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| Two woman discuss something  *Streamlining Expense Approvals* | | | | |
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|  | | USER MANUAL |  | |

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| Group of people | |  | | --- | | TABLE OF CONTENTS |   **Introduction**  **1 Overview of the Workflow.**  **2 User Roles.**  **3 Prerequisites**  **4 Step-by-Step Instructions**  **5 Notifications and Alerts...…………………….**  **6. Troubleshooting**  **7. FAQs**  **8. Contact Information** |

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| Introduction |

**Welcome to the Employee Expenses Submission Approval Flow User Manual!**

**This manual offers detailed instructions on using the system to submit, monitor, and approve employee expense claims.**

**The approval workflow is structured to streamline the process, promoting accuracy, efficiency, and clear communication between employees and approvers.**

**Whether you're filing an expense report or evaluating a request for approval, this guide is designed to help you easily navigate every step of the process.**

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| 1. Overview of the Workflow |

**This approval flow automates the submission and approval of employee expenses using Microsoft Forms, SharePoint, and Power Automate.**

**The process includes:**

1. **Submission of expense requests by employees.**
2. **Storing request details in a SharePoint list.**
3. **Two-level approvers based on the amount of expense.**
4. **Automated notifications to approvers for approval or rejection.**
5. **Automated notifications for Employees about the request approval or rejection.**
6. **Update the approval status in the share point list for further decision-making**

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| 2. uSER ROLES |

* **Submitters**: **Employees submitting expense requests.**
* **Approvers**:

**Financial Manager:** Assigned personnel to review and approve the request

When the employee requests a higher expense amount.

**Financial Accountant:** Assigned personnel to review and approve the requests When the employee requests a lower expense amount.

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| 3. Prerequisites |

**Before using the Employee Expenses Submission Approval Flow, ensure the following requirements are met:**

**Access Requirements**

**Submitters**:

* Access to the Employee Expenses Submission Form (via Microsoft Forms).
* Permission to upload required documents (e.g., receipts).
* A valid email address to receive notifications about the status of their submission**.**

**Approvers:**

* Access to email for receiving approval notifications.
* Permission to edit the Expenses Submission List in SharePoint

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**Permissions**.

* **Approvers**: Must have edit permissions for the SharePoint list to record approval or rejection.

**Account Requirements**:

* A valid Microsoft 365 account with access to Microsoft Forms, SharePoint, and Power Automate

**System Configuration**

* **Ensure Power Automate is properly configured with:**

Primary and backup approvers' emails correctly listed in the Regular Approvers List.

Access to the SharePoint site where the Expenses Submission List is hosted**.**

**Technical Requirements**

* A stable internet connection to access Microsoft Forms, SharePoint, and email notifications.
* Supported browsers: Microsoft Edge, Google Chrome, or Firefox (latest versions recommended).

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| 4. Step-by-Step Instructions |

**A. Submitting an Expense Request**

**1. Open the Employee Expenses Submission Form**

* <https://forms.office.com/r/LhGJ0tfc6Q?origin=lprLink>

**2. Fill out the following details**

**Employee Name**: Provide your name

**Email Address**: Provide your organizational email address

**Department:** Choose your current department

**Date:** The submission date of the expense

**Type of expense:** Choose the category of expense

**Amount:** The expense amount you are requesting

**Description:** Brief description of the expense

**Attachments**: Include any receipts or other attachments if available

**Approval Status:** Choose the pending status

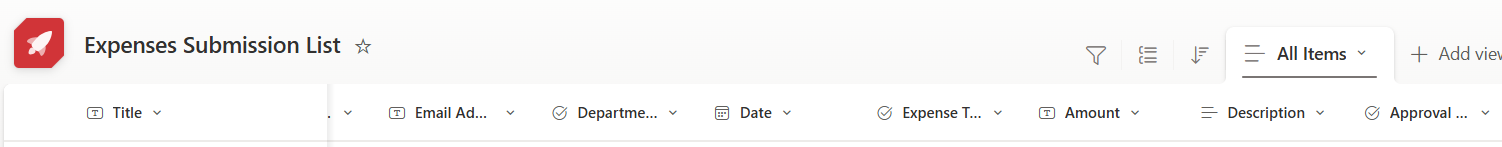
**3.** **Click Submit to send the request.**

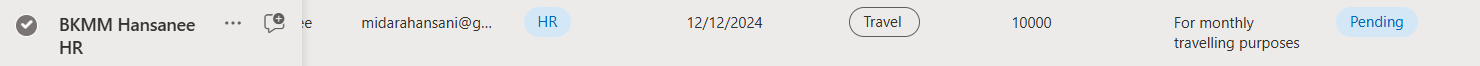
After the submission, you will receive a confirmation email like this

A screenshot of a computer

Description automatically generated

The submitted details will be updated in the employee submission list





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**B. Approval Process**

Approvers will receive an email notification with the expense details via Outlook and Teams.

If the employee requesting amount is greater than 50000, The approval will proceed to the financial manager,

Otherwise, if the requested amount is less than that the approval will proceed with the financial accountant.

A screenshot of a email

Description automatically generated

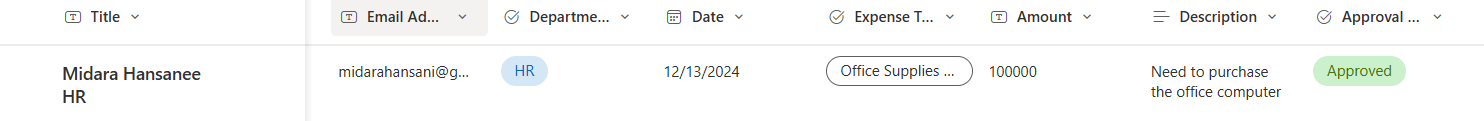
A screenshot of a computer

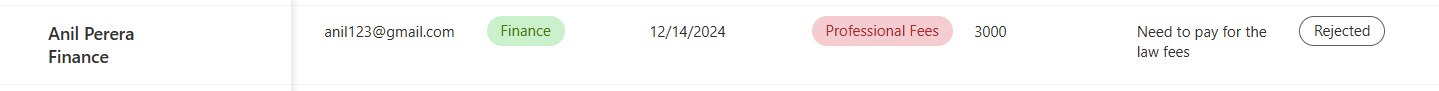
Description automatically generated

**In the email:**

* **Click Approve to accept the expense.**
* **Click Reject to decline the request.**

**The flow records the response in the SharePoint Expenses Submission List.**





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| 5. Notifications and Alerts |

**Submitters**: Receive an email confirmation when their expense is approved or rejected.

**When Manager or Accountant approves the request**

A screenshot of a computer

Description automatically generated

**When Manager or Accountant declines the request**

A close-up of a message

Description automatically generated

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| 6. Troubleshooting |

**Issue**: Notifications not received.

Solution:

* Ensure that email filters are not blocking the notifications.
* Verify that approver email is in the Approvers List

**Issue**: Expense not appearing in the SharePoint list.  
**Solution**:

* Confirm the Microsoft Form submission was completed.
* Refresh the site
* Check Power Automate flow history for errors.

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| 7.FAQs |

**What would happen if I entered incorrect Expense details?**

Contact your manager to request a correction or re-submit the form.

**How do I check the status of my expense submission?**

Access the **SharePoint Expenses Submission List** and check for the **Approval Status** or contact approver.

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| 8. Contact Information |

For technical issues or further assistance, please contact:

**Support Team**: Midara Hansanee

**Email**:40-adc-0019@kdu.ac.lk