User Manual

VERSION 1.0

for Streamlining Travel Approval Process Using Power Automate.

Task 2: **Streamlining Travel Approval Process Using Power Automate**

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User Manual for Streamlining Travel Approval Process Using Power Automate

Table of Contents

Introduction **3**

Who Should Use the Manual 3

Process Overview 3

Logging in to the Travel Approval Application 4

Process -1 Regular User Login **5**

Process -2 User Admin Login **10**

Link to the Approval Process Demo **12**

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:

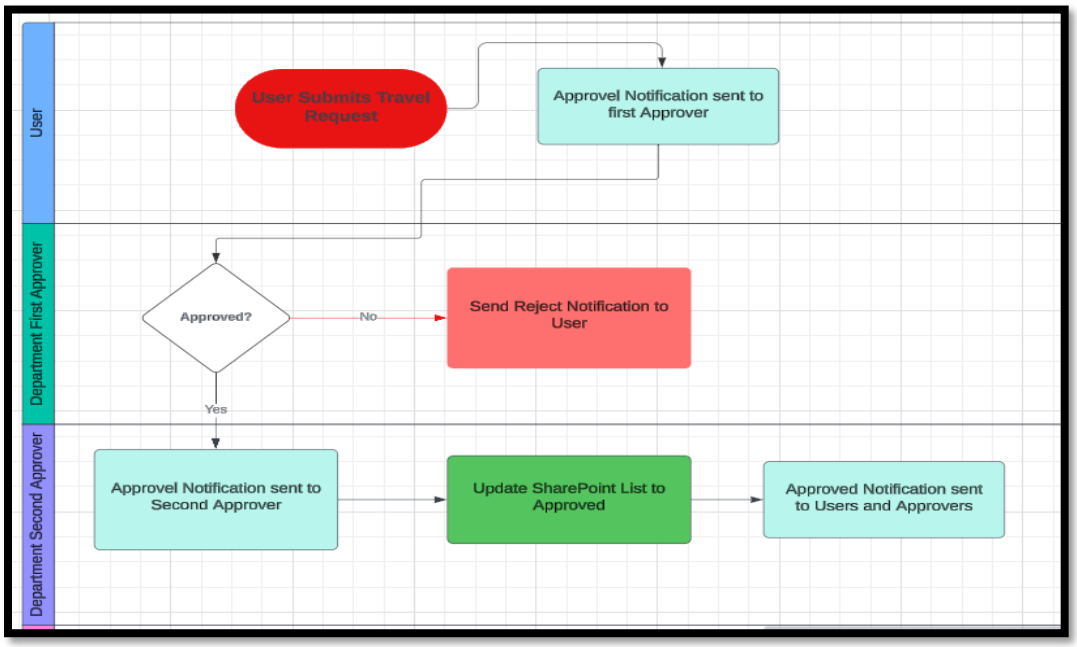
1. A travel request is submitted.

2. Notifications are sent to two designated approvers of the specific department.

3. Approvers approve or reject the request.

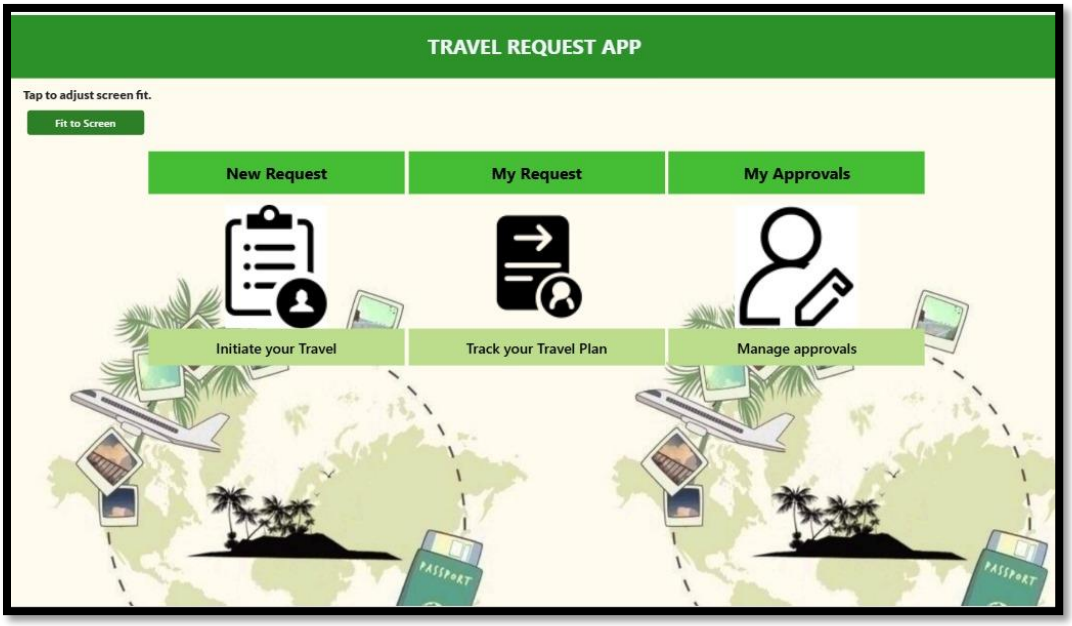
4. The system updates the request status in SharePoint.

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.

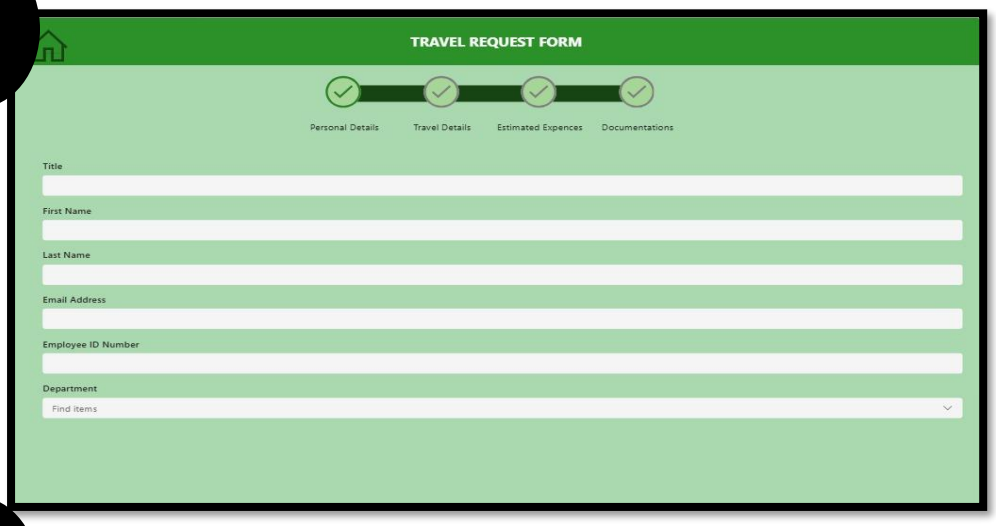
5. Process -1 Regular User Login

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



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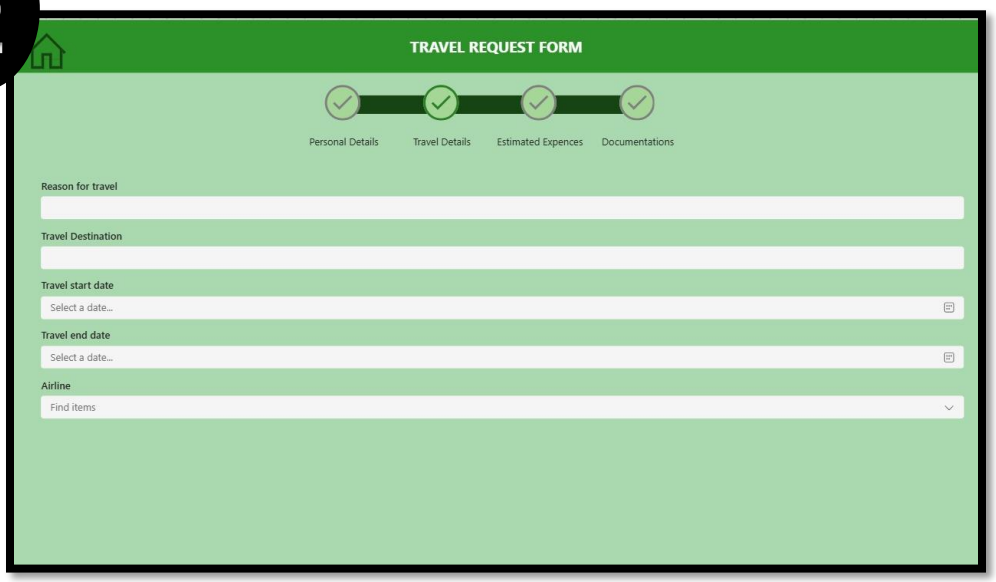
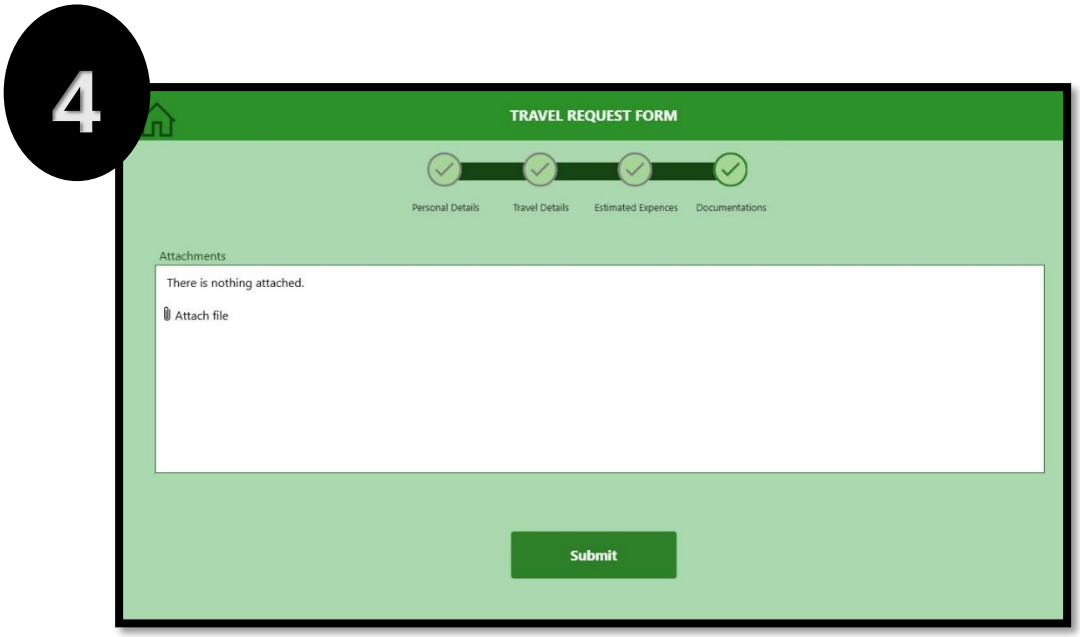
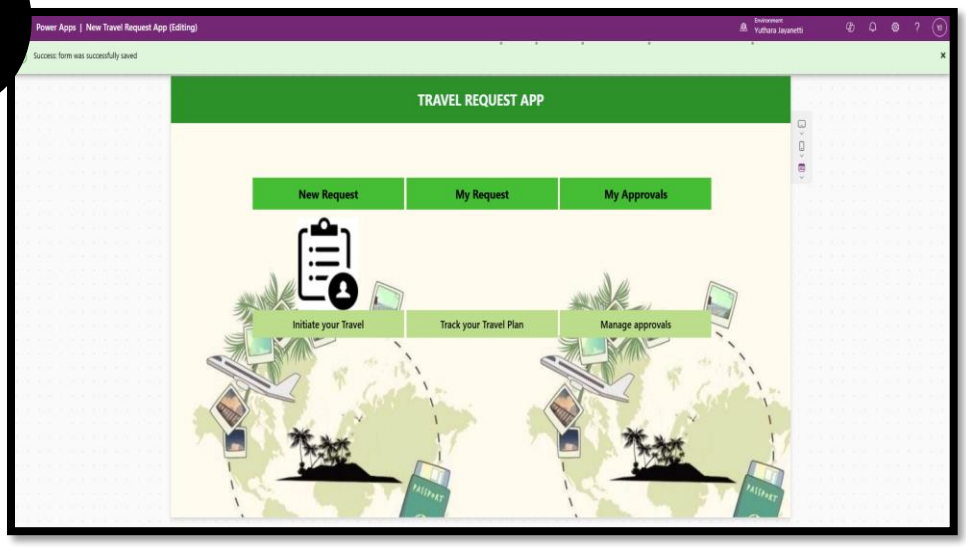


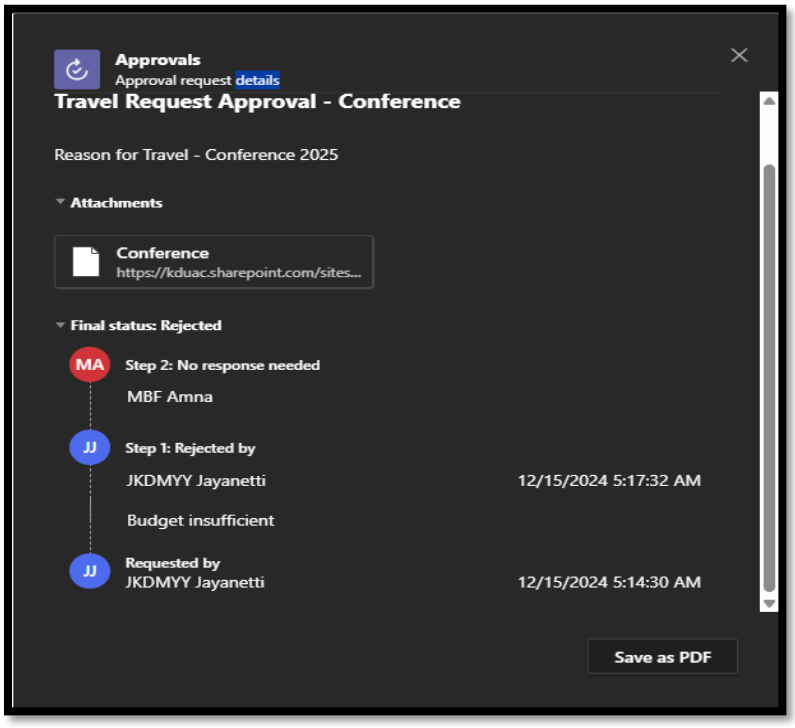


- This is the final step for submitting the form. You can also attach any files if required.
- User gets a successful submission notification and will be navigated back to HomePage.

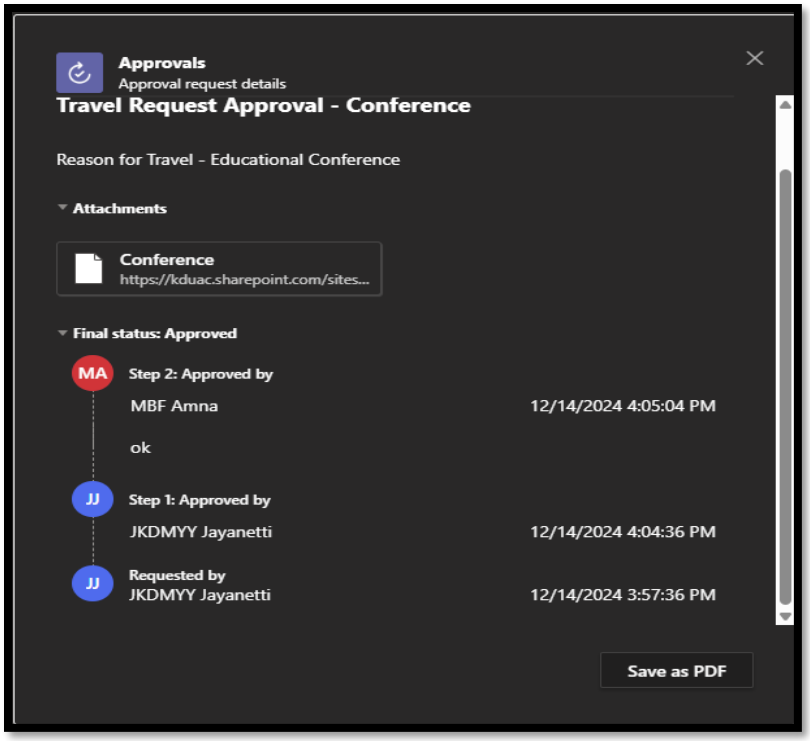
5



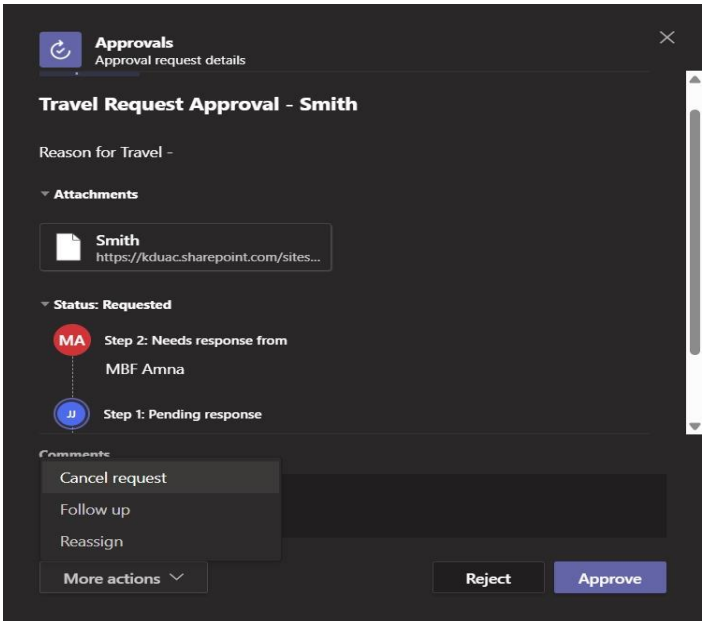
- The user can see the approval workflow via Teams with date and time.

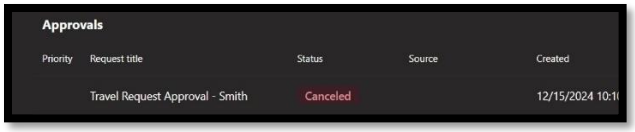


- The above workflow shows a rejected approval process. The user can also save the workflow as a PDF.



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



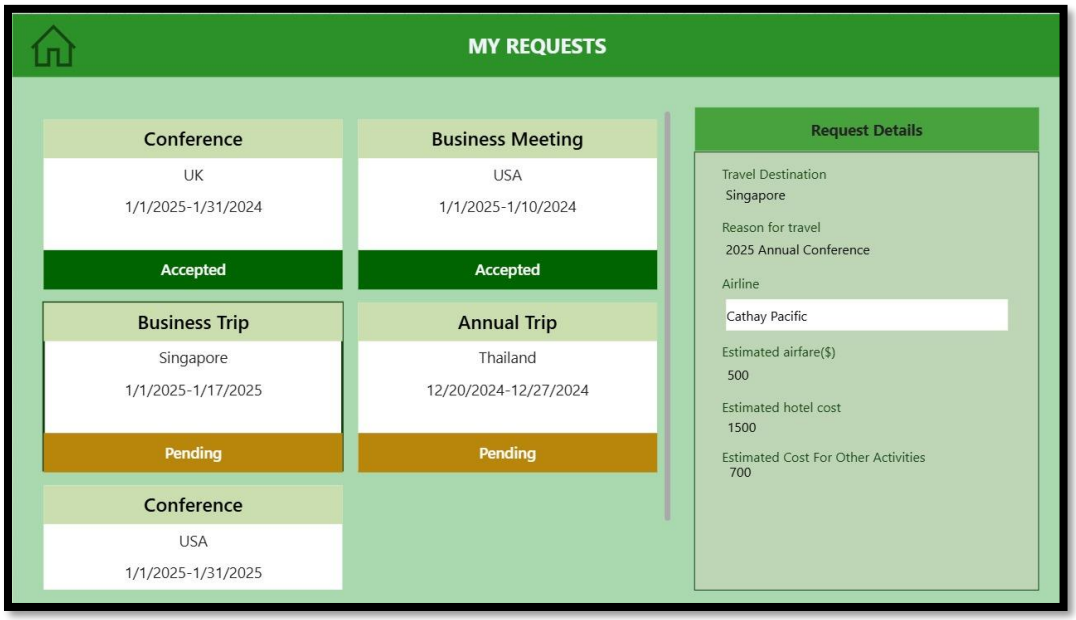


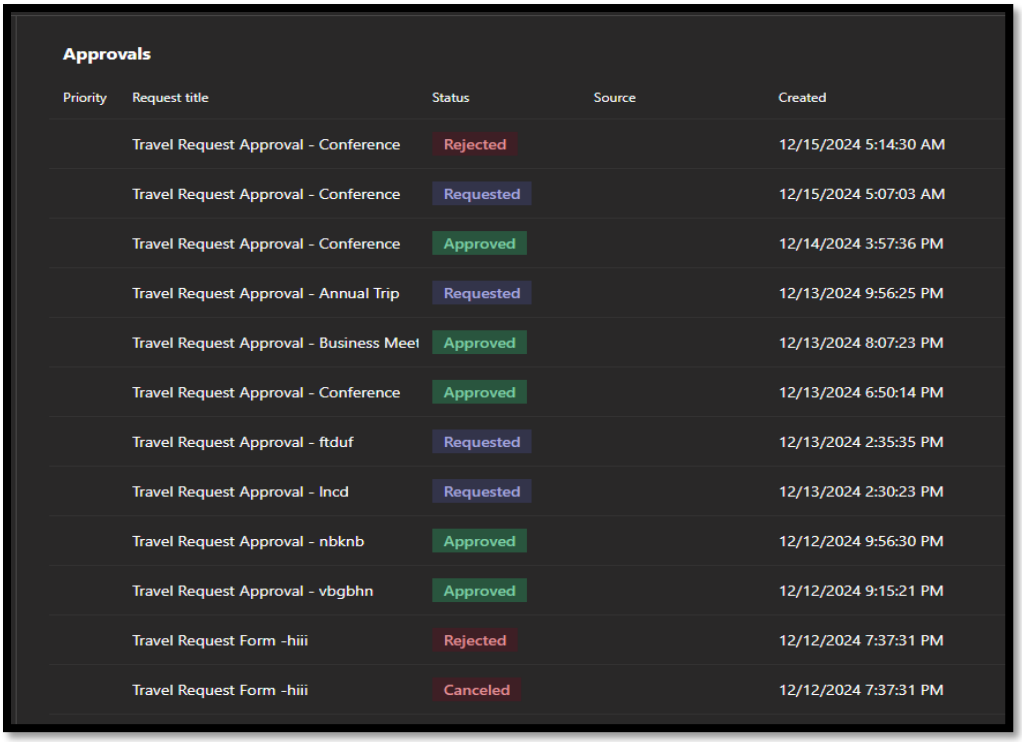
- The User can view the submitted request status both via teams and the Application.

- View submitted travel requests.

- Track approval progress and request status.

-View Request details from the side pane.





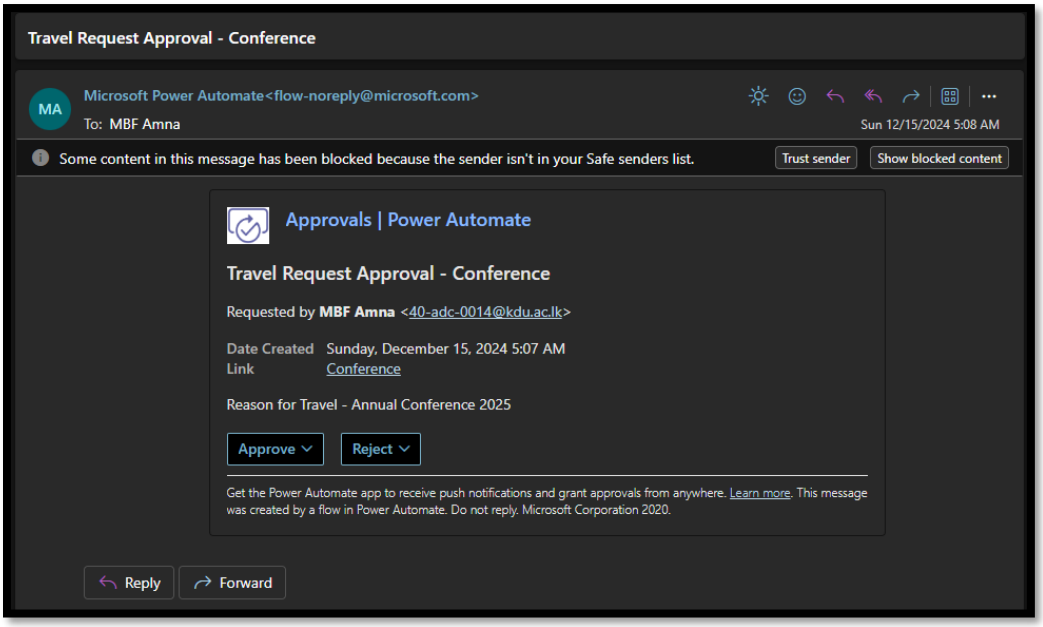
6. Process -2 User Admin Login

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

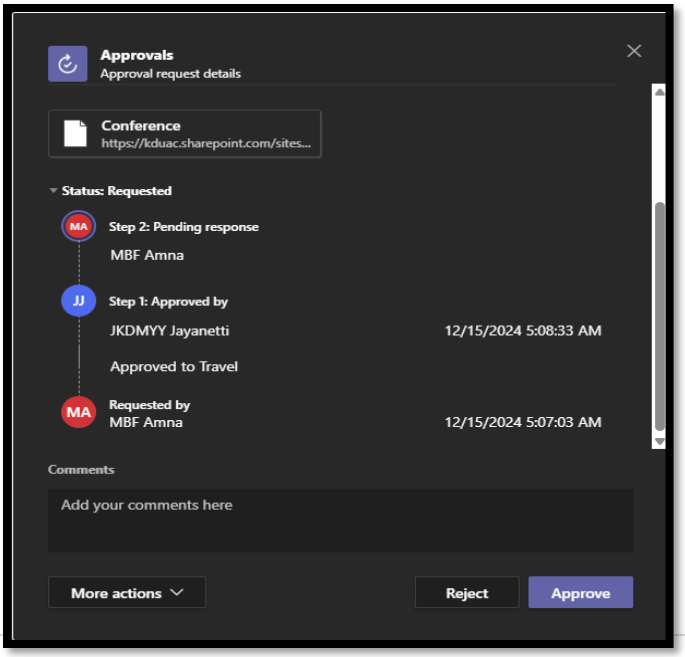
- Access all travel requests submitted across departments.

- Monitor approval status and detailed audit logs.

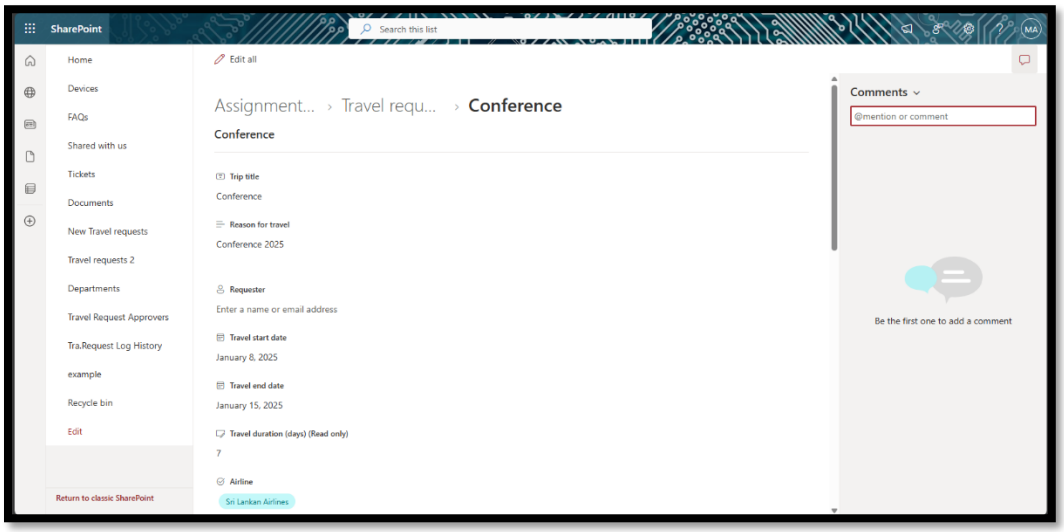
- Once a User triggers a flow by submitting the form, the First approver of the specific department gets a notification email via Outlook.



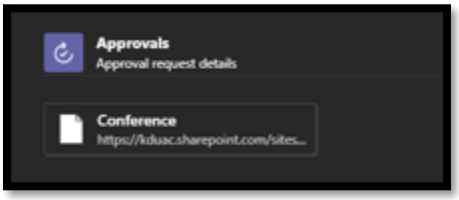
- Once the First Approver approves, the second approver is notified.
- Only when both the approvers Approve the request is successfully approved and then the user is notified.



- 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.

9. Conclusion

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

Link to the Approval Process:

https://kduac-my.sharepoint.com/:v:/g/personal/40-adc-0023_kdu_ac_lk/EcE4cbZ_ru5Mm25GlvtUBW4BQCoynhUqsx5TpxFiXr0iUQ?nav=eyJyZWZlcnJhbEluZm8iOnsicmVmZXJyYWxBcHAiOiJPbmVEcml2ZUZvckJ1c2luZXNzIiwicmVmZXJyYWxBcHBQbGF0Zm9ybSI6IldlYiIsInJlZmVycmFsTW9kZSI6InZpZXciLCJyZWZlcnJhbFZpZXciOiJNeUZpbGVzTGlua0NvcHkifX0&e=lneldi

END of User Manual

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