Microsoft | US Health & Life Sciences

Approvals + eSign

Annie Colonna, Aoife McDonnel, Dara Adeyemo
Welcome and Housekeeping

Today’s session is being recorded, and the recording will be publicly posted in the HLS Community Connection Yammer community and the Healthcare and Life Sciences Blog. Please leave the session now if you don’t give consent to be recorded. You will still be able to access the recorded session after today through the sites mentioned above.

Go to ... > Turn on Live Captions to follow along.

Use the Chat or if you have a question.

Use Reactions to give feedback to the speaker.

During anonymous polls and surveys, select an answer and click Submit.
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We encourage everyone to assist in creating a welcoming and safe environment.
Approvals + eSign

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Approvals

Approvals app helps users engage with their approvals processes in the flow of their work in Microsoft Teams.

It surfaces approvals so users can collaborate and act on them quickly, whether they are simple or structured, and whether they are from Teams or other systems.
Demo – Approve a discount rate for a sales deal
Approvals app in Teams workflow

Requestor

- Approvals hub
- Chat/Channel (Compose ext.)
- Create a request

Approvers

- Approvals hub
- Notification
- Chat/Channel (Adaptive card)
- Details Dialog
- Review request
- Approve or Reject
- Approvals hub
- Notification
- Chat/Channel (Adaptive card)
Approvals Auditing

- Approvals are stored in the **Microsoft Dataverse**
- Audit events are logged within the **M365 Security and Compliance Center**.
  1. Go to the Microsoft 365 Compliance Site.
  2. Select the Audit section.
  3. Search for activities under Microsoft Teams approvals activities.

### Audit Events by Category Type

<table>
<thead>
<tr>
<th>Core Approvals</th>
<th>E-Signature</th>
<th>Approval Template</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create new approval request</td>
<td>Added e-signature to approval request</td>
<td>Create a new template</td>
</tr>
<tr>
<td>View approval request details</td>
<td>Viewed e-signature request details</td>
<td>Edit an existing template</td>
</tr>
<tr>
<td>Approved approval request</td>
<td>Reviewed e-signature request</td>
<td>Enable/disable a template</td>
</tr>
<tr>
<td>Rejected approval request</td>
<td>Canceled e-signature request</td>
<td>Viewed template</td>
</tr>
<tr>
<td>Canceled approval request</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shared approval request</td>
<td></td>
<td></td>
</tr>
<tr>
<td>File attached to approval request</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reassigned approval request</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Approvals App integrates across M365
Demo – Sending an approval from Word
## Approvals Graph APIs

Use Graph APIs to automate workflows and integrate Approvals with your business applications.

<table>
<thead>
<tr>
<th>API capability</th>
<th>Example use case</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a new approval request</td>
<td>A custom business app automatically creates an approval</td>
</tr>
<tr>
<td>Get a list of approvals per user</td>
<td>Create a report to understand how many approvals users are submitting and their status</td>
</tr>
<tr>
<td>Get an approval based on an approval id</td>
<td>Link approvals status into a custom business app to keep the user in context of their workflow</td>
</tr>
<tr>
<td>Get a list of requests associated with an approval</td>
<td>Understand the details of a group of approvals</td>
</tr>
</tbody>
</table>
Demo – eSign in Approvals with Adobe
Microsoft Syntex eSignature - June 2023

Create e-sign request from PDF viewer
- Internal & External users
- Multiple recipients
- Multiple signature fields

Admin
- Specifying e-sign provider preferences

View & Track e-sign requests
- SharePoint
- Approvals app

Document management
- Signed document auto-saved in SharePoint

Cancel
- Cancelling a request
- Notifications

Review a request document
- Add signature fields
- Sign document
- Decline to sign
- Notifications

Licensing
- Billing per consumption
Requesting an e-signature
Users can create e-sign requests for PDFs
Daniela opens the pdf

A coachmark directs Daniela's attention to the new feature.
Then clicks on "add more recipients"
She adds Serena Davis
Next, Daniela selects "Add signature fields" to prepare the document.
She adds signature fields for each recipient

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry’s standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. Means, and other cause, whether of the kind enumerated or otherwise, not reasonably within the control of the party claiming suspension. Failure to prevent or settle any strike shall not be considered to be a matter within the control of the party claiming suspension. However, in order to be excused from delay or failure to perform, such party must act diligently to remedy the cause of such delay or failure.

**No Pause Terms**

Contoso Electronics works under “no pause” terms, meaning work is continuous and uninterrupted throughout each major deliverable.

**IN WITNESS WHEREOF,** the parties hereto have caused this SOW to be effective as of the day, month and year first written above.

<table>
<thead>
<tr>
<th>Northwind Traders</th>
<th>Contoso Electronics</th>
</tr>
</thead>
<tbody>
<tr>
<td>By:</td>
<td>By:</td>
</tr>
<tr>
<td>Date:</td>
<td>Date:</td>
</tr>
<tr>
<td>Signature:</td>
<td>Signature:</td>
</tr>
</tbody>
</table>

---
She adds signature fields for each recipient

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**Northwind Traders**

**Contoso Electronics**

By: ____________________________

Date: __________________________

Signature: ______________________

By: ____________________________

Date: __________________________

Signature: ______________________
When she clicks on "Signature", Daniela drag and drops the signature field onto the PDF.
She repeats the process for other recipients
Once signature fields are placed, Daniela presses send to complete the e-signature request.
Reviewing a document
Serena gets an email notifying her of the request.
Serena adds the date

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. Means, and other cause, whether of the kind enumerated or otherwise, not

August 16, 2022

Northwind Traders
By: Serena Davis
Date: Click to add date
Signature: Click to sign

Contoso Electronics
By:
Date:
Signature:
Then Serena adds her signature
She hits "Sign"
And can press "Complete" to send the signed document to Daniela.

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. Means, and other cause, whether of the kind enumerated or otherwise, not reasonably within the control of the party claiming suspension. Failure to prevent or settle any strike shall not be considered to be a matter within the control of the party claiming suspension. However, in order to be excused from delay or failure to perform, such party must act diligently to remedy the cause of such delay or failure.

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**Northwind Traders**

By: Serena Davis  
Date: August 16, 2022  
Signature: 

**Contoso Electronics**

By:  
Date:  
Signature:
Understanding the progress of the request

Daniela gets an email reporting that Serena has signed the request. The e-sign request progress is also available to Daniela in SharePoint & Approvals in Teams
Teams & Approvals

Email

SharePoint
The document is signed by all parties

Once all parties have signed the document, Daniela is notified.
Daniela receives an email saying that the request has been signed by all parties.
New "Signed" folder to house all the documents
New "Signed" folder to house all the documents
Viewing the audit trail

Recipients and creators can view the audit trail of the signed document to verify the integrity of the signatures

Creator's view
Daniela Mandera
Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry’s standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. Means, and other cause, whether of the kind enumerated or otherwise, not reasonably within the control of the party claiming suspension. Failure to prevent or settle any strike shall not be considered to be a matter within the control of the party claiming suspension. However, in order to be excused from delay or failure to perform, such party must act diligently to remedy the cause of such delay or failure.

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### Northwind Traders

**By:** Serena Davis  
**Date:** August 16, 2022  
**Signature:** [Signature]

### Contoso Electronics

**By:** Eric Ishida  
**Date:** August 16, 2022  
**Signature:** [Signature]
Scrolling to the end of the document, the audit trail is available.
<table>
<thead>
<tr>
<th>Session Date &amp; Time</th>
<th>Session Focus</th>
<th>Session Registration</th>
</tr>
</thead>
</table>
| Monday Dec 5th 11:00am – 12:00pm EST       | Teams + ServiceNow Integration  
Target Audience: IT Professionals                                           | aka.ms/TeamsSummitDay1        |
| Monday Dec 5th 2:00pm – 3:00pm EST         | Employee Engagement – (Teams + Viva Engage)  
Target Audience: IT Professionals, HR, Corp Communications, and Learning & Development | aka.ms/TeamsSummitDay1pm      |
| Tuesday Dec 6th 11:00am – 12:00pm EST      | Microsoft Teams Phone – Fall 2022 Updates  
Target Audience: IT Professionals                                           | aka.ms/TeamsSummitDay2        |
| Tuesday Dec 6th 2:00pm – 3:00pm EST        | Microsoft Approvals and E-sign Integration  
Target Audience: All, Finance, HR & Contract Management                        | aka.ms/TeamsSummitDay2pm      |
| Wednesday Dec 7th 12:00pm – 1:00pm EST     | What's new with Microsoft Teams?  
Target Audience: All – Session is great for Champion Groups                    | aka.ms/TeamsSummitDay3        |
| Thursday Dec 8th 11:00am – 12:00pm EST     | Microsoft Supercharge Analytics and Reporting with M365 data!  
Target Audience: IT Professionals, ITDM, HR, and Learning & Development          | aka.ms/TeamsSummitDay4        |
| Thursday Dec 8th 2:00pm – 3:00pm EST       | Company Communicator and Teams Emergency Operations Center App  
Target Audience: IT Professionals, HR, Corp Communications and Learning & Development | https://aka.ms/teamssummitday4pm |
| Friday Dec 9th 11:00am – 12:00pm EST       | Enabling Hybrid Work with Microsoft Teams  
Target Audience: All- Session is great for Champion Groups                      | aka.ms/TeamsSummitDay5        |
THANK YOU!!!

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HLS Community Connection Yammer Registration