Configure dynamic approval process using NITRO components

Applies to:

Crow Canyon NITRO activated sites in:

SharePoint Online and On-Premises 2013/2016/2019

Description

Dynamic approval process means creating approval levels dynamically at the time of submission of a request where approvers are defined within the submitted request. That is, each request has its own approval levels and approver tasks are created for these levels accordingly.

In this example, we have considered Purchase Request and the flow is defined as below.

1. Approvers will be specified by the user while submitting the request for approval. All the below approver columns will be available in Request form.
   Approver columns:
   a. Manager
   b. Department Head
   c. HR Manager
   d. CEO
   e. President
   f. HR VP
2. Approval tasks will be created only for the approvers defined in above approver columns. If approvers are not defined, then that approver level will be skipped.
3. For this we have used custom action to verify the approver column is empty or not in the request. If approver is blank, then that level will be skipped otherwise it will create a level in 'Approval Levels' list.
4. Next, when request is submitting, we will invoke a workflow that will create tasks for the levels created in 'Approval Levels' list in ascending order.
5. Based on approval decision, request will be approved/denied or will go for next level.

Summary of steps

1. **List schema**

   - Create 'Purchase Requests' list
   - Create 'Approval Levels' list
   - Create 'Approver Tasks' list

2. **Configure workflows for approval process**
   - Approval process for normal flow
   - Approval process for send back flow
   - Update request decision on approval decision

3. **Configure custom actions for approval process**
   - Purchase Requests list

       i.   Create approval levels

      ii.   Submit for approval

- Approver Tasks list
  - i.   Approve
  - ii.   Deny
  - iii.   Send back
  - iv.   Reassign

4. **Configure NITRO forms for the lists**
   - 'Purchase Requests' list
   - 'Approval Levels' list
   - 'Approver Tasks' list

Detailed steps

In dynamic approval process, there are no pre-defined approval levels. The approval levels and their approvers are defined by the requester at the time of submission of request. When a request is submitted for approval, approval levels are created for the approvers specified in submitted request. The levels are not created for those approval level columns that are empty.

1. List schema

Purchase Requests list

Create a list with custom list template and name it as 'Purchase Requests'. Create below required fields in this list.

Column internal name	Column display name	Column type	Purpose
Title	'Short Description' (Change display name of existing 'Title' column)	Single line of text	For short description about the request
ApprovalStatus	Status	Choice Choice options: Pending Submission Approval Not Required Pending Approval Sent Back Approved Denied	Indicates current approval status of the request
SubmittedFor	Submitted For	Person or Group	Contains requester of the purchase request
Comments	Comments	Multiple lines of plain text with 'Append Changes to Existing Text'	To capture approver comments in the purchase request
Level	Level	Number	To capture the current approval level

ApprovalLevel	Approval Level	Single line of text	Indicates the current approval level name
ApprovalTasks	Approval Tasks	Multiple lines of enhanced rich text	To show approval tasks in the request
ApprovalWorklog	Approval Worklog	Multiple lines of plain text with 'Append Changes to Existing Text'	To capture approval process worklog
ApprovedDate	Approved Date	Date and Time	To capture the request approval date
Manager	Manager	Person or group (single selection enabled, people only)	To specify Manager level approver
DepartmentHead	Department Head	Person or group (single selection enabled, people only)	To specify Department Head level approver
HRManager	HR Manager	Person or group (single selection enabled, people only)	To specify HR Manager level approver
CEO	CEO	Person or group (single selection enabled, people only)	To specify CEO level approver
President	President	Person or group (single selection enabled, people only)	To specify President level approver
HRVP	HR VP	Person or group (single selection enabled, people only)	To specify HR VP level approver

Approval Levels list

Create a list with custom list template and name it as 'Approval Levels'. Create below required fields in this list.

Column internal name	Column display name	Column type	Purpose
ApprovalLevelName	Approval Level Name	Single line of text	To capture the approval level name
Level	Level	Number	To capture the approval level number
Approver	Approver	Person or Group	To capture the approver for approval level
RelatedRequest	Related Request	Lookup pointing to 'Purchase Requests' list showing ID	Indicates approval levels for related purchase request

Approver Tasks list

Create a list with 'Tasks' list template and name it as 'Approver Tasks'. Create below required columns in this list.

Column internal name	Column display name	Column type	Purpose
ApprovalLevel	Approval Level	Single line of text	To capture the approval level name
ApprovalDecision	Approval Decision	Choice Choice options: Approved Sent Back Denied	To capture approver's decision
RelatedRequest	Related Purchase Request	Lookup pointing to 'Purchase Requests' list showing 'Short Description'	Indicates approval tasks for related purchase request
Comments	Comments	Multiple lines of plain text	To capture approver comments
Level	Level	Number	To capture the approval level number

2. Configure workflows for approval process

Workflow 1: Approval Process for Normal Flow

Create a user triggered workflow on 'Purchase Requests' list.

Create/Configure Workflow

Workflow Settings

Workflow Name*   Approval Process for Normal Flow

Site*   Purchase Order System ( )

List*   Purchase Requests

Workflow Description   Approval process on purchase request item for approve and deny flow. Send Back flow is in separate workflow.

When to start the Workflow

When*
- an item is created
- an item is modified
- an item is deleted
- an item is created/modified (async)
- based on date/time column in item
- ● scheduled / user / bot triggered
  - ☐ scheduled
  - ☑ user / bot triggered
- scheduled report

Trigger Options   ☑ Process this workflow for items created, modified, or deleted by automated processes

ⓘ *Items can be created, modified, or deleted by users or by automated processes (provider-hosted apps, custom code, etc.) without user intervention. There is the potential for cascading execution of workflows when workflows are triggered by changes made by automated processes. Leaving this box unchecked means that the workflow will only run when changes are made by logged in users and not by automated processes.*

Conditions

AND | OR   ✚ Add condition   ⊕ Add group

Action1: QL_GetApprovalLevel

Configure a query list action for querying 'Approval Levels' list. This action will fetch next approval level.

Query List Action Settings

When to execute this Action

Conditions

AND OR   + Add condition ⊕ Add group

General Settings

Please refer manual for below configurations.

Action Name*	QL_GetApprovalLevel
Action Description	
Type* ⓘ	Item
Select Query Site URL* ⓘ	⦿ Select Site from Current Site Collection ◯ Specify Site Url
	Purchase Order System (/sites/nitro1/PO81) ▾
Query List* ⓘ	Approval Levels ▾
Get Item(s) From*	◯ Lookup Column ◯ Related Items ◯ List View ⦿ Query Builder ◯ Query

Fetch items from 'Approval Levels' list as per the conditions specified below.

AND OR   + Add condition ⊕ Add group

| Level | greater | %%[Level|Level]%% | ✖ Delete |
| Related Request | equal | lookupid:%%[ID|ID]%% | ✖ Delete |

Sort by	Level ▾	⦿ Asc ◯ Desc
Items Limit ⓘ	1	

Continue Workflow Execution* ⓘ	⦿ Always ◯ Only if item(s) found ◯ Only if no item found
Delay Execution ⓘ	

Powered By NITRO STUDIO™   ✔ Save   ✖ Cancel

Action2: Set status to approved when no approval levels match

Configure update item action. This action will update the request status to 'Approval Not Required' when a purchase request is submitted for approval, but no approval level is found for the request (no approvers defined in the request).

Conditions:

Column	Evaluation type	Expression
Advanced Condition	equal	QL_GetApprovalLevel##$count([ID|ID]),,0
Status	equal	Pending Submission

'QL_GetApprovalLevel##$count([ID|ID]),,0' is to check whether approval levels found for the query list 'QL_GetApprovalLevel' action or not.

Action3: Approve Request if no more matching approvals

Configure an update item action. This action will update the request status to 'Approved' when all the required approval levels are complete, and request is approved at all levels.

Conditions

Column	Evaluation type	Expression
Status	equal	Pending Approval
Advanced Condition	equal	QL_GetApprovalLevel##$count([ID|ID]),,0

Update Item Action Settings

When to execute this Action

Conditions

AND OR

Status	equal	Pending Approval
Advanced Condition	equal	QL_GetApprovalLevel##$c...

QL_GetApprovalLevel##
$count([ID|ID]),,0

General Settings

Action Name* : Approve Request if no more matching approvals

Action Description :

Item(s)* :
- ○ Current
- ○ Lookup
- ○ Query List

Delay Execution ⓘ :

Column Mappings

+ Add Column Mapping

Column Name	Column Value	Actions
Status	Approved	✏ ✕
Approval Worklog	Approving request as all required approvals are done.	✏ ✕
Approved Date	{UtcNow}	✏ ✕

Page 1 of 1   5 ▾ items per page   1 - 3 of 3 items

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Action4: Create tasks for next level approvers

Configure add list item action. This action will create a task in 'Approver Tasks' list for item (approval level) fetched by query list action.

Conditions

Column	Evaluation type	Expression
Status	not equal	Approved
Advanced Condition	not equal	QL_GetApprovalLevel##$count([ID|ID]),,0

Create Item Action Settings

When to execute this Action

Conditions

AND OR   + Add condition ⊕ Add group

| Status | not equal | Approved | ✖ Delete |
| Advanced Condition | not equal | QL_GetApprovalLevel##$c | ✖ Delete |

General Settings

Action Name*   Create tasks for next level approvers

Action Description

Run for*   ○ Current Item   ● Query List   ○ Variable

Query List Action*   QL_GetApprovalLevel

Select Target Site URL*   ⦿ Select Site from Current Site Collection   ○ Specify Site Url

Purchase Order System (/sites/nitro1/PO81) ▼

Target List*   Approver Tasks ▼

Content Type   (Default) ▼

Delay Execution ⓘ

Column Mappings

+ Add Column Mapping

Column Name ⋮	Column Value ⋮	Actions
Title	$strcat([Title|Title], ,- ,QL_GetApprovalLevel##[Approval Level Name|ApprovalLevelName])	✎ ✖
Assigned To	QL_GetApprovalLevel##[Approvers|Approver]	✎ ✖
Approval Level	QL_GetApprovalLevel##[Approval Level Name|ApprovalLevelName]	✎ ✖
Level	QL_GetApprovalLevel##[Level|Level]	✎ ✖
Due Date	$calcbusinesstime({Today},3:0:0:0)	✎ ✖
Related Purchase Request	[ID|ID]	✎ ✖

|◀ ◀ Page 1 of 1 ▶ ▶| All ▼ items per page   1 - 6 of 6 items

Copy attachments ⓘ   ☐

✔ Save   ✖ Cancel

Note: Configure column mappings as required.

Action5: Update Request Status to Pending Approval

Configure update list item action. This action will update current request when all the approval levels are not yet complete.

Conditions

Column	Evaluation type	Expression
Status	not equal	Approved
Advanced Condition	not equal	QL_GetApprovalLevel##$count([ID|ID]),,0

Workflow 2: Approval Process for Send Back flow

Create a user triggered workflow on 'Purchase Requests' list. This workflow gets triggered while submitting a sent back request. In send back flow, approval level is resumed from where the request was sent back.

Note: We can skip this workflow if "Send Back" is not required.

Action1: Check current level approval tasks

Configure a query list action for querying 'Approver Tasks' list. This action will fetch current level approval tasks for which no decision has been taken. Next action will be executed only if no tasks are found from this action.

Query List Action Settings

When to execute this Action

Conditions

AND OR | + Add condition ⊕ Add group

General Settings

Please refer manual for below configurations.

Action Name* : Check current level approval tasks

Action Description :

Type* ⓘ : Item Collection

Select Query Site URL* ⓘ : ● Select Site from Current Site Collection ○ Specify Site Url

Purchase Order System (/sites/nitro1/PO81) ▼

Query List* ⓘ : Approver Tasks ▼

Get Item(s) From* : ○ Lookup Column ○ Related Items ○ List View ● Query Builder ○ Query

Fetch items from 'Approver Tasks' list as per the conditions specified below.

AND OR | + Add condition ⊕ Add group

Related Purchase Request ▼ | equal ▼ | lookupid:%%[ID|ID]%% | ✖ Delete

Approval Decision ▼ | is empty ▼ | | ✖ Delete

Level ▼ | equal ▼ | %%[Level|Level]%% | ✖ Delete

Sort by : -- Select Column -- ▼ ● Asc ○ Desc

Items Limit ⓘ : 50 ▲▼

Continue Workflow Execution* ⓘ : ○ Always
○ Only if item(s) found
● Only if no item found

Delay Execution ⓘ :

Define Variable Mappings

Powered By **NITRO STUDIO™** | ✔ Save ✖ Cancel

Action2: QL_GetApprovalLevel

Configure a query list action for querying 'Approval Levels' list. This action will fetch current approval level.

Query List Action Settings

When to execute this Action

Conditions

AND OR + Add condition + Add group

General Settings

Please refer manual for below configurations.

Action Name*	QL_GetApprovalLevel
Action Description	
Type* ⓘ	Item
Select Query Site URL* ⓘ	⦿ Select Site from Current Site Collection ○ Specify Site Url
	Purchase Order System (/sites/nitro1/PO81)
Query List* ⓘ	Approval Levels
Get Item(s) From*	○ Lookup Column ○ Related Items ○ List View ⦿ Query Builder ○ Query

Fetch items from 'Approval Levels' list as per the conditions specified below.

AND OR + Add condition + Add group

| Level | greater or equal | %%[Level\|Level]%% | ✖ Delete |
| Related Request | equal | lookupid:%%[ID\|ID]%% | ✖ Delete |

Sort by	Level	⦿ Asc ○ Desc
Items Limit ⓘ	1	
Continue Workflow Execution* ⓘ	⦿ Always	
	○ Only if item(s) found	
	○ Only if no item found	
Delay Execution ⓘ		

Define Variable Mappings

+ Add Variable Mapping

Powered By NITRO STUDIO™   ✔ Save   ✖ Cancel

Action3: Approve Request if no matching approval levels found

Configure an update item action. This action will update the request status to 'Approved' when all the required approval levels are complete, and request is approved at all levels.

Conditions

Column	Evaluation type	Expression
Status	equal	Sent Back
Advanced Condition	equal	QL_GetApprovalLevel##$count([ID|ID]),,0

Action4: Create tasks for next level approvers

Configure add list item action. This action will create a task in 'Approver Tasks' list for item (approval level) fetched by query list action.

Conditions

Column	Evaluation type	Expression
Status	not equal	Approved
Advanced Condition	not equal	QL_GetApprovalLevel##$count([ID|ID]),,0

Action5: Update Request Status to Pending Approval

Configure update list item action. This action will update current request when all the approval levels are not yet complete.

Conditions

Column	Evaluation type	Expression

Status	not equal	Approved
Advanced Condition	not equal	QL_GetApprovalLevel##$count([ID|ID]),,0

Workflow3: Update Request status on approval decision

Create a workflow on item modified event on 'Approver Tasks' list. This workflow sets the request status in 'Purchase Requests' list when approver takes decision for a task.

Action1: Set Request status to Denied

Configure an update item action to update lookup list item. Set request status as 'Denied' when an approver denies a task.

Conditions

Column	Evaluation type	Expression
Approval Decision	equal	afterchange:Denied

Update Item Action Settings

When to execute this Action

Conditions

| AND | OR | | | + Add condition | ⊕ Add group |

| Approval Decision | ▾ | equal | ▾ | afterchange:Denied | ✖ Delete |

General Settings

| Action Name* | Set Request status to Denied |

Action Description

Item(s)*
- ◯ Current
- ◉ Lookup Related Purchase Request ▾
- ◯ Query List

Delay Execution ⓘ

Column Mappings   **+ Add Column Mapping**

Column Name	⋮	Column Value	⋮	Actions
Status		Denied		✏ ✖
Approval Worklog		$strcat([Approval Level|ApprovalLevel], ,level approval is denied by, ,[Assigned To|AssignedTo])		✏ ✖
Comments		$strcat(@[,[Assigned To|AssignedTo],@]:,</br>, [Comments|Comments])		✏ ✖

| |◀ ◀ Page 1 of 1 ▶ ▶| 5 ▾ items per page | 1 - 3 of 3 items |

Powered By NITRO STUDIO™   ✔ Save   ✖ Cancel

Action2: Set Request status to Sent Back

Configure an update item action to update lookup list item. Set request status as 'Sent Back' when an approver sends back the purchase request.

Note: Ignore this action if 'Sent Back' is not required

Conditions

Column	Evaluation type	Expression
Approval Decision	equal	afterchange:Sent Back

Update Item Action Settings

When to execute this Action

Conditions

AND OR   + Add condition   ● Add group

| Approval Decision | equal | afterchange:Sent Back | ✖ Delete |

General Settings

Action Name*   Set Request status to Sent Back

Action Description

Item(s)*   ○ Current
        ● Lookup   Related Purchase Request
        ○ Query List

Delay Execution ⓘ

Column Mappings   + Add Column Mapping

Column Name	⋮	Column Value	⋮	Actions
Status		Sent Back		✏ ✖
Comments		$strcat(@[,[Assigned To|AssignedTo],@]:,</br>, [Comments|Comments])		✏ ✖
Approval Worklog		$strcat([Approval Level|ApprovalLevel], ,level approval is sent back by, ,[Assigned To|AssignedTo])		✏ ✖

|◄ ◄ Page 1 of 1 ► ►| 5 ▼   items per page   1 - 3 of 3 items

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▲ NITRO STUDIO™   ✔ Save   ✖ Cancel

Action3: Update comments in Request – Approved

Configure an update item action and update required columns in 'Purchase Requests' list when a task is approved.

Conditions

Column	Evaluation type	Expression
Approval Decision	equal	afterchange:Approved

Update Item Action Settings

When to execute this Action

Conditions

AND OR | + Add condition | + Add group

Approval Decision | equal | afterchange:Approved | ✖ Delete

General Settings

Action Name* : Update comments in Request - Approved

Action Description :

Item(s)* :
○ Current
● Lookup | Related Purchase Request
○ Query List

Delay Execution ⓘ :

Column Mappings

+ Add Column Mapping

Column Name		Column Value		Actions
Comments		$strcat(@[,[Assigned To|AssignedTo],@]:,</br>, [Comments|Comments])		✏ ✖
Approval Worklog		$strcat([Approval Level|ApprovalLevel], ,level task is approved by, ,[Assigned To|AssignedTo])		✏ ✖

|◀ ◀ Page 1 of 1 ▶ ▶| 5 ▼ items per page | 1 - 2 of 2 items

Powered By NITRO STUDIO™ | ✔ Save | ✖ Cancel

Action4: Invoke approval process on request item

Configure invoke workflow action to invoke 'Approval Process for Normal Flow' NITRO workflow.

Conditions

Column	Evaluation type	Expression
Approval Decision	equal	afterchange:Approved

Invoke Workflow Action Settings

When to execute this Action

Conditions

AND OR   + Add condition   ⊙ Add group

Approval Decision ⌄   equal ⌄   afterchange:Approved   ✕ Delete

General Settings

Action Name*   Invoke approval process on request item

Action Description

Item(s)* ⓘ
  ○ Current
  ⦿ Lookup   Related Purchase Request ⌄
  ○ Query List

Workflow Type   ○ SharePoint ⦿ NITRO Workflows ○ Power Automate

Workflow*   Approval Process for Normal Flow ⌄

Note: Workflows configured with 'Manual' option for 'scheduled or user or bot triggered' workflows in Crow Canyon "NITRO Workflows" application can be invoked from this action.

Delay Execution ⓘ

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NITRO STUDIO™   ✔ Save   ✕ Cancel

Note: Configure workflows to send notifications on request status and approval tasks updates.

3. Custom Actions

Configure custom actions in 'Purchase Requests' list

Navigate to 'Purchase Requests' list -> 'Custom Actions' from 'LIST' ribbon -> configure new custom action.

Custom Action1: Create Approval levels

This action is for creating dynamic approval levels. It will check for the approval level columns that are not empty and create approval levels.

Custom Actions

Configure Custom Action

General Settings

Title* : Create Approval levels

Tooltip Text :

Icon : [Choose File] No file chosen

[+]   [⬆ Upload]

☑ Use default icon

Form Sequence : 100

ECB Sequence : 400

Delay Execution ⓘ : 0 milliseconds

Show In* :
- ☑ NITRO Forms ⓘ
- ☐ Display Form
- ☐ Edit Control Block ⓘ
- ☐ Item Print Manager ⓘ
- ☐ List View Ribbon

Confirmation Message : [NO]

Continue on Error : [NO]

Auto Close ⓘ : [NO]

Condition Settings

When to execute the action

If logged in user:

◉ Everyone

◯ Users/Groups

[In ▾] [User/Group ▾] [Enter names or email addresses...]

and if below conditions are met:

[ALL | ANY]   [+ Add condition] [+ Add group]

Show message to user if conditions are not met:

[   ]

What Actions to execute

[📄] [+ New Action ▾]

Title	Type	Actions
Add Approver1	Add List Item	✏ ✕
Add Approver2	Add List Item	✏ ✕
Add Approver3	Add List Item	✏ ✕
Add Approver4	Add List Item	✏ ✕
Add Approver5	Add List Item	✏ ✕
Add Approver6	Add List Item	✏ ✕

Note: You can drag-drop actions in the grid to change order of execution

Post Action Processing

List View Ribbon : ☐ Reload

Edit Control Block : ☐ Reload View

Display Form :
- ◯ Reload
- ◯ Redirect
  - ◉ URL [Enter Page URL]
  - ◯ Edit Item Form
  - ◯ New Item Form
- ◉ None

Completion Message : [NO]

[✓ Save] [← Cancel]

Action 1: Configure 'Add List Item' action 'Add Approver1'.

Configure Add List Item Action

Action Name* Add Approver1

Execution Status ⓘ
- ◉ Always show
- ○ Show only if conditions matched
- ○ Never show

When to execute this Action

Conditions

ALL ANY   + Add condition ⊕ Add group

Manager ▾   is not empty ▾   ⓘ ✖ Delete

General Settings

Run for *
- ◉ Current Item
- ○ Query List Action Item(s)
- ○ Variable

Select Target Site URL*   ◉ Select Site from Current Site Collection   ○ Specify Site Url

Purchase Order System (/sites/nitro1/PO81) (this site) ▾

Target List*   Approval Levels ▾

Content Type   (Default) ▾

Copy attachments/document   ○ Yes   ◉ No

Item Column Value Settings

ⓘ Changing above will clear any configured item column value settings

User input columns ⓘ   Predefined column values ⓘ

+ Add Column Mapping

Column Name	Value Expression	Actions
Approvers	[Manager|Manager]	✎ ✖
Level	1	✎ ✖
Title	[Short Description|Title]	✎ ✖
Approval Level Name	Manager	✎ ✖
Related Request	[ID|ID]	✎ ✖

Note: Predefined column values take precedence if column is also shown for user input

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NITRO STUDIO™   ✔ Ok   ✖ Cancel

Action 2: Configure 'Add List Item' action 'Add Approver2'.

Configure Add List Item Action

Action Name*	Add Approver2
Execution Status ⓘ	● Always show ○ Show only if conditions matched ○ Never show

When to execute this Action

Conditions

ALL ANY   **+ Add condition**   **⊕ Add group**

| Department Head ▾ | is not empty ▾ | ⓘ **✖ Delete** |

General Settings

Run for *	◉ Current Item ○ Query List Action Item(s) ○ Variable
Select Target Site URL*	◉ Select Site from Current Site Collection ○ Specify Site Url
	Purchase Order System (/sites/nitro1/PO81) (this site) ▾
Target List*	Approval Levels ▾
Content Type	(Default) ▾
Copy attachments/document	○ Yes ◉ No

Item Column Value Settings

ⓘ Changing above will clear any configured item column value settings

User input columns ⓘ   Predefined column values ⓘ

+ Add Column Mapping

Column Name	Value Expression	Actions
Approvers	[Department Head|DepartmentHead]	✎ ✖
Level	2	✎ ✖
Title	[Short Description|Title]	✎ ✖
Approval Level Name	Department Head	✎ ✖
Related Request	[ID|ID]	✎ ✖

Note: Predefined column values take precedence if column is also shown for user input

✓ Ok   ✖ Cancel

Action 3: Configure 'Add List Item' action 'Add Approver3'.

Configure Add List Item Action

Action Name*	Add Approver3
Execution Status ⓘ	◉ Always show ○ Show only if conditions matched ○ Never show

When to execute this Action

Conditions

ALL ANY   **+ Add condition**   **⊕ Add group**

| HR Manager ▾ | is not empty ▾ | ⓘ ✖ Delete |

General Settings

Run for *	◉ Current Item ○ Query List Action Item(s) ○ Variable
Select Target Site URL*	◉ Select Site from Current Site Collection ○ Specify Site Url Purchase Order System (/sites/nitro1/PO81) (this site) ▾
Target List*	Approval Levels ▾
Content Type	(Default) ▾
Copy attachments/document	○ Yes ◉ No

Item Column Value Settings

ⓘ Changing above will clear any configured item column value settings

User input columns ⓘ   Predefined column values ⓘ

+ Add Column Mapping

Column Name	Value Expression	Actions
Approvers	[HR Manager|HRManager]	✏ ✖
Level	3	✏ ✖
Title	[Short Description|Title]	✏ ✖
Approval Level Name	HR Manager	✏ ✖
Related Request	[ID|ID]	✏ ✖

Note: Predefined column values take precedence if column is also shown for user input

Powered By **NITRO STUDIO™**   ✔ Ok   ✖ Cancel

Action 4: Configure 'Add List Item' action 'Add Approver4'.

Configure Add List Item Action

Action Name* : Add Approver4

Execution Status ⓘ
- ● Always show
- ○ Show only if conditions matched
- ○ Never show

When to execute this Action

Conditions

ALL ANY		+ Add condition ● Add group
CEO	is not empty	ⓘ ✖ Delete

General Settings

Run for *
- ◉ Current Item
- ○ Query List Action Item(s)
- ○ Variable

Select Target Site URL* : ◉ Select Site from Current Site Collection ○ Specify Site Url

Purchase Order System (/sites/nitro1/PO81) (this site)

Target List* : Approval Levels

Content Type : (Default)

Copy attachments/document : ○ Yes ● No

Item Column Value Settings

ⓘ Changing above will clear any configured item column value settings

User input columns ⓘ   Predefined column values ⓘ

+ Add Column Mapping

Column Name	Value Expression	Actions
Approvers	[CEO|CEO]	✏ ✖
Level	4	✏ ✖
Title	[Short Description|Title]	✏ ✖
Approval Level Name	CEO	✏ ✖
Related Request	[ID|ID]	✏ ✖

Note: Predefined column values take precedence if column is also shown for user input

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NITRO STUDIO™

✔ Ok   ✖ Cancel

Action 5: Configure 'Add List Item' action 'Add Approver5'.

Configure Add List Item Action

Action Name*	Add Approver5

Execution Status ⓘ
- ● Always show
- ○ Show only if conditions matched
- ○ Never show

When to execute this Action

Conditions

ALL ANY				+ Add condition ⊕ Add group
	President ▾	is not empty ▾		ⓘ ✖ Delete

General Settings

Run for *
- ⦿ Current Item
- ○ Query List Action Item(s)
- ○ Variable

Select Target Site URL*   ⦿ Select Site from Current Site Collection   ○ Specify Site Url

	Purchase Order System (/sites/nitro1/PO81) (this site)	▾

Target List*	Approval Levels	▾
Content Type	(Default)	▾

Copy attachments/document   ○ Yes   ⦿ No

Item Column Value Settings

⚠ Changing above will clear any configured item column value settings

User input columns ⓘ   Predefined column values ⓘ

+ Add Column Mapping

Column Name	Value Expression	Actions
Approvers	[President|President]	✎ ✕
Level	5	✎ ✕
Title	[Short Description|Title]	✎ ✕
Approval Level Name	President	✎ ✕
Related Request	[ID|ID]	✎ ✕

Note: Predefined column values take precedence if column is also shown for user input

Powered By **NITRO STUDIO™**   ✓ Ok   ✕ Cancel

Action 6: Configure 'Add List Item' action 'Add Approver6'.

Configure Add List Item Action

Action Name*	Add Approver6
Execution Status ⓘ	● Always show
	○ Show only if conditions matched
	○ Never show

When to execute this Action

Conditions

ALL ANY				+ Add condition ● Add group
	HR VP ▼	is not empty ▼		ⓘ ✖ Delete

General Settings

Run for *	● Current Item
	○ Query List Action Item(s)
	○ Variable
Select Target Site URL*	● Select Site from Current Site Collection ○ Specify Site Url
	Purchase Order System (/sites/nitro1/PO81) (this site) ▼
Target List*	Approval Levels ▼
Content Type	(Default) ▼
Copy attachments/document	○ Yes ● No

Item Column Value Settings

ⓘ Changing above will clear any configured item column value settings

User input columns ⓘ   Predefined column values ⓘ

 + Add Column Mapping

Column Name	Value Expression	Actions
Approvers	[HR VP|HRVP]	✏ ✖
Level	6	✏ ✖
Title	[Short Description|Title]	✏ ✖
Approval Level Name	HR VP	✏ ✖
Related Request	[ID|ID]	✏ ✖

Note: Predefined column values take precedence if column is also shown for user input

✔ Ok   ✖ Cancel

Custom Action 2: Submit for approval

This action will submit the purchase request for approval.

Note: This action we will invoke from Purchase Request form.

Custom Actions

Configure Custom Action

General Settings

Title*	Submit for approval	
Tooltip Text		
Icon	Choose File No file chosen	

Use default icon   ☁ Upload

Form Sequence	100
ECB Sequence	400
Delay Execution ⓘ	0 milliseconds

Show In*
- ☐ NITRO Forms ⓘ
- ☑ Display Form
- ☐ Edit Control Block ⓘ
- ☐ Item Print Manager ⓘ
- ☐ List View Ribbon

Confirmation Message	NO
Continue on Error	NO
Auto Close ⓘ	NO

Condition Settings

When to execute the action

If logged in user:
- ◉ Everyone
- ○ Users/Groups

In ⌄   User/Group ⌄   Enter names or email addresses...

and if below conditions are met:

ALL ANY					+ Add condition ✛ Add group
Status ⌄	equal ⌄	Pending Submission	...	❶	✖ Delete
Status ⌄	equal ⌄	Sent Back	...	❶	✖ Delete

Show message to user if conditions are not met:

What Actions to execute

▦   + New Action ⌄

Title	Type	Actions
Create approval levels	Invoke Custom Action	✎ ✖
Approval Process Normal Flow	Invoke Workflow	✎ ✖
Approval Process Send Back flow	Invoke Workflow	✎ ✖

Note: You can drag-drop actions in the grid to change order of execution

Post Action Processing

List View Ribbon	☑ Reload
Edit Control Block	☑ Reload View
Display Form	◉ Reload
	○ Redirect

◉ URL Enter Page URL
○ Edit Item Form
○ New Item Form

○ None

Completion Message **YES**

- ○ Action 'Submit for approval' completed successfully.
- ◉ Purchase Request is submitted for approval

✔ Save   ← Cancel

Action1: Create approval levels

Configure 'Invoke Custom Action' action to invoke 'Create Approval levels' custom action.

Action2: Approval Process Normal Flow

Configure 'Invoke Workflow' action to invoke 'Approval Process for Normal Flow' workflow.

Action3: Approval Process Send Back flow

Configure 'Invoke Workflow' action to invoke 'Approval Process for Send Back flow' workflow.

Configure custom actions in 'Approver Tasks' list

Navigate to 'Approver Tasks' list -> 'Custom Actions' from 'LIST' ribbon -> configure new custom action.

Custom Action1: Approve

This action is for approving the assigned task.

Custom Actions

Configure Custom Action

General Settings

Title*	Approve	Show In*	☑ NITRO Forms ⓘ
Tooltip Text	Approves the task		☑ Display Form
Icon	Choose File No file chosen		☐ Edit Control Block ⓘ
	⊕	⬆ Upload	☐ Item Print Manager ⓘ
	☑ Use default icon		☐ List View Ribbon
		Confirmation Message	NO
Form Sequence	100 ⬍	Continue on Error	NO
ECB Sequence	400 ⬍	Auto Close ⓘ	NO
Delay Execution ⓘ	0 milliseconds ⬍		

Condition Settings

When to execute the action

If logged in user:

○ Everyone
● Users/Groups

| In ⌄ | Column ⌄ | Assigned To ⌄ |

and if below conditions are met:

ALL ANY   ➕ Add condition   ➕ Add group

| Approval Decision ⌄ | is empty ⌄ | ⓘ ✖ Delete |

Show message to user if conditions are not met:

The Task is already completed or is not assigned to you.

What Actions to execute   💾   ➕ New Action ⌄

Title	Type	Actions
Set Decision Value	Execute Script	✏ ✖
Open Approve Form	Update List Item	✏ ✖

Note: You can drag-drop actions in the grid to change order of execution

Post Action Processing

List View Ribbon	☐ Reload
Edit Control Block	☐ Reload View
Display Form	● Reload
	○ Redirect
	⦿ URL Enter Page URL
	○ Edit Item Form
	○ New Item Form
	○ None
Completion Message	NO

✓ Save   ← Cancel

Action1: Set Decision Value

Configure an 'Execute Script' action.

Script:

window["CCSApprovalDecision"] = "Approved";

functionCallback(false);

Action2: Open Approve Form

Configure 'Update List Item' action.

Configure Update List Item Action

Action Name*	Open Approve Form
Execution Status ⓘ	● Always show
	○ Show only if conditions matched
	○ Never show

When to execute this Action

Conditions

ALL ANY   ＋ Add condition ⊕ Add group

General Settings

Run for * ○ Current Item
          ○ Lookup ⓘ
          ○ Query List Action Item(s)

Item Column Value Settings

⚠ Changing above will clear any configured item column value settings

User input columns ⓘ   Predefined column values ⓘ

○ Default Form ⓘ   ● NITRO Form ⓘ

Select NITRO Form*   Approver Tasks

☐ Use this Form to display/edit item from the site

NITRO Form Mode*   ● Inline ⓘ   ○ iFrame ⓘ

Powered By **NITRO STUDIO™**   ✓ Ok   ✕ Cancel

Custom Action 2: Deny

This action is for denying the assigned task.

Custom Actions

Configure Custom Action

General Settings

Title*	Deny	
Tooltip Text	Denies the task	
Icon	Choose File No file chosen	

Upload

☑ Use default icon

Form Sequence	100
ECB Sequence	400
Delay Execution ⓘ	0 milliseconds

Show In*

- ☑ NITRO Forms ⓘ
- ☑ Display Form
- ☐ Edit Control Block ⓘ
- ☐ Item Print Manager ⓘ
- ☐ List View Ribbon

Confirmation Message   NO

Continue on Error   NO

Auto Close ⓘ   NO

Condition Settings

When to execute the action

If logged in user:

- ○ Everyone
- ● Users/Groups

In | Column | Assigned To

and if below conditions are met:

ALL ANY   + Add condition ⊕ Add group

Approval Decision | is empty   ⓘ ✖ Delete

Show message to user if conditions are not met:

The Task is already completed or is not assigned to you.

What Actions to execute

[📄]   + New Action ▾

Title	Type	Actions
Set Decision Value	Execute Script	✏ ✖
Open Approve Form	Update List Item	✏ ✖

Note: You can drag-drop actions in the grid to change order of execution

Post Action Processing

List View Ribbon	☐ Reload
Edit Control Block	☐ Reload View
Display Form	● Reload
	○ Redirect

  ● URL Enter Page URL
  ○ Edit Item Form
  ○ New Item Form

○ None

Completion Message   NO

✔ Save   ← Cancel

Action1: Set Decision Value

Configure an 'Execute Script' action.

Script:

window["CCSApprovalDecision"] = "Denied";

functionCallback(false);

Action2: Open Approve Form

Configure 'Update List Item' action.

Configure Update List Item Action

Action Name*   Open Approve Form

Execution Status ⓘ
- ● Always show
- ○ Show only if conditions matched
- ○ Never show

When to execute this Action

Conditions

`ALL` `ANY`   **+ Add condition**   **⊕ Add group**

General Settings

Run for *
- ◉ Current Item
- ○ Lookup ⓘ
- ○ Query List Action Item(s)

Item Column Value Settings

⊙ Changing above will clear any configured item column value settings

User input columns ⓘ   Predefined column values ⓘ

- ○ Default Form ⓘ   ● NITRO Form ⓘ

Select NITRO Form*   Approver Tasks ▾

☑ Use this Form to display/edit item from the site

NITRO Form Mode*   ● Inline ⓘ   ○ iFrame ⓘ

Powered By **NITRO STUDIO™**   ✓ Ok   ✕ Cancel

Custom Action 2: Send Back

This action sends back the assigned task.

Custom Actions

Configure Custom Action

General Settings

Title*	Send Back	Show In*	☐ NITRO Forms ⓘ
Tooltip Text	Sends back the task		☑ Display Form
Icon	Choose File No file chosen		☐ Edit Control Block ⓘ
			☐ Item Print Manager ⓘ
	⊕ [Upload]		☐ List View Ribbon
	☑ Use default icon	Confirmation Message	NO
Form Sequence	100		
ECB Sequence	400	Continue on Error	NO
Delay Execution ⓘ	0 milliseconds	Auto Close ⓘ	NO

Condition Settings

When to execute the action

If logged in user:

- ○ Everyone
- ● Users/Groups

In	Column	Assigned To

and if below conditions are met:

ALL ANY		＋ Add condition ● Add group
Approval Decision	is empty	ⓘ ✕ Delete

Show message to user if conditions are not met:

The Task is already completed or is not assigned to you.

What Actions to execute

[📄] [＋ New Action ▾]

Title	Type	Actions
Set Decision Value	Execute Script	✎ ✕
Open Approve Form	Update List Item	✎ ✕
Set Purchase Request status to Sent Back	Update List Item	✎ ✕

Note: You can drag-drop actions in the grid to change order of execution

Post Action Processing

List View Ribbon	☐ Reload
Edit Control Block	☐ Reload View
Display Form	● Reload
	○ Redirect
	● URL Enter Page URL
	○ Edit Item Form
	○ New Item Form
	○ None
Completion Message	NO

[✔ Save] [← Cancel]

Action1: Set Decision Value

Configure an 'Execute Script' action.

Script:

window["CCSApprovalDecision"] = "Sent Back";

functionCallback(false);

Action2: Open Approve Form

Configure 'Update List Item' action.

Configure Update List Item Action

Action Name* : Open Approve Form

Execution Status ⓘ
- ◉ Always show
- ○ Show only if conditions matched
- ○ Never show

When to execute this Action

Conditions

ALL ANY   + Add condition ⊕ Add group

General Settings

Run for *
- ◉ Current Item
- ○ Lookup ⓘ
- ○ Query List Action Item(s)

Item Column Value Settings

ⓘ Changing above will clear any configured item column value settings

User input columns ⓘ   Predefined column values ⓘ

- ○ Default Form ⓘ   ◉ NITRO Form ⓘ

Select NITRO Form* : Approver Tasks   ⌄
☑ Use this Form to display/edit item from the site

NITRO Form Mode*   ◉ Inline ⓘ   ○ iFrame ⓘ

✓ Ok   ✕ Cancel

Action3: Set Purchase Request status to Sent Back

Configure 'Update List Item' action.

Configure Update List Item Action

Action Name*	Set Purchase Request status to Sent Back
Execution Status ⓘ	● Always show
	○ Show only if conditions matched
	○ Never show

When to execute this Action

Conditions

[ALL | ANY]   [+ Add condition] [⊕ Add group]

General Settings

Run for *
- ○ Current Item
- ● Lookup Related Purchase Request ⌄ ⓘ
- ○ Query List Action Item(s)

Item Column Value Settings

ⓘ Changing above will clear any configured item column value settings

User input columns ⓘ Predefined column values ⓘ

[+ Add Column Mapping]

Column Name	Value Expression	Actions
Status	Sent Back	🖉 ✕
Comments	[Comments|Comments]	🖉 ✕

Note: Predefined column values take precedence if column is also shown for user input

Powered By NITRO STUDIO™   ✓ Ok   ✕ Cancel

Custom Action 4: Reassign

This action is for reassigning the approver task to some other user. Specify who can perform this action. In this example, site administrator group members can perform this action.

Custom Actions

Configure Custom Action

General Settings

Title*	Reassign
Tooltip Text	
Icon	Choose File No file chosen

☑ Use default icon

Form Sequence	100
ECB Sequence	400
Delay Execution ⓘ	0 milliseconds

⬆ Upload

Show In*
- ☑ NITRO Forms ⓘ
- ☑ Display Form
- ☐ Edit Control Block ⓘ
- ☐ Item Print Manager ⓘ
- ☐ List View Ribbon

Confirmation Message	NO
Continue on Error	NO
Auto Close ⓘ	NO

Condition Settings

When to execute the action

If logged in user:

- ○ Everyone
- ● Users/Groups

  In ▾   User/Group ▾   Administrators x

and if below conditions are met:

ALL ANY   ➕ Add condition ➕ Add group

Approval Decision ▾   is empty ▾   ⓘ ✖ Delete

Show message to user if conditions are not met:

Only administrator users can reassign the tasks. And task should not be already completed.

What Actions to execute

💾   + New Action ▾

Title	Type	Actions
Reassign	Update List Item	✏ ✖

Note: You can drag-drop actions in the grid to change order of execution

Post Action Processing

List View Ribbon	☐ Reload
Edit Control Block	☐ Reload View
Display Form	● Reload
	○ Redirect
	● URL Enter Page URL
	○ Edit Item Form
	○ New Item Form
	○ None
Completion Message	NO

✓ Save   ← Cancel

Action1: Reassign

Configure 'Update List Item' action.

4. Configure NITRO forms for the lists

a. 'Purchase Requests' list

Navigate to 'Purchase Requests' list -> 'NITRO Forms' from 'LIST' ribbon -> configure forms.

1. Configure a new form. Use same form for New / Edit / Display.
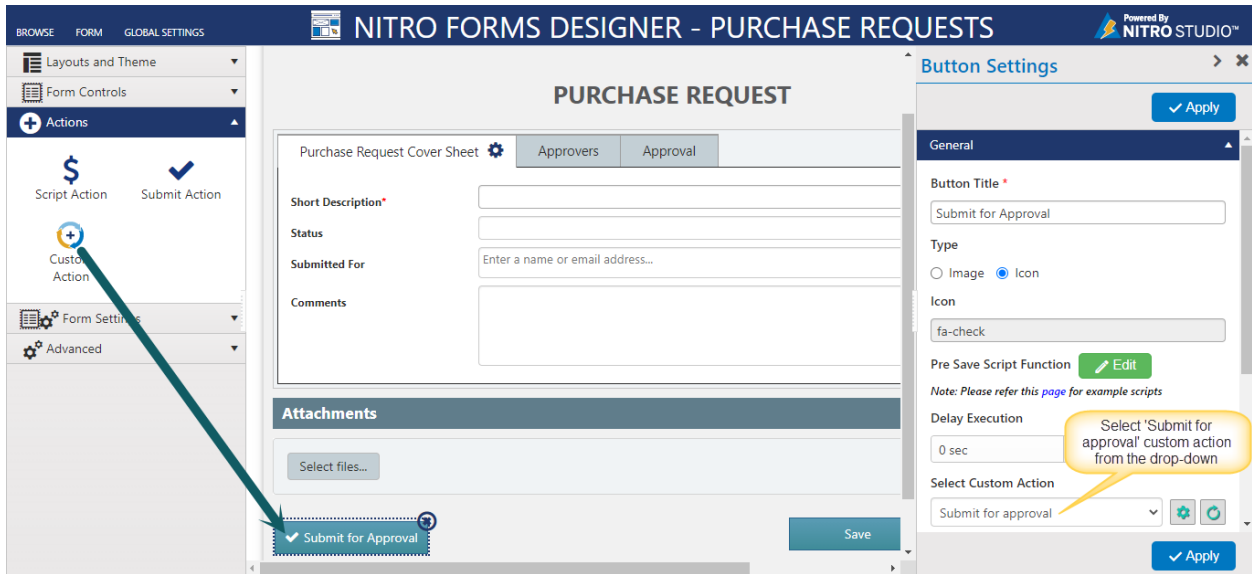
2. Configure 'Hide' permission in 'Submit for Approval' button.
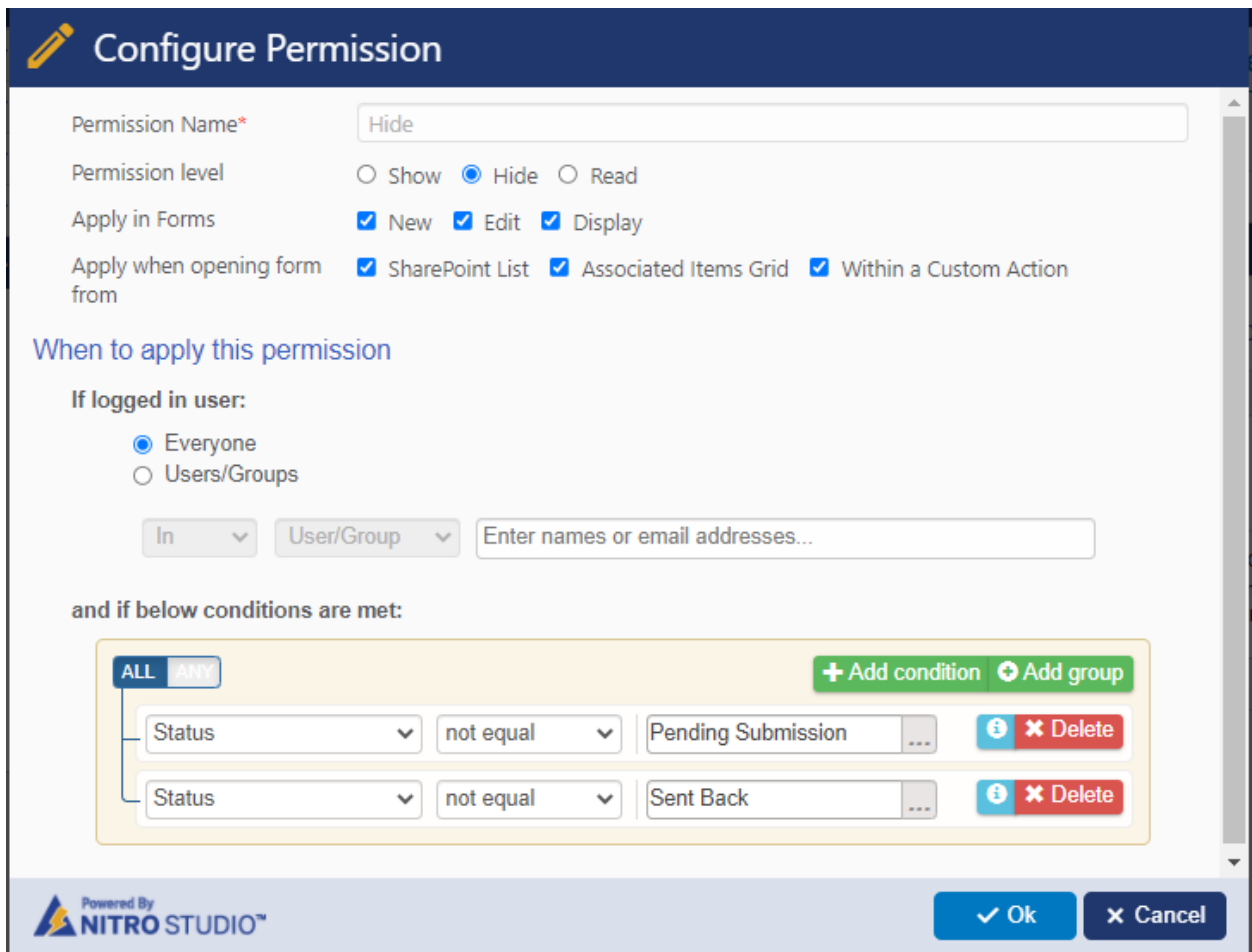
3. Add all the approval level columns in 'Approvers' tab.
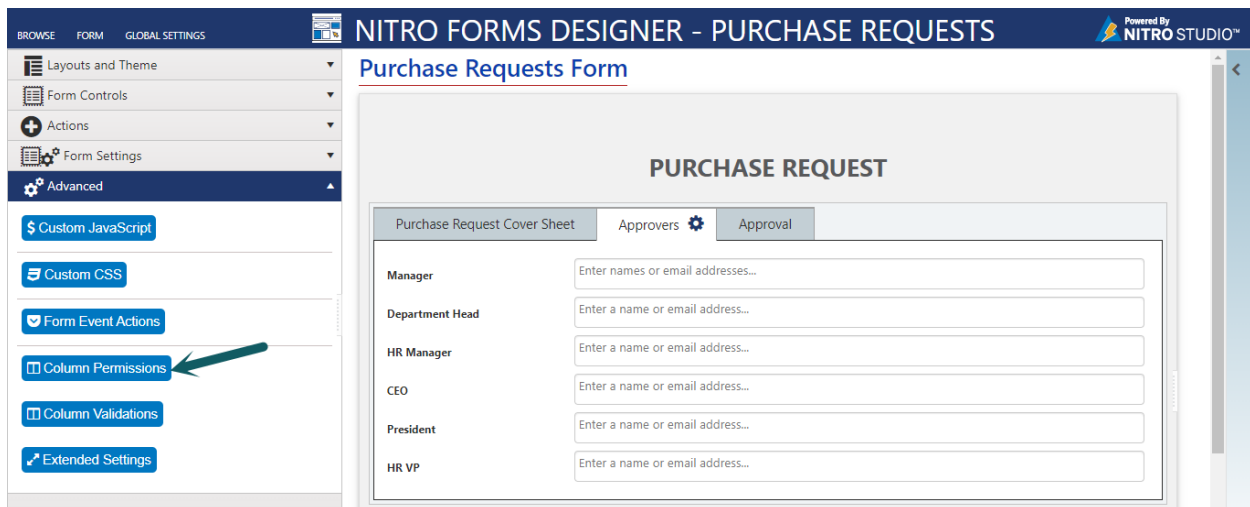
4. Configure read permissions as shown below:
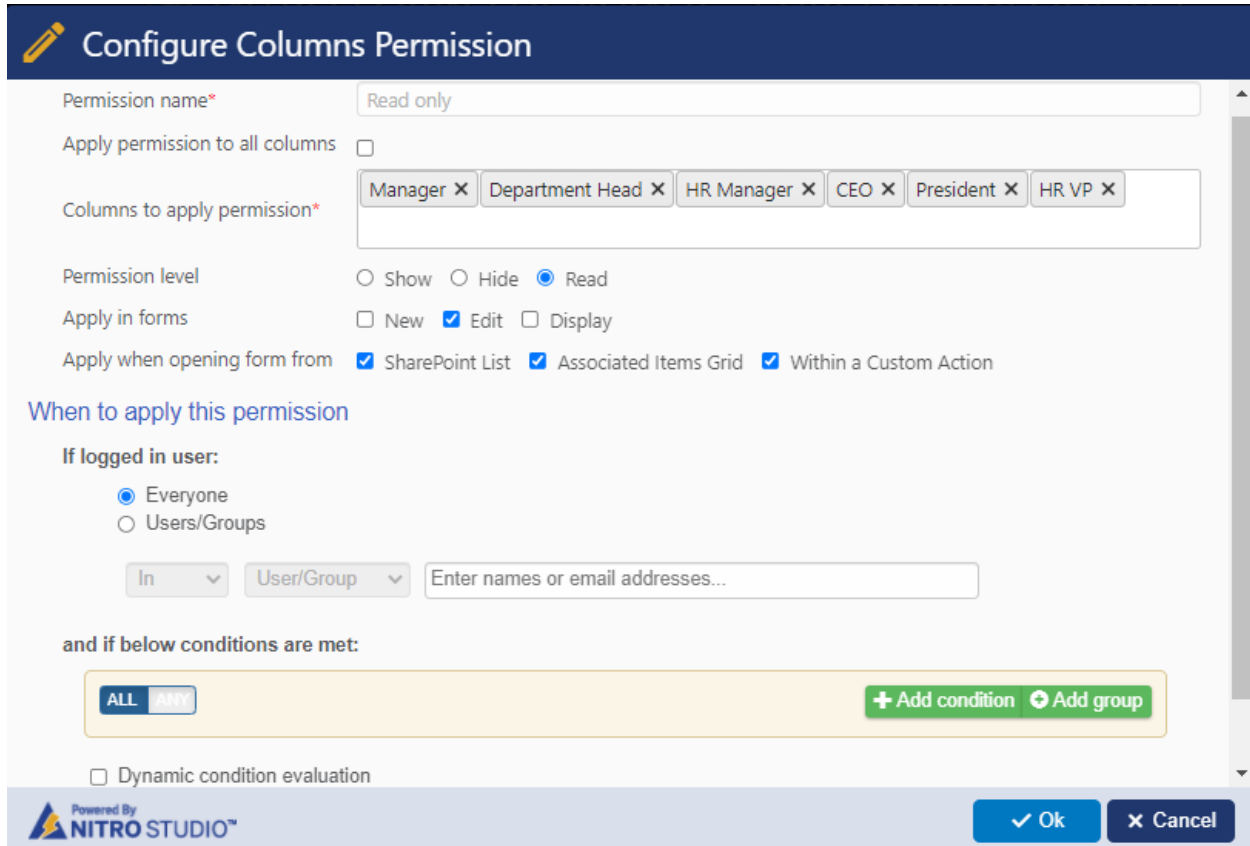
5. Click 'Create Column' from 'FORM' ribbon -> 'NITRO Associated Items Column'. Configure 'Associated' column for 'Approval Tasks' column.

➕ Configure Associated Column

General   UI Settings   Aggregates   Column Mappings   Toolbar

Select Column *   ○ New   ⦿ Existing ⓘ

Column *   [Approval Tasks ⌄]

Data Source

Select Site URL *   ⦿ Select Site from Current Site Collection   ○ Specify Site Url

[Purchase Order System (/sites/nitro1/PO81) (thi... ▾]

Associated List *   [Approver Tasks ⌄]

Associated List View *   [All Tasks ⌄]

☑ Apply View Filter ⓘ

Relationship

⦿ Lookup   ○ Text   ○ Query Builder

Lookup Column *   [Related Purchase Request ⌄] [+]

Operations

Delay loading of items   ☐

Allow Inline Editing   ☐

Select Form *   [Approver Tasks ⌄]

Item Operations   ☐ New   ☑ Edit   ☐ Delete

Powered By
△ NITRO STUDIO™

✓ Ok   ✕ Cancel

6. Configure 'Read' permissions on 'Approval Level' column as shown below:

7. Similarly, configure 'Read' permissions on 'Approval Worklog' column.

8. Configure permissions on 'Approval' tab.

Configure Permission

Permission Name*	Hide for all
Permission level	○ Show ● Hide
Apply in Forms	☑ New ☑ Edit ☑ Display
Apply when opening form from	☑ SharePoint List ☑ Associated Items Grid ☑ Within a Custom Action

When to apply this permission

If logged in user:

● Everyone
○ Users/Groups

| In ▾ | User/Group ▾ | Enter names or email addresses... |

and if below conditions are met:

ALL ANY   ➕ Add condition ⊕ Add group

Powered By
NITRO STUDIO™

✓ Ok   ✕ Cancel

9. Publish the NITRO forms.

b. 'Approval Tasks' list

Navigate to 'Approval Levels' list -> 'NITRO Forms' from 'LIST' ribbon -> configure forms.

1. Configure a new form. Use same form for New / Edit / Display.
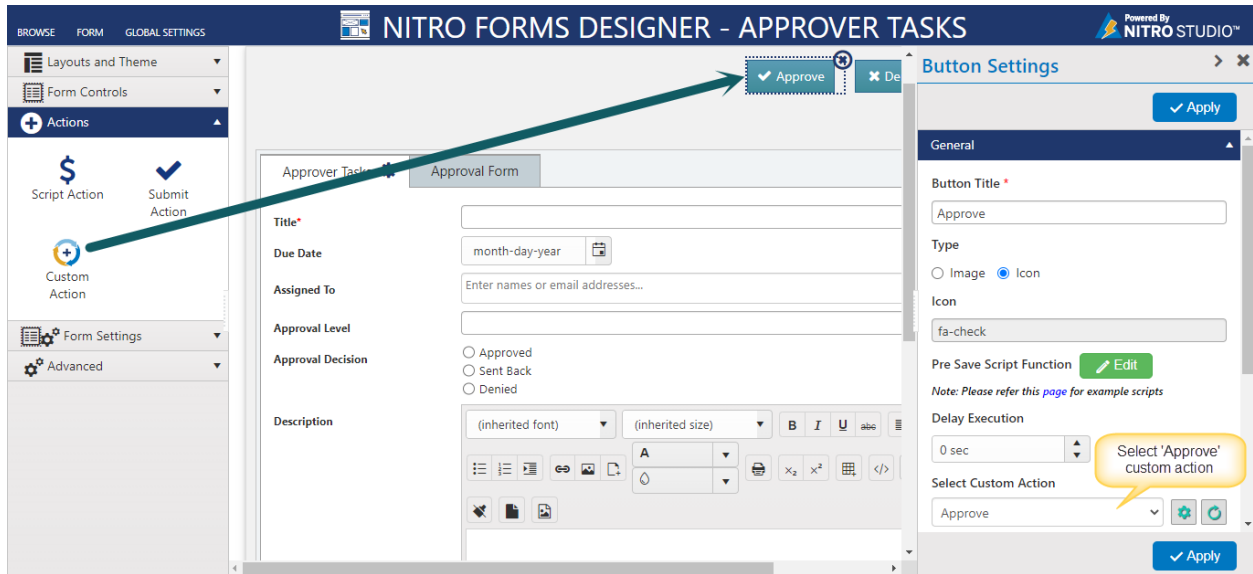
2. Configure below script in 'Custom JavaScript' in advanced section in NITRO Forms designer section

formContext.setColumnControlValueByName("ApprovalDecision", window["CCSApprovalDecision"]);

Note: In above script replace 'ApprovalDecision' with approval task status column as per your requirement.

2. Configure permissions for 'Approve' button.

✔ Approve   ✖ De

Button Settings   ＞   ✖

✔ Apply

General   ▼

Permissions   ▲

Configured Permissions   **+ Add**

Name	Level	Actions
Hide	Hide	✏ ✖
Hide for logged in user not in Assigned To	Hide	✏ ✖

☐ Dynamic condition evaluation
☐ Hide permission has higher priority in case of multiple permissions

Configure Permission

Permission Name*	Hide
Permission level	○ Show ● Hide ○ Read
Apply in Forms	☑ New ☑ Edit ☑ Display
Apply when opening form from	☑ SharePoint List ☑ Associated Items Grid ☑ Within a Custom Action

When to apply this permission

If logged in user:

- ● Everyone
- ○ Users/Groups

| In ⌄ | User/Group ⌄ | Enter names or email addresses... |

and if below conditions are met:

ALL ANY   ➕ Add condition ⊕ Add group

| Approval Decision ⌄ | is not empty ⌄ | ℹ ✖ Delete |

Powered By **NITRO STUDIO™**   ✓ Ok   ✕ Cancel

Configure Permission

Permission Name*	Hide for logged in user not in Assigned To
Permission level	○ Show ● Hide ○ Read
Apply in Forms	☑ New ☑ Edit ☑ Display
Apply when opening form from	☑ SharePoint List ☑ Associated Items Grid ☑ Within a Custom Action

When to apply this permission

If logged in user:

- ○ Everyone
- ● Users/Groups

| Not In ⌄ | Column ⌄ | Assigned To ✖ |

and if below conditions are met:

ALL ANY   ➕ Add condition ⊕ Add group

Powered By **NITRO STUDIO™**   ✓ Ok   ✕ Cancel

3. Similarly, add custom action for 'Deny'.

3. Configure permissions on 'Deny' button.

Configure Permission

Permission Name*	Hide
Permission level	○ Show ● Hide ○ Read
Apply in Forms	☑ New ☑ Edit ☑ Display
Apply when opening form from	☑ SharePoint List ☑ Associated Items Grid ☑ Within a Custom Action

When to apply this permission

If logged in user:

● Everyone
○ Users/Groups

In ▾	User/Group ▾	Enter names or email addresses...

and if below conditions are met:

ALL ANY	✚ Add condition ⊕ Add group

Approval Decision ▾	is not empty ▾	❶ ✖ Delete

Powered By **NITRO STUDIO™**   ✔ Ok   ✖ Cancel

Configure Permission

Permission Name*	Hide for logged in user not in Assigned To
Permission level	○ Show ● Hide ○ Read
Apply in Forms	☑ New ☑ Edit ☑ Display
Apply when opening form from	☑ SharePoint List ☑ Associated Items Grid ☑ Within a Custom Action

When to apply this permission

If logged in user:

○ Everyone
● Users/Groups

Not In ▾	Column ▾	Assigned To ✖

and if below conditions are met:

ALL ANY	✚ Add condition ⊕ Add group

Powered By **NITRO STUDIO™**   ✔ Ok   ✖ Cancel

4. Add custom action for 'Send Back'

5. Configure permissions for 'Send Back' button.

Configure Permission

Permission Name*	Hide
Permission level	○ Show ● Hide ○ Read
Apply in Forms	☑ New ☑ Edit ☑ Display
Apply when opening form from	☑ SharePoint List ☑ Associated Items Grid ☑ Within a Custom Action

When to apply this permission

If logged in user:

- ● Everyone
- ○ Users/Groups

In ▼	User/Group ▼	Enter names or email addresses...

and if below conditions are met:

`ALL` `ANY`   ✚ Add condition ⊕ Add group

| Approval Decision ▼ | is not empty ▼ | ℹ ✖ Delete |

Powered By **NITRO STUDIO™**   ✓ Ok   ✖ Cancel

Configure Permission

Permission Name*	Hide for logged in user not in Assigned To
Permission level	○ Show ● Hide ○ Read
Apply in Forms	☑ New ☑ Edit ☑ Display
Apply when opening form from	☑ SharePoint List ☑ Associated Items Grid ☑ Within a Custom Action

When to apply this permission

If logged in user:

- ○ Everyone
- ● Users/Groups

Not In ▼	Column ▼	Assigned To ✖

and if below conditions are met:

`ALL` `ANY`   ✚ Add condition ⊕ Add group

Powered By **NITRO STUDIO™**   ✓ Ok   ✖ Cancel

6. Configure permissions on 'Approval Decision' column.

7. Configure 'Read' permission for multiple columns as shown below:

8. Configure permissions on 'Approver Tasks' tab.

9. Configure permissions on 'Approval Form' tab.

Configure Permission

Permission Name*	Show only in custom forms
Permission level	● Show ○ Hide
Apply in Forms	☑ New ☑ Edit ☑ Display
Apply when opening form from	☐ SharePoint List ☐ Associated Items Grid ☑ Within a Custom Action

When to apply this permission

If logged in user:

- ● Everyone
- ○ Users/Groups

In ▼	User/Group ▼	Enter names or email addresses...

and if below conditions are met:

ALL ANY   ➕ Add condition ⊕ Add group

Powered By NITRO STUDIO™   ✓ Ok ✗ Cancel

Configure Permission

Permission Name*	Hide
Permission level	○ Show ● Hide
Apply in Forms	☑ New ☑ Edit ☑ Display
Apply when opening form from	☑ SharePoint List ☑ Associated Items Grid ☐ Within a Custom Action

When to apply this permission

If logged in user:

- ● Everyone
- ○ Users/Groups

In ▼	User/Group ▼	Enter names or email addresses...

and if below conditions are met:

ALL ANY   ➕ Add condition ⊕ Add group

Powered By NITRO STUDIO™   ✓ Ok ✗ Cancel

10. Publish the NITRO Forms.

c. 'Approval Levels' list

Navigate to 'Approval Levels' list -> 'NITRO Forms' from 'LIST' ribbon -> configure forms.

1. Configure a new form. Use same form for New / Edit / Display.

2. Add columns to the form as shown below:

3. Publish the NITRO forms.