Xoralia Power Automate Flow Functionality

The following information describes the process of up-versioning a document stored in a SharePoint document library synced with Xoralia using PowerAutomate.

1. Installation requirements

The detail assumes that a Power Automate workflow has been deployed to the tenant environment by Content Formula. Due to limitations with Power Automate, the workflow requires that:

1. Each SharePoint site must have its own 'Drafts' library, and its own 'Send for Review' and 'Send for Approval' Power Automate workflow deployed by ContentFormula.

2. Each Document Library (in a given Site) synced with Xoralia must have its own 'Copy to drafts' Power Automate workflow deployed by ContentFormula.

3. Each SharePoint site must have its own 'Drafts' document library.

2. Prerequisites

For a given SharePoint site e.g. https://cfcloud.sharepoint.com/sites/OOTB_Accelerate there must be:

1. A document library containing word documents of policies that are synced with Xoralia e.g. Accelerate - HR policies - All Documents (sharepoint.com)

2. A document library called 'Drafts' – it is in this folder that the revised document will undergo editing, and a review and approval stage.

Furthermore anyone responsible for carrying out this workload must be a member of an Azure Active Directory (AAD) group called 'Document Approvers'.
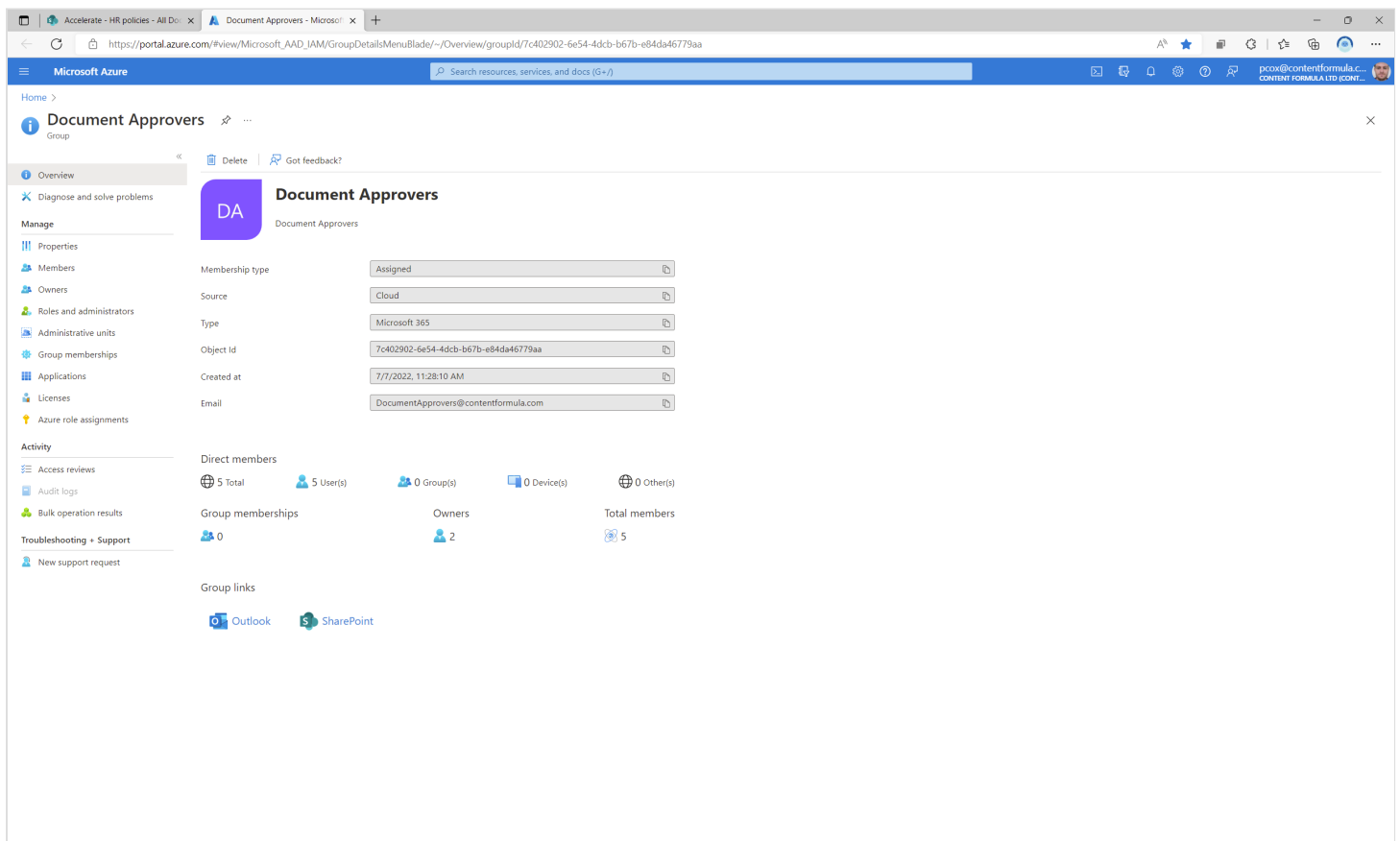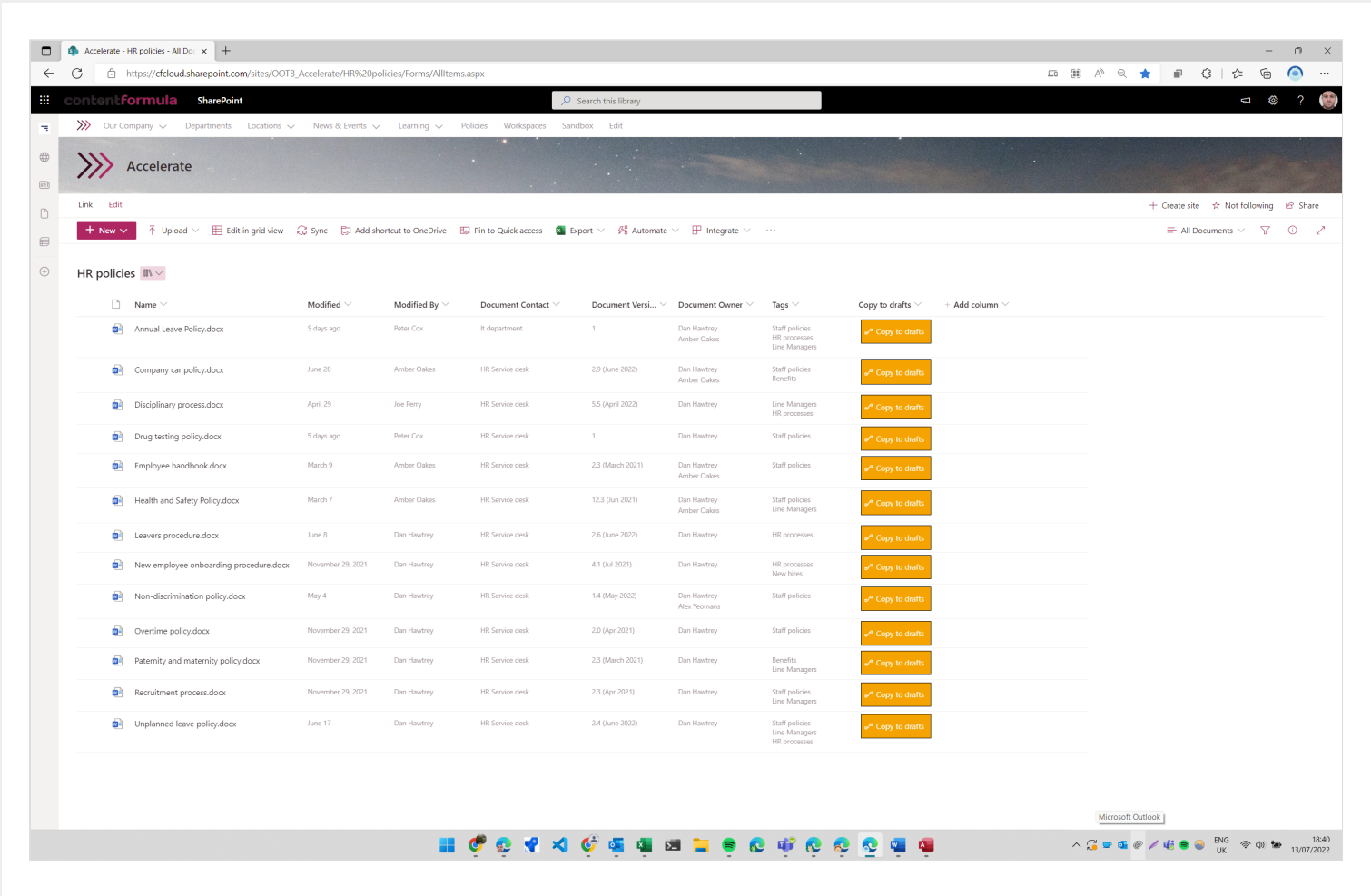

3. Procedure

For this tutorial, we will assume that the 'Annual Leave Policy.docx' policy is to be upgraded from version '1' to '2'

3.1 Copy to Drafts

Click the 'Copy to drafts' button for the relevant document – a panel should then show up on the right hand side of the browser window.

Then click the 'Run flow' button.

The user will then receive an e-mail notification if the document was successfully copied to the 'Drafts' document Library.

https://cfcloud.sharepoint.com/sites/OOTB_Accelerate/HR%20policies/Forms/AllItems.aspx

contentformula SharePoint

Search this library

Our Company Departments Locations News & Events Learning Policies Workspaces Sandbox Edit

Accelerate

Link Edit

+ New ↑ Upload Edit in grid view Sync Add shortcut to OneDrive Pin to Quick access Export Automate Integrate ...

HR policies

Run flow
Xoralia - Copy to drafts (HR Policies)
Owner: Peter Cox

	Name	Modified	Modified By	Document Contact	Document Versi...	Document Owner	Tags	Copy to drafts	+ Add column
	Annual Leave Policy.docx	5 days ago	Peter Cox	It department	1	Dan Hawtrey / Amber Oakes	Staff policies / HR processes / Line Managers	Copy to drafts	
	Company car policy.docx	June 28	Amber Oakes	HR Service desk	2.9 (June 2022)	Dan Hawtrey / Amber Oakes	Staff policies / Benefits	Copy to drafts	
	Disciplinary process.docx	April 29	Joe Perry	HR Service desk	5.5 (April 2022)	Dan Hawtrey	Line Managers / HR processes	Copy to drafts	
	Drug testing policy.docx	5 days ago	Peter Cox	HR Service desk	1	Dan Hawtrey	Staff policies	Copy to drafts	
	Employee handbook.docx	March 9	Amber Oakes	HR Service desk	2.3 (March 2021)	Dan Hawtrey / Amber Oakes	Staff policies	Copy to drafts	
	Health and Safety Policy.docx	March 7	Amber Oakes	HR Service desk	12.3 (Jun 2021)	Dan Hawtrey / Amber Oakes	Staff policies / Line Managers	Copy to drafts	
	Leavers procedure.docx	June 8	Dan Hawtrey	HR Service desk	2.6 (June 2022)	Dan Hawtrey	HR processes	Copy to drafts	
	New employee onboarding procedure.docx	November 29, 2021	Dan Hawtrey	HR Service desk	4.1 (Jul 2021)	Dan Hawtrey	HR processes / New hires	Copy to drafts	
	Non-discrimination policy.docx	May 4	Dan Hawtrey	HR Service desk	1.4 (May 2022)	Dan Hawtrey / Alex Yeomans	Staff policies	Copy to drafts	
	Overtime policy.docx	November 29, 2021	Dan Hawtrey	HR Service desk	2.0 (Apr 2021)	Dan Hawtrey	Staff policies	Copy to drafts	
	Paternity and maternity policy.docx	November 29, 2021	Dan Hawtrey	HR Service desk	2.3 (March 2021)	Dan Hawtrey	Benefits / Line Managers	Copy to drafts	
	Recruitment process.docx	November 29, 2021	Dan Hawtrey	HR Service desk	2.3 (Apr 2021)	Dan Hawtrey	Staff policies / Line Managers	Copy to drafts	
	Unplanned leave policy.docx	June 17	Dan Hawtrey	HR Service desk	2.4 (June 2022)	Dan Hawtrey	Staff policies / Line Managers / HR processes	Copy to drafts	

This flow uses SharePoint, Office 365 Users, and Office 365 Outlook.
Review connections and actions

Run flow   Cancel

Copy to Drafts: The document 'Annual Leave Policy.docx' has been copied to the 'Drafts' document library - Peter Cox - Outlook - CFCloud - Power Automate - Microsoft Edge

about:blank

↩ Reply all | 🗑 Delete ⊘ Junk Block ...

Copy to Drafts: The document 'Annual Leave Policy.docx' has been copied to the 'Drafts' document library

ⓘ This message was sent with Low importance
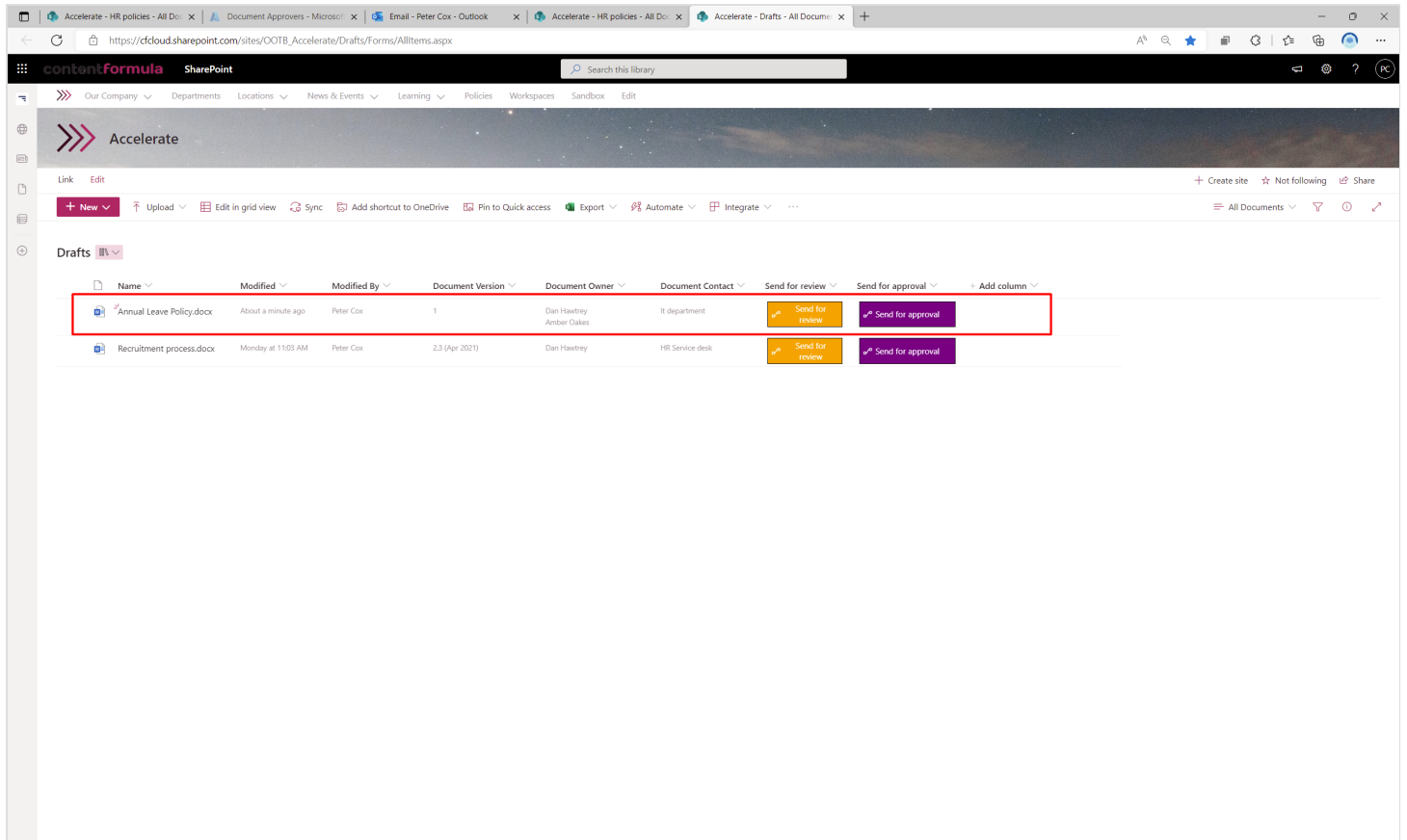
PC **Peter Cox**
To: Peter Cox

Wed 13/07/2022 18:47

Peter Cox,

The document 'Annual Leave Policy.docx' has been copied to the 'Drafts' document library - please make your changes to this document here.

Remember to send the document for review or approval once you have finished making your changes.

NOTE: This is an automated e-mail. Please do not reply to this e-mail.

↩ Reply   → Forward

3.2 Send for review

At this stage of the workflow, the editor will make changes to the document ready for the members of the 'Document Approvers' group to comment on.

Once the revised document has been finalised, the document is expected to be sent 'for review' – this can be thought of an informal review process prior to sending the document for approval, where members of the group can leave comments on the document.

It is important that the 'Document Version' column metadata is not left blank, otherwise the flow will fail.

Click the 'Send for review button for the relevant document – a panel should then show up on the right hand side of the browser window.

Then click the 'Run flow' button.

The members of the 'Document Reviewers' group should then receive an email reminding them to review the document
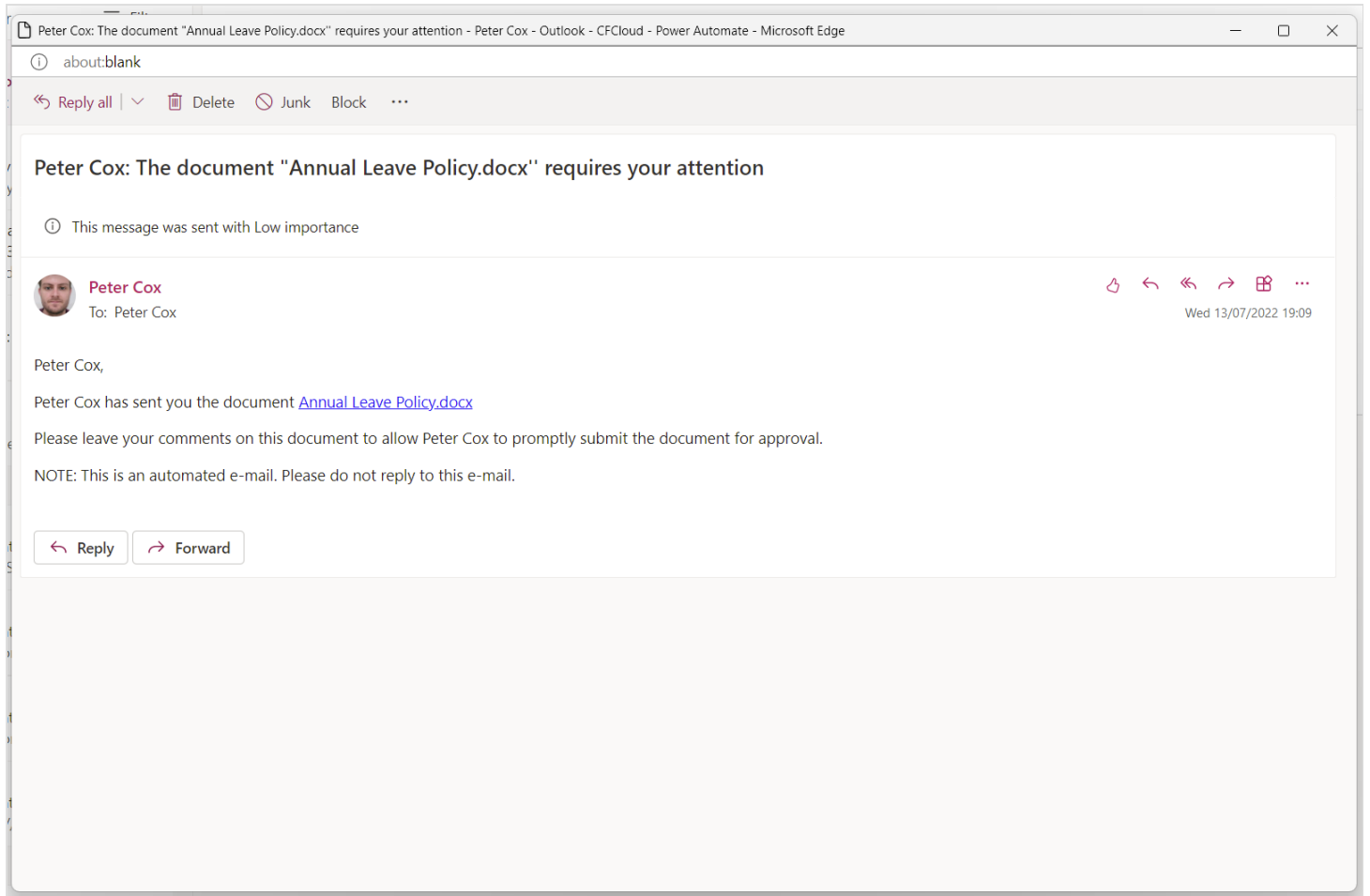
3.2 Send for approval

At this stage of the workflow, the editor will send the document for 'Approval' to the members of the 'Document Approvers' AAD group.

Once this approval process has successfully been completed, the document can/will be deleted from the 'Drafts' document library and will replace the existing document in the document library it originated from.

It is important that the 'Document Version' column metadata is not left blank, otherwise the flow will fail. This is a parameter that can be set up as part of the flow but it is on necessary.

Once done, the user is expected to click the 'Send for approval' button for the relevant document – a panel should then show up on the right hand side of the browser window.

The editor must manually specify the document library for which the document is to be copied into / override the original document. This is to ensure the document can be sent back to its original document library automatically once the approval process is complete.

User to then click the 'Run flow' button.
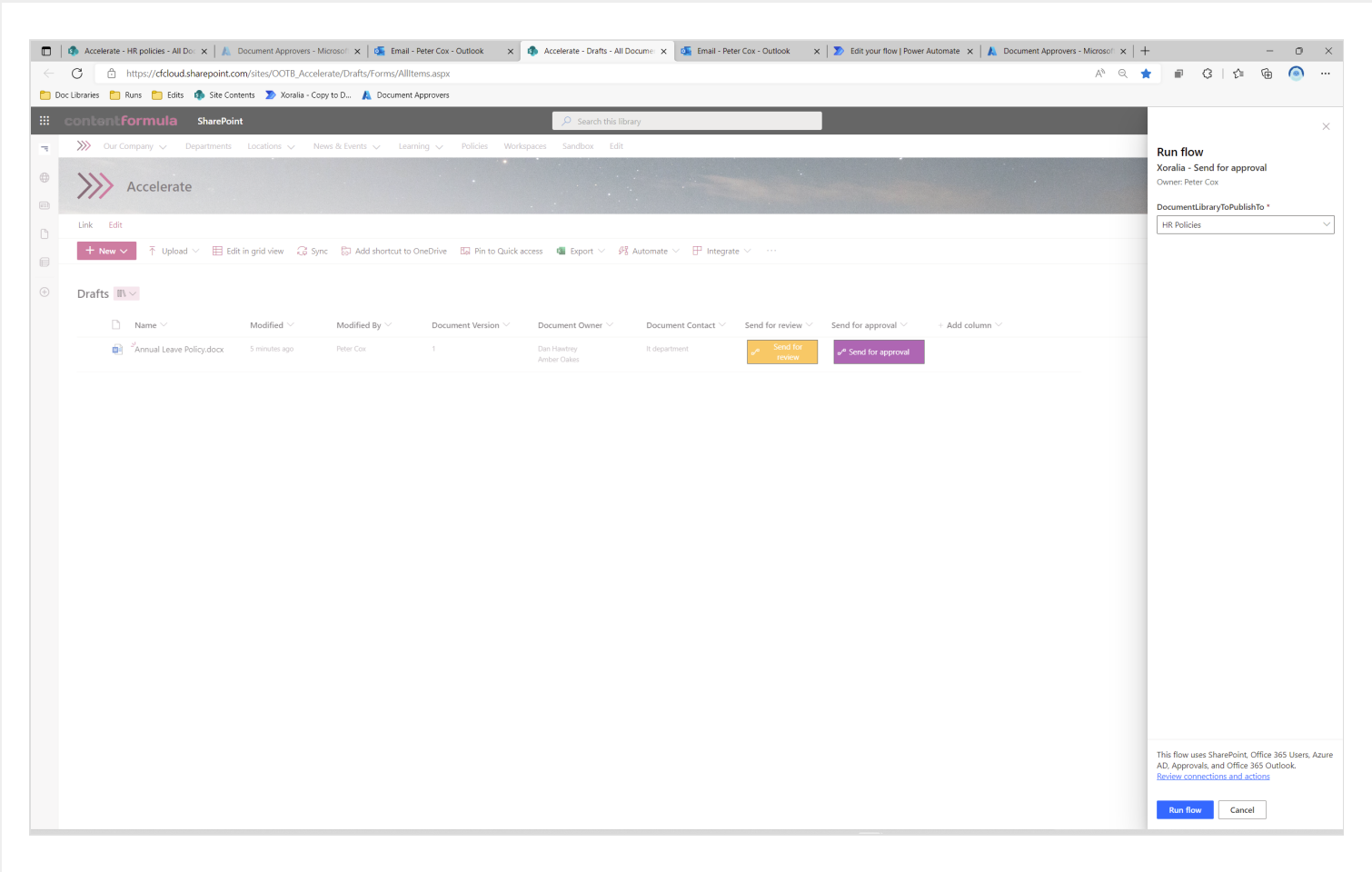
The members of the 'Document Reviewers' group then receive an email with an adaptive card as per below, giving them the choice to either 'Approve' or 'Reject' the document, and leave comments if appropriate.
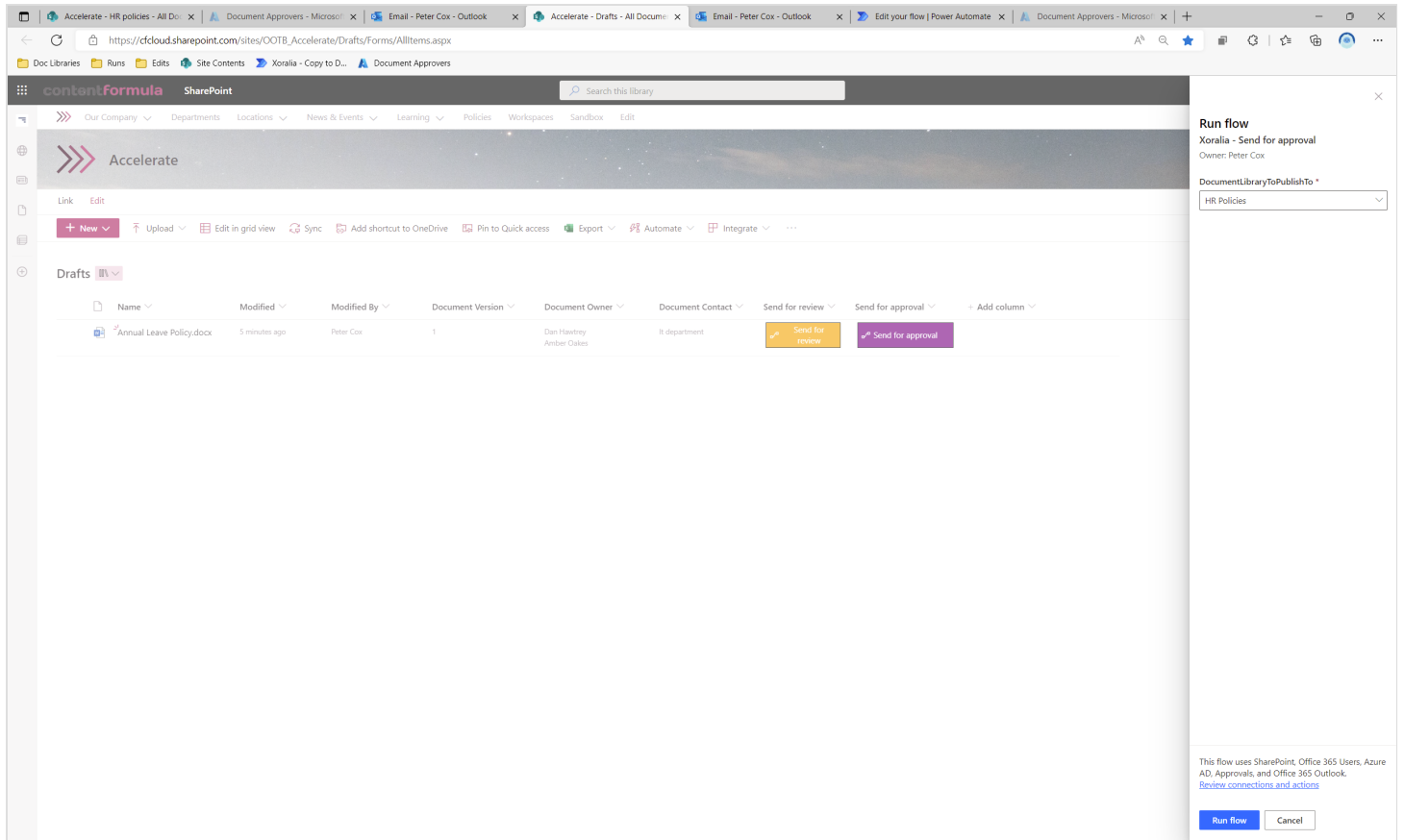
Each person in the group must approve the document for it to override the original in the specified Document Library. It could also be specified only the first user has to approval the document.

If the document is approved, the editor then receives an e-mail informing them if the document has been approved along with each approver's comments:
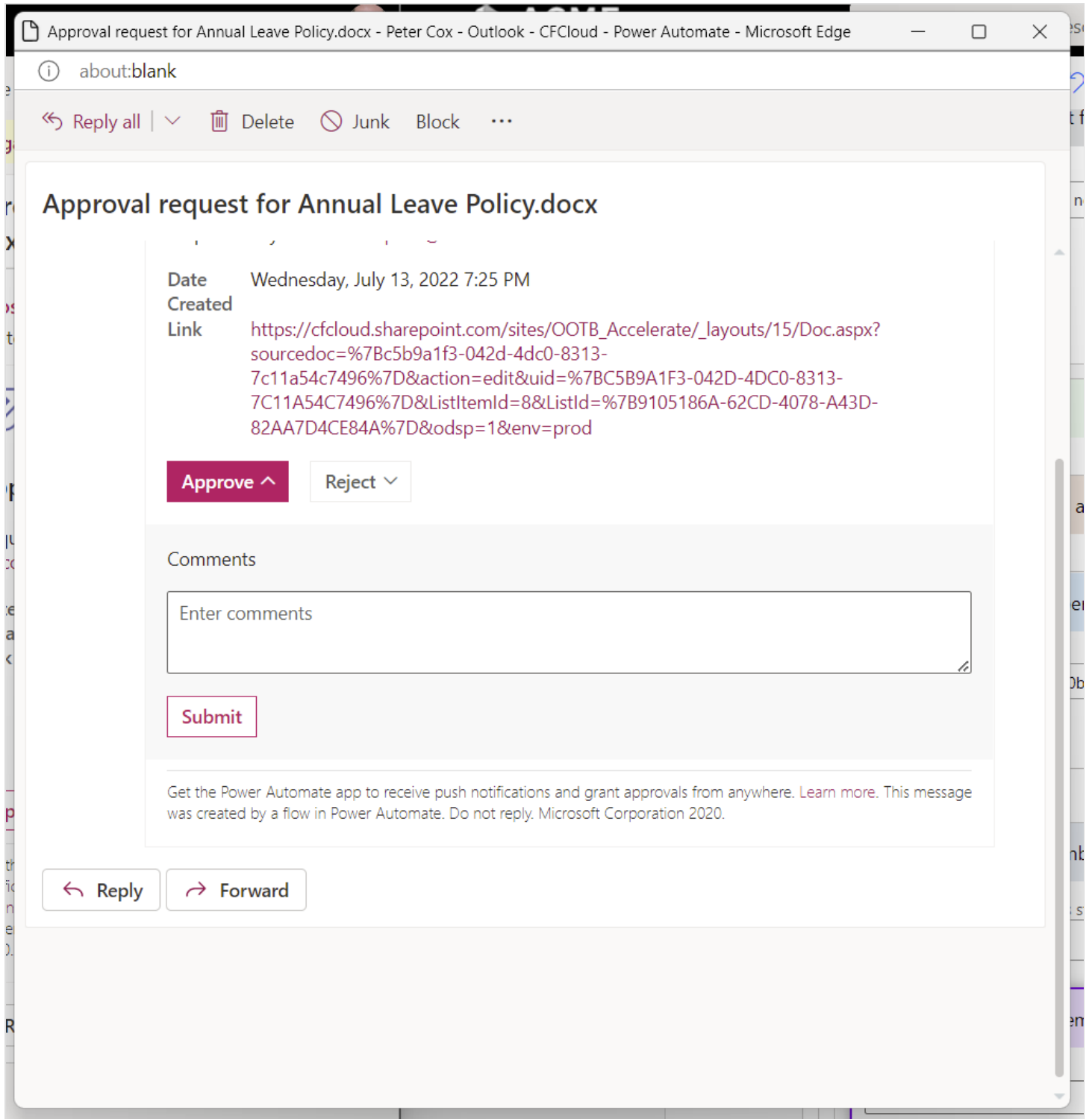
The document in the original document library will be then overridden with the newly approved document (if parameter is set), and the draft version in the 'Drafts' document library will be deleted:

Screen 1 (top):

Accelerate - HR policies - All Do... | Document Approvers - Microsoft | Accelerate - Drafts - All Docume... | Email - Peter Cox - Outlook | Document Approvers - Microsoft | +

https://cfcloud.sharepoint.com/sites/OOTB_Accelerate/Drafts/Forms/AllItems.aspx

Doc Libraries   Runs   Edits   Site Contents   Xoralia - Copy to D...   Document Approvers

contentformula   SharePoint

Search this library

Our Company   Departments   Locations   News & Events   Learning   Policies   Workspaces   Sandbox   Edit

Accelerate

Link   Edit

+ Create site   ☆ Not following   Share

+ New   ↑ Upload   Edit in grid view   Sync   Add shortcut to OneDrive   Pin to Quick access   Export   Automate   Integrate   ···

All Documents

Drafts

	Name	Modified	Modified By	Document Version	Document Owner	Document Contact	Send for review	Send for approval	+ Add column

This folder is empty

Screen 2 (bottom):

Accelerate - HR policies - All Do... | Document Approvers - Microsoft | Accelerate - Drafts - All Docume... | Email - Peter Cox - Outlook | Document Approvers - Microsoft | Accelerate - HR policies - All Do... | +

https://cfcloud.sharepoint.com/sites/OOTB_Accelerate/HR%20policies/Forms/AllItems.aspx

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