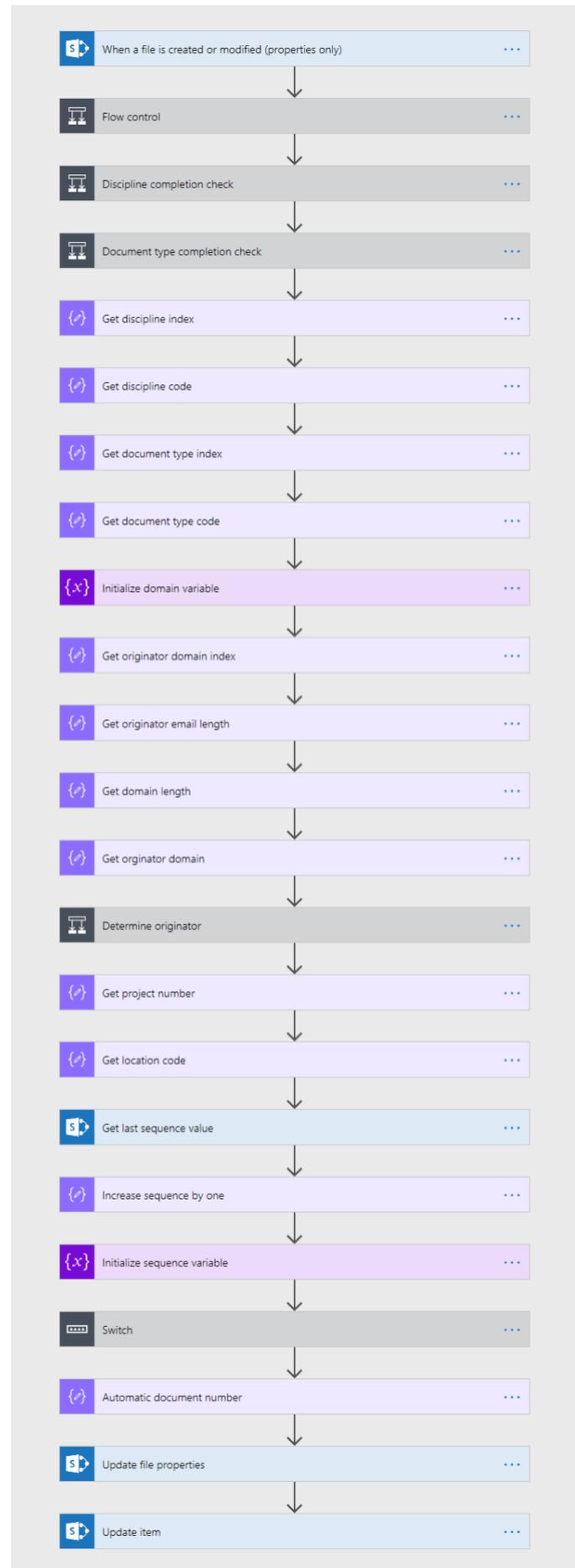


Team Flow configuration



Flow checks for any new or modified file in a the Project Documents document library.

Flow checks for the status of the *flowcontrol* field. Without this check the Flow will run continuously. If *flowcontrol=On* then the flow will continue otherwise it will exit.

Flow checks for the status of the *discipline* field. If the field contains the default value then the Flow will exit as the user has not selected the appropriate discipline.

Flow checks for the status of the *doctype* field. If the field contains the default value then the Flow will exit as the user has not selected the appropriate document type.

The discipline code is stored at the end of the managed metadata term in a set of square braces. It is abstracted in two-steps. (1) Retrieve index of left square brace.

(2) Use index of left square brace to extract the code. The code is in the form [XX].

The document type code is stored at the end of the managed metadata term in a set of square braces. It is abstracted in two-steps. (1) Retrieve index of left square brace.

(2) Use index of left square brace to extract the code. The code is in the form [XX].

To enable the determination of the originator code, a variable is initialized which will be used later in a condition.

The creators email domain is used to determine the originator code. It is abstracted in four-steps. (1) Retrieve index of the @ in the *Author (Created by)* field.

(2) Calculate the overall length of the value in the *Author* field.

(3) Calculate the length of the domain.

(4) Extract the domain using inputs from prior steps.

A condition is used to apply the originator code using domain from the prior steps. The domain variable is updated to the correct three letter originator code.

The value in the *prjnum* field is set at folder root level.

The value in the *site locations* field is set at folder root level.

The last used sequence number is stored in the *Parameters* SharePoint list. This value can be adjusted to determine the start index for the sequence.

The last used sequence number is stored in the *sequence* field *Parameters* SharePoint list. The value is incremented by 1 for use in the new AND.

To enable the determination of the leading zero padding for the sequence code, a variable is initialized which will be used in the next switch case.

The switch case determines how many leading zero's are required to pad the sequence number out to five digits.

The ADN is assembled in the form: {project number}-{location code}-{originator}-{document type}-{discipline}-{sequence}

The ADN is added to the *adn* field for the file and the *flowcontrol* field set to *off* to prevent future runs.

The *sequence* field in the *Parameters* list is updated using the value of the sequence variable

[!!] No error handling if Project number or location is blank

Error handling can be added following pattern for discipline and doctype

Flows that exit without completion are listed in Flow as 'cancelled'

The Flow cannot proceed until the user has provided both values

Multi-step processes are used to reduce the complexity of expressions

This step would need additional cases if more than two originator domains are used

Alternative would be for the user to select this value from Managed metadata

[!!] Manually changing the index to a number less than one previously issued will result in duplicate ADNs

A fresh ADN can be generated by setting the *flowcontrol* field to Yes.

toggling the Flow to run again will generate a new sequence number

SharePoint configuration

Project Documents

- Project number**
Field: *prjnum*
Managed metadata
- Site location**
Field: *Site%5Fx0020%5FLocations*
Managed metadata
- Discipline**
Field: *discipline*
Managed metadata
- Document type**
Field: *doctype*
Managed metadata
- Flow control**
Field: *flowcontrol*
Choice (On,Off)
- ADN**
Field: *ADN*
Single line of text

[!!] Users need contribute rights for ADN to function

Set as default column metadata
[!!] Note no error handling if this is blank

Set as default column metadata
[!!] Note no error handling if this is blank

Set by user
Default value set on column to *Set value [!]*

Set by user
Default value set on column to *Set value [!]*

Default value set on column to *On*. Switched to *Off* as result of a successful Flow. Can be toggled by user

Set by Flow.
Default value set on column to *Do not edit [!]*

Alternatives:

- One project per document library
- Use URL of library to reduce number of metadata columns

Columns and terms:

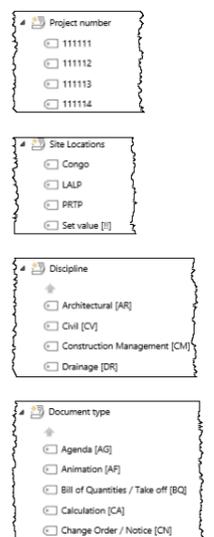
- Managed metadata defined at Site Collection level
- Document ID column displayed
- Managed metadata columns have a 'Set value [!]' term set as their default to prompt user entry
- Limited set of users need access to Term Store as *Contributors* to manage terms. Recommend use of closed term sets

Columns added to new Content type *Shell document* which is a child of Project Document:

- Project number
- Site location
- Discipline
- Document type
- Flow control
- ADN

Shell document set as default content type

Library set to display in 'New' experience to improve user experience



Parameters

- Title**
Field: Title
Single line of text
- sequence**
Field: *sequence*
Number (zero decimal places)

[!!] Users need contribute rights for ADN to function

Set with placeholder text

Set by Flow. Can be overridden by user

