General Sir John Kotelawala Defence University

Faculty of Management, Social Sciences and Humanities

Department of Languages

BSc in Applied Data Science Communication

Advanced SQL and Cloud Databases / LB2224

Group Assignment

P Laksia – D/ADC/23/0013

PRM Perera – D/ADC/23/0031

MM Jayasinghe – D/ADC/23/0035

RYN Sanduprabha – D/ADC/23/0046

Advanced SQL and Cloud Databases / LB 2224

Year 2: Semester 1

Assignment number 1

15.12.2024

Employee Leave Requests Workflow User Guide

Content

1. About the Guide

The user guide for the automated workflow of the Employee Leave Request App acts as an aid to the users of the app to understand, operate and troubleshoot the automated workflow for managing employee leave requests.

The user guide helps to automate the approvals updating the balance leaves that the employees has while sending notifications to the employees about the status of their requests – whether the requests are approved or denied. The intended users of this app are the employees to submit their leave requests, managers to approve or deny their requests and the Human Resource (HR) teams to oversee the leave management.

The guide consists of several sections which will aid the users when using the app.

i. Product features – This section will provide details about the key functionalities of the automated workflow.
ii. How to operate the Product – This section will provide a detailed step – by – step instructions to the users who are interacting with the automated workflow.
iii. Troubleshooting Tips – This section will provide solutions to the common issues that the user may encounter while interacting with the automated workflow.
iv. Frequently Asked Questions (FAQs) – this section will provide answers to most common queries asked by the users on regards the functionality of the workflow.
v. Glossary – This section will define the key terms used in the guide or the workflow.
vi. Appendix – This section will provide supplementary information about the images and diagrams used I the guide.

2. Product Features

Workflow Trigger

The trigger implemented in the workflow is **When an Item is Created** which is a trigger from SharePoint. This workflow automatically triggers when an employee submits a leave request through Power Apps.

Workflow Actions

The actions implemented in the workflow are:

i. **Update Item** - Once the request is submitted, the workflow first updates the data source (e.g., a SharePoint list) with the leave request details.
Depending on the approval status, the system automatically updates the status of the leave request in the data source (e.g., SharePoint list or any other integrated system).

ii. **Start for an Approval** - The workflow then sends the leave request for approval, and it waits for the manager to review and respond to the request.

iii. **Condition** - If the manager approves the request, the workflow marks the leave request as approved, updating the status accordingly in the data source.
If the manager rejects the request, the workflow marks the request as rejected, and the status is updated in the data source to reflect the rejection.

iv. **Sending an email (V2)** – This action allows you to send an email through Microsoft Outlook to trigger various events such as leave request submissions or an approval process.

Automation Benefits

i. **Efficiency and Time-Saving:** By automating the approval process, the workflow eliminates the need for manual follow-up between employees and managers, streamlining the overall leave management process.

ii. **Timely Updates:** Employees and managers receive immediate and accurate updates regarding the status of leave requests, reducing delays in approval or rejection.

iii. **Enhanced Visibility:** Both employees and managers gain better visibility into the status of leave requests, improving transparency and communication throughout the approval process.

iv. **Consistency and Accuracy:** The automated system ensures that all leave requests are processed consistently, reducing human errors and ensuring that all approvals and rejections are recorded correctly in the data source.

3. How to Operate the Product

For Employees

i. Submitting a Leave Request:

- To initiate a leave request, open the Power App and enter all necessary details, such as the leave type (sick leave, annual leave, etc.), the dates for the leave, and any additional reason or comments.
- Once you submit the leave request, the workflow is automatically triggered. This initiates the approval process and sends the request to your manager for review through Microsoft Outlook.

ii. Receiving Notifications:

- **Initial Submission Confirmation:** After submitting the leave request, you will receive an email confirming that your request has been successfully sent to your manager. This email assures you that the leave request is under review.
- **Approval or Denial Decision:** Once your manager has reviewed your leave request, you will receive another email notifying you of the decision. This email will indicate whether your leave request has been approved or denied. If your request has been either approved or denied, the email may also include comments from your manager, explaining the decision or providing additional feedback.

For Managers

i. Receiving Request Notifications:

- Whenever an employee submits a leave request through the Power App, you will receive an email notification to inform you that a new request is awaiting your approval.
- The notification email will include the details of the request, such as the type of leave requested, the requested leave dates, the reason for the leave, and a link that allows you to approve or deny the request with just one click.

ii. Approving or Denying Requests:

- Upon receiving the request notification, you can review all the details of the leave request directly in the email.
- Using the provided link, you can approve or deny the leave request. While approving or denying, you have the option to add comments explaining your decision, such as providing context or suggesting an alternative course of action.

iii. Confirmation of Decision:

- After you make a decision regarding the leave request (either approved or denied), both you and the employee will receive confirmation emails.
- The email you receive will confirm the status of the request and provide any comments you’ve added during the approval or denial process.

- The employee will also be notified of the decision and any feedback you have provided, ensuring transparency and clear communication throughout the process.

4. Troubleshooting Tips

Emails Not Received

If you or the recipient is not receiving email notifications, follow these steps:

- **i.** **Verify Email Address:** Ensure that your email address is correct and active in the Power App or Power Automate settings.
- **ii.** **Check Spam or Junk Folder:** Sometimes, emails from automated systems can be directed to the spam or junk folder. Be sure to check these folders in your email account.
- **iii.** **Confirm Workflow Activity:** Ensure that the Power Automate workflows are active. You can verify this in the Power Platform Admin Center to confirm the workflow is running properly.

Workflow Not Triggering

If the workflow does not trigger when a leave request is submitted:

- i. **Confirm Submission:** Verify that the leave request was successfully submitted through the Power App. If the request was not submitted correctly, the workflow will not trigger.
- ii. **Review Workflow History:** Go to Power Automate and check the workflow's run history for any errors or issues that may have prevented the workflow from executing. Any failures will be recorded here for troubleshooting.

Errors in Approval Links

If the approval links in the email are not working as expected:

- i. **Ensure Functional Links:** Double-check that the approval or rejection links in the email are correct and functional. Sometimes the links can become broken if there are issues in the workflow.
- ii. **Contact Administrator:** If issues with the links persist, contact the system administrator to verify the workflow settings and ensure everything is configured correctly in Power Automate.

5. <u>Frequently Asked Questions (FAQs)</u>

i. Can I change leave details after submission?

Once a leave request is submitted, it cannot be modified. However, if you need to change any details, you can cancel the existing request in the Power App and submit a new one with the updated information.

ii. What happens if a manager doesn't respond to a request?

If a manager does not respond to a leave request within a specified time (e.g., 24 hours), the workflow automatically sends a reminder email to the manager to prompt a response. This ensures that leave requests are reviewed and processed in a timely manner.

iii. Can I view a history of my leave requests?

Yes, you can view a history of all your past leave requests and their statuses directly in the Power App. This provides you with easy access to track previously submitted requests and their outcomes.

iv. Can managers delegate requests to another manager?

The current workflow does not include a feature for managers to delegate leave requests to another manager. However, this functionality can be implemented upon request. Contact your administrator if you would like this feature to be added.

6. Glossary

i. **Workflow:** A series of automated actions that are triggered by specific events, such as the submission of a leave request. The workflow streamlines processes like approval, notifications, and calendar updates.

ii. **Trigger:** The event that initiates the workflow. For example, the submission of a leave request by an employee triggers the workflow to begin the approval process.

iii. **Actions:** The tasks or processes performed by the workflow in response to the trigger. Actions include sending emails, updating request statuses, and making calendar updates.

iv. **Approval Email:** An automated email sent to managers to notify them of a leave request awaiting their approval. The email includes options to approve or deny the request and may allow managers to add comments

v. **Notification:** Automated emails sent to users (employees and managers) to inform them about the status of their leave requests. These notifications include updates on submission, approval/denial, and calendar entries.