Power of the Cloud Conference 2021

https://powerofthecloud.net/

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Lab 1 - MS Teams beyond Chat and Meetings

Goals for this lab

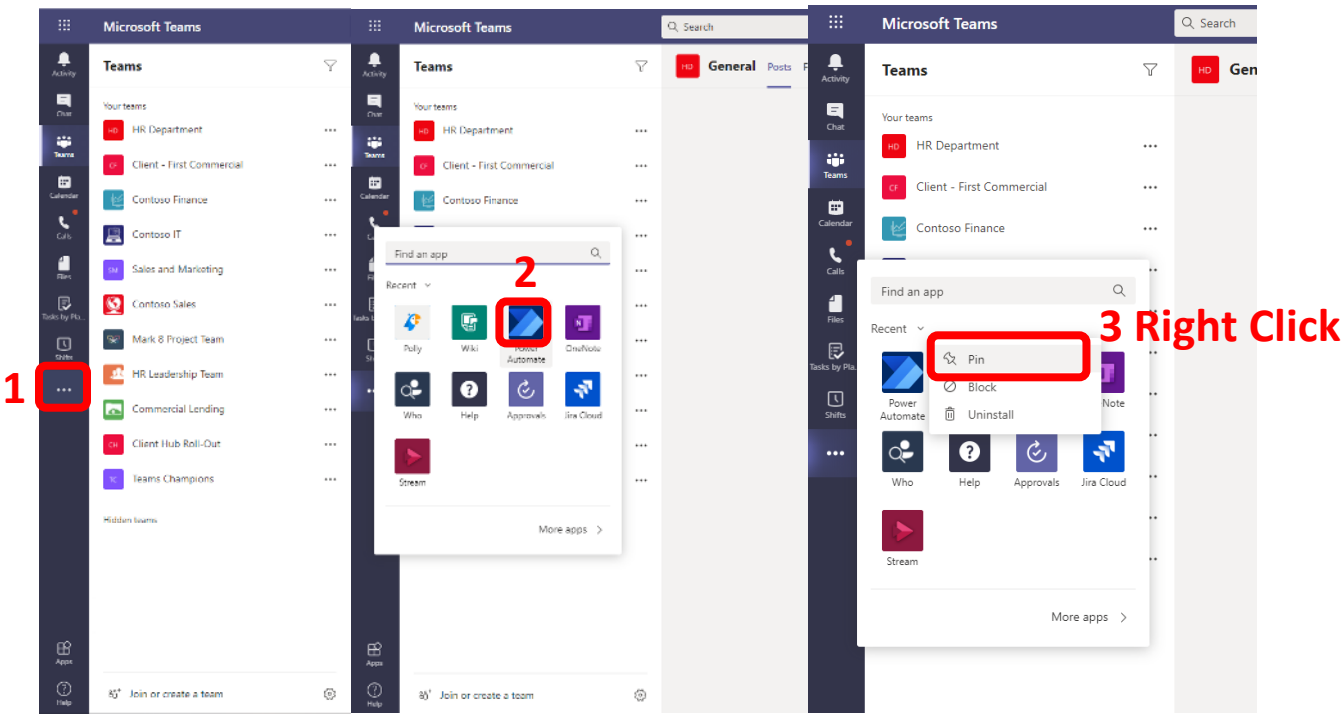
	Explore simple ways to create reminders and notifications in your day-to-day life at work without leaving the MS Teams App Learning: • Add Power Automate app to Teams • Build workflows • Flows & Notifications with adaptive cards

Task 1: Create a reminder to follow up on a message in MS Teams.

The purpose of this reminder is to send you a subtle nudge to reply to a message from a Chat or a Teams Post. We are all busy working on many projects, initiatives and having multiple conversations.

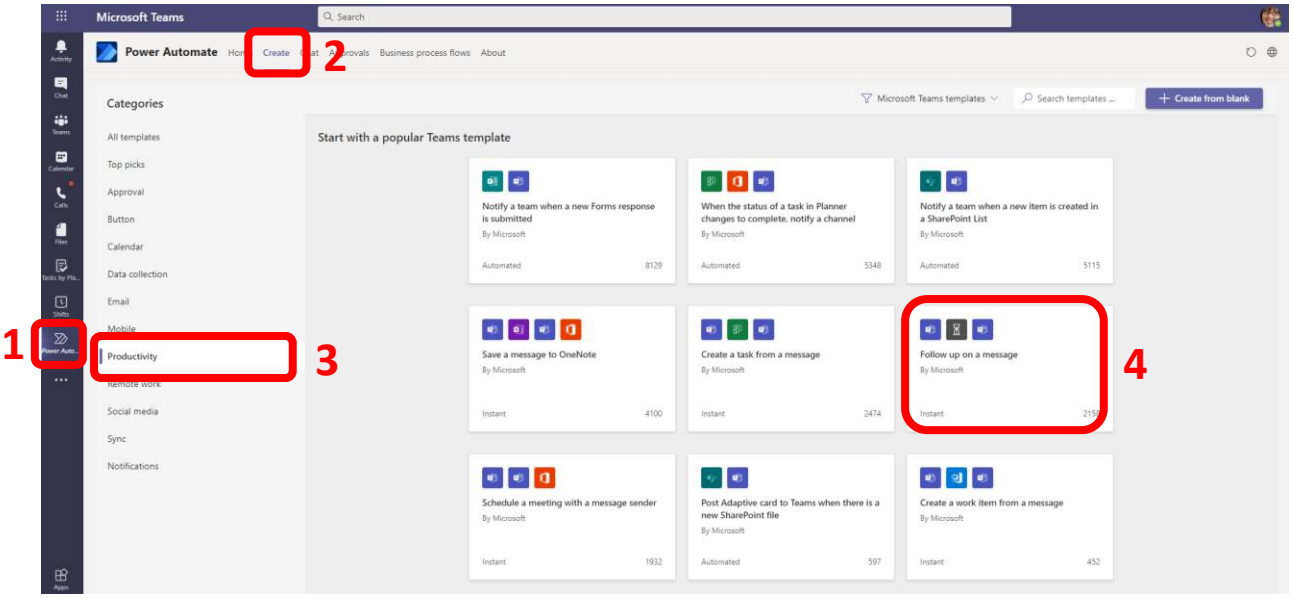
Try the following steps to see how you can create simple reminders for yourself, so you don't let things slip into an abyss.

Step 1: Add and Pin the Power Automate app to your App bar.



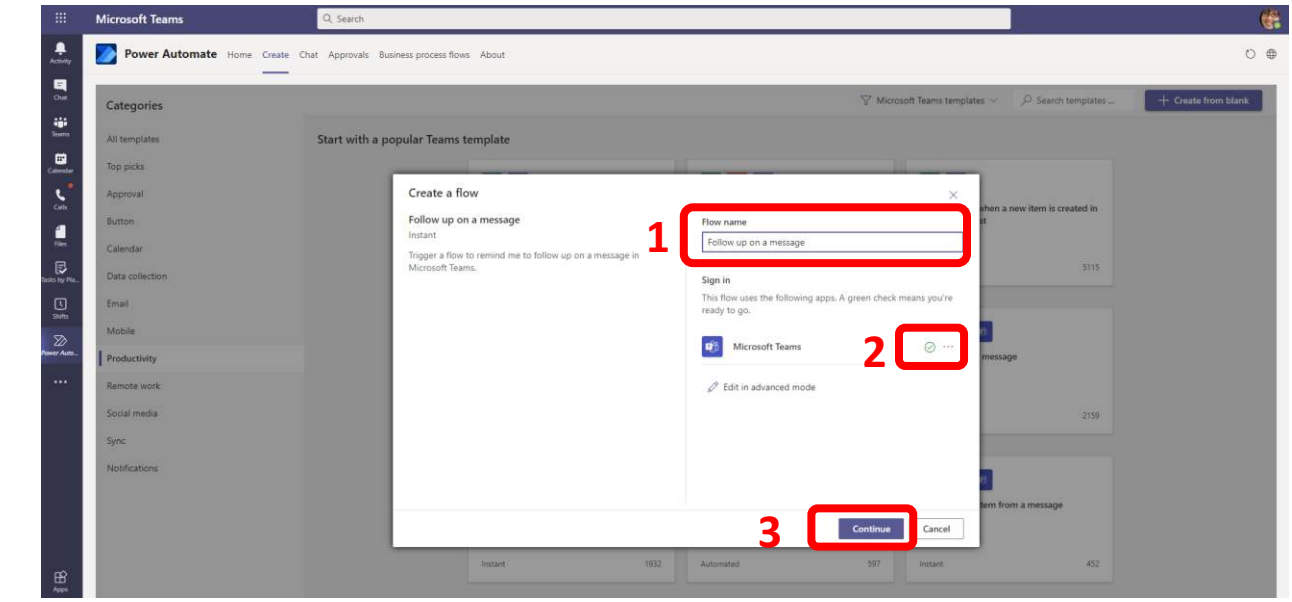
Step 2: Find and select the templated reminder flow.

1. Navigate to the Power Automate app
2. Select "**Create**" in the tab – located at the top of your screen
3. Select "**Productivity**" from the list of Categories displayed
4. Select the template "**Follow up on a message**"



Step 3: Create and connect the flow

1. Name your flow as you would like it to appear (e.g. Follow up on a message)
2. Wait for the green check mark to appear
3. Click **Continue**
4. You will receive a pop up confirming your flow has been created – Select **Done**

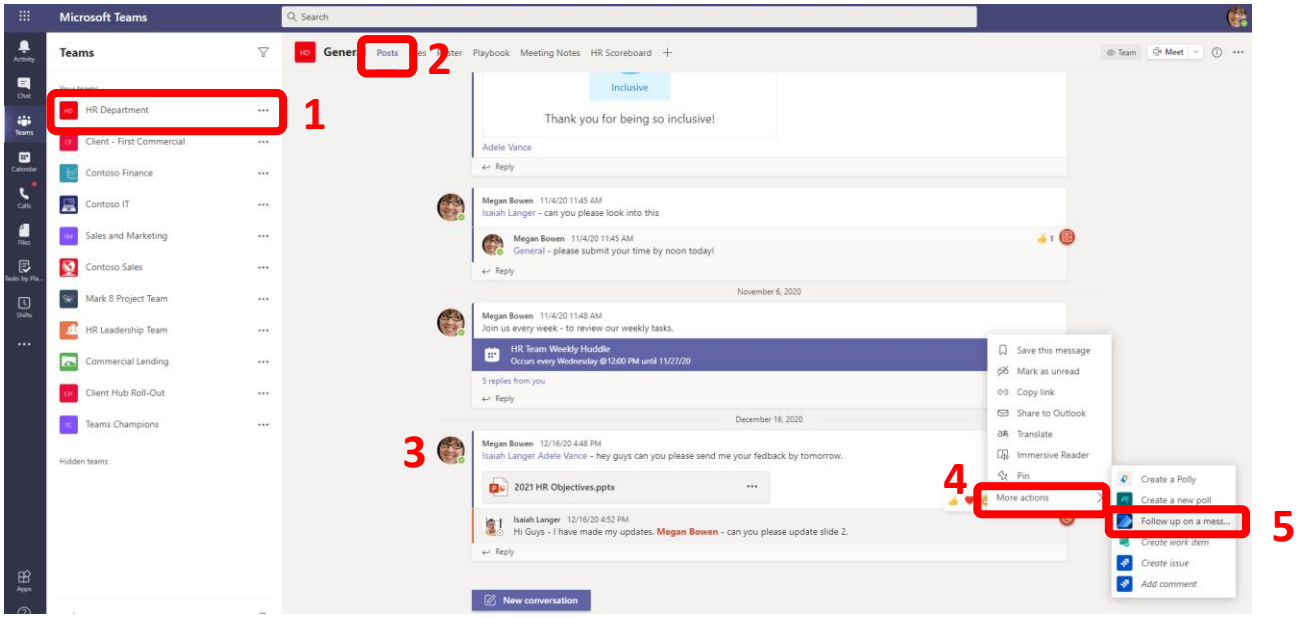


Congratulations – you have created your first flow! Now let's test it.

Step 4: Create a reminder

1. Navigate to a Team you have access to – click on the **General channel**

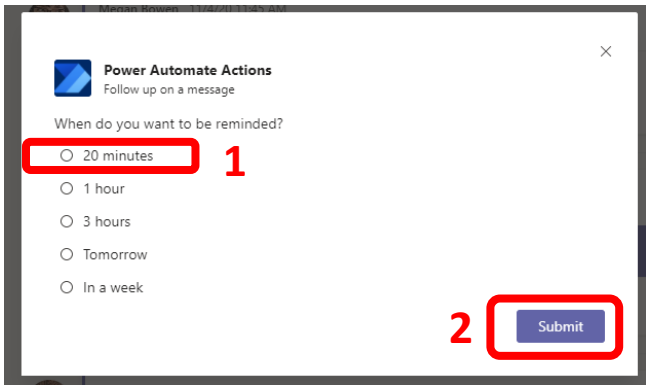
2. Click on the **Posts** tab in the team
3. Scroll to a conversation
4. Hover over a message to the right - Click "**…**" + Select "**More Actions**"
5. Find your flow according to the name you gave it in Step 3.1



Step 5: Decide when you want to be reminded?

The action card is pre-populated with specific reminder intervals out of the box. Should you wish to edit these, this can be found in the advanced settings of your flow.

1. Select your **time interval** – try 20 minutes for this lab
2. **Submit** your action
3. Wait 20 minutes!



Task 2: Schedule a meeting instantly

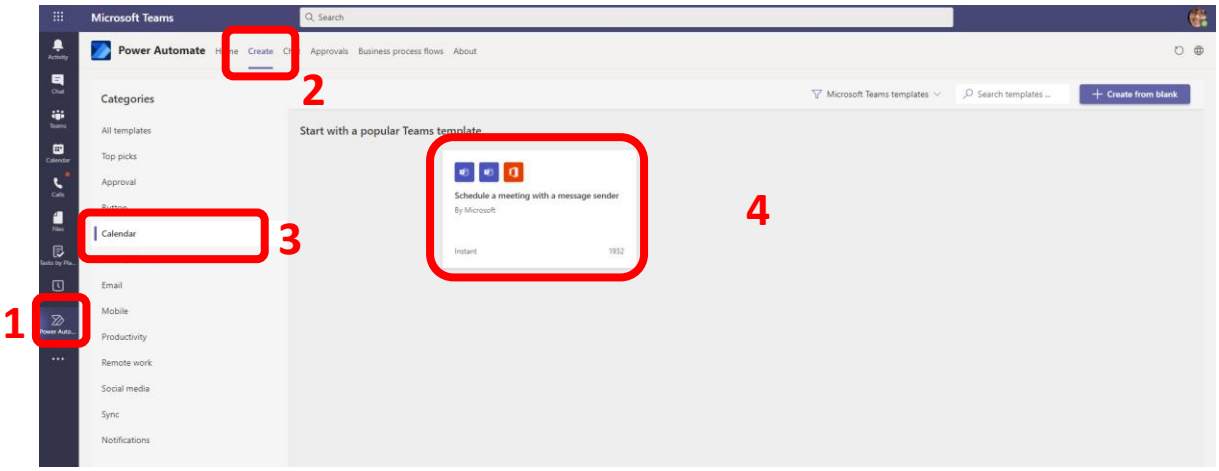
Very often we find ourselves in the middle of conversations with our colleagues. At times, we would like to continue the conversation at a later time with some time booked off in calendars.

Scheduling meetings is a simple task, however, may result in having you to navigate away from your work to your Outlook Calendar and/or your Teams Calendar (essentially the same thing).

Implementing the following flow will eliminate the step of having to navigate away from your work, saving you just a little bit more time in your day!

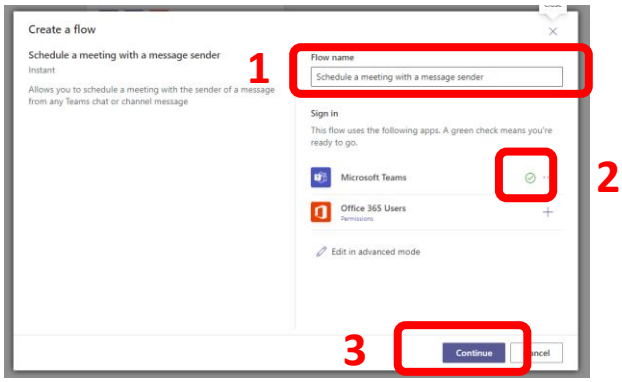
Step 1: Find and select the templated flow

1. Navigate to your pinned Power Automate app
2. Select Create
3. Navigate to the "**Calendar**" category
4. Select the template called "**Schedule a meeting with a message sender**"



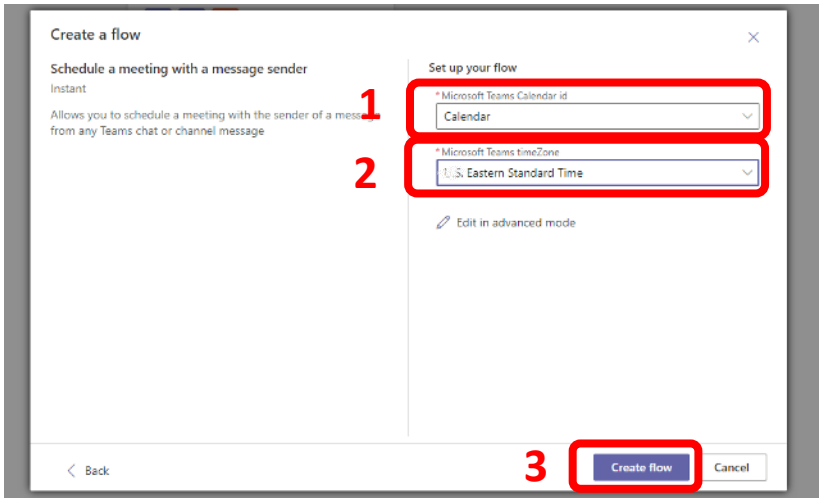
Step 2: Create and connect the flow

1. Enter a **name** for your flow (e.g. Schedule a meeting)
2. Ensure the connection is successful with a green check mark – click continue



Step 3: Setup your flow

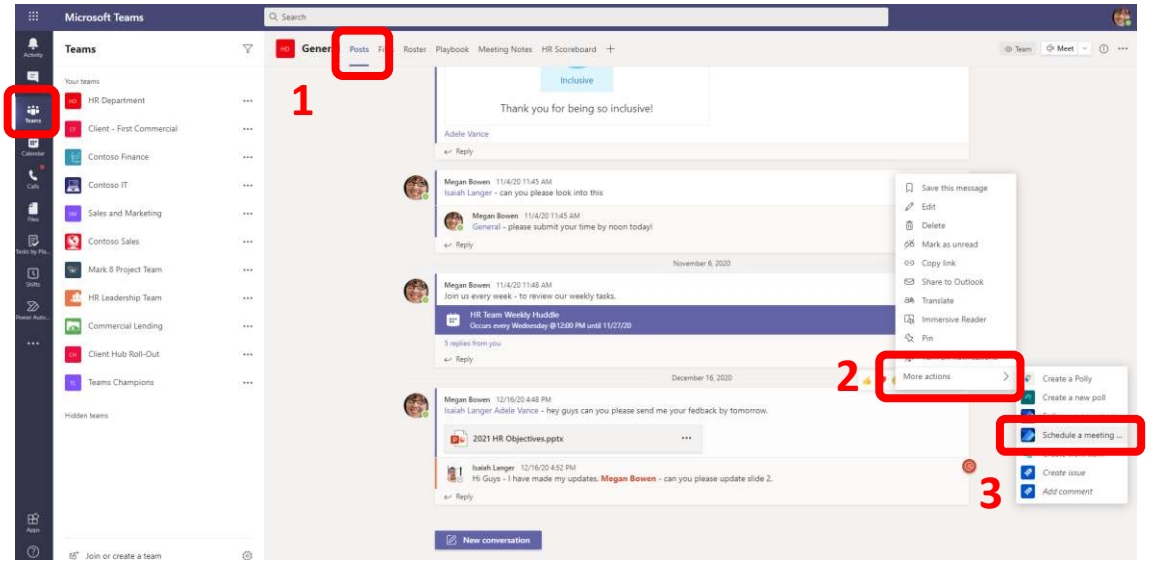
1. Select the Calendar you would like to connect to – "**Calendar**" is normally your default exchange calendar
2. Select the timezone – "**Eastern Standard Time"**
3. Click "**Create flow**"



Congratulations – you have created your second flow! Now let's test it.

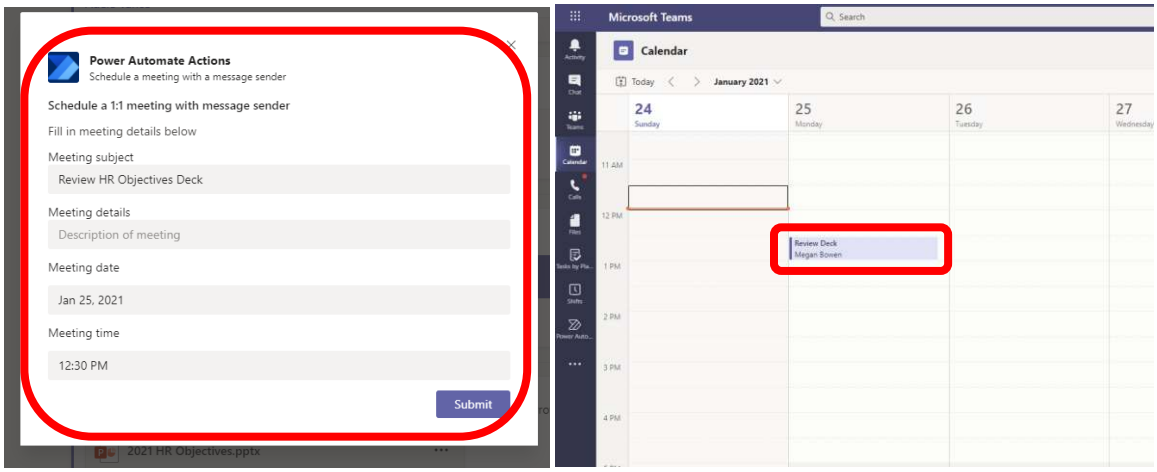
Step 4: Schedule a meeting with a colleague

1. Navigate to a Team **conversation** or Chat conversation
2. Select a conversation and "**…More Actions**"
3. Select the flow you created (the name you selected will appear) "**Schedule a meeting**"



Step 5: Submit meeting details

1. An action card will pop-up for you to **fill in the meeting details**
2. Ensure to enter a date/time in the future 😊
3. Click **Submit** – this will trigger the flow to start and generate a meeting invitation in your calendar with your colleague as an attendee



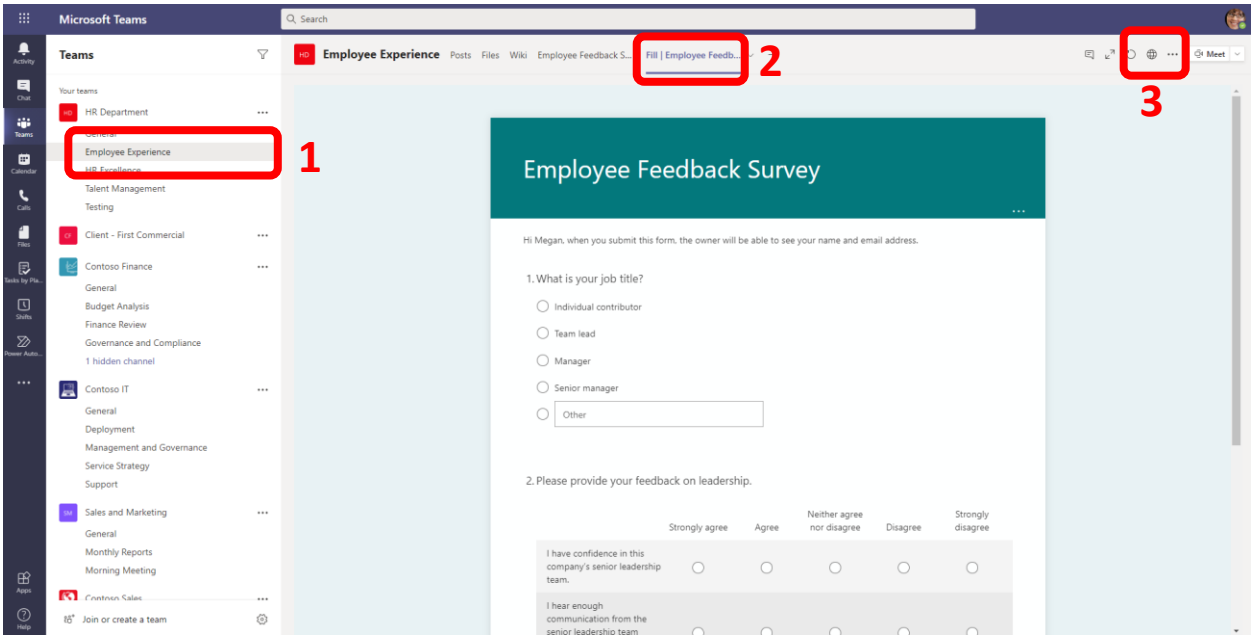
Task 3: Get a notification when a response has been submitted to an Employee Survey generated with a MS Form.

The purpose of this flow is to post a message in a Teams channel when a response has been submitted to a Microsoft Form. This can be especially useful when a MS Form has been circulated for responses, with a team responsible for addressing responses within a specific timeframe with the ability to have conversations and collaboration.

Step 1: Obtain your MS Form ID

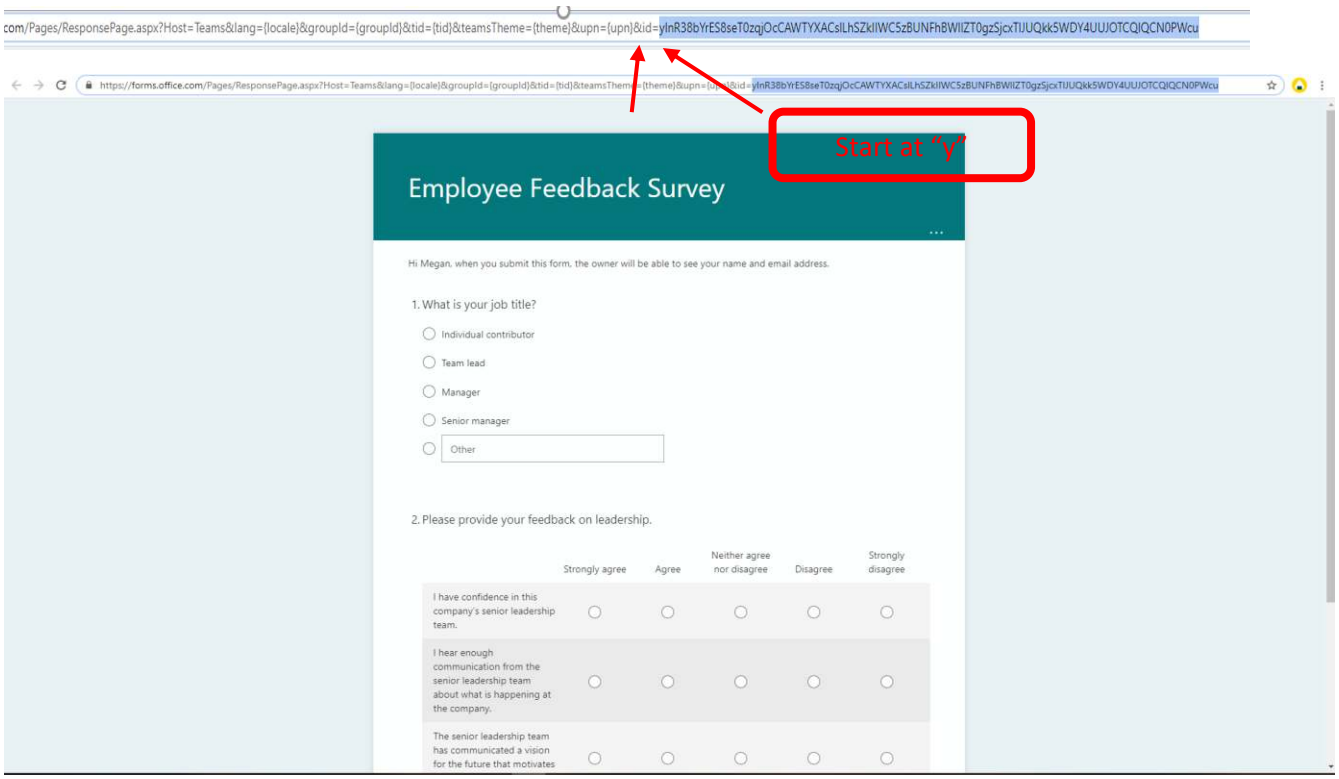
This step may or may not be required, however, I would recommend it is best to copy the Form ID, if possible, in case Power Automate is unable to automatically retrieve the Form ID for you.

1. Navigate to the **HR Department Team** – **Employee Experience Channel**
2. Select the **Employee Feedback Survey Tab**
3. Open in browser



Step 2: Copy the Form ID to your clipboard

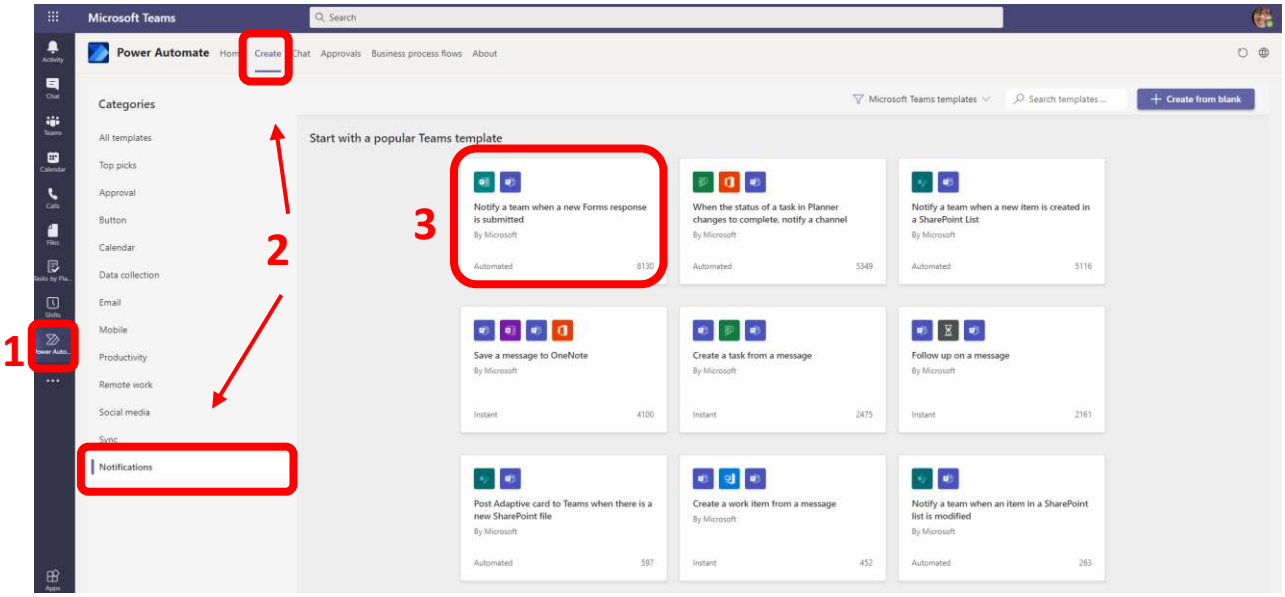
1. Open the browser window with the MS Form open
2. Highlight and **copy** the portion of the URL after "**&id=**", starting with a letter. The Form ID will look like a string of random numbers and letters.



Great! Now you have the Form ID copied to your clipboard.

Step 3: Create and Connect the flow

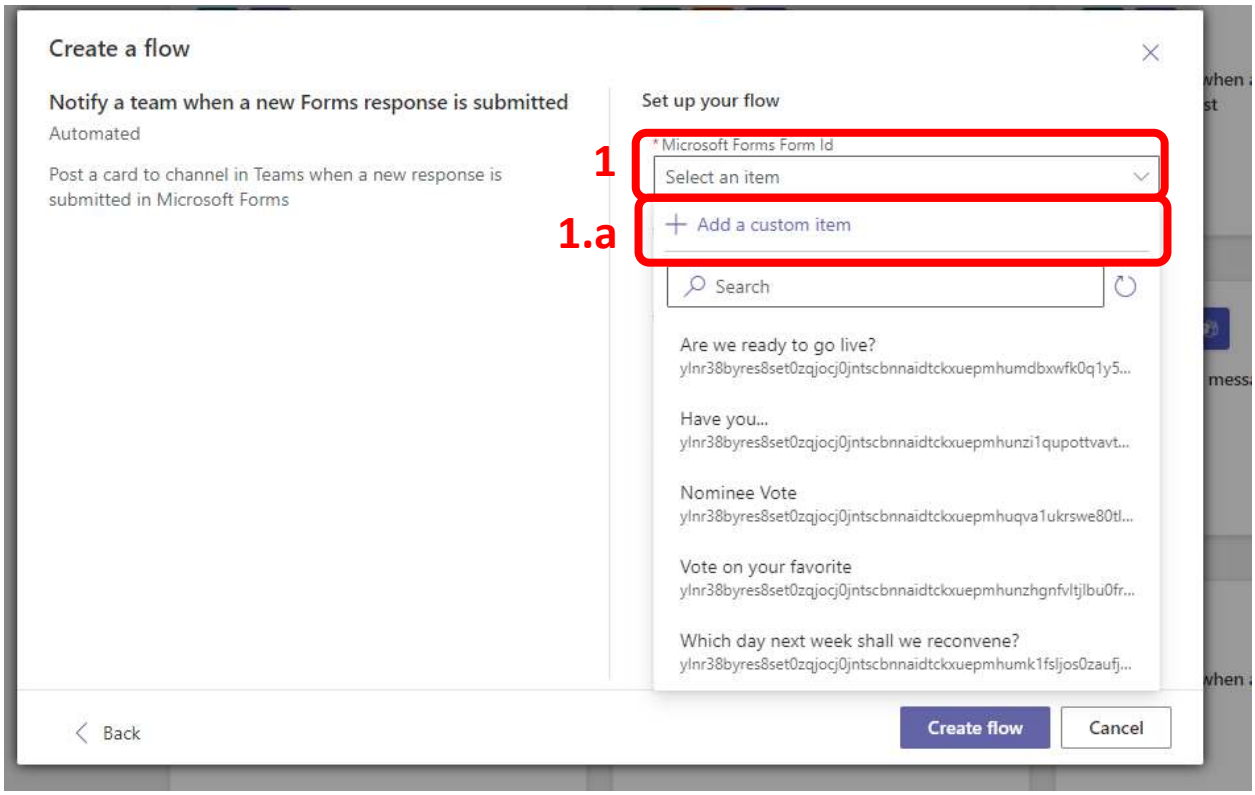
1. Navigate to your Power Automate app
2. Select **Create** and then **Notifications** under Categories
3. Select the template "Notify a team when a Forms response is submitted"

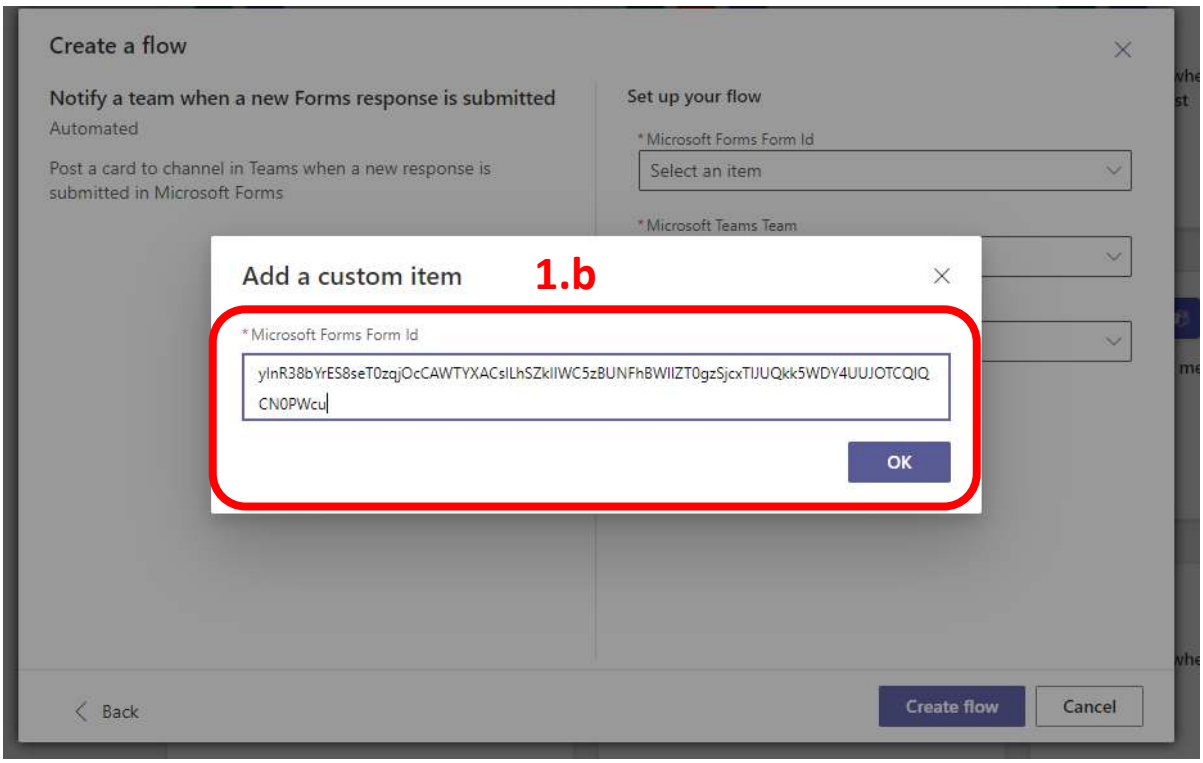


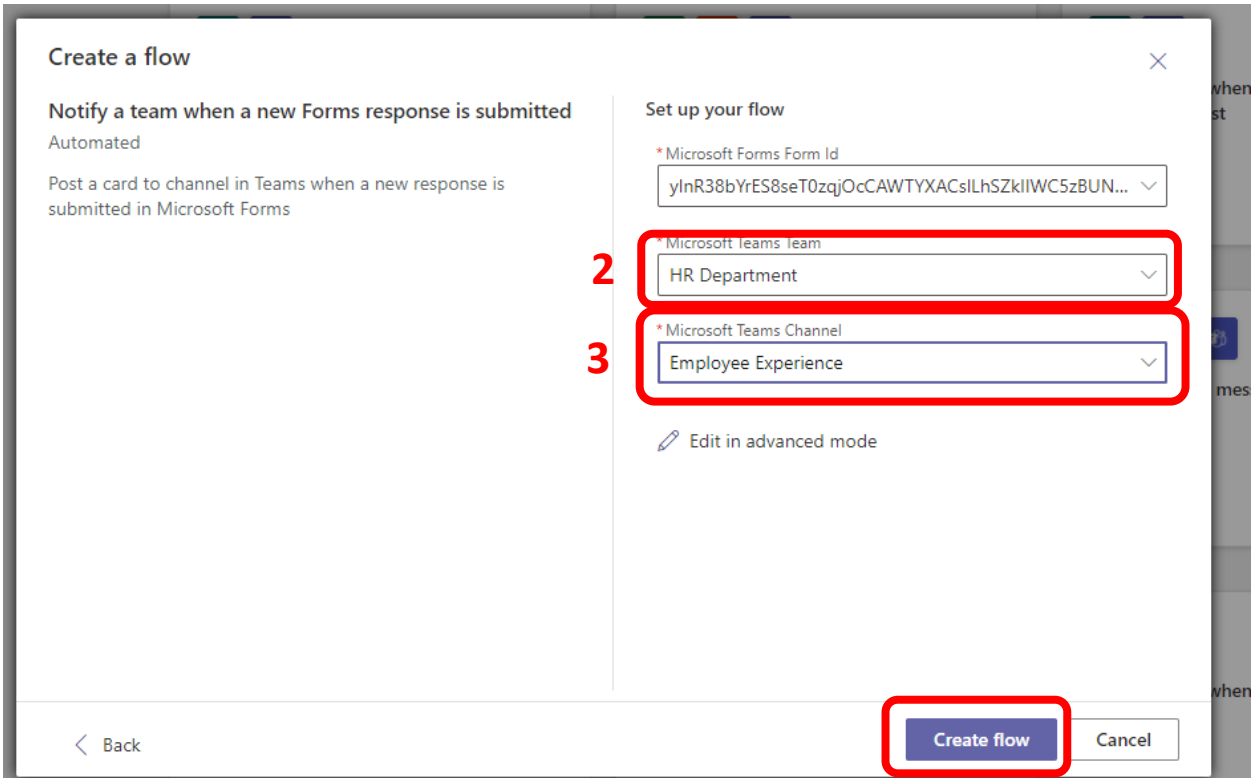
4. Name your flow as you please – “Notify a team when a Forms response is submitted”
5. Confirm the connection is successful and click Continue

Step 4: Connect your flow to a MS Form and a MS Team Channel

1. Select the field “Microsoft Forms Form ID” – this field will generate recommended Forms – not always the form you are wishing to connect.
    a. If the form you are connecting does NOT appear in the drop down, select **“+Add a custom item**”
    b. **Paste the Forms ID** you copied to clipboard in the dialogue box – Click Ok
2. Select the Microsoft Team to connect to – in this case it will be HR Department
3. Select the Microsoft Teams Channel to post notifications to – select a channel you prefer


Create a flow
Notify a team when a new Forms response is submitted
Automated
Post a card to channel in Teams when a new response is submitted in Microsoft Forms
Set up your flow
1
* Microsoft Forms Form Id
Select an item
1.a
Add a custom item
Search
Are we ready to go live?
ylnr38byres8set0zqjocj0jntscbnnaidtckxuepmhumdbxwfk0q1y5...
Have you...
ylnr38byres8set0zqjocj0jntscbnnaidtckxuepmhunzi1qupottvavt...
Nominee Vote
ylnr38byres8set0zqjocj0jntscbnnaidtckxuepmhuqva1ukrswe80tl...
Vote on your favorite
ylnr38byres8set0zqjocj0jntscbnnaidtckxuepmhunzhgnfvltjlbu0fr...
Which day next week shall we reconvene?
ylnr38byres8set0zqjocj0jntscbnnaidtckxuepmhumk1fsljos0zaufj...
Back
Create flow
Cancel


Create a flow
Notify a team when a new Forms response is submitted
Automated
Post a card to channel in Teams when a new response is submitted in Microsoft Forms
Set up your flow
* Microsoft Forms Form Id
Select an item
* Microsoft Teams Team
Add a custom item
1.b
* Microsoft Forms Form Id
ylnR38bYrES8seT0zqjOcCAWTYXACsILhSZkIIWC5zBUNFhBWIIZT0gzSjcxTIJUQkk5WDY4UUJOTCQIQ
CN0PWcu
OK
Back
Create flow
Cancel



Congratulations! You have now created your third and last flow for this lab. If you have made it this far, consider yourself a superstar. 😊

Now let's go and test this flow!

1. Navigate to the HR Department Team – Employee Experience Channel
2. Select the Employee Feedback Form
3. Fill in the form with your responses
4. Confirm your response has been submitted
5. Navigate to the Teams Channel you connected your flow to for notifications
6. Select the Posts tab in that channel
7. You will see an adaptive card posted such as:

Lab 2 - Putting the rails on and Managing the Microsoft Teams Super Highway

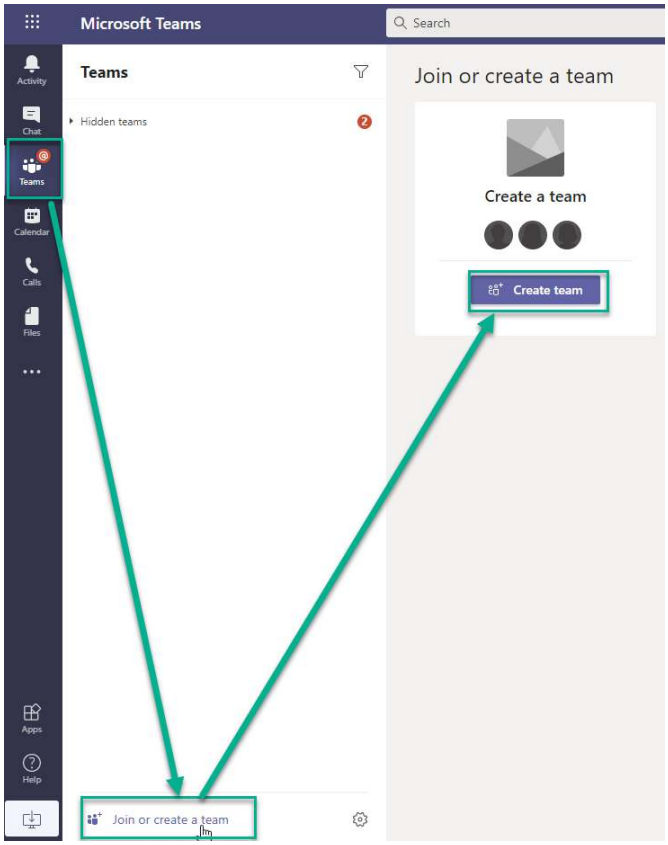
Goals for this lab

	In this lab, we will be covering how to: • Create a Team from a Template • Modify Team and channel settings • Create a private channel • Restrict the use of the General files tab.

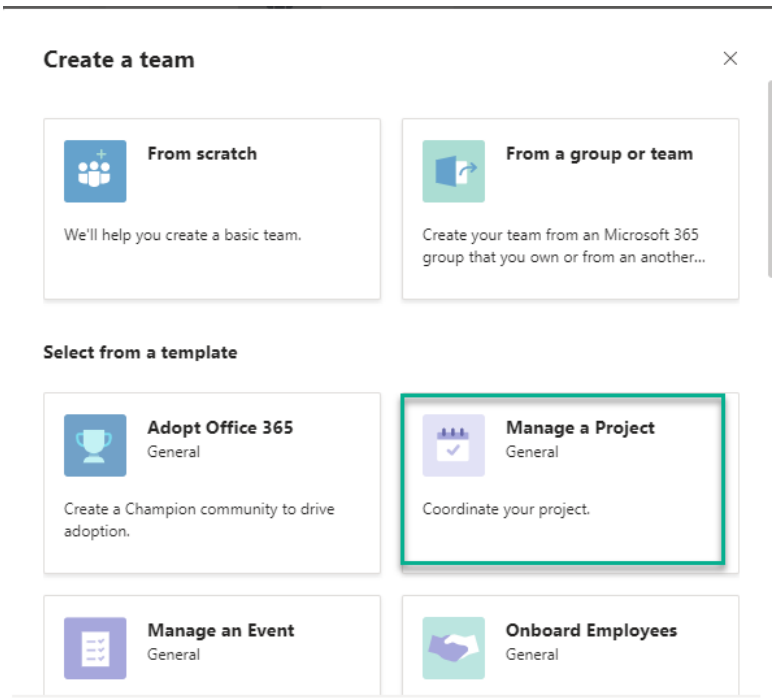
Task 1: Create a new team from a Template

We will be creating a new Team using a Microsoft Teams template that you created or an existing one.

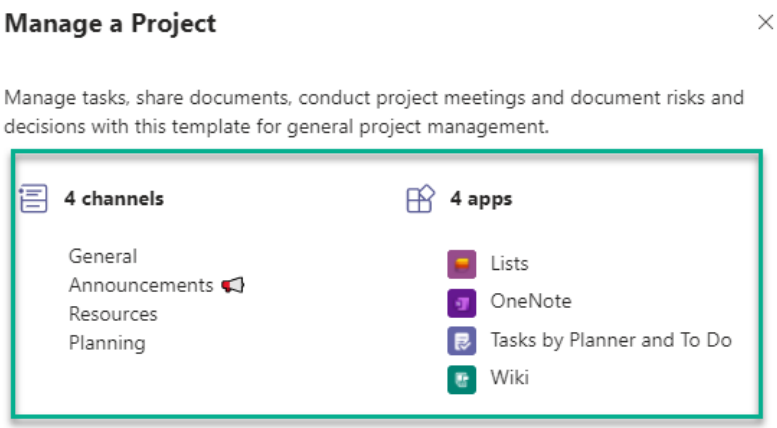
1. Browse to https://teams.microsoft.com
2. From the left-hand menu select > Teams
3. In the bottom left-hand corner select > Join or create a team
4. In the middle right select > Create a Team



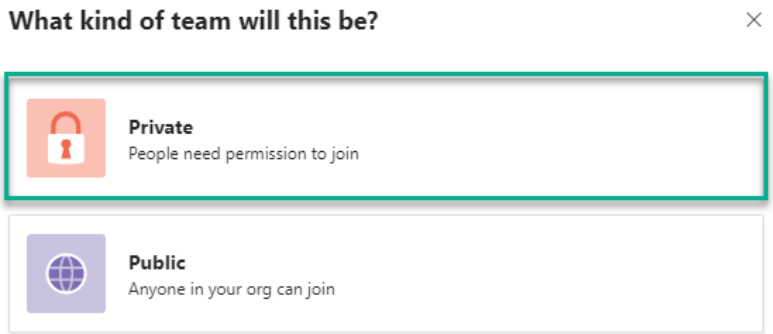
5. Select from a template > Select one of the existing templates in the list, here is the **Manage a Project** template that was selected.



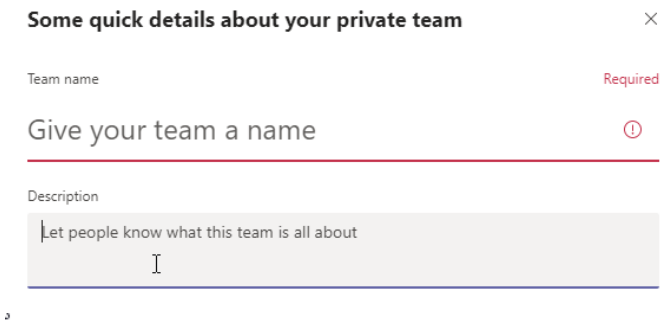
6. The next screen explains what is contained in in the template > Click Start

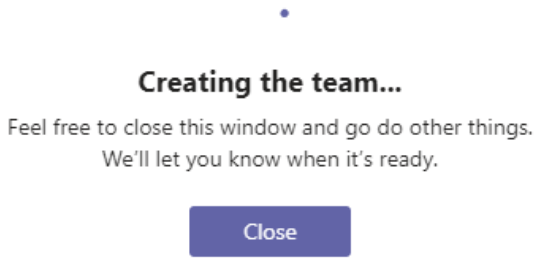


7. Select if you want your team to be Public or Private > Select **Private**

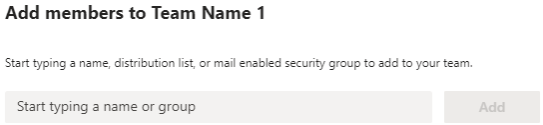


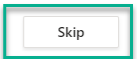
8. Enter a Team name and description -> Click **Create**





9. The team is now being provisioned.
    a. PRO TIP: This process takes may take a few minutes to complete
10. Add member to Teams > Click **Skip**



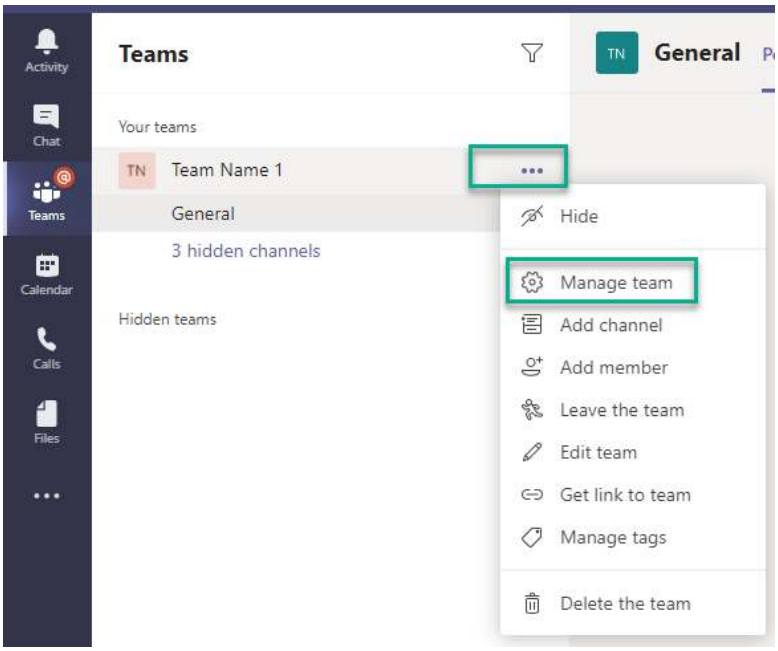


Task 2: Modify Team permissions and settings

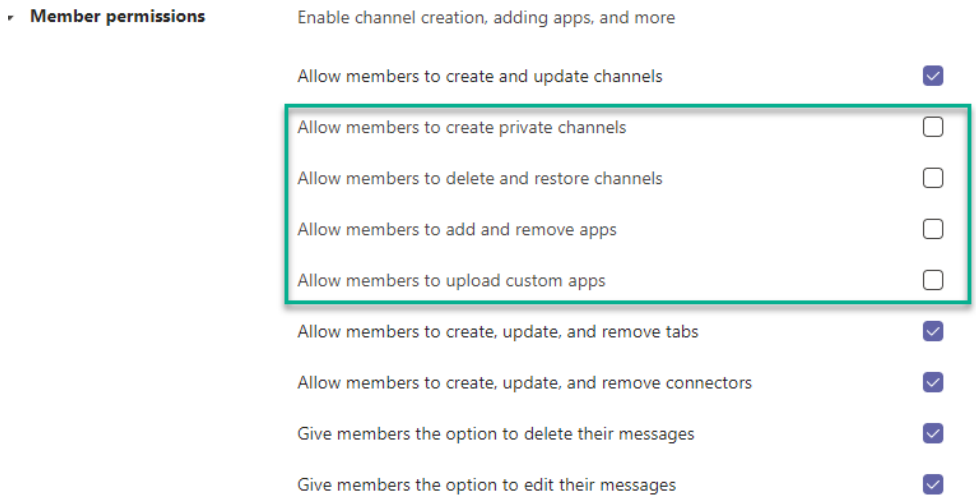
So, we've just created our new Team and we want to apply some governance, most configurations are done from in the Microsoft Admin Centers. However, your IT Department may have left it open for you to decide how to manage your team.

Let's get started.

1. Click on the newly created team name -> Click the ellipsis > Manage team



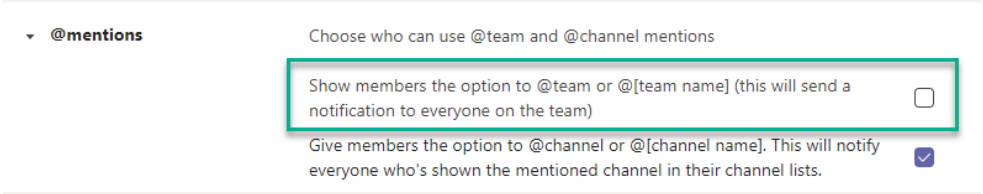
2. Click Settings – We will be modifying the Member permissions, @Mentions, Fun stuff, Tags
3. Click Member permissions
   We want to restrict members of the team to not be able to create private channels, add or delete channels and the ability from adding published or custom apps.



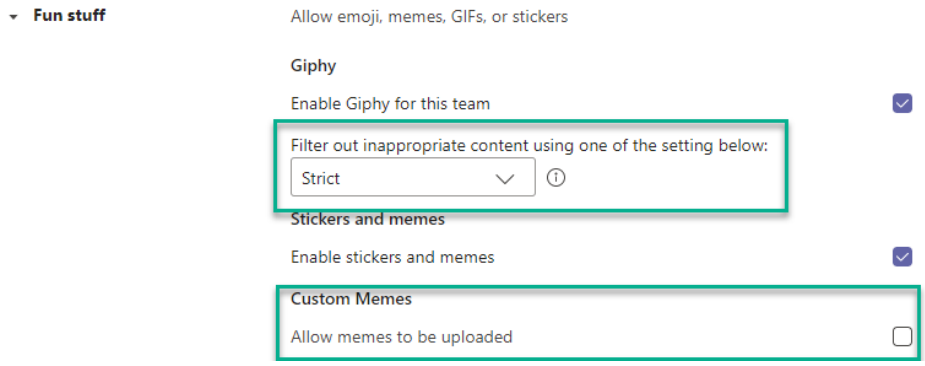
   a. Uncheck Allow members to create private channels
   b. Uncheck Allow members to delete and restore channels
   c. Uncheck Allow members to add and remove apps
   d. Uncheck Allow members to upload custom apps
4. Click @mentions

We want to restrict @mentions to only the channels.

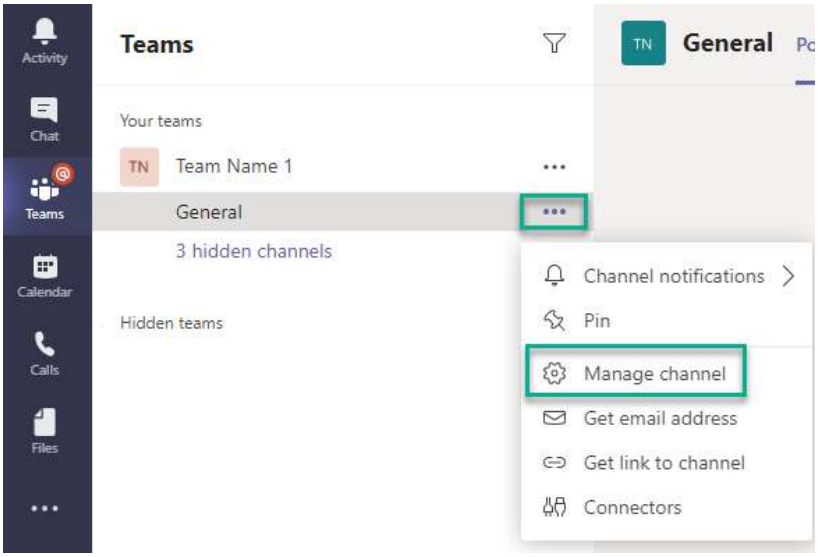
a. Uncheck Show members the option to @team or @[team name] (this will send a notification to everyone on the team) Show members the option to @team or @[team name] (this will send a notification to everyone on the team) 1



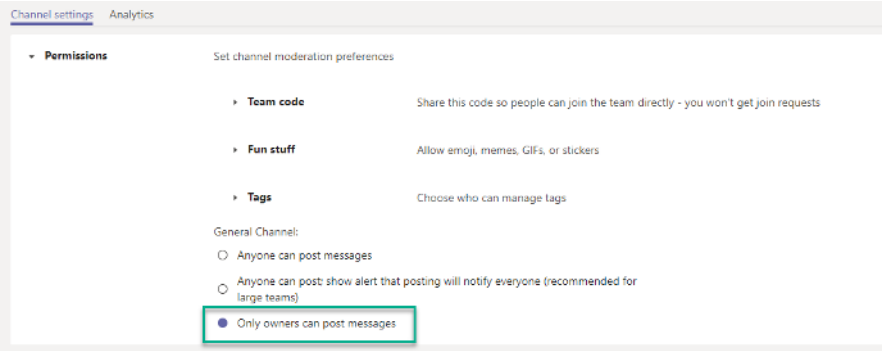
5. Click Fun stuff
   We want to restrict the Giphy rating and the ability to upload custom memes



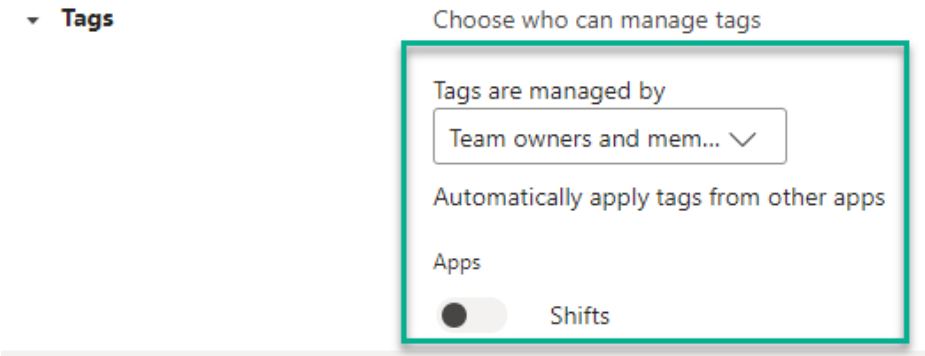
   a. In the Giphy menu > from the drop list select Strict
   b. In the Custom Memes menu > Uncheck Allow memes to be uploaded
6. Next, we don't want our users to be able to post in the General channel, we want to restrict the it to only allow posts from Team owners
7. Click the General channel > Click the ellipsis > Manage channel



8. In the Permissions menu > Select only owners can post messages



9. Click the Tags menu

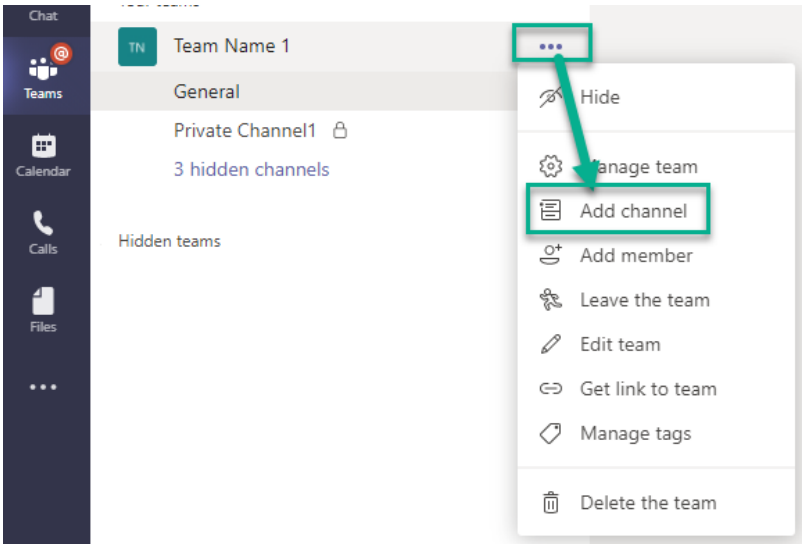


   a. From the drop down list select Team oweners and members
   b. Turn off Apps -> Shifts

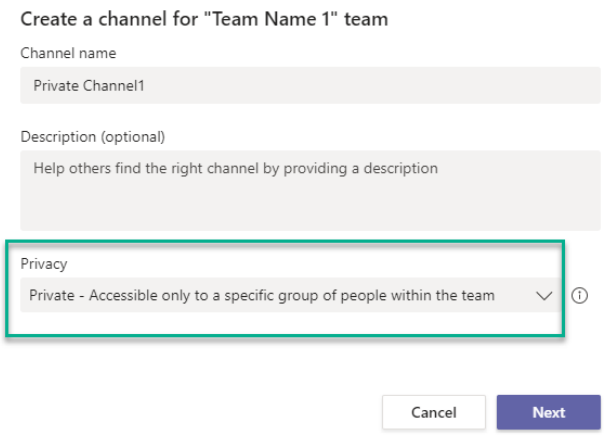
Task 3: Create a Private Channel

We now want to create a private channel private channel for a subset of users to be contained in, and modify the settings.

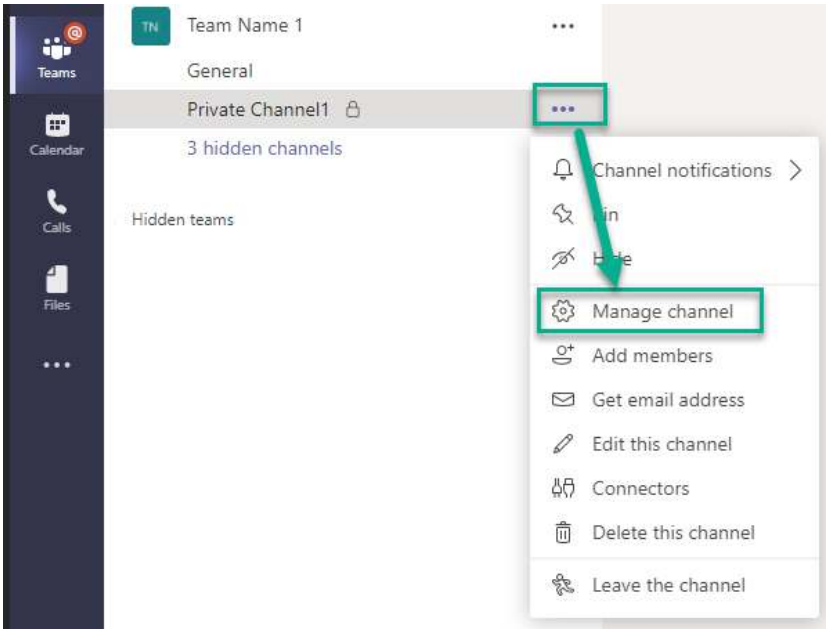
1. Click on the ellipsis beside your Team name > Click add channel



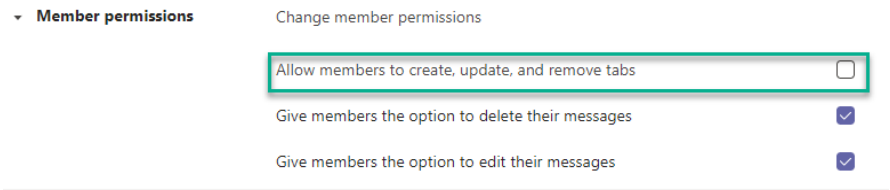
2. Provide a name and description of the channel > Select **Private**, under the **Privacy** drop down list > Click **Next**



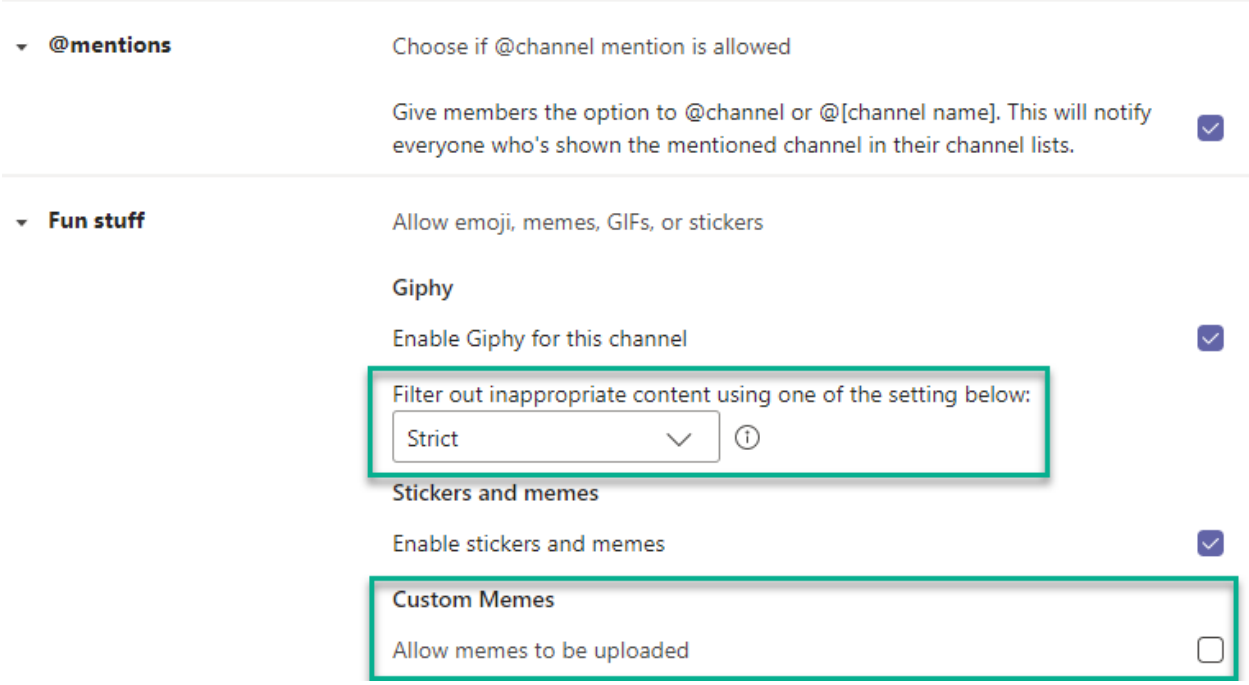
3. Now that your private channel is created, we're going to modify the settings. Click on the ellipsis beside the channel name > Click **Manage channel**



4. We want to restrict this channel from members making any changes
5. Click Settings > In the Member permissions menu
    a. Uncheck Allow members to create, update, and remove tabs



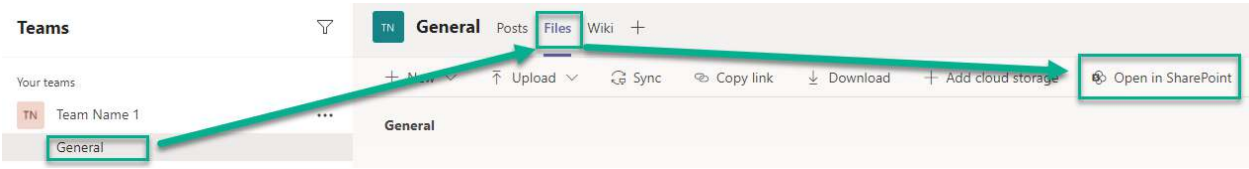
6. NOTE: From Section 2 the settings are inherited from the Teams settings level for Giphy and Customs memes. But can be changed on the private channel.



Task 4: Disable members from uploading files to General channel.

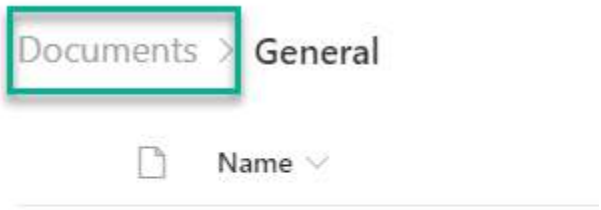
There are instances as a team owner where you would only like the general channel to be used for Informational purposes only. We have previously restricted members from posting within the channel, now we want to restrict them from uploading files in the files tab. To do so we have to change the permissions in the Teams SharePoint site.

1. Click on the General channel
2. Click the Files tab
3. Click Open in SharePoint



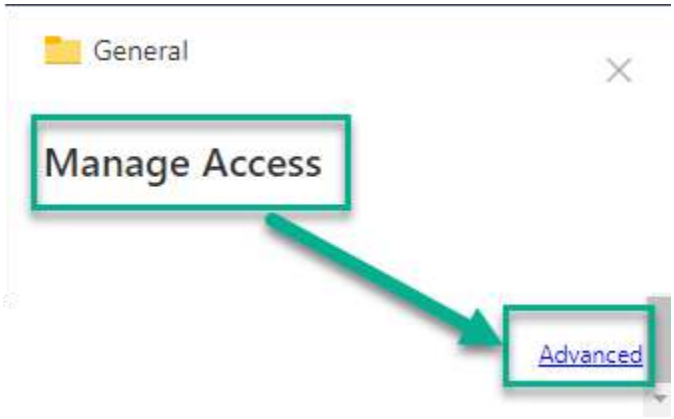
4. As an owner you have full control of your Teams SharePoint site, we will need to modify the permissions of this folder.

5. When the SharePoint site loads click on Documents from the menu

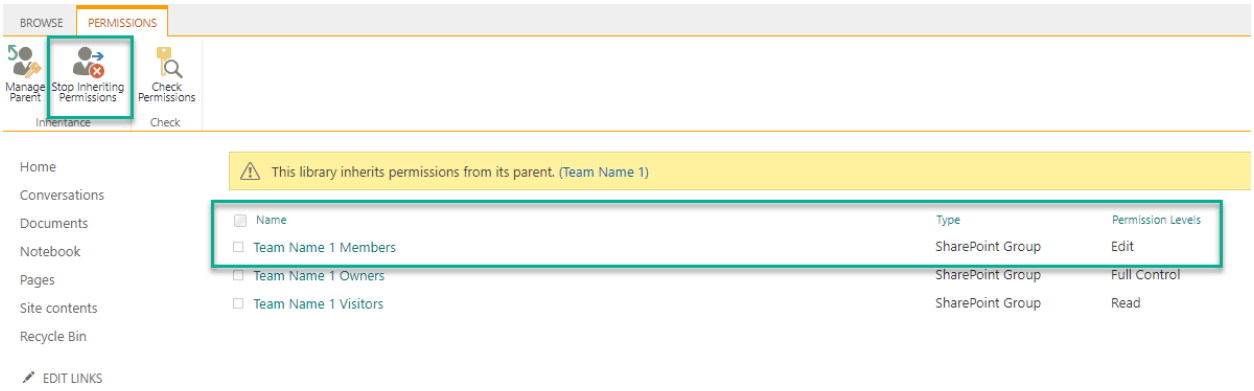


6. Click on the ellipsis next to the General folder (Channel)

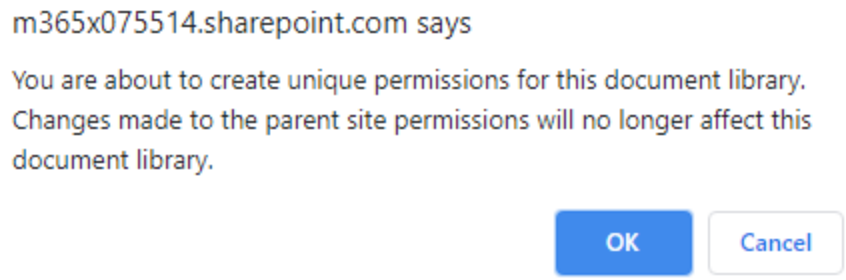
7. Under General > Manage Access > Scroll to the bottom and click Advanced



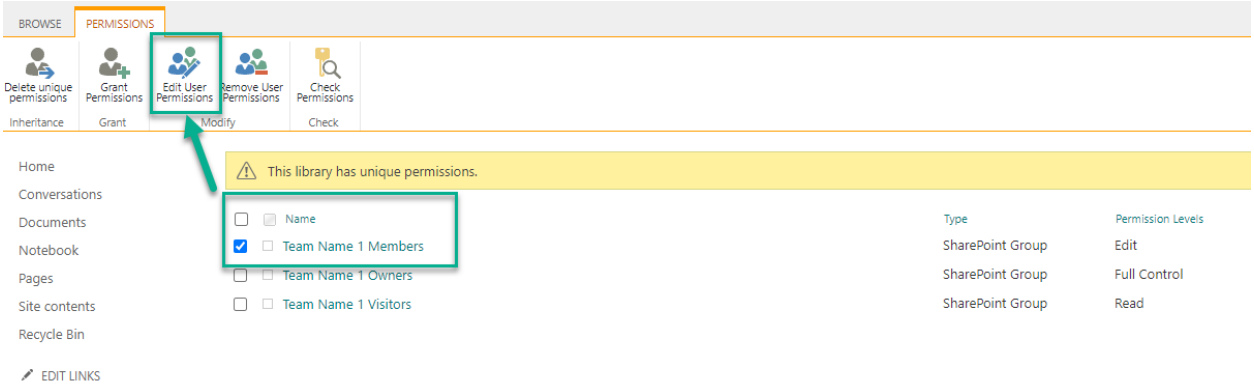
8. We want to change the Members Permissions to read, in order to achieve this we have to stop Inheriting permissions.



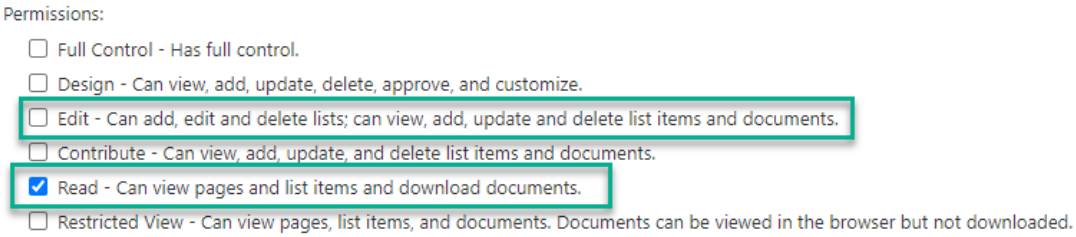
9. When Prompted that you will be stopping inheritance and creating unique permissions for this document library > Click Ok. (note these changes can be reverted at any time we will show that below)



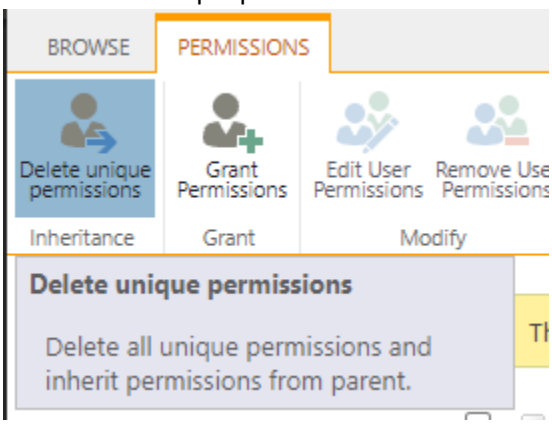
10. Now that the inhertance is stopped > Click Members group > Click Edit User Permissions



11. In the Permissions window
    a. Uncheck Edit - Can add, edit and delete lists; can view, add, update and delete list items and documents.
    b. Check Read - Can view pages and list items and download documents.



    c. Click OK
12. You have now restricted the Files tab in the General channel to read only for all members
13. If you would like to revert these changes in the future follow the steps above to access the permissions menu
14. Click Delete unique permissions > Click Ok and inheritance will be re-applied.



Congratulations on completing the governance hands on lab, for more information on how to apply governance, adoption, roll out of Microsoft teams go to: http://aka.ms/successwithteams

Lab 3 - Building Power Platform Solutions using Microsoft Dataverse for Teams

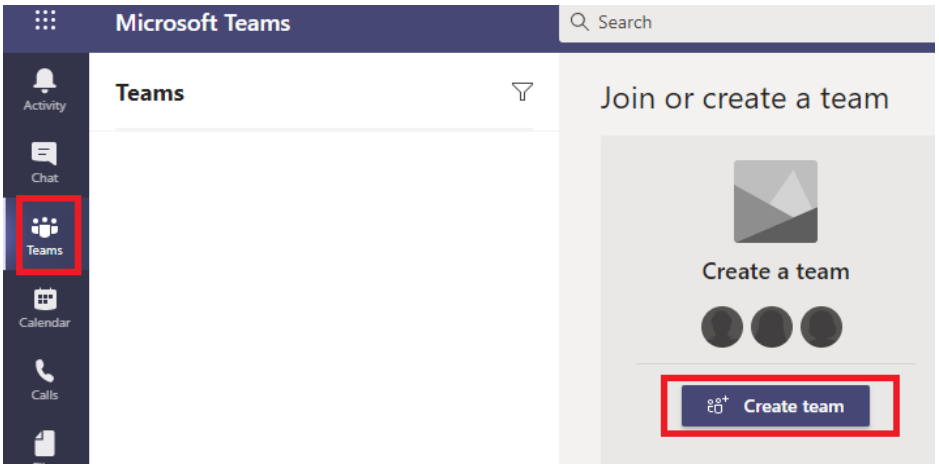
Goals for this lab

	Build a Help Desk Solution so users can create requests (tickets), check ticket status & add an approval process using flow. Learning: • Creating Tables • Build App • Flow to post adaptive cards for ticket approvals in Teams

Task 1: Create Power App with Microsoft Dataverse for Teams

1. Login to https://teams.microsoft.com/ using an account with a valid Office license

2. **Skip steps 2-5 if you want to leverage an existing Team.** Select 'Teams' on left hand navigation and then click on 'Create a team' option.



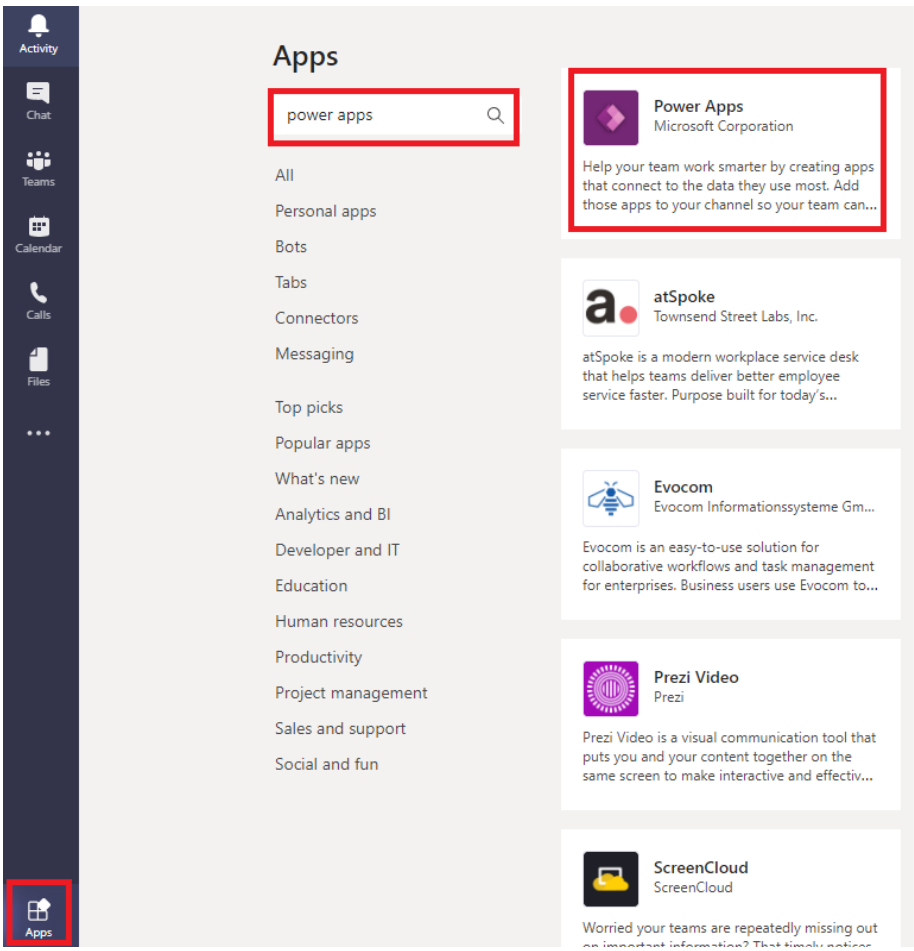
3. Click template as 'From scratch' > 'Private team' and give your Team any name of your choice and click Create

4. You can add any users as members or just skip adding any members.

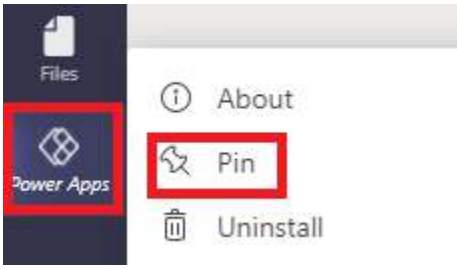
5. You should now have a Team created. We will leverage this Team to create our Dataverse for Teams environment.

Task 2: Create the Help Desk App

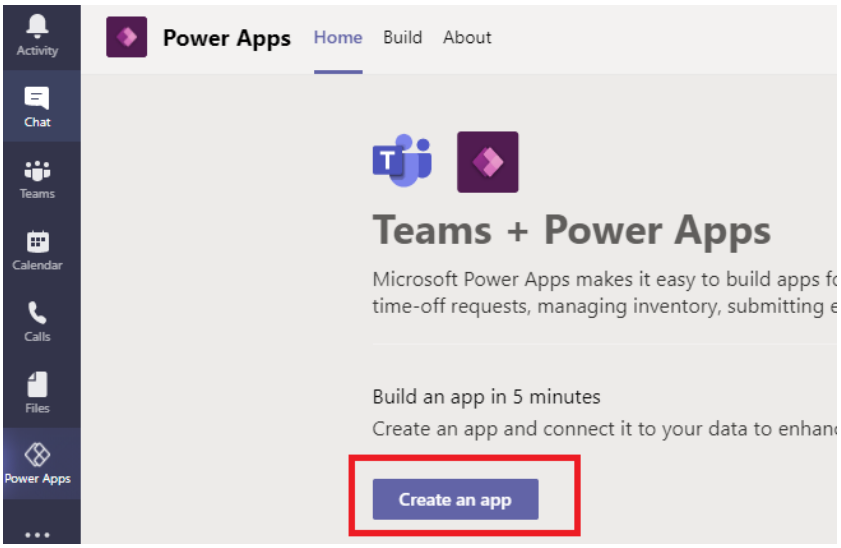
1. In https://teams.microsoft.com/ on the left-hand navigation, select Apps and search for “Power Apps” and select the “Power Apps” App from the App Store and “Add” the App.



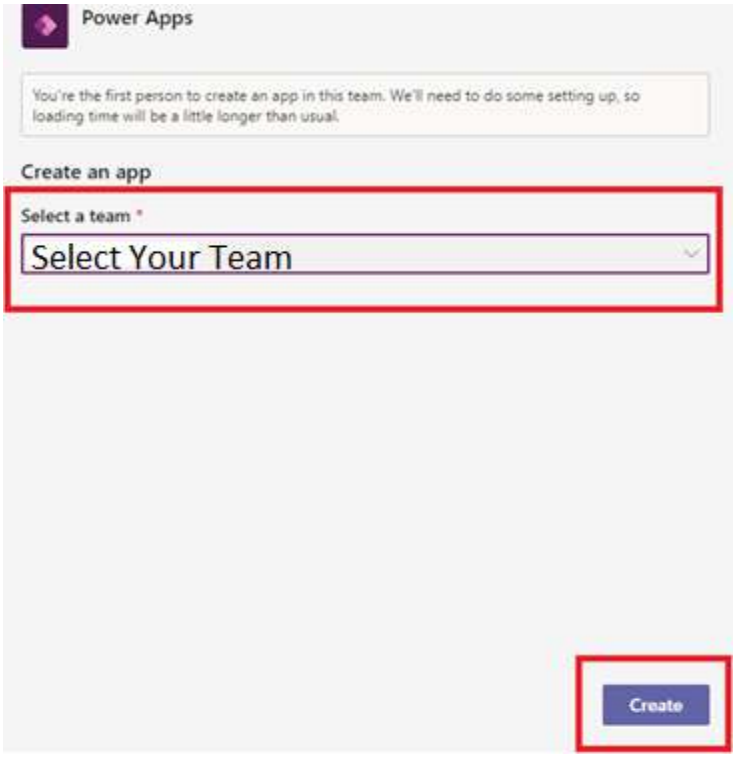
2. Once you add the App, it will show up on the left-hand navigation rail. Right-click on the App icon in the left-hand navigation and Pin the App so that it is Pinned to the navigation.



3. Select the “Power Apps” Teams App and click on “Create an App”



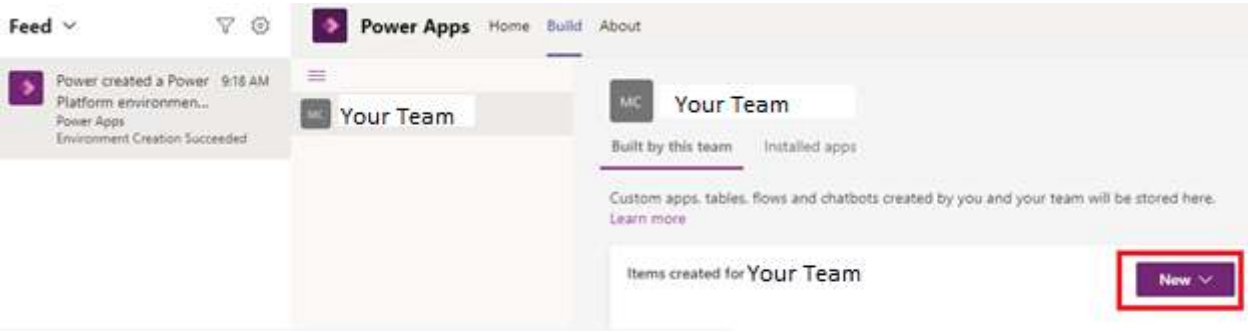
4. Select the Microsoft Team for which you want to build an App and click “Create”



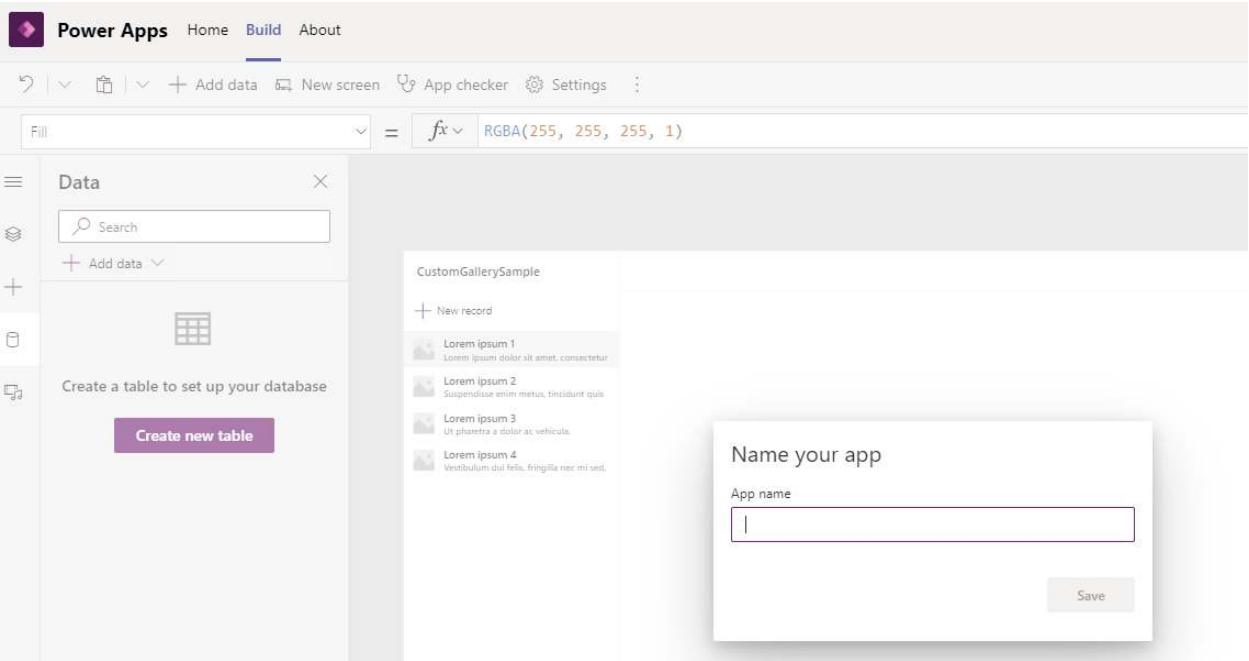
Note:

If you are the first person to create an app in this team then loading time will be a little longer than usual. You will be notified in Teams once the Teams environment is ready for use.

5. If you click on the notification once environment is ready or go the “Build” tab of the Power Apps Teams App, then you can select the “New” button and create new “App”

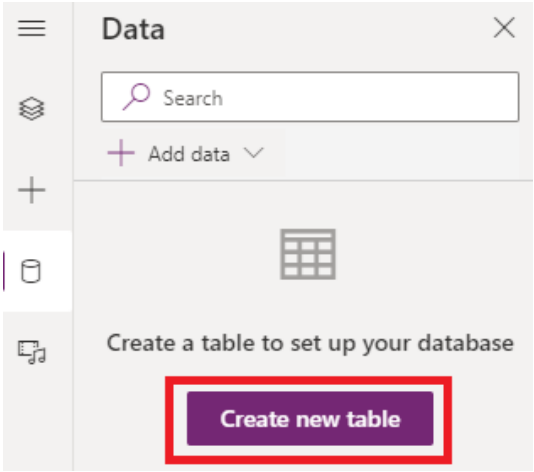


6. Once the “Power App” make experience opens in the Teams context, give your App a name “Help Desk” and click Save.

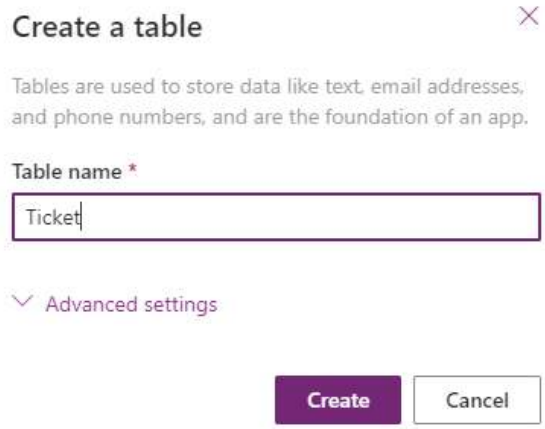


7. Next, we will create Tables to store information for “Tickets” and create a related table to store information of ticket category and approver.

Click on “Create new Table”

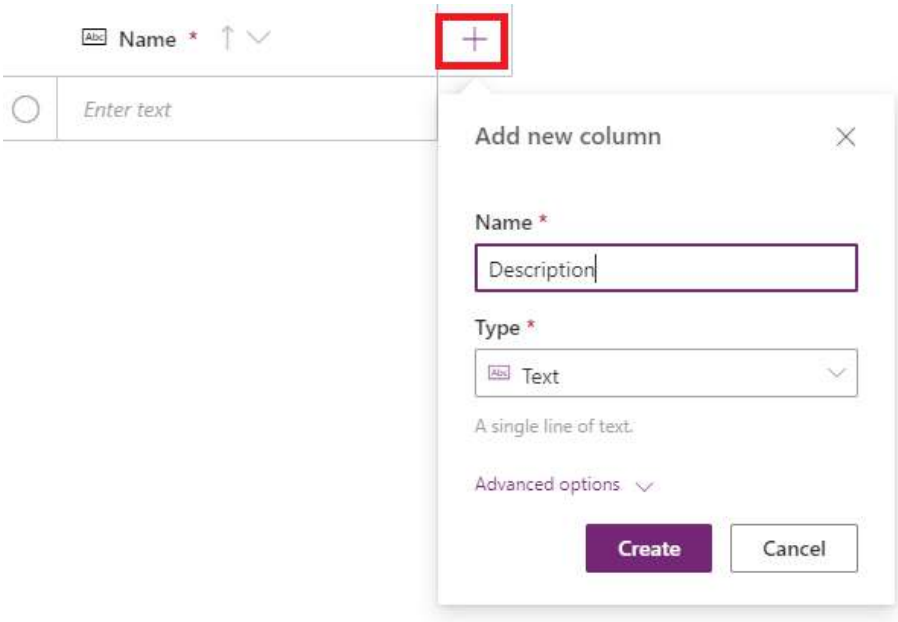


Give Table name as “Ticket” and click Create.

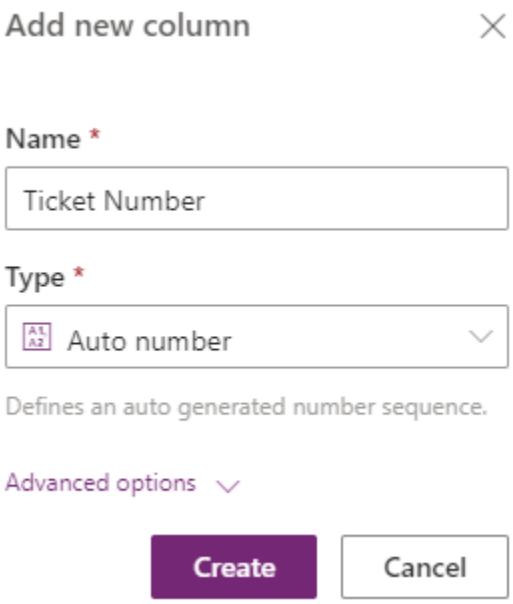


8. This will lead you to the Table creation experience in Quick Edit Mode.

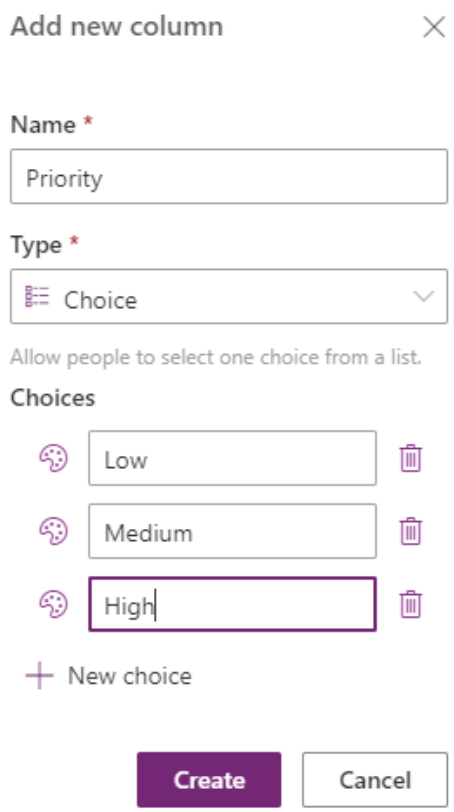
   We will create “Description” column of type “Text” by clicking on the + Icon.



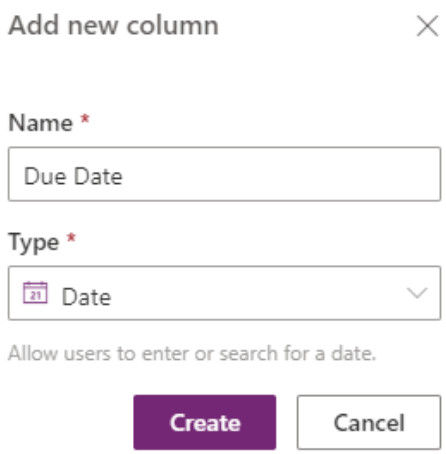
9. Next, create a column named “Ticket Number” of type “Auto number”



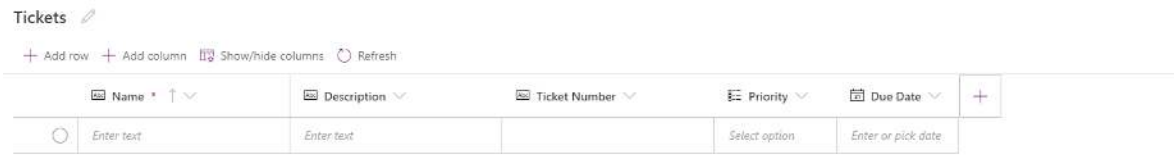
10. Create column named “Priority” of type “Choice” and enter Choices as Low. Medium & High.



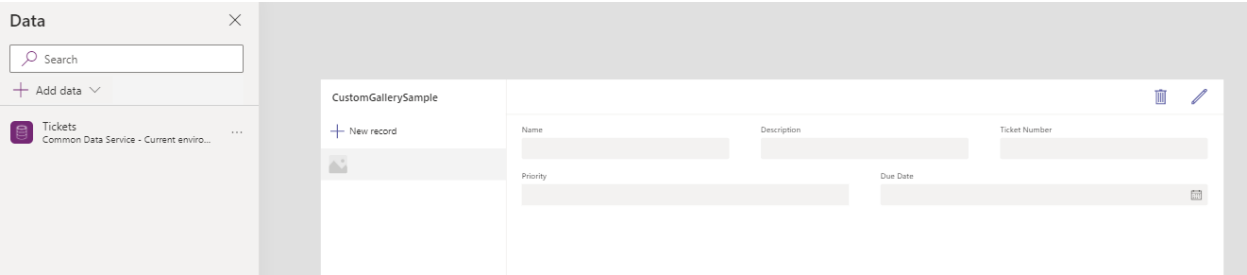
11. Create column named “Due Date” of type “Date”



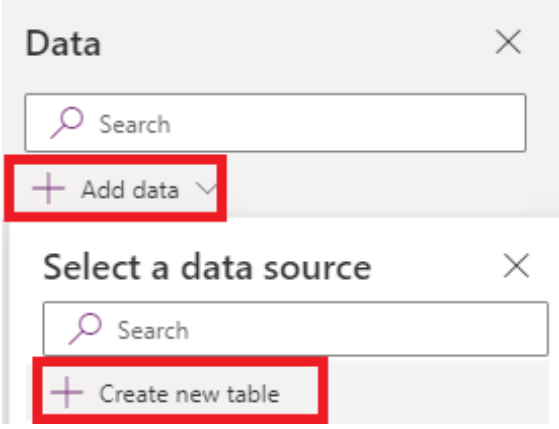
12. Next, close the table editor experience by clicking on Close button



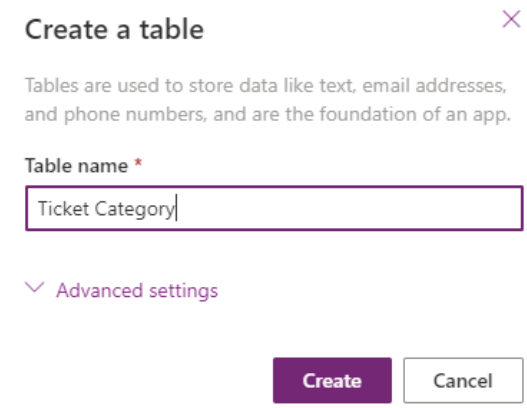
13. The Table will be saved, and the App will automatically include the Table as a connection. Also, the home screen will now have a connected Gallery and Form control associated with the newly created Table.



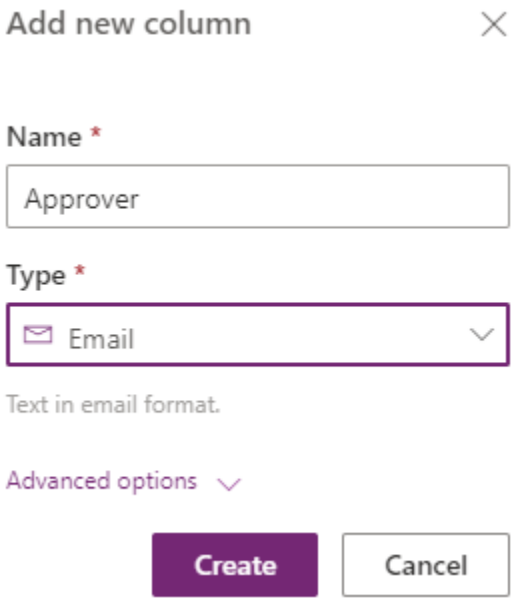
14. We will add another table to create Category information for tickets.
    Go to Add Data and then click on Create new Table



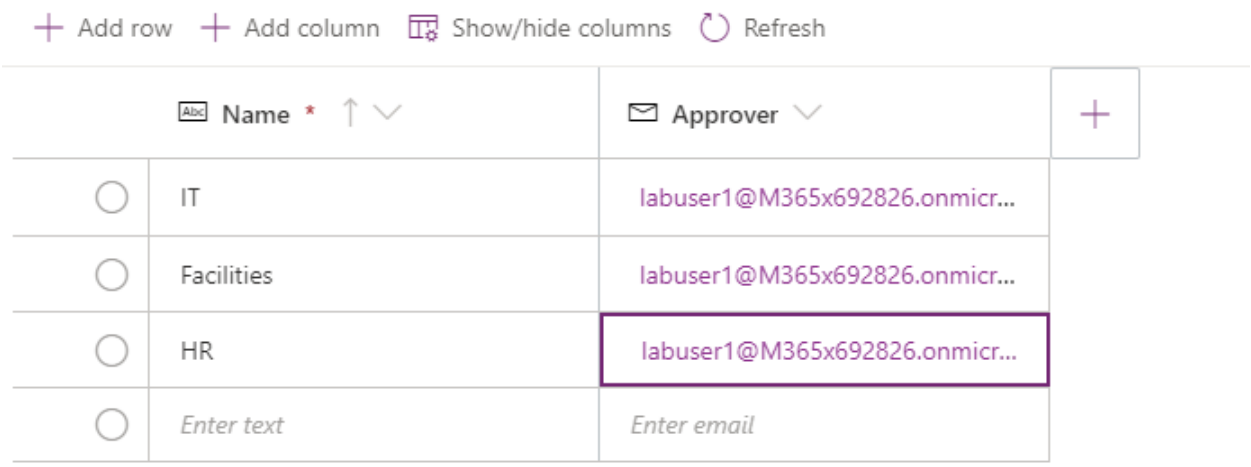
Name the Table “Ticket Category” and click Create



15. Add a column named Approver of type Email



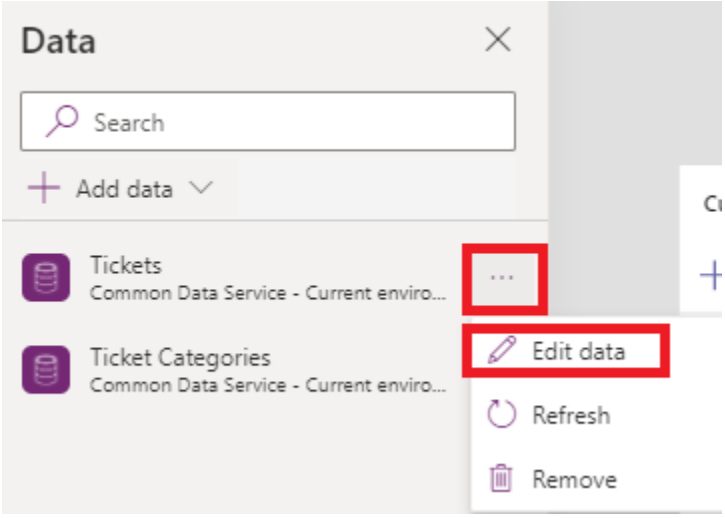
16. Enter sample data into Table and define your approvers for each Category. You can set yourself as the approver.



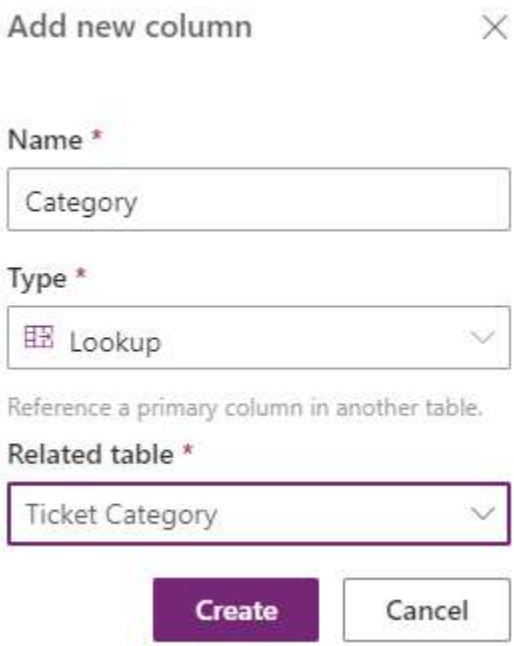
Once complete, click on Close button to Save the Table

17. Next, we will create an association(relationship) between the Tickets table and the Ticket Categories table.

    Got to Data Sources, select 3 ellipses on the Tickets Table and click on Edit data.

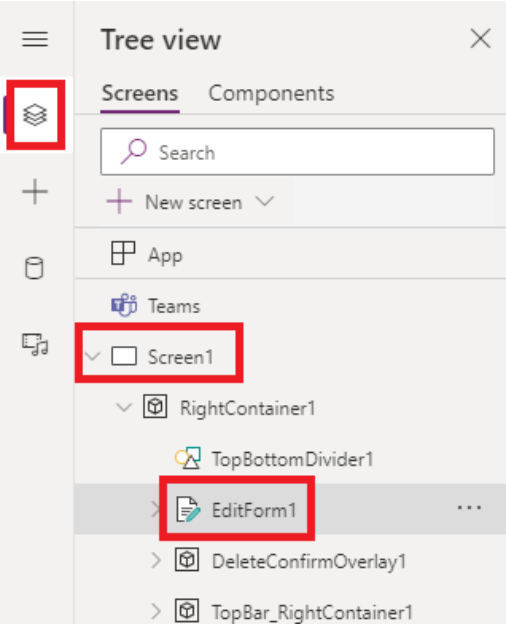


    Add column named “Category”, select type as Lookup and select the Related Table as “Ticket Category”.

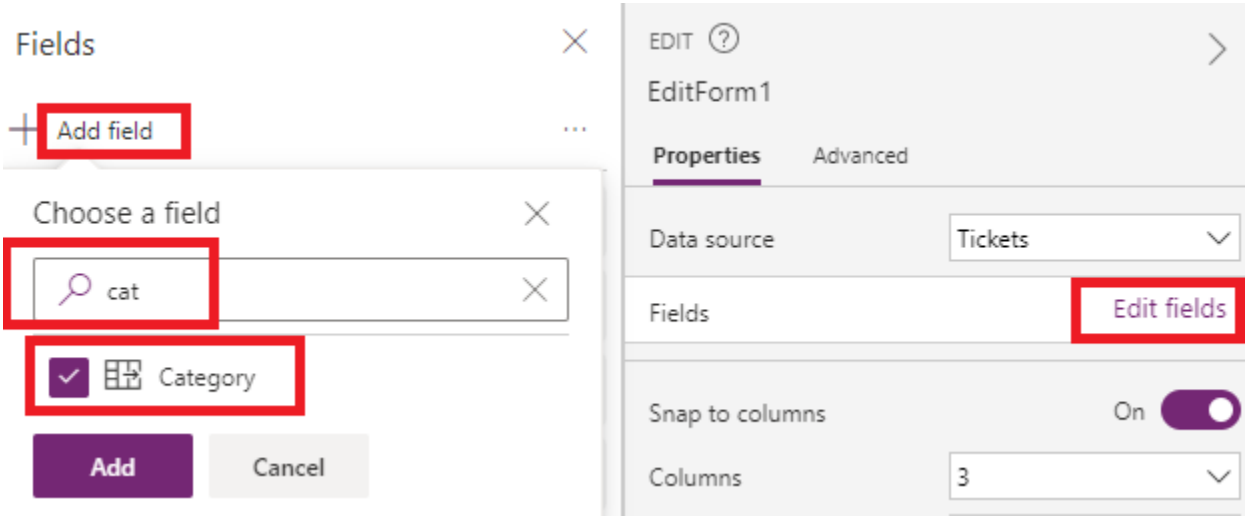


    Close the Table edit experience.

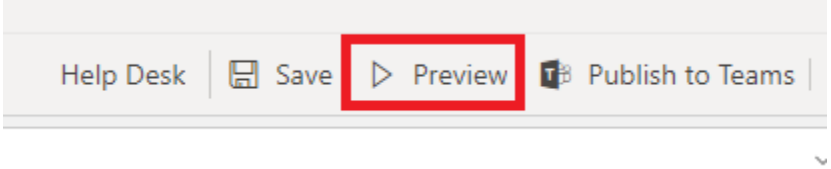
18. Next, we will go to the tree view and select the Form Control to add the newly created column to the form.

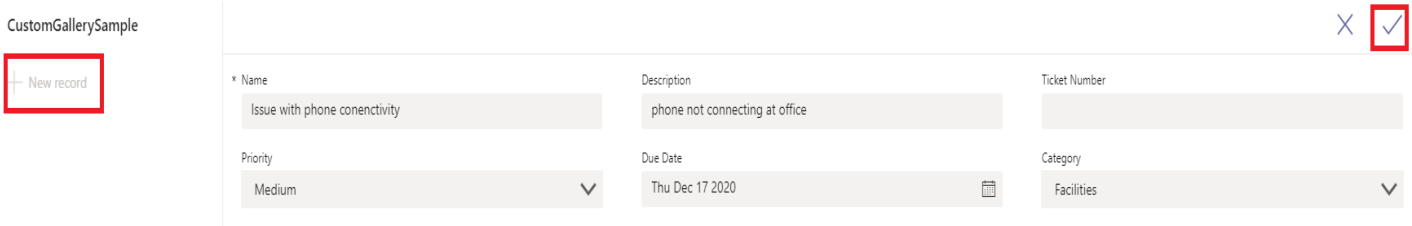


Edit fields and add the Category column to the Form



19. Preview the App and Add records. Try modifying and deleting data. The App provides full CRUD (Create, Read, Update, Delete) operations.



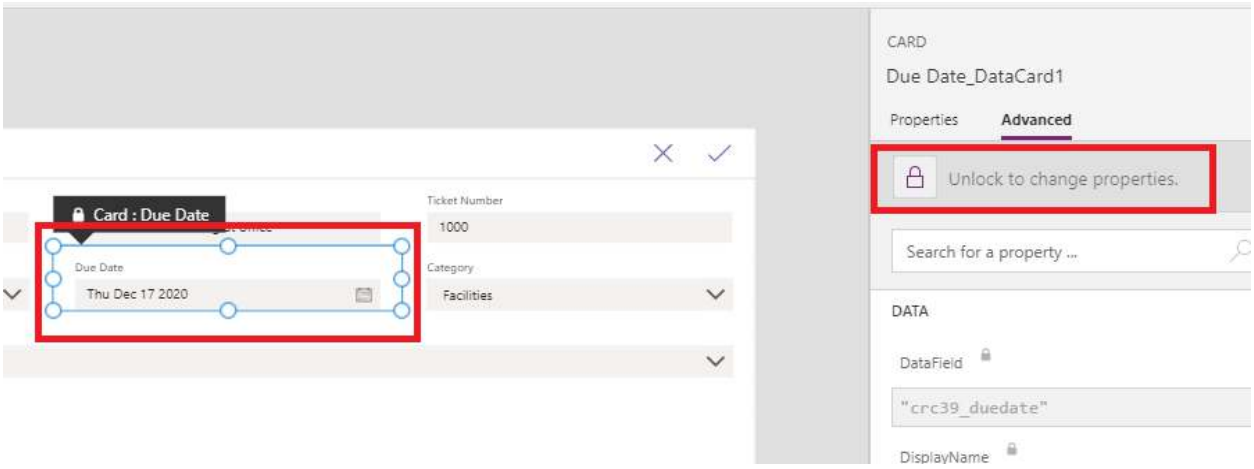


Notice how the Ticket Number is auto-generated once record is Saved.

Also, the Category column information is coming from the Related Table.

20. Next, add a column to the Tickets Table called Ticket Status of type Choices and add the following Choices – Pending, Rejected, Approved. Add the newly added column to the Tickets Form on screen. Same steps as before.

21. Select the "Due Date" data card in the form control, go to advanced properties tab and unlock the card.



Set Default property of the data card as follows:

```
If(
   EditForm1.Mode = FormMode.New || ThisItem.Priority <>   DataCardValue4.Selected.Value,
   Switch(
      DataCardValue4.Selected.Value,
      'Priority (Tickets)'.Low,
      DateAdd(
         Today(),
         14
      ),
      'Priority (Tickets)'.Medium,
      DateAdd(
         Today(),
         7
      ),
      'Priority (Tickets)'.High,
      DateAdd(
         Today(),
         3
      ),
      ThisItem.'Due Date'
   ),
   ThisItem.'Due Date'
)
```

Where EditForm1 is name of your form control

And DataCardValue4 is the priority chocie field combox box control name.

22. Next, set the display mode property of the Due Date data card to DisplayMode.View

    Now if you preview the App, the due date will be automatically calculated based on the selected priority when you create a new ticket.

23. Next, unlock the Ticket Status data card, set Display mode to DisplayMode.View,

    Set Default property as follows:
    If(EditForm1.Mode<>FormMode.New, ThisItem.'Ticket Status', 'Ticket Status (Tickets)'.Pending)

    Set visible property as
    EditForm1.Mode<>FormMode.New

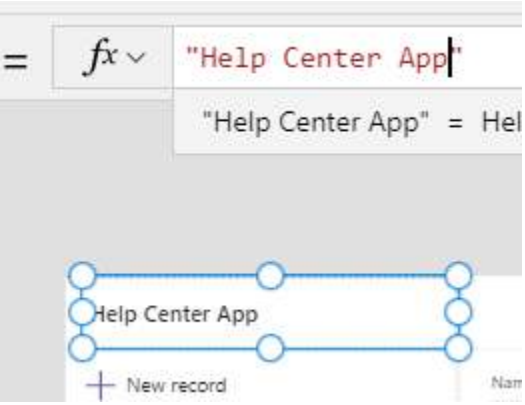
    This will ensure the Status is set to “Pending” when new record is created and the Status is read only when record is edited.

    Now if you preview the App, and create a new item, you can see the Status column in action.

24. Next, unlock the Priority, Description and Category data cards and make them required by setting the required property to **true.**

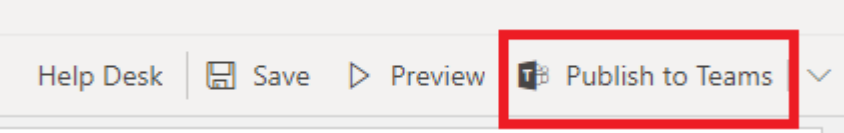
25. Rename, AppNameLabel label to

"Help Center App - " & Teams.ThisTeam.DisplayName



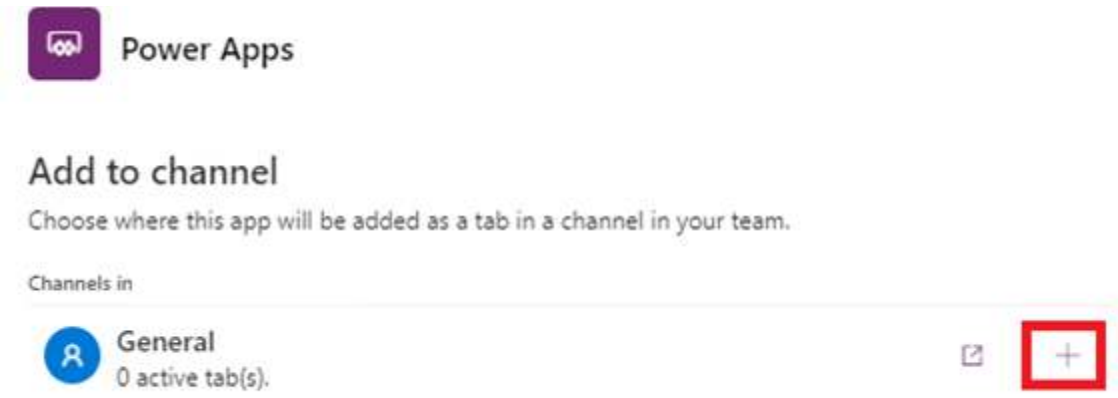
The Teams object will add the team name once we publish the App to Teams.

26. Next, click on Publish to Teams



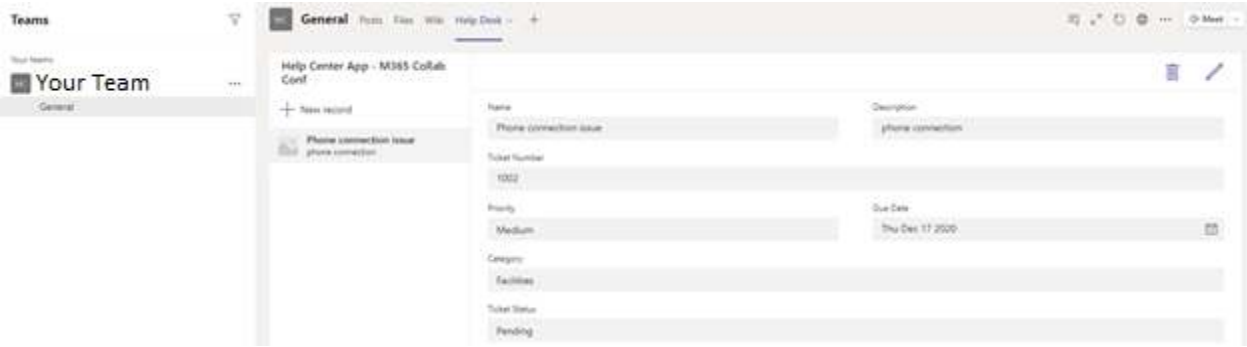
Click Next (this will Publish the App).

Next, it will list out all the channels associated with your current Team. To add the App as a tab to any of your Team's channels, select the + icon and then "Save and close" button.



27. Now go to the Team's channel and select the Tab with your App Name.

The App will now be avaliable within Teams and will also work on the Teams Mobile App.



28. Test your App and try adding new records.

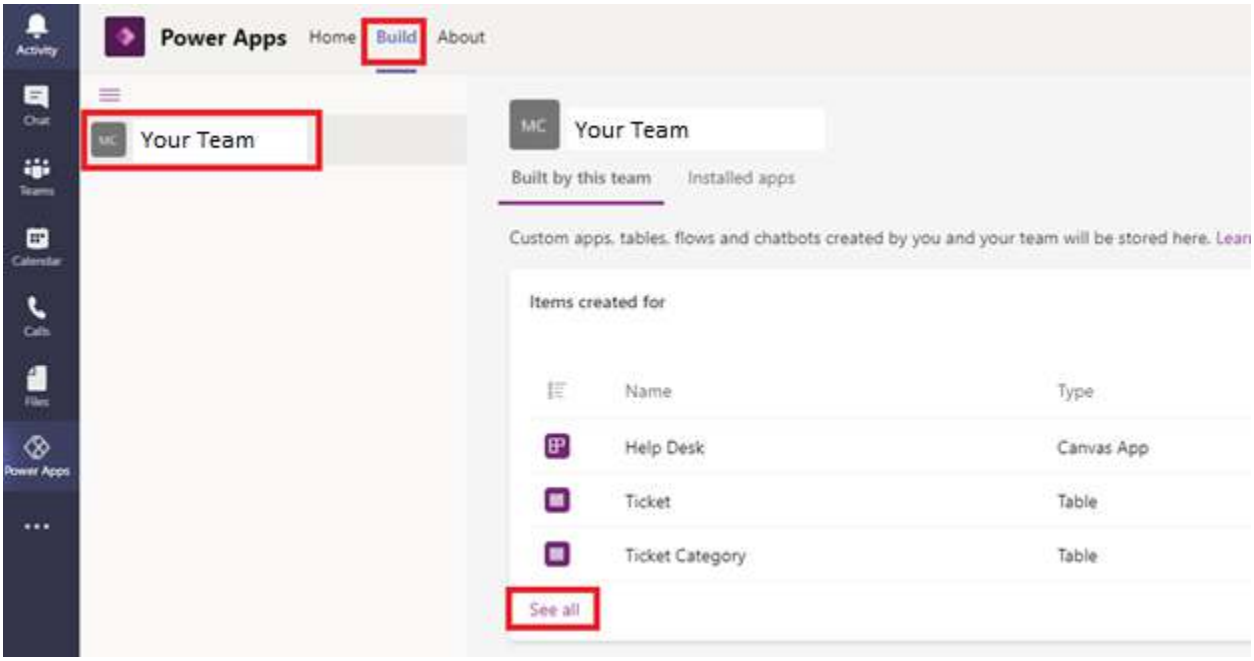
29. Congratulations!!! You have successfully built an App in Dataverse for Teams.

Task 3: Create flow for Approvals of Tickets

1. In Teams, select the Power Apps Teams App and go to the Build Tab.

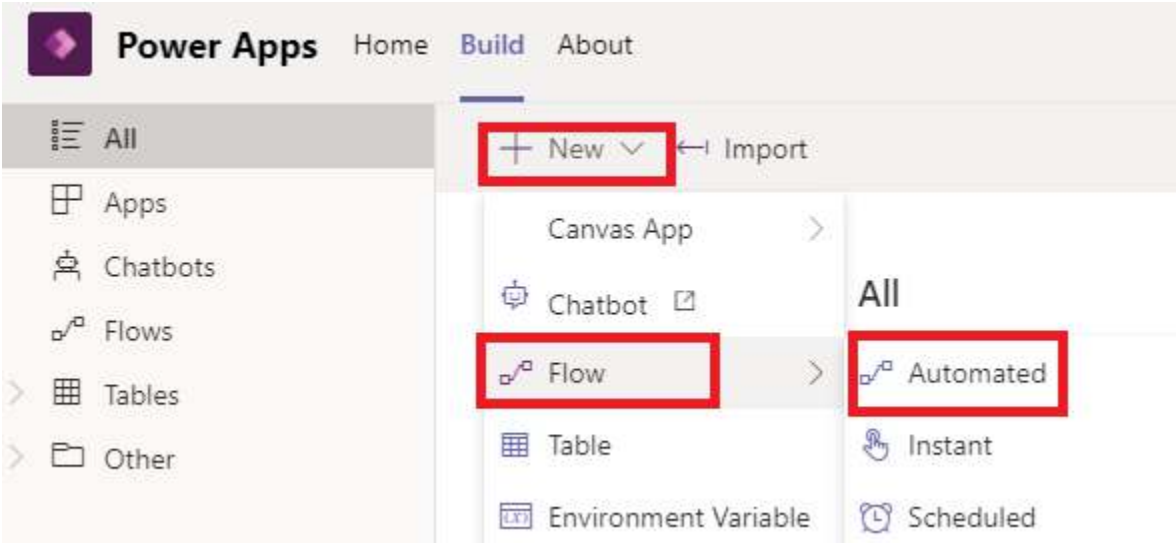
This will list out all the Teams that have a Dataverse for Teams environment setup.

Select your Team and click on See All.



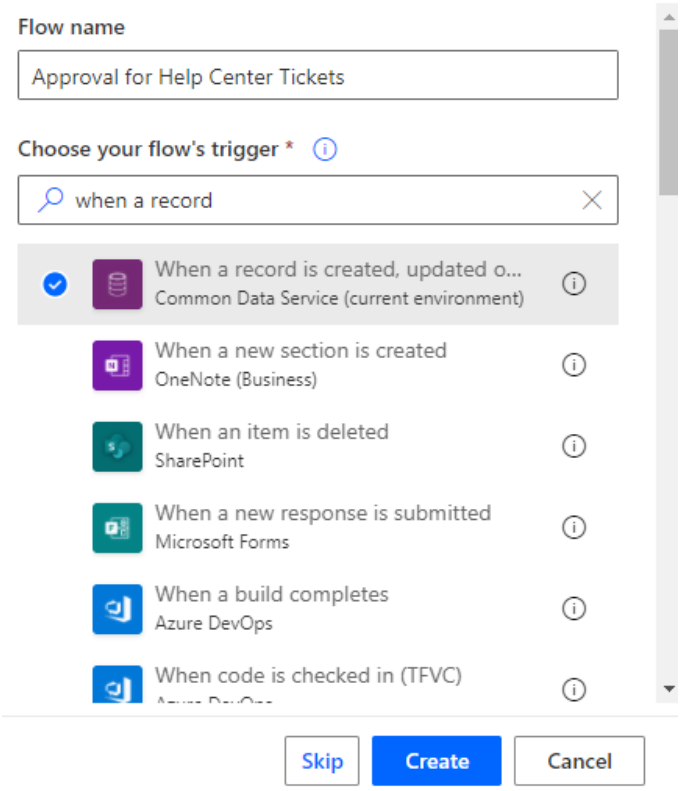
This will list out all the artifacts created within the Team's environment.

2. Select New, Flow and then select Automated flow.

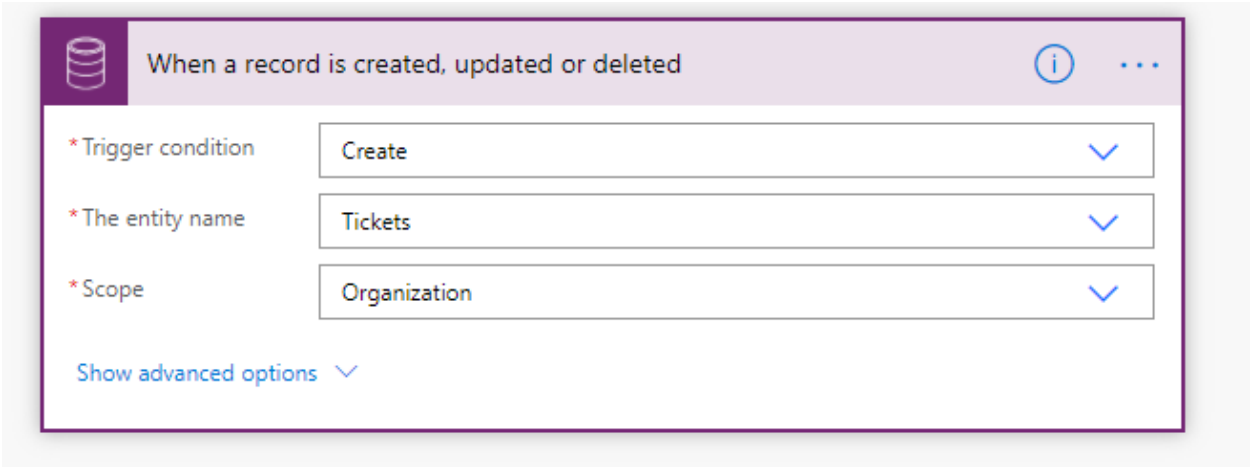


3. Click Get Started if a pop-up message appears.

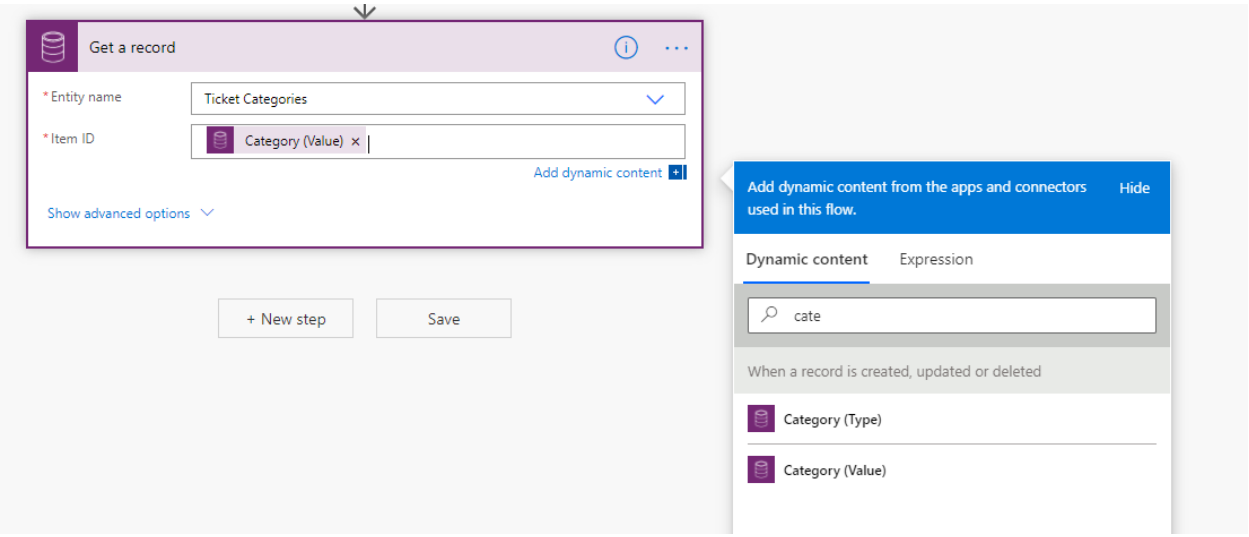
Name your flow "Approval for Help Center Tickets" and select the trigger "When a record is created,updated or deleted" for the CDS current environment connector and click Create.



4. Set trigger action as follows:



5. Next add the “Get a record” action for the CDS current environment connector and configure as follows. We will query the related table to fetch the Approver name for the selected Category.

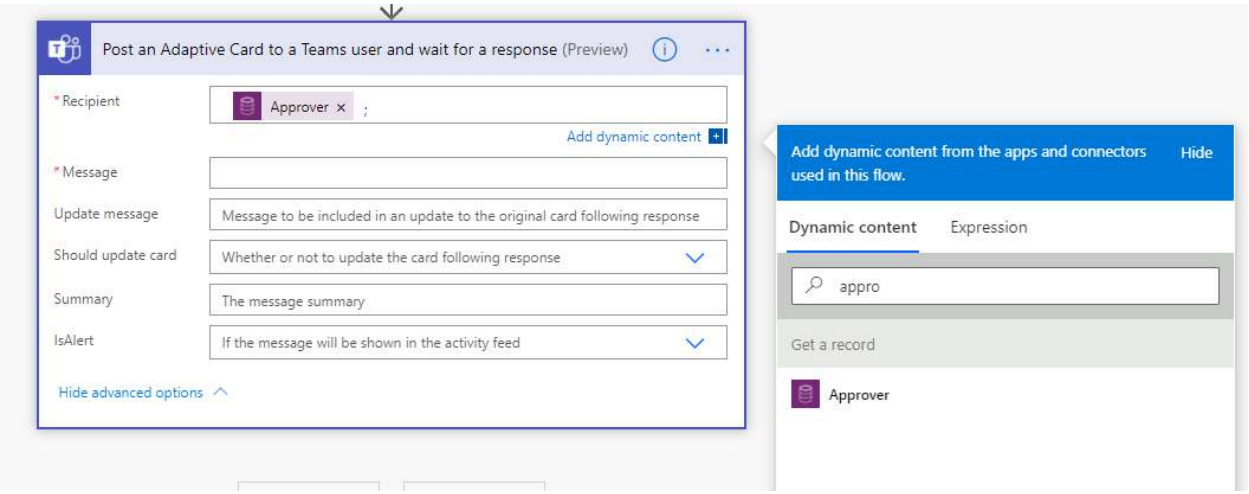


For the Item ID, select the Category (Value) dynamic content.

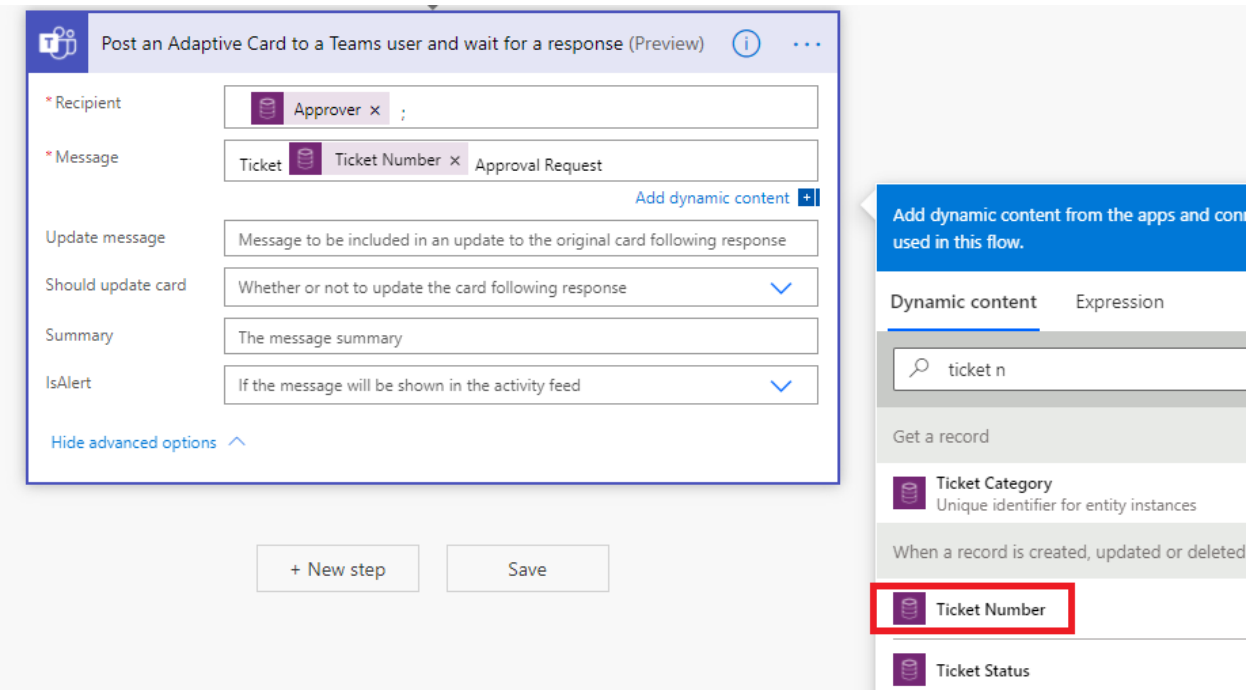
The Category Value includes the guid for the associated ticket category.

6. Next add the action “Post an adaptive card to a Teams user and wait for a response (preview)” from the Microsoft Teams connector.

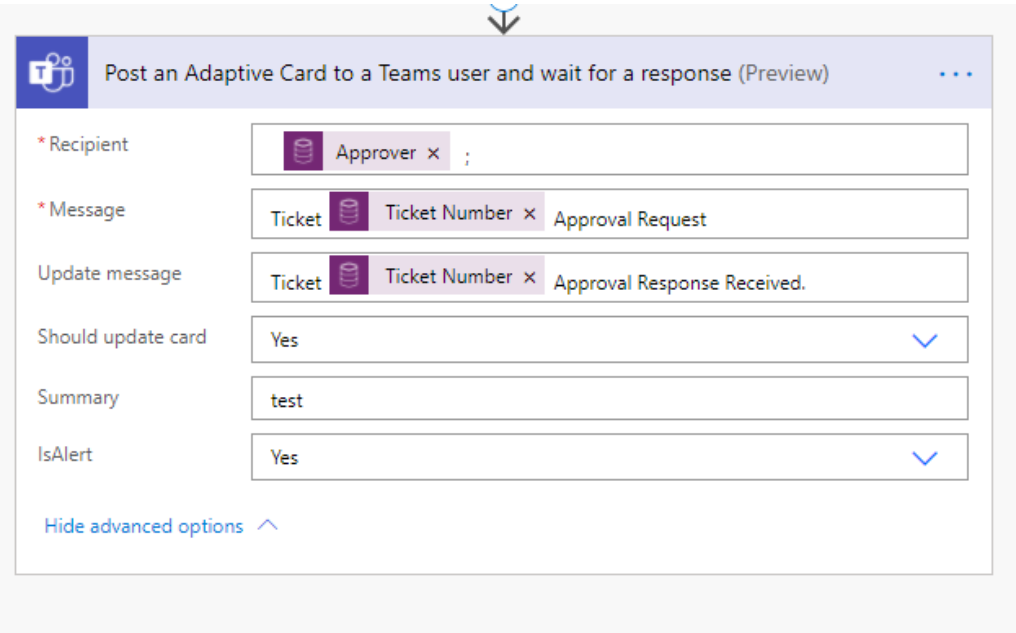
Set Recipient from the Dynamic Content “Approver” obtained from the Get a record action.



7. Set Message as follows:

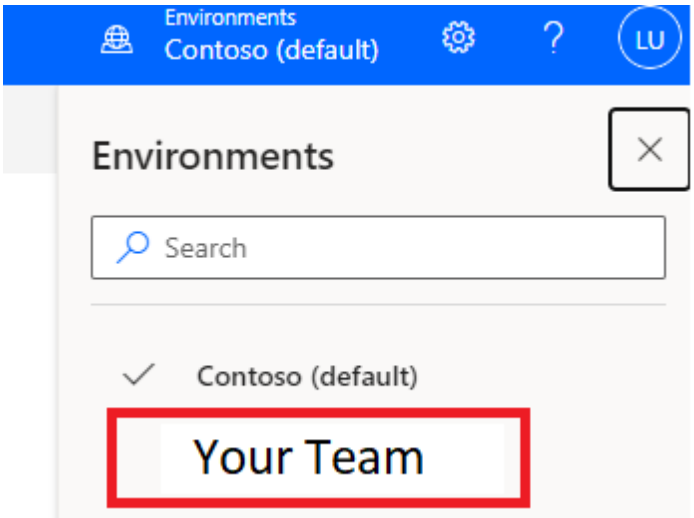


Set remaining properties as follows:

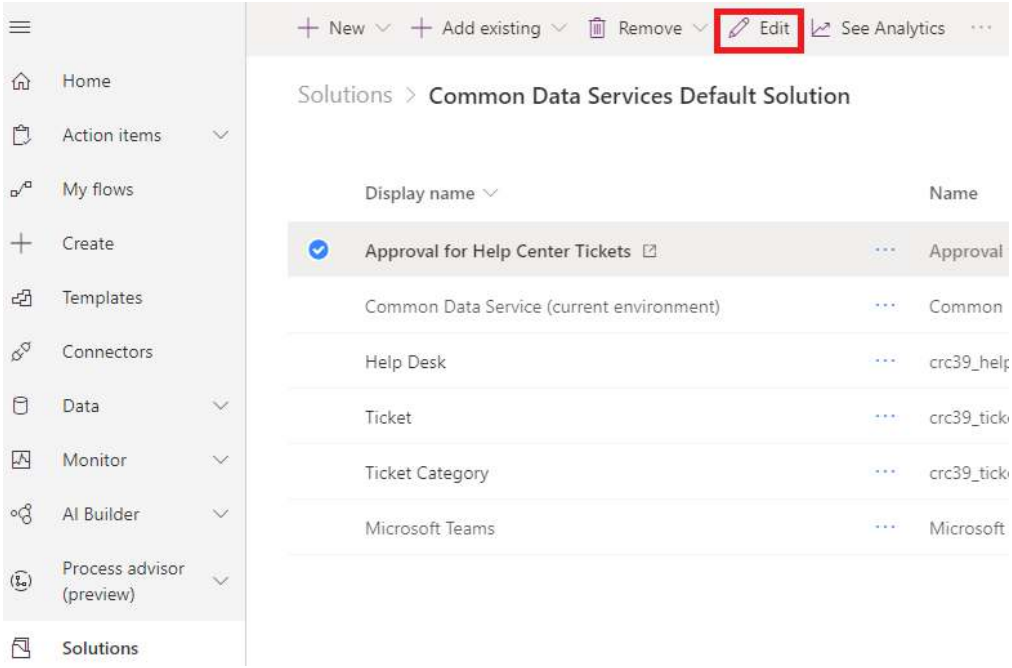


8. Save the flow.

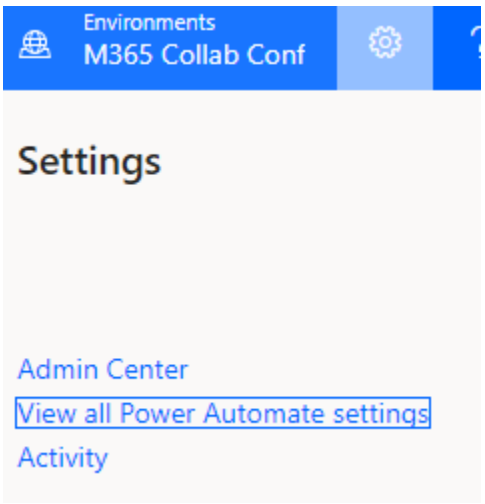
9. Following steps are needed due to certain preview features which are required for this Task .Now go to flow.microsoft.com and select the environment with your Team Name



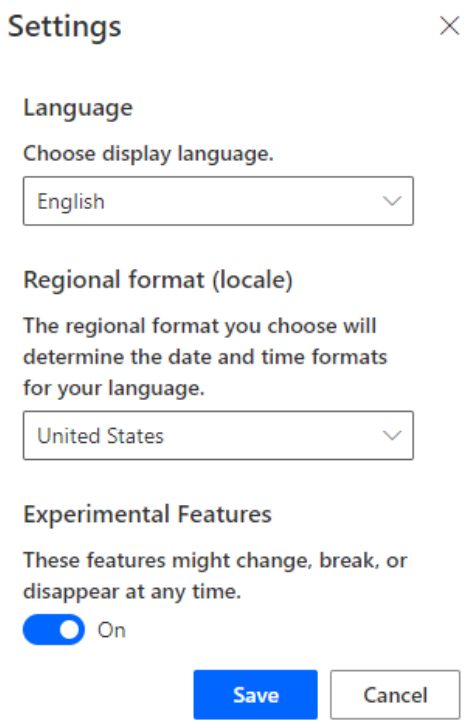
Next, go to Solutions > Common Data Services Default Solution > Select your flow and click Edit.



10. Next go to sttings gear on top right-hand corner and select “View all Power Automate Settings”

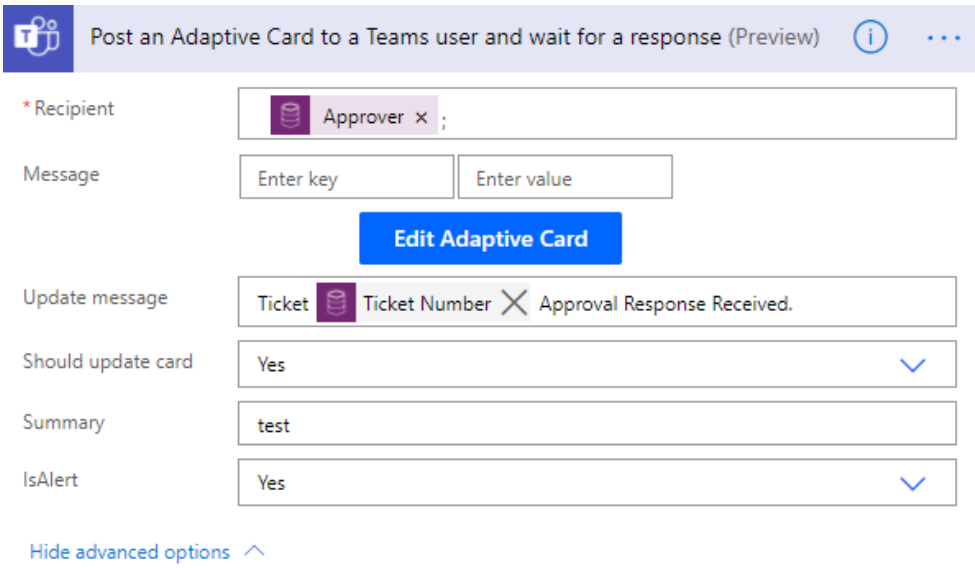


Enter settings as follows and click Save

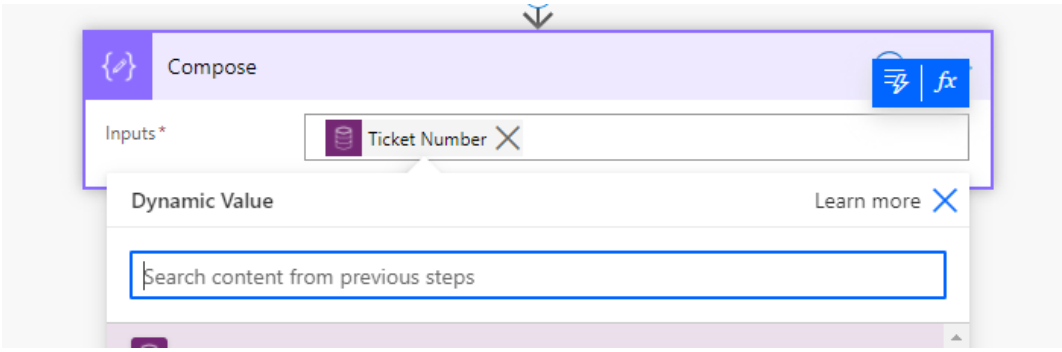


If prompted to reload the page, say Yes.

11. Now open the Teams Adaptive ard action, you should see a “Edit Adaptive Card” button as follows.

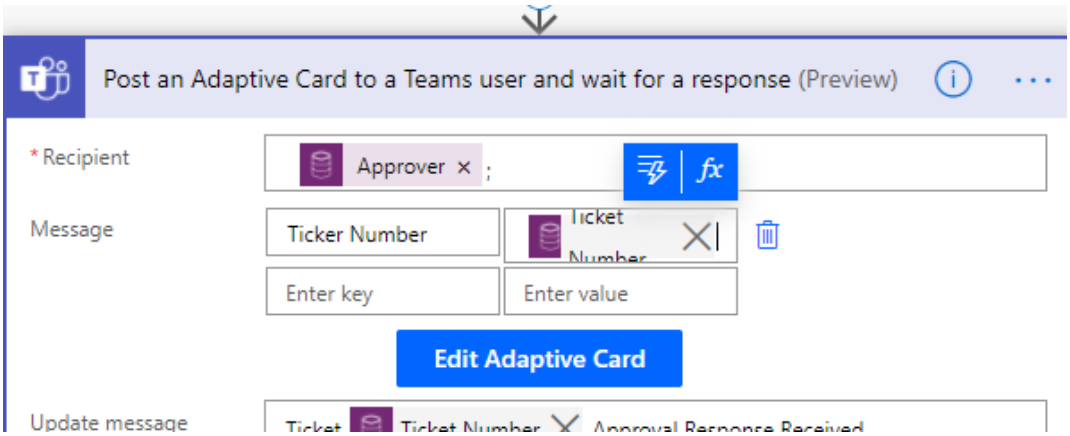


12. Next, add a compose action and select the Ticket Number dynamic content

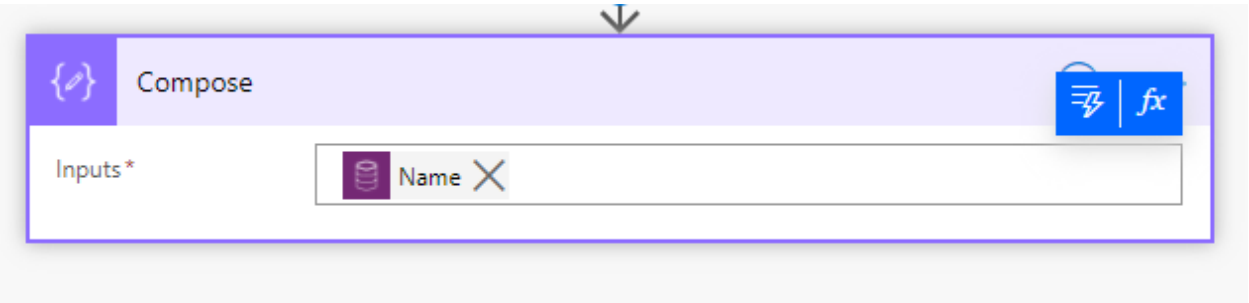


Copy the Ticket Number dynamic content by using ctrl A + Ctrl C

13. Now for the Teams action, add a Key called “Ticket Number” and for the value paste the Ticket Number dynamic content that was copied. If it does not paste on first attempt, then try again.

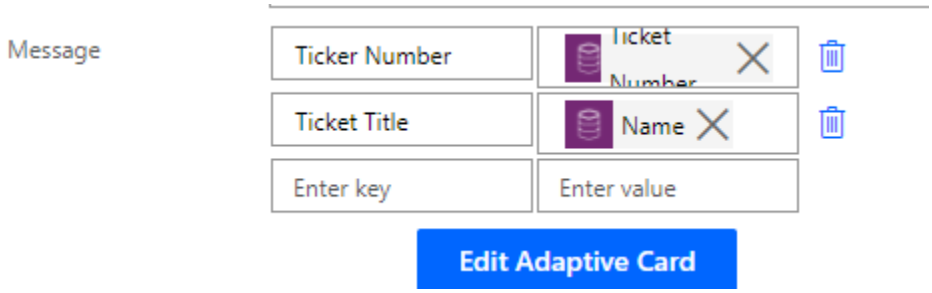


14. Back to the Compose action, delete the ticket number dynamic content and add the Name dynamic content from the flow trigger. (Important to select the dynamic content from the flow trigger action “When a record is created, updated or deleted”)



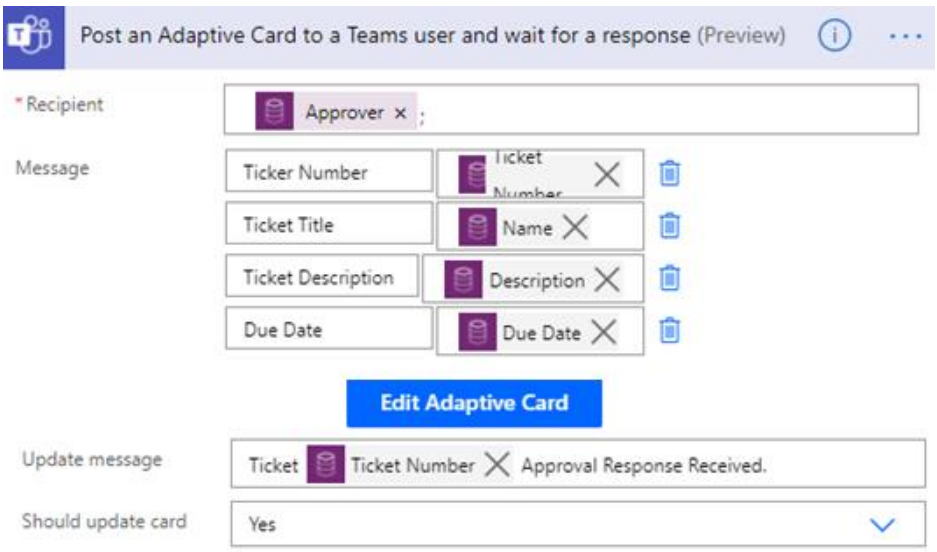
Copy the dynamic content value (You may have to try multiple times.)

Back to the Teams action, add Ticket Title key and set value to the Name dynamic content (paste the Name dynamic content copied in compose) as shown in figure below:

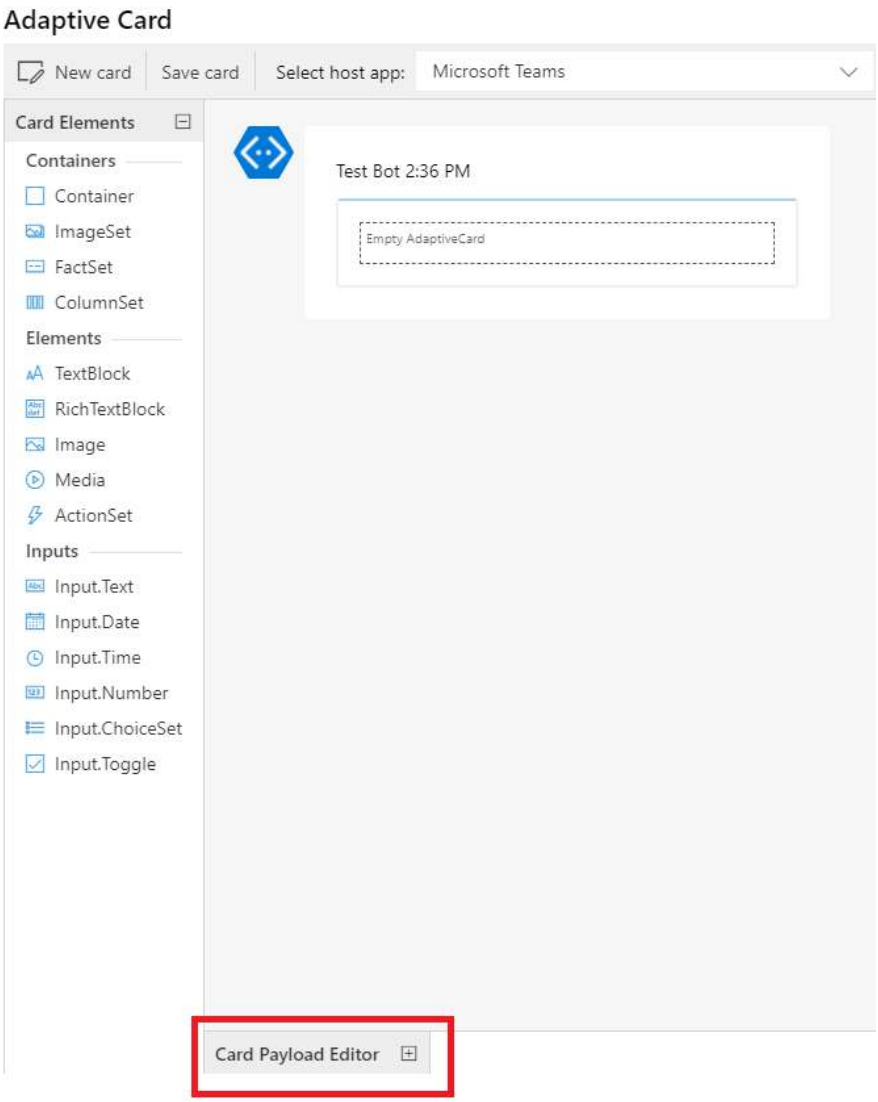


15. Repeat above steps again and select the Ticket Description & Due Date.

Your adaptive card action should look like below



16. Next Click on the Edit adaptive card button and select card payload editor + icon at bottom



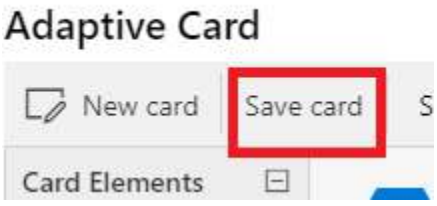
17. Next add the following payload and replace the current payload.

```
{
  "$schema": "http://adaptivecards.io/schemas/adaptive-card.json",
  "version": "1.2",
  "type": "AdaptiveCard",
  "body": [
    {
      "type": "Image",
      "url": "https://www.wsps.org/Home/ShowPublishedImage/2713/637342193161670000",
      "height": "100px",
      "horizontalAlignment": "Center",
      "separator": true,
      "spacing": "Medium"
    },
    {
      "text": "New Ticket Approval Request - {$root.Ticket Number}",
      "type": "TextBlock",
      "weight": "Bolder",
      "fontType": "Default",
      "color": "Accent"
    },
    {
      "type": "ColumnSet",
      "columns": [
        {
          "width": "stretch",
          "type": "Column",
          "items": [
            {
              "type": "TextBlock",
              "text": "Title"
            },
            {
              "text": "Description",
              "type": "TextBlock"
            },
            {
              "text": "Due Date",
              "type": "TextBlock"
            }
          ]
        },
        {
          "width": "stretch",
          "type": "Column",
          "items": [
            {
              "text": "{$root.Ticket Title}",
              "type": "TextBlock"
```

```
            },
            {
                "text": "{$root.Ticket Description}",
                "type": "TextBlock"
            },
            {
                "text": "{$root.Due Date}",
                "type": "TextBlock"
            }
        ]
    }
  ],
  "bleed": true,
  "style": "emphasis"
},
{
  "type": "ColumnSet",
  "columns": [
    {
      "width": "stretch",
      "type": "Column",
      "items": [
        {
            "text": "Decision",
            "type": "TextBlock"
        }
      ]
    },
    {
      "width": "stretch",
      "type": "Column",
      "items": [
        {
            "choices": [
                {
                    "title": "Approved",
                    "value": "Approved"
                },
                {
                    "title": "Rejected",
                    "value": "Rejected"
                }
            ],
            "placeholder": "Decision",
            "type": "Input.ChoiceSet",
            "id": "acDecision"
        }
      ]
    }
  ]
},
```

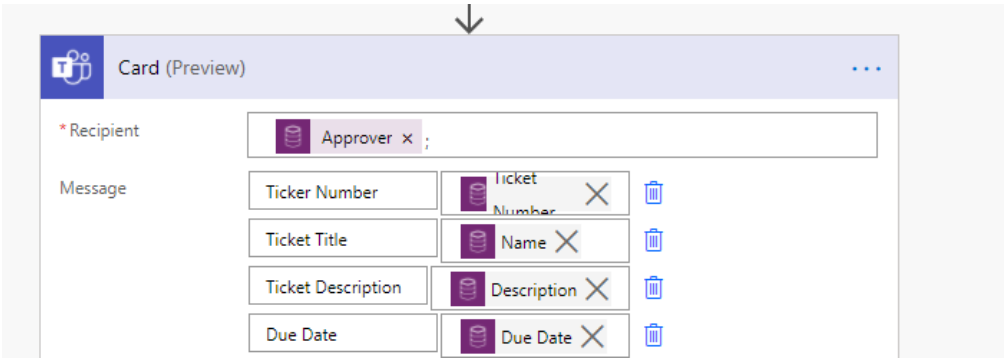
```
    {
      "type": "ActionSet",
      "actions": [
        {
          "title": "Submit Response",
          "type": "Action.Submit"
        }
      ],
      "horizontalAlignment": "Center"
    }
  ]
}
```

18. Save the card

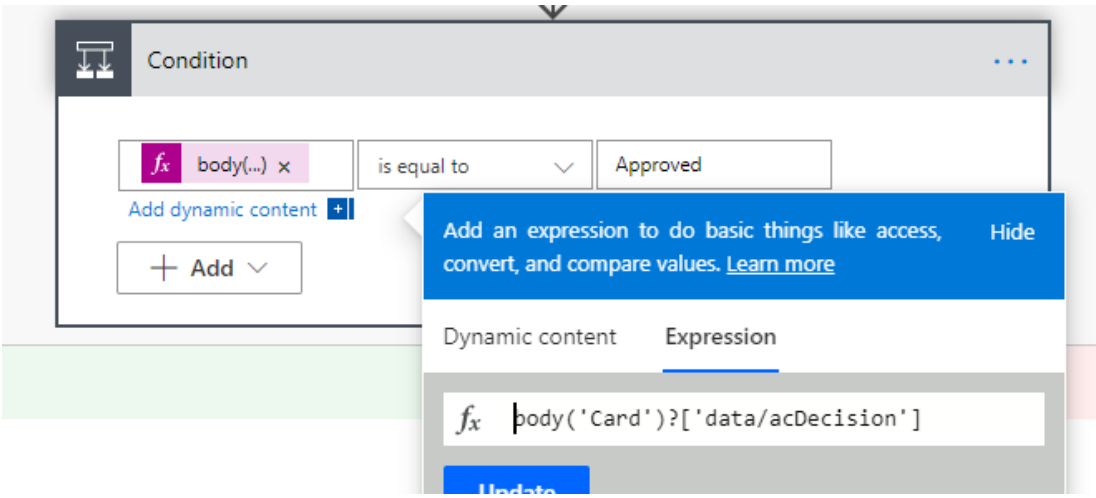


19. Delete the compose action.

20. Rename the Teams action to Card

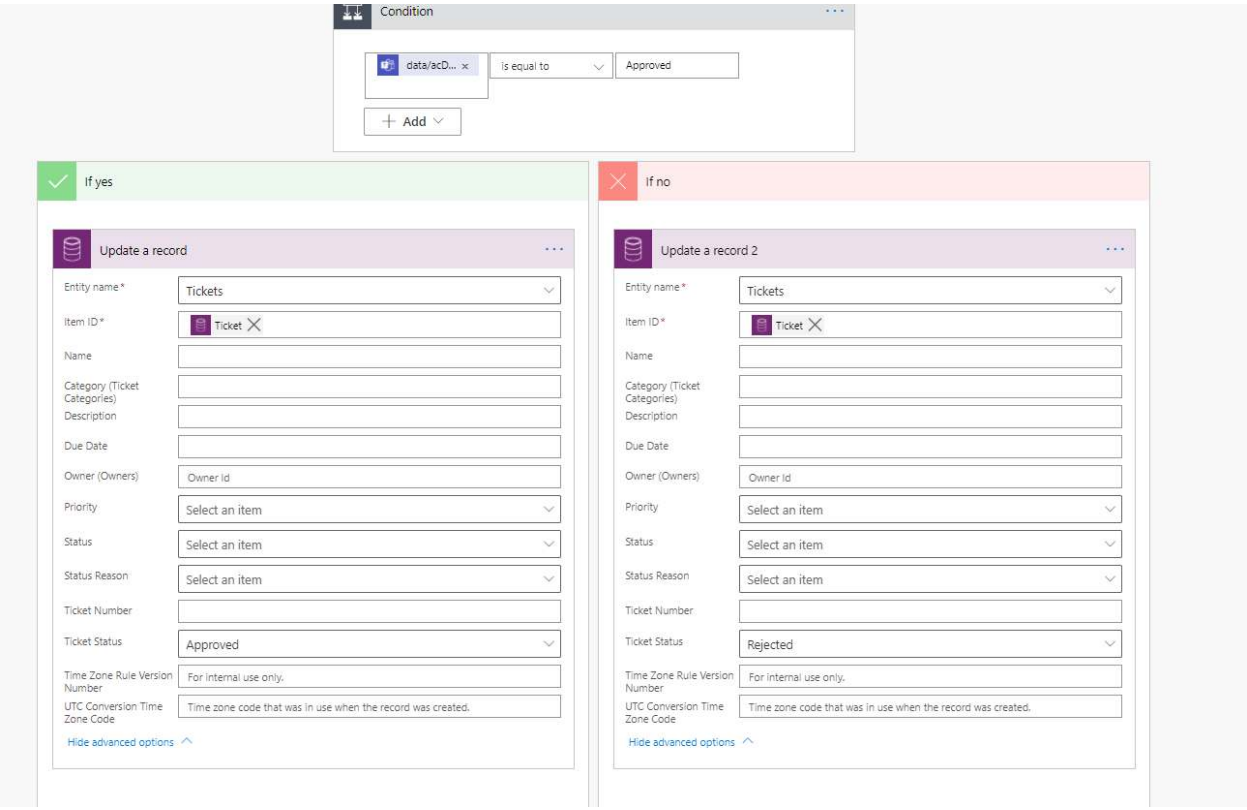


21. Add a condition and an expression to check the response of the adaptive card as follows. Check to see if response is "Approved". For the condition ensure to use the expression dialog. Expression - body('Card')?['data/acDecision']



22. For the Yes branch add the “Update a record” action, select Entity as Tickets, select item ID as Ticket and set Ticket Status to Approved.

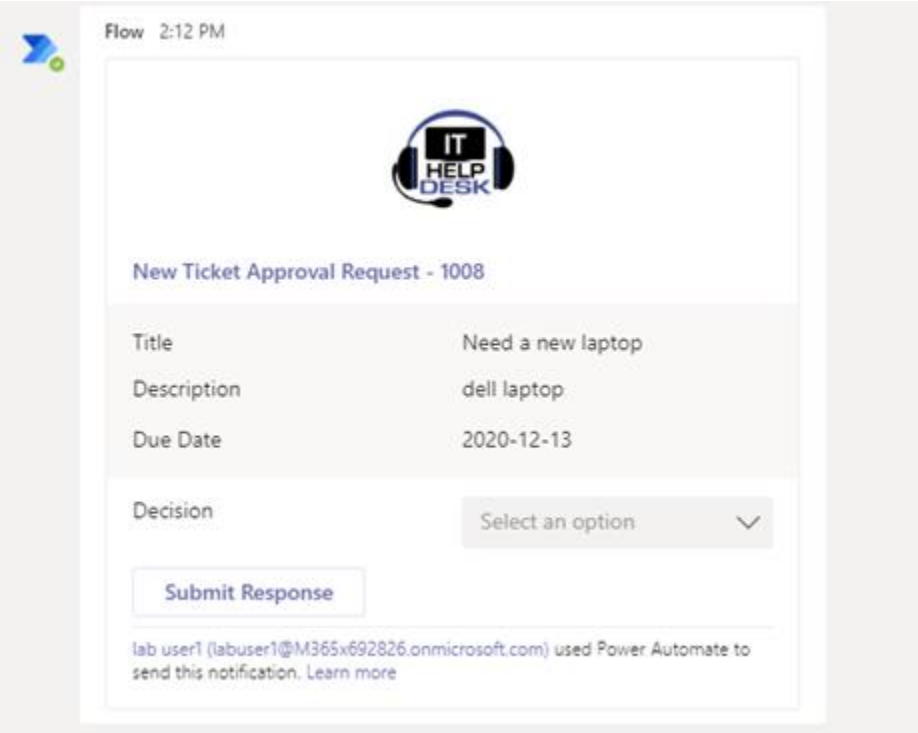
For the No branch add the “Update a record” action, select Entity as Tickets, select item ID as Ticket and set Ticket Status to Approved.



23. Save the flow.

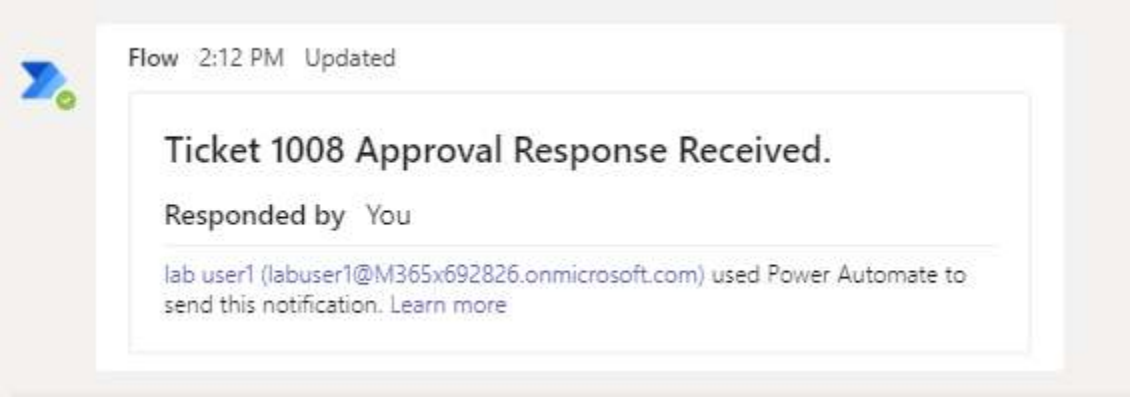
24. Go back to your App in Teams and create a new ticket.

25. Once a new ticket is created, the flow will trigger (can take from 5-10 mins to trigger for first flow created in Dataverse for Teams environment), and it will send the Approver (based on the Category selected) an adaptive card in Teams.



26. The Approver can then take their decision and Submit their response directly within Teams.

Once response is submitted the card will close as shown below.



27. The ticket status in the App will be updated based on the Approver's decision.

28. Congratulations!!! You have successfully built a flow in Dataverse for Teams.