Fabric Plan

E7 Setting up Approvals, Access Controls and Automations

This FAQ addresses common questions and clarifications that arise while working through the E7 — Setting up Approvals, Access Controls and Automations exercise. It covers commonly asked questions pertaining to setting up the approval workflow, access controls and automations in PowerTable.

Part 1 Set Up Approval Workflows

1. **What does "Requires Approval for All Changes" actually do?**
   It removes the ability to write directly to the database and routes every pending change through a reviewer instead. You enable it from the Approvals button on the PowerTable ribbon, and once it is on, you must nominate approvers under **Who can Approve changes?** before saving. From that point a contributor can stage edits as normal but cannot commit them to the database without approval.

2. **Does enabling approvals cover the whole Plan item or only the sheet I enabled it on?**
   Approval setup is specific to each PowerTable sheet – you can set up different approval workflows for different sheets.

3. **How do I know the approval workflow is in place?**
   The commit button changes — Save to Database is replaced by Submit for Review.

4. **Do I have to fill in the Submit for Review popup?**
   No — all three fields are optional, and are only used to provide more context to the approval request should you need to.

5. **Why did my edits revert to the old values after I submitted them?**
   That is expected. The submitted values are held with the request rather than written to the table, so the grid returns to its committed state and marks the affected cell with an Excel-like note indicator showing there is a pending approval for that record. Hovering the indicator shows the proposed change.

6. **How does the approver know something is waiting?**
   The Approvals button on the PowerTable tab gains a badge showing the number of pending approvals, and the approver also receives a Teams message summarising the request with a Review request button. The approver can open the request using the button on the Teams message.

7. **Can I approve a change I submitted myself?**
   This is possible so long as you are also one of the approvers configured for the request. If not, you must wait for approval from an authorized approver.

8. **What is the difference between Pending Requests and My Requests?**
   Pending Requests is the approver's view — requests awaiting action from you, split across the Pending Review, Overdue, Action Required and Closed tabs. My Requests is the submitter's view of requests you raised. Both are reached through the Approvals button, with Manage Approvals in the top right leading to the configuration screen.

9. **What is the difference between Reject, Request Changes and Approve?**
   Approve commits the change. Reject dismisses it without writing to the table. “Request changes” allows the approver to submit comments on changes that need to be made on the data – the requestor can re-submit the request after making changes.

10. **Can I approve some of the rows in a request but not others?**
    Yes. When there are multiple changes to be approved in a single request, you may select some of the changes that need to be made and approve them while keeping the remaining ones pending.

11. **What happens when I click Approve?**
    The save is committed at that moment and the row in the sheet reflects the approved values. There is no separate save step for the approver, and the submitter does not need to resubmit. The note indicator clears once the change is written.

12. **Does the audit log show who approved a change as well as who made it?**
    Yes. The Audit Data tab carries both an Updated By and an Approved By column, so an approved write records the submitter and the approver against the same Transaction ID.

13. **How many approval levels can I set up, and can a level have more than one approver?**
    With multi-level approvals enabled, you can assign up to 3 levels of approval. Each level can have multiple approvers.

14. **With rule-based approvals, how does PowerTable decide who reviews a change?**
    It matches the change against the Approval Rules you define and routes to that rule's approvers. Each rule has a Rule Name, a Condition and an Approvers list. The default approver field is mandatory, marked with an asterisk, because a change that matches no rule still needs somewhere to go.

Part 2 Set up Access Controls

15. Where do I configure access controls, and is Row Access the only category?

Access controls can be configured using the **Manage Access** button that sits on the Setup tab of the toolbar. You can set up access controls for Rows and for Columns separately within this configuration screen.

16. What do the Add, Update and Delete sections control?

They map to the three write operations against the table - who can insert new rows, who can modify existing rows, and who can remove them. Each is configured independently so that authorization to perform those operations can be set up to be mutually exclusive.

17. What does “All users in this domain” actually cover?

Everyone who has access to this Fabric Plan item. It is not a grant to your whole tenant - a user who cannot open the Plan item gains nothing from it. Workspace access remains the outer boundary; these settings partition what a user can do once inside.

18. Can I grant access to a group rather than naming people individually?

Yes. Specific users grants the ability to specific individuals or security groups in all three sections, and the picker searches by name or email. This is the option to reach for when the approver or editor population is managed in Entra rather than maintained by hand.

19. Why is Rule-based access offered for Update and Delete but not for Add?

For inserts, a new value is being inserted. There are no prior values to test a condition against, which is why this option is offered only for the Update and Delete functions.

20. How does a rule-based access rule work?

Each rule pairs a filter with a user list, so the named users can act only on rows matching that filter. Add Rule creates rules and Delete all clears them; each row carries edit and delete controls.

21. When does “Delete Type” appear, and what does it decide?

It appears as soon as you set “Who can delete rows?” to anything other than No one, and it determines how a deletion is reflected in the underlying table.

22. What is the difference between Permanent and Mark as Deleted?

Permanent (Hard Delete) removes the row from the underlying table. Mark as Deleted (Soft Delete) leaves the row in place and writes a status value into a column you nominate, so the record stays queryable. Soft delete is the option to choose when the data has downstream consumers or a retention requirement.

23. What do I have to configure if I choose soft delete?

To set up a soft delete, you will have to configure:

- **Column** - the column that will carry the deleted status. The example uses Location.
- **Set value upon deletion** - the value written to that column when a row is soft-deleted. The example uses Disposed, which is one of the rows in the locations table.
- **Show Deleted rows** - whether the sheet continues to display marked rows.

24. Do Access Controls apply to all PowerTable sheets within a Plan Item?

No. Access Controls that have been setup within a PowerTable sheet only applies to that sheet. This allows us to customize these access controls per PowerTable sheet.

25. Do these controls stop someone editing the table directly in the SQL database?

These settings are configured inside the Plan item and govern what users can do through the PowerTable sheet; They are not enforced at the database level – security at the database level will have to be governed by permissions at the workspace and the database item level.

Part 3 Setting up Automations

26. Where do I build an automation, and what does "Create Automation" give me?

Automations sits on the Setup tab of the toolbar alongside "Manage Access". **Create Automation** opens an empty canvas with an Add Trigger placeholder and a list of suggested triggers — no trigger or action is preconfigured. It allows you to set up an automation workflow from scratch.

27. What triggers can an automation use, and what does When a button is clicked wait for?

At the moment, there are 5 triggers available — When a record is created, When a record is updated, When a record is deleted, When a form is submitted, and When a button is clicked.

28. Can I limit when a trigger fires?

Yes — the trigger's Properties panel has a Conditions (Optional) section where you add rules on Field, Operator and value. The automation is triggered when changes in column data meet the specified conditions.

29. Can one automation have more than one trigger?

No, each automation can triggered only by one type of event. But it is possible to set up multiple automations. You can also duplicate an automation and change just the trigger to have the same actions configured for different trigger types or conditions.

30. What action types can I add?

Add Action offers two groups. Advanced contains Conditional Group and Repeating Group, for branching and looping. PowerTable contains Create Record, Update Record, Delete Record, Find Record(s) and Bulk Create Record.

31. In the exercise, why does the automation look up the Depot location instead of using its Id directly?

Because the assets table stores Location as an Id, not as text, and hard-coding that Id would break if the locations table changed. The exercise names the alternative explicitly — hard code the Location Id in the Update action — and chooses the lookup instead. Find Record(s) retrieves the row where Location is Depot, and the Update action then references the Location Id it returned.

32. Why does each action ask for the schema and table again?

Actions are configured independently, so each one carries its own Configuration block with the Schema and Table. This allows you to affect tables that are not a part of the PowerTable sheet as well.

33. What is the difference between Single Record and Multiple Records in Fetch type?

Single Record returns one matching row, Multiple Records returns all records that are a match. The Find Configuration screen also lets you choose which columns to return under Select columns and optionally sort the results.

34. What does Update type Single Update do if several rows match my condition?

It updates only the first record matching the specified condition. Multiple Updates is the option for acting on every matching row.

35. In the exercise, how does the Update action know which row's button was clicked?

The update action knows this through a reference to the trigger's output rather than a fixed value. In Step 10, we set the rule Asset Id = and then, in the Value field, we click the + button, select the “When a button is clicked trigger” and pick the Asset Id from it. That token resolves at run time to the Asset Id of the row whose button was pressed — the run history contains the details of values that were passed or processed during each step of the automation.

36. What is the difference between Clear Value and Replace Value in the Fields section?

Clear Value empties the field, Replace Value writes something into it.

37. In the exercise, how does the Location field pick up the Id that the Find action returned?

The same way the trigger reference works but by pointing at an action instead. Set Location to Replace Value, click the + button, select the Find Record(s) action and then select Location Id. The token picker lists Trigger and Actions as separate sources, so any earlier action's output is available to a later one.

38. How do I create the button that runs the automation?

You can create a button column using the **Insert Column** on the PowerTable ribbon, navigating to the “Visual Column” menu, and selecting the **Add Button Column** option.

39. Is a Button Column added to the underlying table?

No. Any “Visual Column” that is created in a sheet persists only within that particular PowerTable sheet – it is not written back to the database.

40. What does Run History show me?

A row per job with Job ID, Started At, Status, Duration, Started By and a View Details link. View Details expands each stage in turn — the trigger with its Triggered By and Triggered On values, the Find Record(s) output showing the retrieved location row, and the Update Record input showing the schema, table, resolved field values and the conditions applied. This is the place to look when a button click reports success but the row does not change as expected.

41. What does the toggle next to the automation name do?

The toggle enables or disables the automation. When disabled, the steps in the automation are not processed even when the trigger condition is met.