

HOW-TO WHITE PAPER

HOW TO USE MICROSOFT 365 POWER AUTOMATE TO APPROVE DOCUMENTS

What is Microsoft Power Automate?

Microsoft Power Automate is a powerful business process management tool that helps organizations automate business workflows to collect, view, manage and communicate information between multiple systems without the need for developers or coding knowledge. With its intuitive drag-and-drop features users can easily create and integrate flows for multiple Microsoft 365 business applications including SharePoint libraries or lists, Microsoft OneDrive and / or Microsoft Teams.

How-To-Article Focus

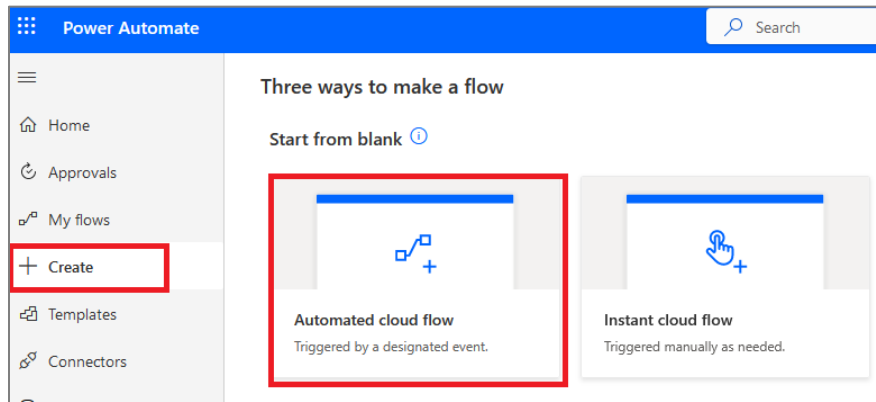
In this How-to-Article, we will focus on building an automated approval flow within a SharePoint list. We will show you how to create an approval process so that every time an employee adds an item to the Equipment Request list, somebody will receive a request to approve it. We'll also discuss how information is shared, approved and / or rejected between IT managers and users.

Getting Started - Detailed Steps to Trigger Approvals from Microsoft Lists

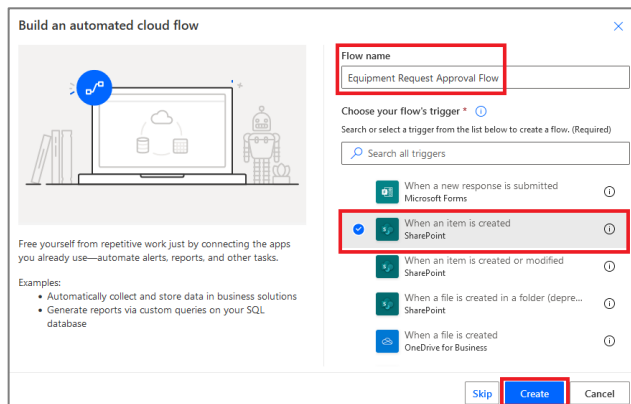
1. The first step is to create a list within Microsoft List. We have created the list below as an example.

Equipment Requests ☆ ☹					
Product Name ▾	Product Type ▾	Quantity ▾	Brand ▾	Color ▾	Approval Status ▾
Monitor 100AG	Monitor	2	LG	Black	Approved
Headset LP90	Headset	1	Microsoft	Grey	Approved
Surface Laptop	Laptop	1	Microsoft	Grey	New Request

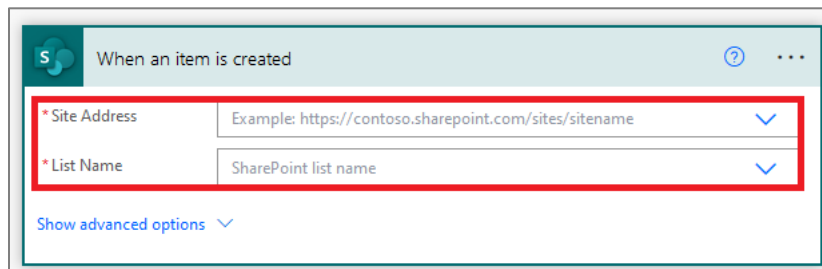
2. Next, launch the Power Automate platform [found here](#).
3. Select **Create**, then **Automated Cloud Flow**.



4. Name your flow choose **When an Item is Created** as the flow trigger.
5. Select **Create**.



6. Choose the **SharePoint** site address and **List Name** that you want to trigger the approval.



7. Select **New Step** and then **Start and Wait for an Approval**.
8. Choose **Approve/Reject – First to Respond**. This means that the approval process will complete after the first response, regardless of whether it is Approve or Reject. Depending on your needs you could choose:

- a. **Wait for all Responses** – this means that the approval process will not complete until all reviewers have selected one of the custom responses.
 - b. **Everyone Must Approve** – this means that the approval process will not complete until all reviewers have approved, or one reviewer has rejected.
9. Fill in the remaining fields using the corresponding dynamic content. The **Assigned to** field is the person in your organization who should receive the approval request.

When an item is created

Start and wait for an approval

* Approval type: Approve/Reject - First to respond

* Title: Title

* Assigned to: Maria Gaffney

Details: Product Type V...

Item link: Link to item

Item link description: Describe the link to the item

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Before we move on it is important to note that a semi colon appears after the name in the Assigned To field by default. You must **remove the semicolon** for the flow to work successfully!

10. Select **New Step** then choose **Condition**. Fill in the condition as shown below.

Condition

Outcome is equal to Approve

+ Add

11. Within the **If Yes** section choose **Update Item** and fill in the required fields as shown below.
12. You will also want to update the Approval Status column within the SharePoint list. To do that, choose **Show Advanced Options** then select **Approved** within the **Approval Status Value** field.

✓ If yes

Update item

* Site Address: Development - <https://vortexmsp.sharepoint.com/sites/Development>

* List Name: Equipment Requests

* Id: ID

* Title: Title

Product Type Value:

Quantity Value:

Brand:

Color Value:

Approval Status Value: Approved

Show advanced options

13. To finish the **If Yes** section, select **Add an Action** then **Send an Email (V2)**.

14. Draft your email to the requestor, using the below example as a guideline.

Send an email (V2)

* To: Created By Email

* Subject: New Equipment Request: Title has been approved

* Body:

Font 12 B I U

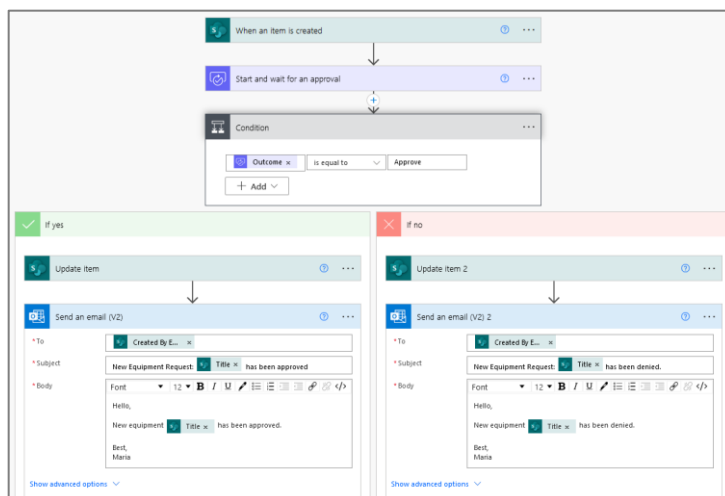
Hello,

New equipment Title has been approved.

Best,
Maria

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15. Finally, repeat these steps for the **If No** section. When you are done, your flow should look like this.



That's it! Your flow is ready for use. Every time an employee adds an item to the Equipment Request list, the IT manager receives a request to approve it. The IT manager will get an email to approve or deny the request and the requestor gets a notification informing them of the result.

To learn more about leveraging Microsoft Power Automate, please visit the [Microsoft Experts](#) of our website or contact us at 202.602.6662 or info@vortexmsp.com.