Multi-Level Approval Power Automate

Notes: Green text for dynamic content fields

1. Create a SharePoint List named “Approvers”
   1. Add a Person or Group “Column named “Approver”
      1. Check Required Column
2. Create a SharePoint List named “Laptop Request”
   1. Add a Single Line Text Column named “Approval Status”
   2. Add a Multi-Line Text Column named “Comments”
   3. Add a Single Line Text Column named “Approver”
   4. Add a Choice Column named “WorkstationType”
      1. Standard
      2. Performance
      3. 2 in 1
3. Populate your Approvers list with at least two approvers (You can use yourself twice)
   1. Example:
      1. Title - 1
      2. Approver
      3. Title – 2
      4. Approver

Graphical user interface, application

Description automatically generated

1. Navigate to Power Automate via the Waffle or App Launcher
2. Click on “+ Create”
3. Select “Automate Cloud Flow”

Graphical user interface, application, Word

Description automatically generated

1. Flow Name: Multi-Level Approval
2. Choose your flow’s trigger
   1. SharePoint
      1. When an Item is created

Graphical user interface, application

Description automatically generated

1. Click Create
2. Add your SharePoint Site Url and the list Name “Laptop Request”
3. Click on “+ New Step”, Search for SharePoint and select “Get Item”
   1. Add Site Url and Laptop Request List
4. Select “ID” from the dynamic content

Graphical user interface, text, application, email

Description automatically generated

1. Click on “+ New Step”, Search for variable and select “Initialize variable”
2. Name the variable “Comments” and set as a string for type

Graphical user interface, text, application, email

Description automatically generated

1. Click on “+ New Step”, Search for variable and select “Initialize variable”
2. Name the variable “ApprovalStatus” and set as a string for type

Graphical user interface, text, application

Description automatically generated

1. Click on “+ New Step”, Search for SharePoint and select “**Get Items**”. May sure to use Get Items not Get item
   1. Add Site Url and Approvers List

Graphical user interface, text, application, email

Description automatically generated

1. Click on “+ New Step”, Search for Condition and select “Condition” (Note: This will add an Apply to Each Loop)
   1. Add the variable “ApprovalStatus” to the left side of the condition
   2. Add “Rejected/Cancelled” to the other site
   3. Set the condition to “Is not equal to”

Graphical user interface, text, application, email

Description automatically generated

1. The right of the condition “No” will be left blank

Graphical user interface, application

Description automatically generated

1. Go to “Yes” or left side of the Condition
2. Click on “Add an Action”, Search for Approval and select “Start and Wait for an Approval”.
   1. Approval Type - Approve/Reject – First to respond
   2. Title: -New (Get item: Workstation Type Value from the dynamic content) Laptop request for (Get item: Created by Displayname from the dynamic content)
   3. Assigned to - Get Items: Approver Email from the dynamic content
   4. Details – (Get item: Created by DisplayName from the dynamic content) has requested a new laptop on (Get item: Created from the dynamic content)
   5. Link to item - Get item: Link to Item from the dynamic content
   6. Item link description
      1. Use concat Expression
         1. concat(Get item: ID, ‘-‘ ,Get item :Workstation Type Value)

Graphical user interface, text, application, email

Description automatically generated

1. Click on “Add an Action”, Search for variable and select “Append to string variable”
   1. Select Comments variable
   2. Put “Response summary” from dynamic content for the value
   3. Add “;” at the end to separate the comments

Graphical user interface, application

Description automatically generated

1. Click on “Add an Action”, Search for Condition and select “Condition”
   1. Add the dynamic content “Outcome” to the left side of the condition
   2. Add “Approve to the other site
   3. Set the condition to “equal to”

Graphical user interface, application

Description automatically generated

1. On the “Yes” or left side of the condition, click on “Add an Action”, Search for variable and select “Set variable”
2. Select “ApprovalStatus” to “Approve”

Graphical user interface, application, email

Description automatically generated

1. Click on “Add an Action”, Search for SharePoint and select “Update Item”
   1. Add Site Url and Laptop Request List
   2. Id - Get Item: ID from the dynamic content
   3. Title - Get Item: Title from the dynamic content
   4. WorkstationTypeValue
      1. Select “Enter Custom Value”
      2. Get Item: WorkstationTypeValue from the dynamic content
   5. ApprovalStatus - Variable: Approval Status from the dynamic content
   6. Approver - Get Items: Approver Displayname from the dynamic content
   7. Comments - Variable: Comments from the dynamic content

Graphical user interface, text, application, email

Description automatically generated

1. On the “No” or right side of the condition, click on “Add an Action”, Search for variable and select “Set variable”
2. Select “ApprovalStatus” to “Rejected/Cancelled”

Graphical user interface, application

Description automatically generated

1. Click on “Add an Action”, Search for SharePoint and select “Update Item”
   1. Add Site Url and Laptop Request List
   2. Id - Get Item: ID from the dynamic content
   3. Title - Get Item: Title from the dynamic content
   4. WorkstationTypeValue
      1. Select “Enter Custom Value”
      2. Get Item: WorkstationTypeValue from the dynamic content
   5. ApprovalStatus - Variable: Approval Status from the dynamic content
   6. Approver - Get Items: Approver Displayname from the dynamic content
   7. Comments - Variable: Comments from the dynamic content

Graphical user interface, text, application, email

Description automatically generated

1. Create a new item on the Laptop Request to activate the flow.