

VERSION 1.0

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## Member Contributions

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# User Manual for Streamlining Travel Approval Process Using Power Automate

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## 1. Introduction

This user manual provides a step-by-step guide on how to streamline the travel approval process using Microsoft Power Automate. The automated workflow reduces delays, ensures transparency, and improves communication through real-time notifications.

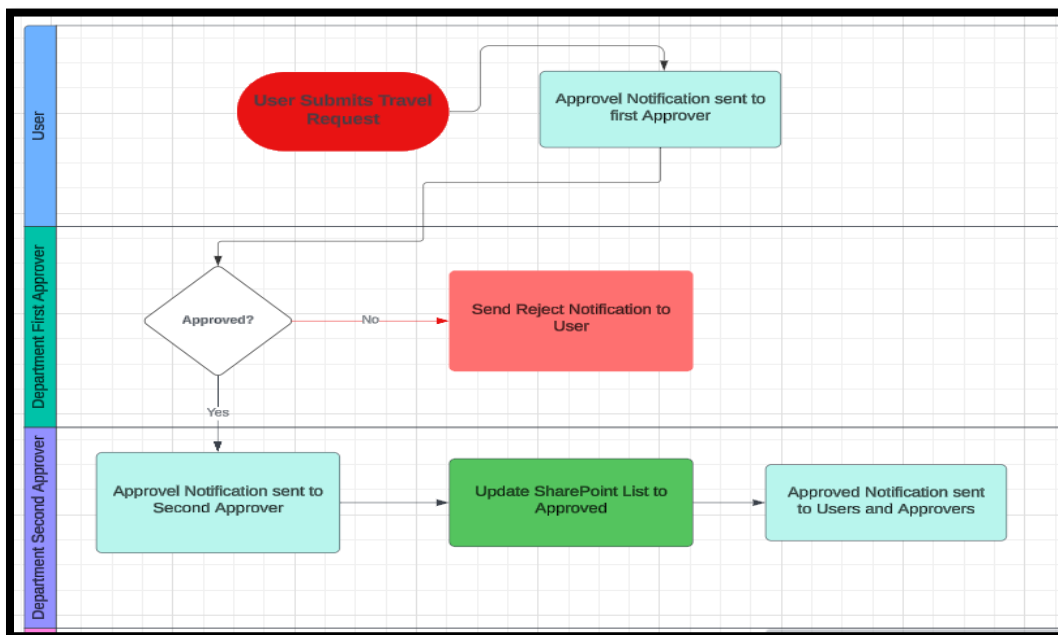
## 2. Who Should Use the Manual

This manual is intended for administrators, and general users responsible for managing and approving travel requests within the organization.

## 3. Process Overview

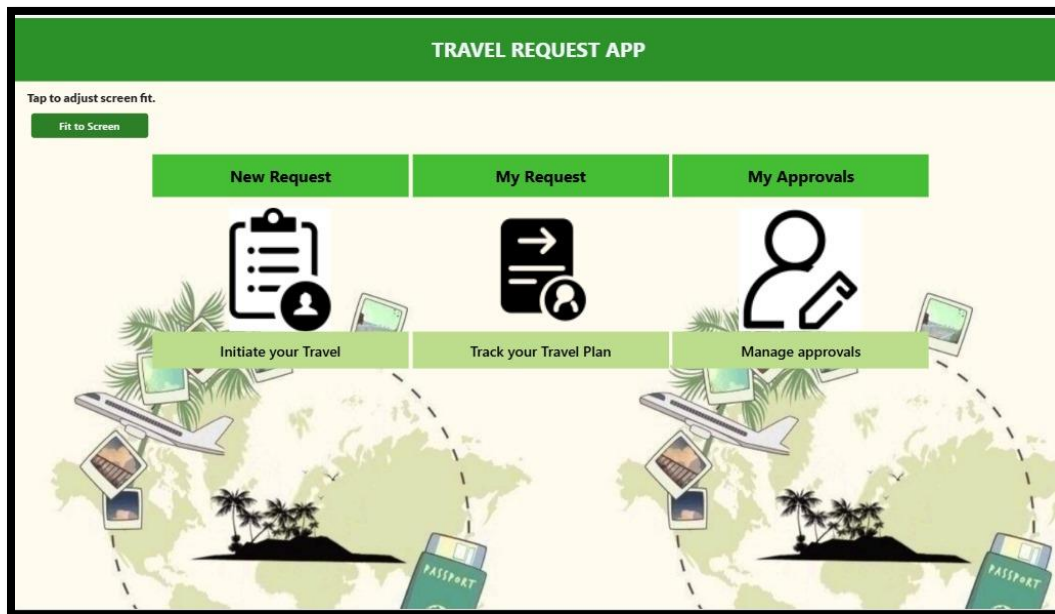
The travel approval workflow follows these stages:

1. A travel request is submitted.
2. Notifications are sent to two designated approvers of the specific department.
3. Approvers approve or reject the request.
4. The system updates the request status in SharePoint.
5. Notifications are sent to the requester and approvers.



#### 4. Logging in to the Travel Approval Application

##### 1. Navigate to the application's HomePage.



**NOTE:** When a user's email is similar to approvers email, he is called "User Admin". The rest of the users are called "Regular Users".

Regular Users can only see **New Request** Tab and **My Request** Tab.

Admin Users can see three tabs **New Request** Tab, **My Request** Tab and **My Approvals** Tab.

## 5. Process -1 Regular User Login

Regular Users can only see **New Request** Tab and **My Request** Tab.

### New Request Section

- Submit a new travel request using the designated form.
- Enter required details like destination, purpose, Department (Required Field) and travel dates.
- Click **Submit** to initiate the approval workflow.
- The **Progress Indicators** show you where you are within the app with the Highlighted Green Color.
- You can navigate to the next part of the form by ✓ pressing the Check Mark.

**1**

**TRAVEL REQUEST FORM**

Progress Indicators: Personal Details (checked), Travel Details, Estimated Expenses, Documentations

Form Fields:

- Title
- First Name
- Last Name
- Email Address
- Employee ID Number
- Department (Find items)

**2**

**TRAVEL REQUEST FORM**

Progress Indicators: Personal Details, Travel Details (checked), Estimated Expenses, Documentations

Form Fields:

- Reason for travel
- Travel Destination
- Travel start date (Select a date...)
- Travel end date (Select a date...)
- Airline (Find items)

3

TRAVEL REQUEST FORM

Personal Details Travel Details Estimated Expenses Documentations

Estimated hotel cost

Estimated airfare

Estimated Cost For Other Activities

4

TRAVEL REQUEST FORM

Personal Details Travel Details Estimated Expenses Documentations

Attachments

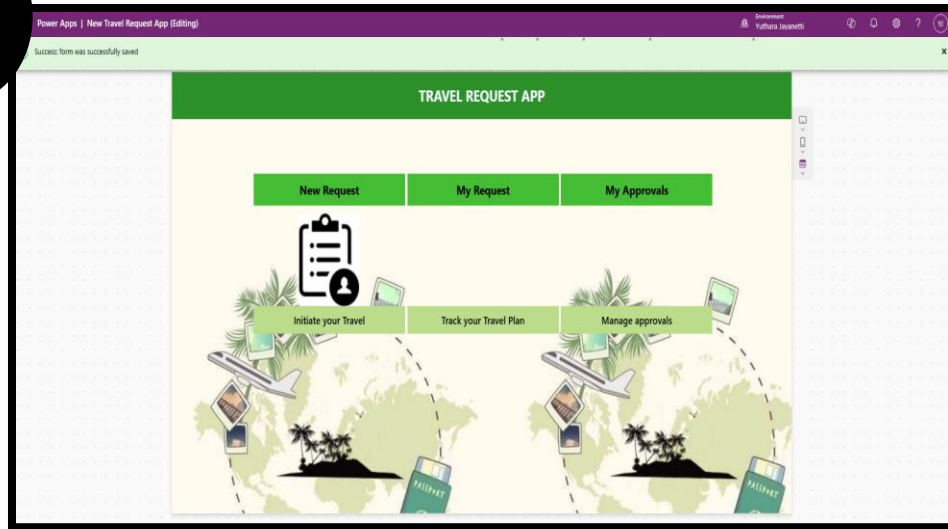
There is nothing attached.

Attach file

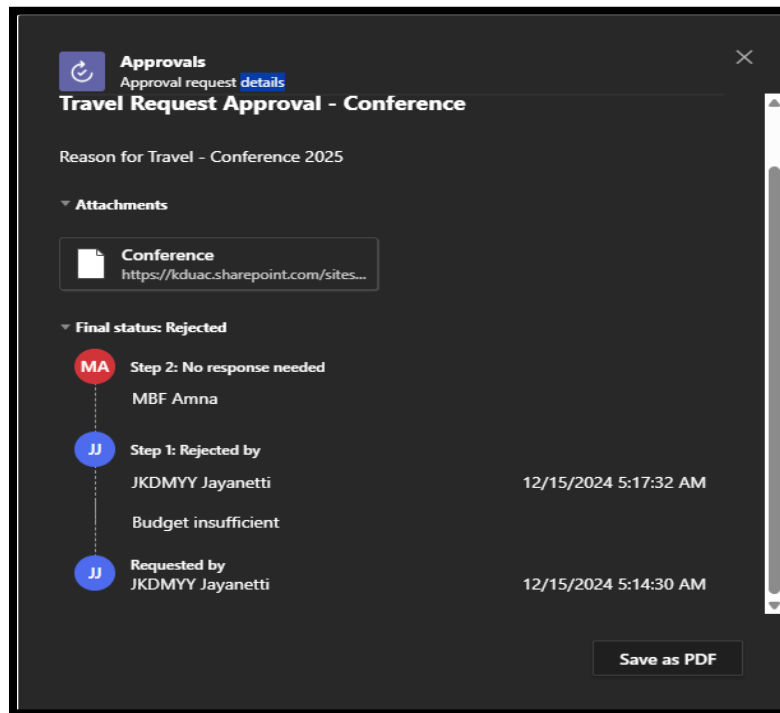
Submit

- This is the final step for submitting the form. You can also attach any files if required.
- User gets a successful submission notification and will be navigated back to HomePage.

5



- The user can see the approval workflow via Teams with date and time.



- The above workflow shows a rejected approval process. The user can also save the workflow as a PDF.



**Approvals**  
Approval request details

✕

### Travel Request Approval - Conference

Reason for Travel - Educational Conference

▼ Attachments

**Conference**  
<https://kduac.sharepoint.com/sites...>

▼ Final status: Approved

MA

Step 2: Approved by  
MBF Amna  
ok  
12/14/2024 4:05:04 PM

JJ

Step 1: Approved by  
JKDMYY Jayanetti  
12/14/2024 4:04:36 PM

JJ

Requested by  
JKDMYY Jayanetti  
12/14/2024 3:57:36 PM

Save as PDF

- The above workflow shows a successfully approved request.
- The users can Withdraw the submitted Requests via Teams Activity Section.

**Approvals**  
Approval request details

✕

### Travel Request Approval - Smith

Reason for Travel -

▼ Attachments

**Smith**  
<https://kduac.sharepoint.com/sites...>

▼ Status: Requested

MA

Step 2: Needs response from  
MBF Amna

JJ

Step 1: Pending response

Cancel request  
Follow up  
Reassign

More actions ▼

Reject

Approve

**Approvals**


Priority	Request title	Status	Source	Created
	Travel Request Approval - Smith	Canceled		12/15/2024 10:11

- The User can view the submitted request status both via teams and the Application.

- View submitted travel requests.

- Track approval progress and request status.

-View Request details from the side pane.


**MY REQUESTS**

Conference

UK  
1/1/2025-1/31/2024

Accepted

Business Meeting

USA  
1/1/2025-1/10/2024

Accepted

Business Trip

Singapore  
1/1/2025-1/17/2025

Pending

Annual Trip

Thailand  
12/20/2024-12/27/2024

Pending

Conference

USA  
1/1/2025-1/31/2025

**Request Details**

Travel Destination  
Singapore
Reason for travel  
2025 Annual Conference
Airline  
Cathay Pacific
Estimated airfare(\$)  
500
Estimated hotel cost  
1500
Estimated Cost For Other Activities  
700

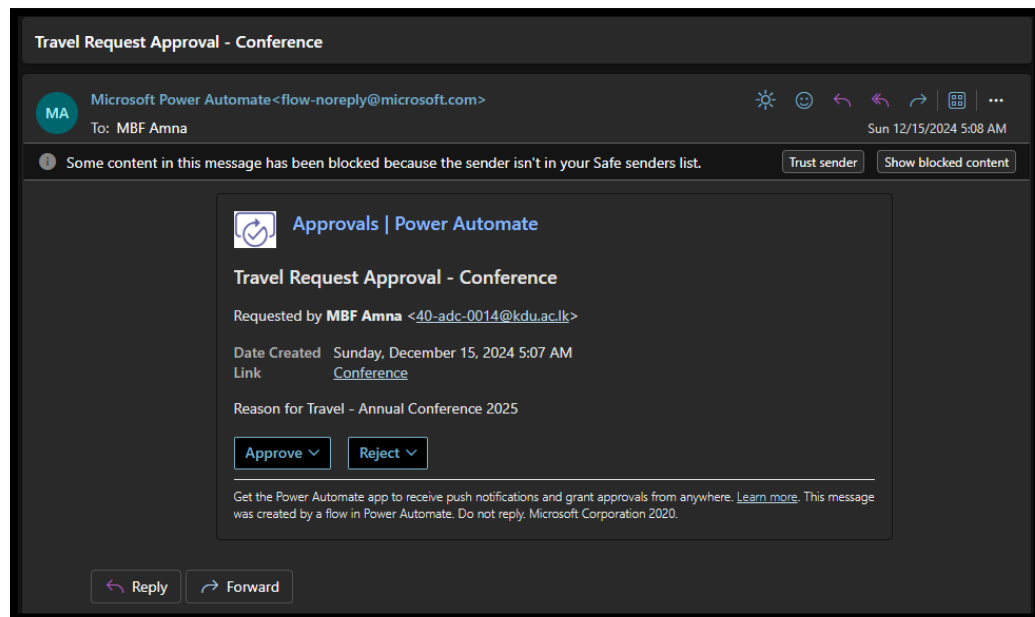
Approvals				
Priority	Request title	Status	Source	Created
	Travel Request Approval - Conference	Rejected		12/15/2024 5:14:30 AM
	Travel Request Approval - Conference	Requested		12/15/2024 5:07:03 AM
	Travel Request Approval - Conference	Approved		12/14/2024 3:57:36 PM
	Travel Request Approval - Annual Trip	Requested		12/13/2024 9:56:25 PM
	Travel Request Approval - Business Meet	Approved		12/13/2024 8:07:23 PM
	Travel Request Approval - Conference	Approved		12/13/2024 6:50:14 PM
	Travel Request Approval - ftduf	Requested		12/13/2024 2:35:35 PM
	Travel Request Approval - Incd	Requested		12/13/2024 2:30:23 PM
	Travel Request Approval - nbknb	Approved		12/12/2024 9:56:30 PM
	Travel Request Approval - vbgbhn	Approved		12/12/2024 9:15:21 PM
	Travel Request Form -hiiii	Rejected		12/12/2024 7:37:31 PM
	Travel Request Form -hiiii	Canceled		12/12/2024 7:37:31 PM

## 6. Process -2 User Admin Login

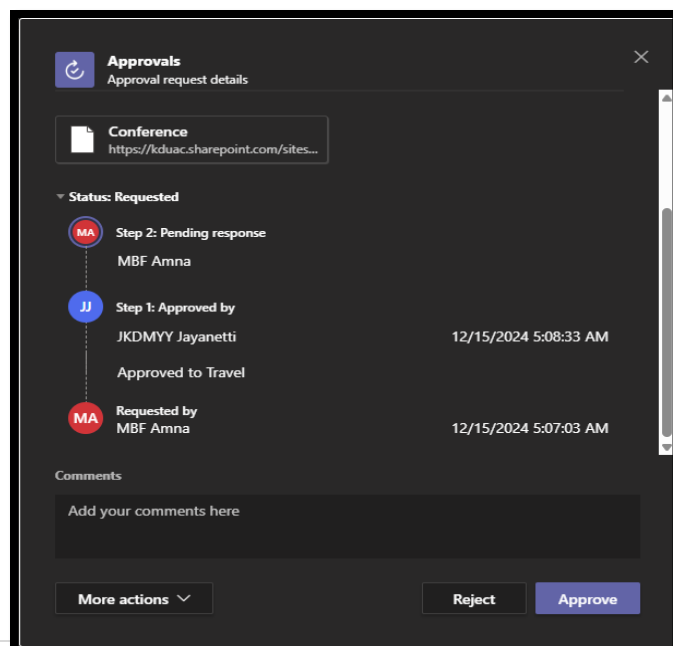
Admin Users can see three tabs **New Request** Tab, **My Request** Tab and **My Approvals** Tab.

- Access all travel requests submitted across departments.
- Monitor approval status and detailed audit logs.

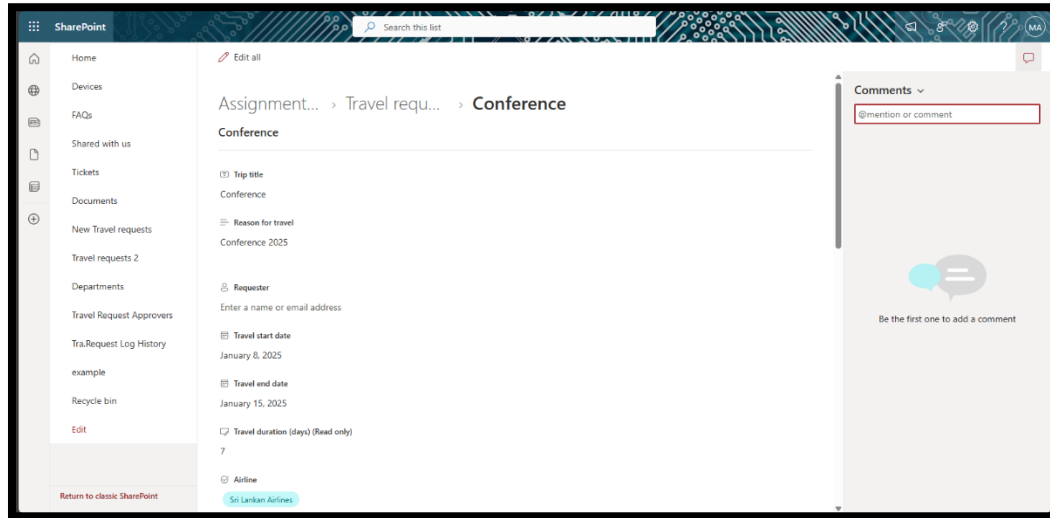
- Once a User triggers a flow by submitting the form, the First approver of the specific department gets a notification email via Outlook.



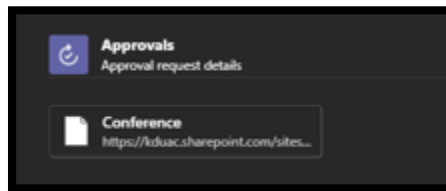
- Once the First Approver approves, the second approver is notified.
- Only when both the approvers Approve the request is successfully approved and then the user is notified.



- The Admin User whether a first approver or the second approver has access to Teams workflow and SharePoint.



- By Selecting link **Conference to this specific request**, the admin user will be redirected to SharePoint.



## 7. Troubleshooting Tips

- Ensure correct permissions are granted in SharePoint and Power Automate.
- Double-check email configurations.
- Review Power Automate logs for error messages.

## 8. Benefits of Automation

- Efficiency: Faster approval process.
- Transparency: Real-time updates.
- Centralized Tracking: All requests stored in SharePoint.
- Improved Communication: Automated notifications keep everyone informed.

Automating the travel approval process with Power Automate simplifies workflows, reduces manual tasks, and enhances team collaboration through automated notifications and updates.

[https://kduac-my.sharepoint.com/:v/g/personal/40-adc-0023\\_kdu\\_ac\\_lk/EcE4cbZ\\_ru5Mm25GltUBW4BQCoynhUqsx5TpxFiXr0iUQ?nav=eyJyZWZlcnJhYEluZm8iOnsicmVmZXJyYWxBcHAiOiJPbmVEcmI2ZUZvckJ1c2luZXNzIiwicmVmZXJyYWxBcHBIQmBGF0Zm9ybSI6IldlYiIsInJlZmVycmFsTW9kZSI6InZpZXciLCJyZWZlcnJhbFZpZXciOiJNeUZpbGVzTGlua0NvcHkifX0&e=lneldi](https://kduac-my.sharepoint.com/:v/g/personal/40-adc-0023_kdu_ac_lk/EcE4cbZ_ru5Mm25GltUBW4BQCoynhUqsx5TpxFiXr0iUQ?nav=eyJyZWZlcnJhYEluZm8iOnsicmVmZXJyYWxBcHAiOiJPbmVEcmI2ZUZvckJ1c2luZXNzIiwicmVmZXJyYWxBcHBIQmBGF0Zm9ybSI6IldlYiIsInJlZmVycmFsTW9kZSI6InZpZXciLCJyZWZlcnJhbFZpZXciOiJNeUZpbGVzTGlua0NvcHkifX0&e=lneldi)

# END of User Manual