settings

SharePoint

BROWSE PERMISSIONS

Manage Parent Stop Inheriting Permissions Check Permissions

Inheritance Check

Stop Inheriting Permissions

Copy permissions from parent, and then stop inheriting permissions. Changes made to the parent permissions in the future will not apply.

Power Platform Experts Members

Power Platform Experts Owners

Power Platform Experts Visitors

Permissions and Management

- Delete this document library
- Permissions for this document library**
- Manage files which have no checked in version
- Workflow Settings
- Enterprise Metadata and Keywords Settings

SharePoint Setup – Assign Permission Level



← → ↻ cft007.sharepoint.com/sites/PowerPlatformExperts/_layouts/15/user.aspx?obj={D209219D-DBA7-4E72-A744-F01E9BBA8B30},DOCLIB

SharePoint

BROWSE PERMISSIONS

Delete unique permissions Inheritance
Grant Permissions Grant
Edit User Permissions Modify
Remove User Permissions Modify
Check Permissions Check

Home
Conversations
Documents
Notebook
Pages
Recent
Flow Designs
Audit Log
Site contents
Recycle Bin

Edit User Permissions
Edit the permission levels for the selected users and groups.

users on this site. Users may have limited access if an item or document under the site has been shared with th
isions.

| <input type="checkbox"/> | Name | Type | Permission Levels |
|-------------------------------------|---------------------------------|------------------|-------------------|
| <input checked="" type="checkbox"/> | Power Platform Experts Members | SharePoint Group | Contribute |
| <input type="checkbox"/> | Power Platform Experts Owners | SharePoint Group | Design |
| <input type="checkbox"/> | Power Platform Experts Visitors | SharePoint Group | Restricted View |

Home Users or Groups
Conversations The permissions of these users or groups will be modified.
Documents
Notebook Choose Permissions
Pages Choose the permissions you want these users or groups to have.
Recent
Flow Designs
Audit Log
Site contents
Recycle Bin

Users:

Power Platform Experts Members

Permissions:

- Full Control - Has full control.
- Design - Can view, add, update, delete, approve, and customize.
- Edit - Can add, edit and delete lists: can view, add, update and delete list items and documents.
- Contribute - Can view, add, update, and delete list items and documents.
- Read - Can view pages and list items and download documents.
- Restricted View - Can view pages, list items, and documents. Documents can be viewed in the bro

SharePoint Setup – Button to call flow



SharePoint interface showing a document library for 'Power Platform Experts'. The library contains two flow design documents. The 'Approval Status' column is highlighted in red for the 'Approved' document, and the 'Request Appro...' column is highlighted in red for the 'Pending' document, showing a 'Start Approval' button.

| Name | Modified | Modified By | Approval Status | Request Appro... |
|---------------------------------------|---------------|--------------|-----------------|------------------|
| Document Management Process Flow.docx | 3 minutes ago | Vidit Gholam | Approved | |
| Document Management Process flow.pdf | 2 hours ago | Vidit Gholam | Pending | Start Approval |

Close-up of the 'Request Appro...' column header menu. The 'Format this column' option is highlighted in red.

| Name | Modified | Modified By | Approval Status | Request Appro... |
|---------------------------------------|---------------|--------------|-----------------|------------------|
| Document Management Process Flow.docx | 3 minutes ago | Vidit Gholam | Approved | A to Z |
| Document Management Process flow.pdf | 2 hours ago | Vidit Gholam | Pending | Z to A |

- Edit
- Format this column**
- Move left
- Hide this column
- Pin to filters pane

- Filter by
- Group by Request Approval
- Column settings >
- Totals >

SharePoint Setup – Audit Log



SharePoint Search this list

Power Platform Experts Private group Not following 4 members

+ New Edit in grid view Share Export Automate Integrate All Items* Filter Info Link

Audit Log ☆

| File Name | Approver Name | Requestor Name | Approval Status | Processing Date | + Add column |
|---------------------|--------------------------------|----------------|-----------------|---------------------|--------------|
| Design Document.txt | vgholam@cft007.onmicrosoft.com | Vidit Gholam | Approve | 02/04/2023 16:55:00 | |

Home Conversations Documents Shared with us Notebook Pages Flow Designs Audit Log Site contents Recycle bin Edit

Return to classic SharePoint



SharePoint Setup Demo



Power Automate Setup



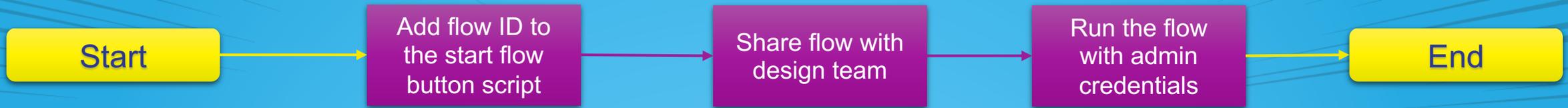
Document Approval Flow

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

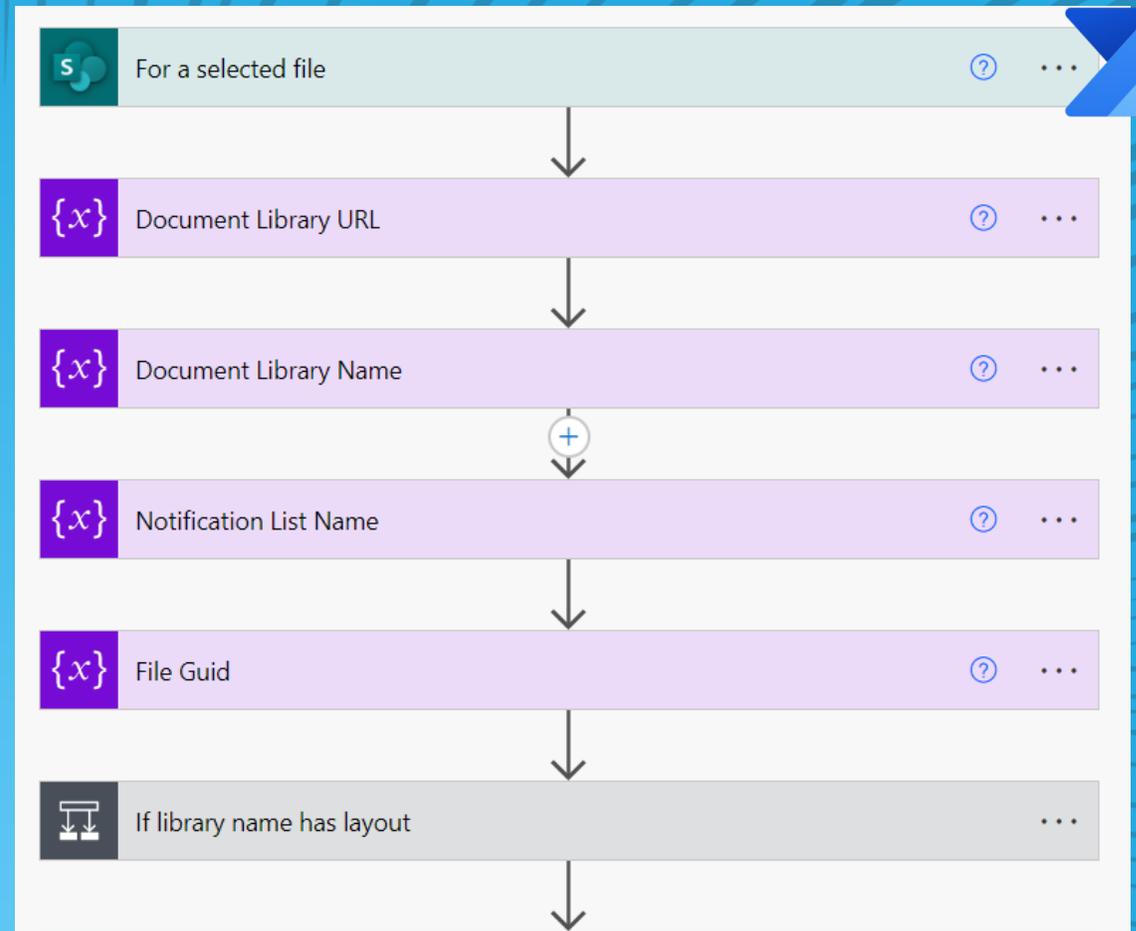
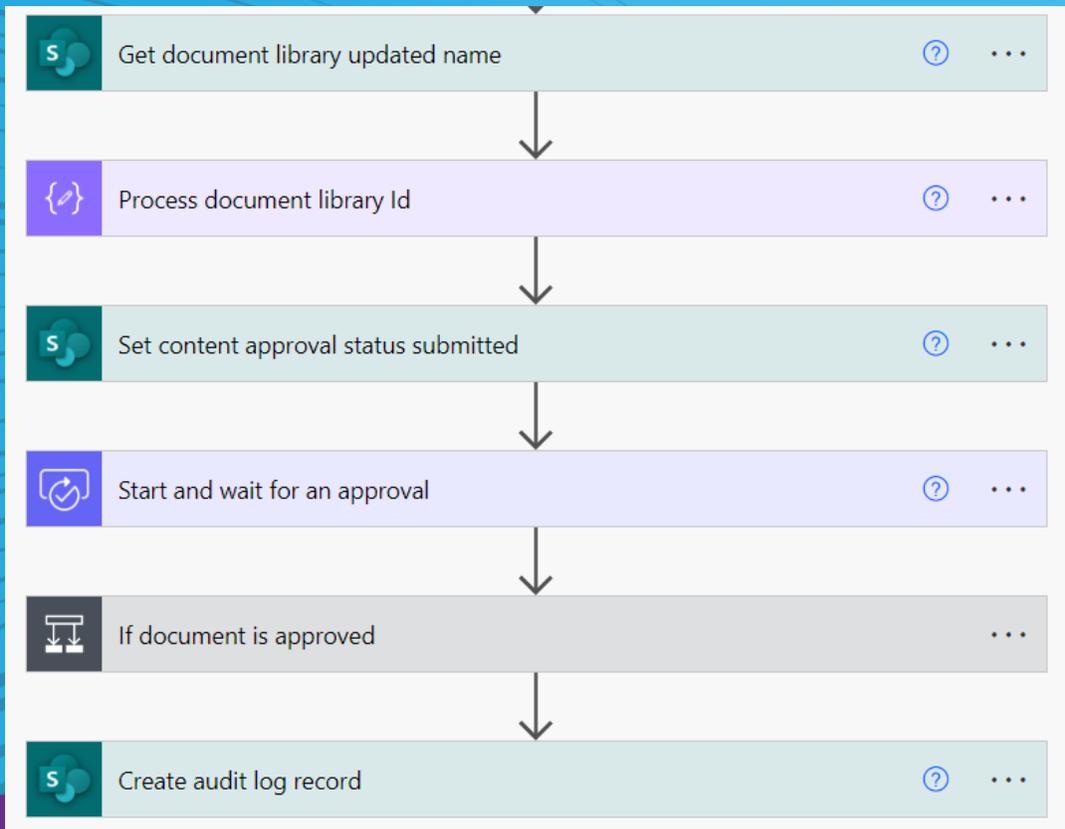
Email notification of approved documents

- Set email notification time

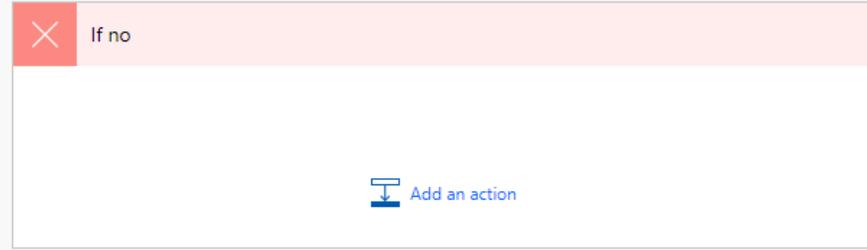
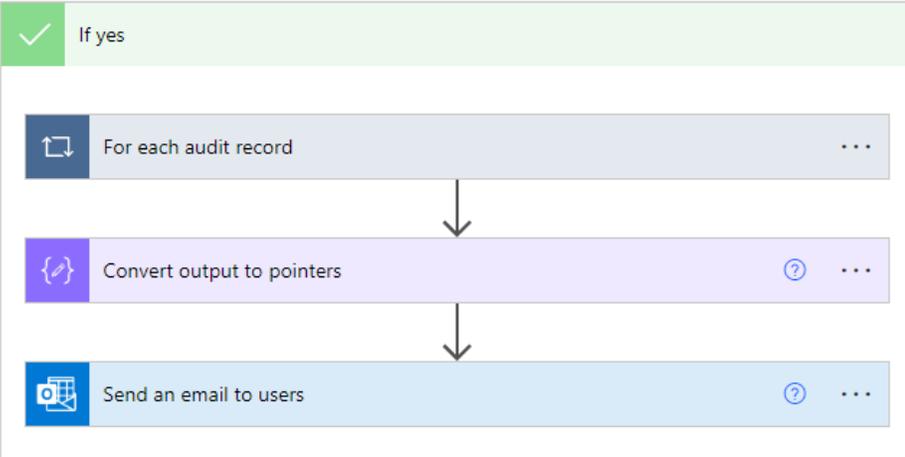
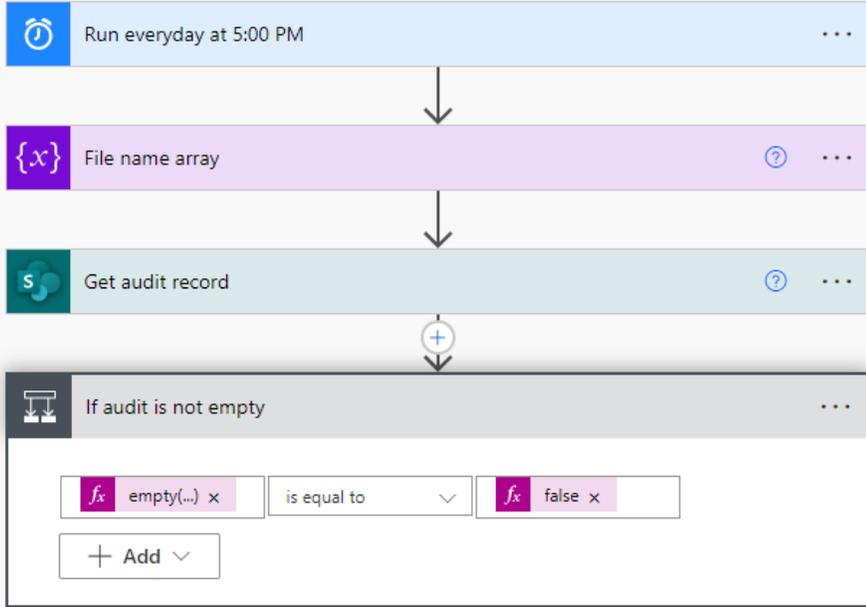
Process flow



Document Approval flow



Email notification of approved documents



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



make.powerautomate.com/environments/Default-31fcaa6d-89ca-4863-8161-d86f76633a48/flows/2ef7af48-f136-46b7-aaf3-6afdaa7e80cc

Power Automate

Search

Environments
Vidit Gholam (Default)

Email notification of approved documents

If yes

If no

For each audit record

Convert output to pointers

*Inputs

concat(...)

Add dynamic content

Send an email to users

Add an action

+ New step

Format data by examples

Select the item you want to change how its data is returned in this flow. The data transformation will be done by using an expression.

Search dynamic value

For each audit record

Current item

Current item

Add an expression to do basic convert, and compare values. [dynamic content](#).

Dynamic content Expression

OK

Format your data

Format data by examples
Provide examples and we'll su

String functions

concat(text_1, text_2, ...)
Combines any number of strin

Collection

contains(collection, value)
Returns true if a dictionary cor

length(collection)
Returns the number of elemen

sort(collection)
Returns an array sorted in asc



Power Automate Flow Demo



Thank You !!



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