

Central Flows SharePoint

Deployment Guide

Overview

This document will guide you on how to apply the Central Flows to your forms and prepare your SharePoint site to accommodate this feature. This document includes deployment steps for:

- STPs (SharePoint Lists)
- Central Flows XTP
- Dashboard and Config Form
- Central Flows (Power Automate Flow)

Prerequisite

- FormsViewer already installed in your target site.
- You have the latest package for Central Flows SharePoint and contents are extracted.

Create the SharePoint Lists

1. Go to the root site of your SharePoint site.
2. Click the gear icon and click **Site Settings**. Note: If you don't see the **Site Settings** option, go to **Site Contents** and click **Settings**.
3. In the **Site Settings** page, navigate to **Web Design Galleries** section. Click **List Templates**.
Note: You can also navigate to <https://YourSharePointSite/catalogs/lt/Forms/AllItems.aspx>

Site Settings

Users and Permissions
People and groups
Site permissions
Access requests and invitations
Site collection administrators
Site app permissions

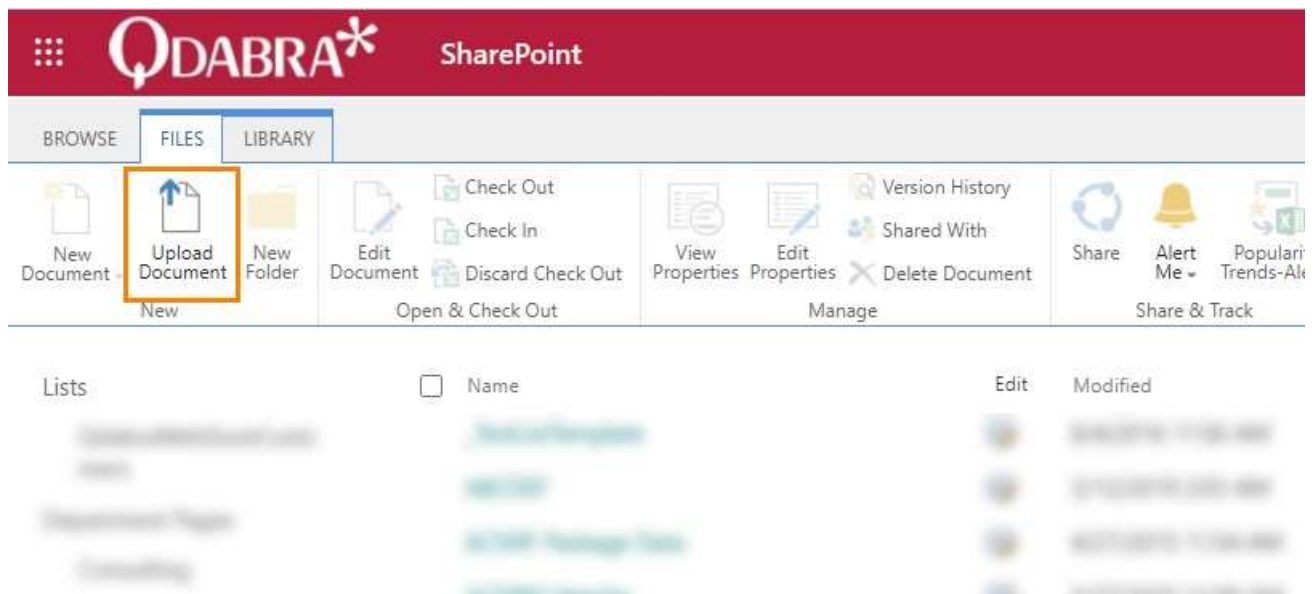
Web Designer Galleries
Site columns
Site content types
Web parts
List templates
Master pages
Themes
Solutions
Composed looks

Look and Feel
Title, description, and logo
Quick launch
Top link bar
Navigation Elements
Change the look

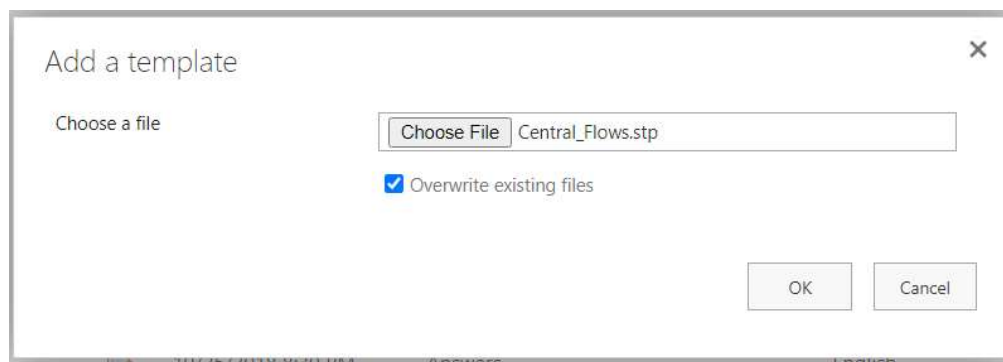
Site Actions
Manage site features
Save site as template
Enable search configuration export
Reset to site definition
Delete this site

Site Collection Administration
Recycle bin
Content Organizer

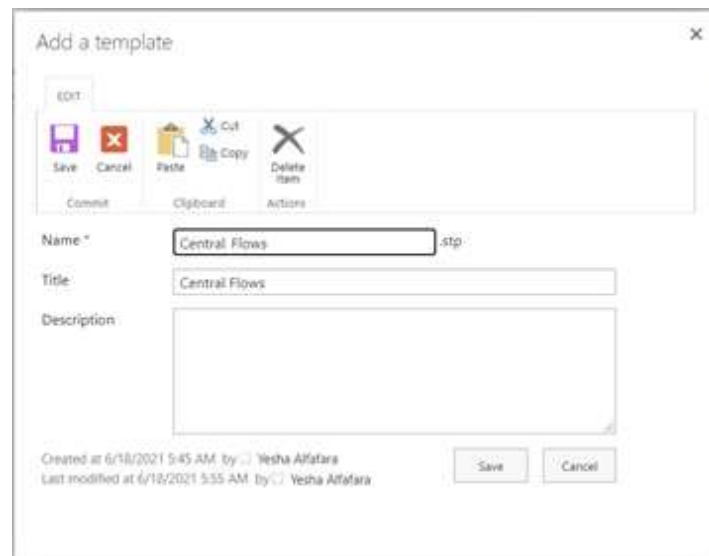
4. In the **List Template Gallery**, click **Files > Upload Document**.



5. In the **Add Template** pop-up window, click **Choose File** and navigate to the **STPs** folder included in the package. Select one STP file. Click **OK**.



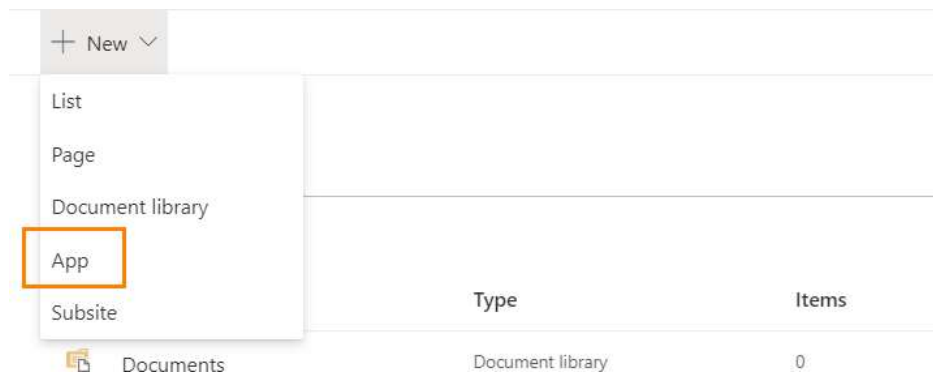
6. Click **Save**. Leave the file name as it is (Do not change the naming convention upon uploading).



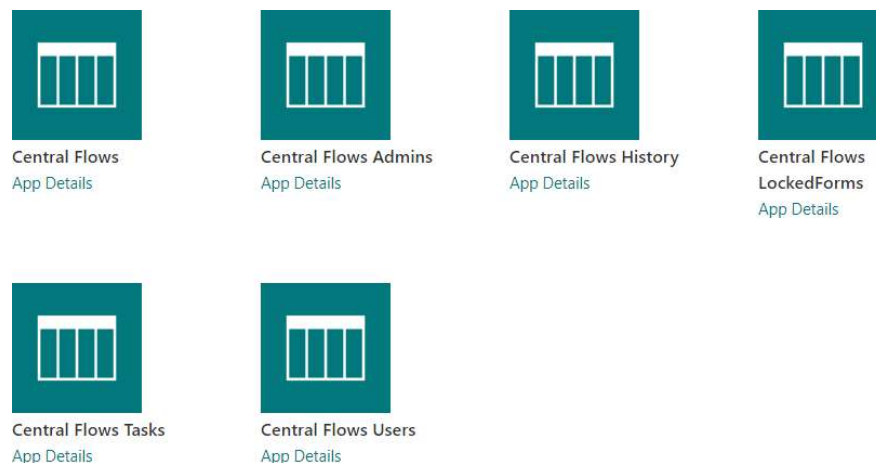
7. Upload the remaining STPs in the package folder. Here's the complete list of the STPs uploaded to SharePoint as list templates:

Central Flows Admins 		11/10/2021 10:36 AM	Central Flows Admins
Central Flows History 		11/10/2021 10:36 AM	Central Flows History
Central Flows LockedForms 		11/10/2021 10:36 AM	Central Flows LockedForms
Central Flows Tasks 		11/10/2021 10:36 AM	Central Flows Tasks
Central Flows Users 		11/10/2021 10:37 AM	Central Flows Users
Central Flows 		11/10/2021 10:37 AM	Central Flows

8. Go to the site where FormsViewer is installed and go to **Site Contents**.
 9. Click + **New** > **App**.

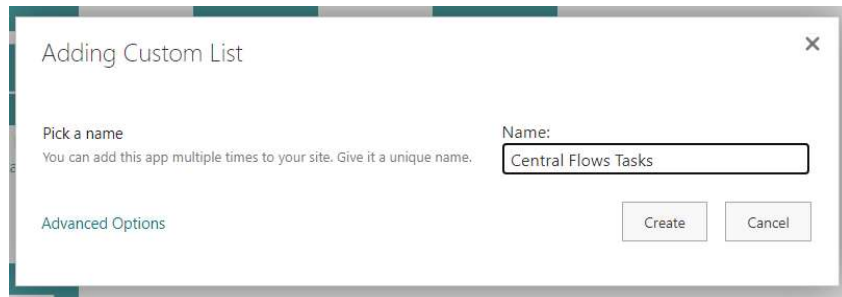


10. Type "Central Flows" in the search box to get all the STPs you just uploaded.



11. Select one from the search results.

12. For the list name, make sure that you copy the name of the list template. Click **Create**.



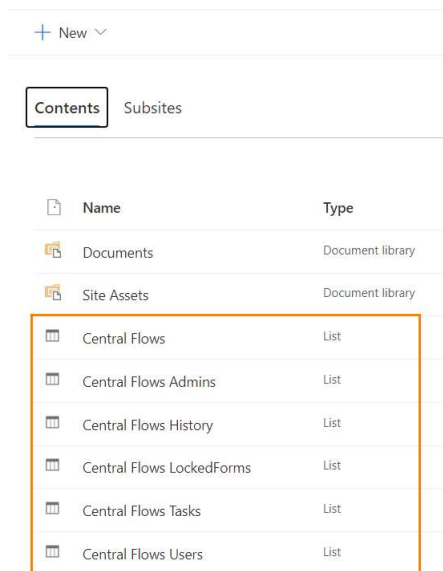
Adding Custom List

Pick a name
You can add this app multiple times to your site. Give it a unique name.

Name:

[Advanced Options](#)

13. Create the lists for the remaining STPs. Here's the complete list successfully created:



+ New	
Contents Subsites	
Name	Type
Documents	Document library
Site Assets	Document library
Central Flows	List
Central Flows Admins	List
Central Flows History	List
Central Flows LockedForms	List
Central Flows Tasks	List
Central Flows Users	List

14. Manually add an admin in the Central Flows Admins list. This is for the user to access the config icon when opening the form.

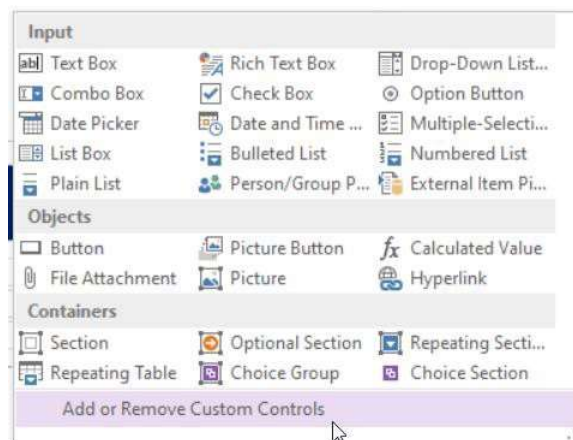
Central Flows Admins

Title	Admin	isDeleted	Department	AdminName	+ Add column
Yesha.Alfajara@Qdabra.com	Yesha Alfajara				

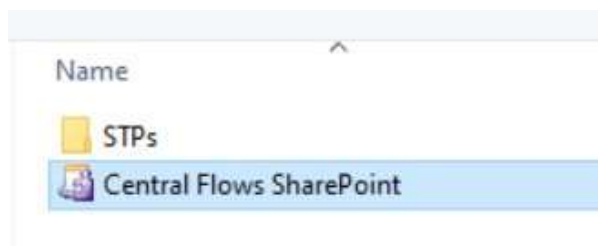


Import the XTP to your form

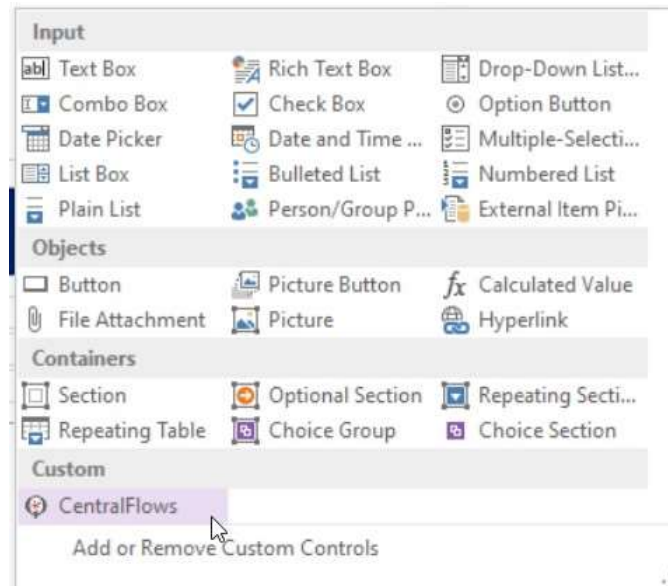
1. Open (in InfoPath Designer) one of your forms where you want to apply the approval workflow feature.
2. Go to the **Controls** section. Click **Add or Remove Custom Controls**.



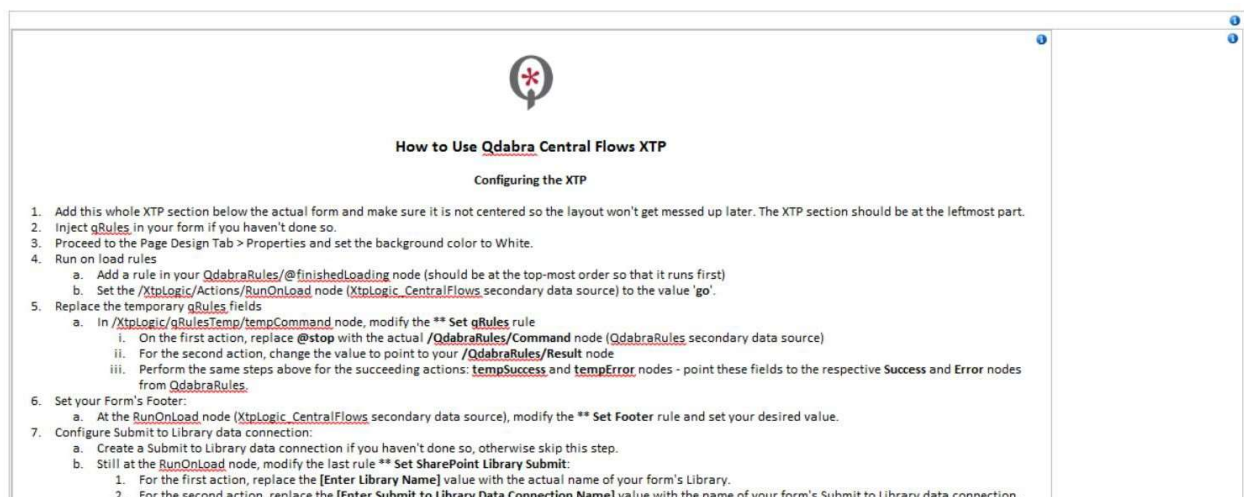
3. Click **Add**, choose **Template Part** option, then browse for the **Central Flows SharePoint XTP** included in the package. Click **Finish**.



4. In your form canvas, point your cursor at the bottom part of the section where your form is located.
5. Go back to the **Controls** section. Click **Central Flows** under **Custom**.



6. Once the XTP is clicked, it will automatically add the XTP section to the form canvas and the fields included in the XTP.
7. Follow the instructions in the XTP on how to configure the rules in order to enable the central flows feature in your form. Save your form after all the changes are made.



8. When done, proceed to FormsViewer and upload the form.

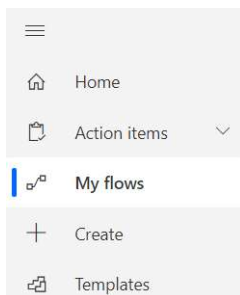
Upload the Dashboard and Config Form to FormsViewer

1. In FormsViewer, click **Upload a new Template**.
2. Upload the Dashboard and Config Form included in the package.

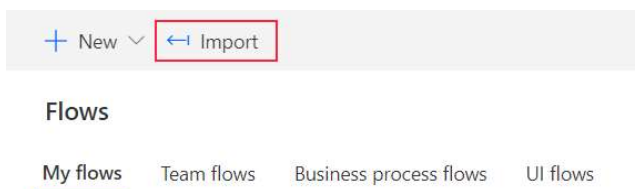
Note: It is important to retain the "Config Form" template name when uploading.

Import the Power Automate Flows

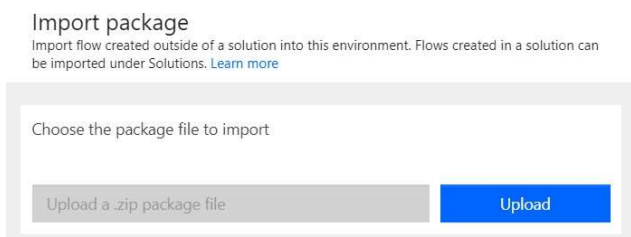
1. From <https://us.flow.microsoft.com/en-us/>, select **My flows**.



2. Click **Import** from the header menu.



3. Click the **Upload** button to select the exported CentralFlowsSharePoint ZIP file from the **Flows** folder included in the package.



4. The package will upload, and there will be options to select.

Review Package Content			
Choose your import options.			
NAME	RESOURCE TYPE	IMPORT SETUP	ACTION
 Central Flows SharePoint	Flow	Update	
Related resources:			
NAME	RESOURCE TYPE	IMPORT SETUP	ACTION
 SMTP	SMTP Connection	Select during import	
 Don.Frac@qdabra.com	SharePoint Connection	Select during import	

5. For each red iconed item, click the link in Import Setup to configure:

- The Flow will need to be imported as "Create as new" the first time, then if you receive updates with changes, as "Update".

Setup

Create as new

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

This app or flow will be new to the environment when the package is imported.

Resource name *

Central Flows SharePoint

- Select SharePoint and Office 365 Email connections.

Setup

Select during import

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

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

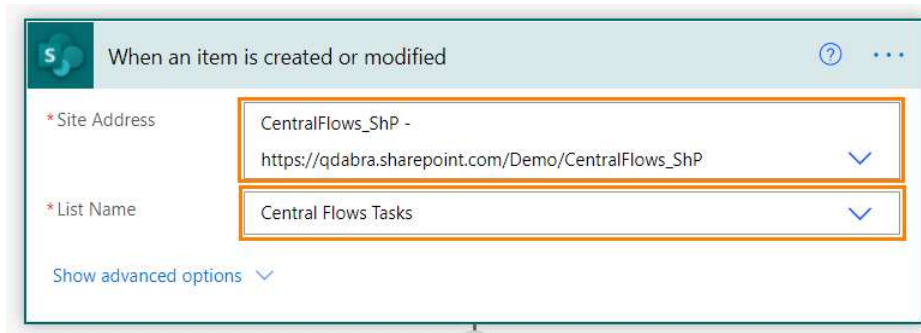
+ Create new
Refresh list

NAME	RESOURCE TYPE
Yesha.Alfara@qdabra.com	29 min ago ✓

- c. When all are ready, the icon changes and the import button at the lower right will be enabled.

Review Package Content			
Choose your import options.			
NAME	RESOURCE TYPE	IMPORT SETUP	ACTION
 Central Flows SharePoint	Flow	Create as new Central Flows SharePoint	
Related resources			
NAME	RESOURCE TYPE	IMPORT SETUP	ACTION
 PowerAutomateSendGrid	SMTP Connection	Select during import PowerAutomateSendGrid	
 Yesha.Alfajara@qdabra.com	SharePoint Connection	Select during import Yesha.Alfajara@qdabra.com	

- d. After both Flows are imported, open each, and change the SharePoint related triggers and actions to the correct site and list. Change the Site Address and List Name in the trigger to point to the Central Flows Tasks list.



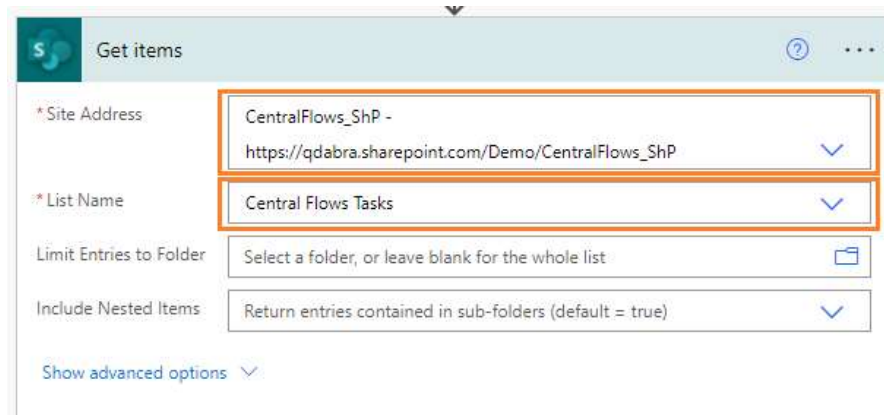
When an item is created or modified

* Site Address: CentralFlows_ShP -
https://qdabra.sharepoint.com/Demo/CentralFlows_ShP

* List Name: Central Flows Tasks

Show advanced options

6. Perform the same steps for the OverdueWorkflowNotifications ZIP file and update the Get items step to point to the same Central Flows Tasks list.



Get items

* Site Address: CentralFlows_ShP -
https://qdabra.sharepoint.com/Demo/CentralFlows_ShP

* List Name: Central Flows Tasks

Limit Entries to Folder: Select a folder, or leave blank for the whole list

Include Nested Items: Return entries contained in sub-folders (default = true)

Show advanced options

Need help with this document?

Contact Support@Qdabra.com