



Approval Hub (HR & Ops Suite)

End-User & Approver Manual

Version 1.0.3



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1. Introduction for End-Users & Approvers

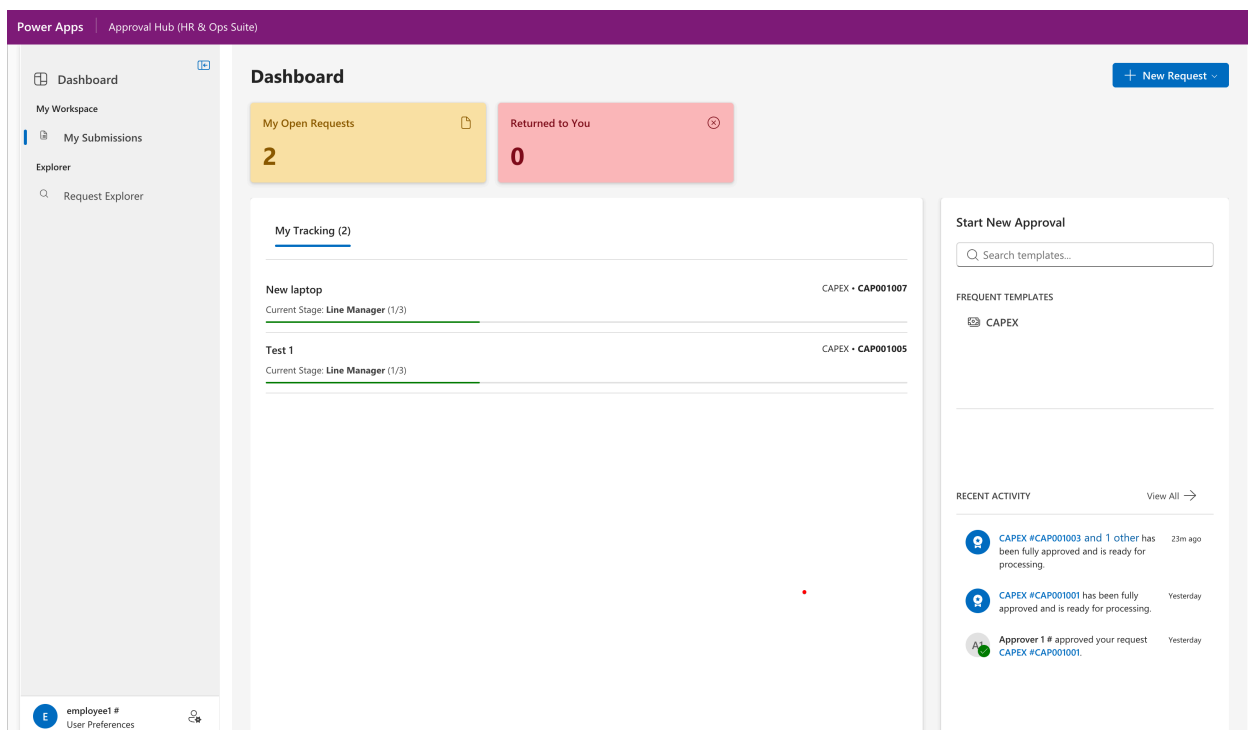
Welcome to the **Approval Hub** operational manual. This guide is tailored specifically for two primary user groups who interact with the platform daily:

- **Standard Employees (End-Users):** Authorized to submit operational requests, track live processing lines, manage personal timesheets, and log time-off records.
- **Managers & Approvers:** Authorized to review pending tasks, evaluate form structures or sub-grids, communicate on timelines, and execute binding approvals or rejections.

The application leverages a unified, responsive interface framework, ensuring consistency across standard computing layouts and mobile web operations.

2. End-User Workspace: Submitting & Tracking Requests

A. Dashboard Overview



The screenshot displays the Approval Hub Dashboard. At the top, there's a purple header with 'Power Apps' and 'Approval Hub (HR & Ops Suite)'. A '+ New Request' button is in the top right. The main content area is divided into several sections: 'My Open Requests' (2) in a yellow box, 'Returned to You' (0) in a red box, and 'My Tracking (2)' which lists two items: 'New laptop' (CAPEX - CAP001007) and 'Test 1' (CAPEX - CAP001005), both with a 'Current Stage: Line Manager (1/3)'. On the right, there's a 'Start New Approval' section with a search bar and 'FREQUENT TEMPLATES' (CAPEX). Below that is 'RECENT ACTIVITY' showing three items: 'CAPEX #CAP001003 and 1 other has been fully approved and is ready for processing.' (23m ago), 'CAPEX #CAP001001 has been fully approved and is ready for processing.' (Yesterday), and 'Approver 1 # approved your request CAPEX #CAP001001.' (Yesterday). A left sidebar contains navigation options: Dashboard, My Workspace, My Submissions, Explorer, and Request Explorer. At the bottom left, there's a user profile section with 'employee #', 'User Preferences', and a settings icon.

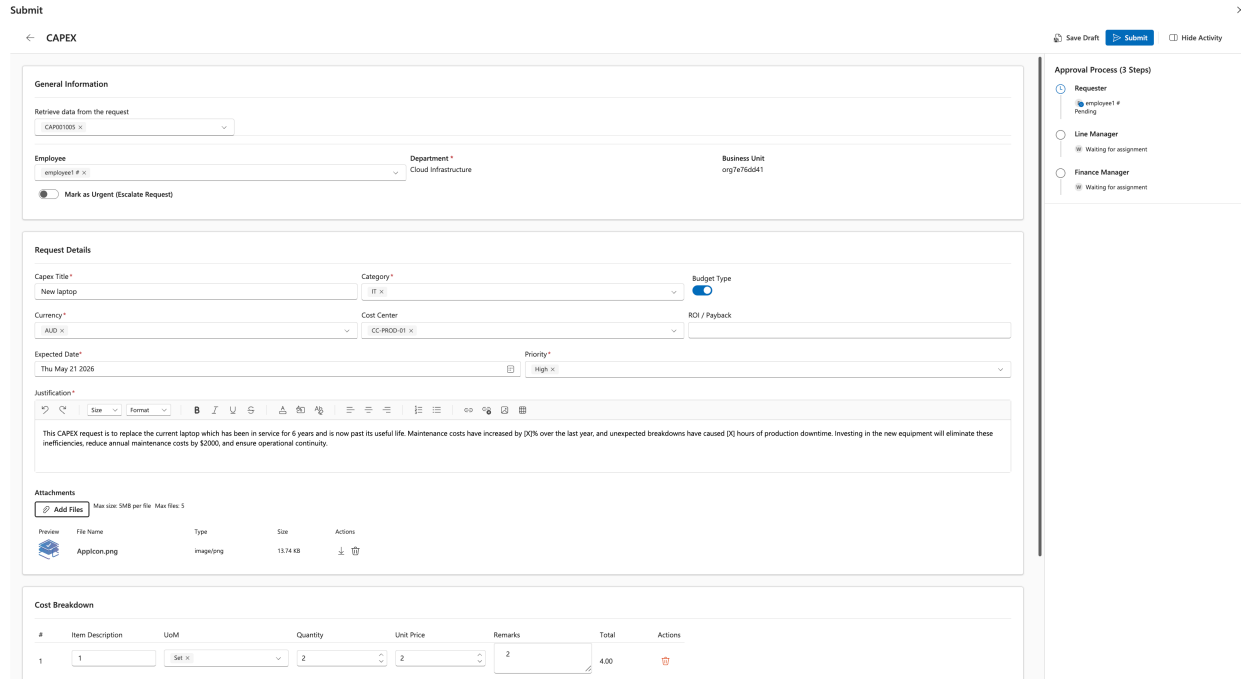
When you log into the system, the **Dashboard** is your primary landing page. This screen is designed to help you manage your time and track your work efficiently through the following key areas:

- **My Open Requests (Yellow):** The number of requests you created that are currently routed and waiting for approval.

- **Returned to You (Red):** Requests that were rejected by a manager and sent back to you for revision.
- **My Tracking:** Displays the real-time progress of requests you are actively monitoring (e.g., currently at the *Line Manager* stage).
- **Recent Activity:** Located on the right column, this is a mini newsfeed displaying the latest actions related to your workflows (e.g., someone just approved your form).
- **Start New Approval:** You can quickly create a new ticket by clicking the blue + **New Request** button in the top right corner, or by selecting directly from the **Frequent Templates** list (such as *CAPEX*).

B. Creating and Submitting a New Request

To create a request (e.g., CAPEX Budget, Expense Claim, Leave Request), follow this standard workflow:



Submit

← CAPEX Save Draft **Submit** Hide Activity

General Information

Retrieve data from the request
CARD01003 x

Employee Department * Cloud Infrastructure Business Unit org1216041
 Mark as Urgent (Escalate Request)

Request Details

Capex Title * Category * Budget Type

Currency * Cost Center RDI / Payback

Expected Date* Priority*

Justification*

This CAPEX request is to replace the current laptop which has been in service for 6 years and is now past its useful life. Maintenance costs have increased by 200% over the last year, and unexpected breakdowns have caused 100 hours of production downtime. Investing in the new equipment will eliminate these inefficiencies, reduce annual maintenance costs by \$2000, and ensure operational continuity.

Attachments

Add Files Max size 5MB per file. Max files: 5

Preview	File Name	Type	Size	Actions
	AppIcon.png	image/png	13.74 KB	

Cost Breakdown

#	Item Description	UoM	Quantity	Unit Price	Remarks	Total	Actions
1	1 <input type="text"/>	Set <input type="text"/>	2 <input type="text"/>	2 <input type="text"/>	2 <input type="text"/>	4.00	

Approval Process (3 Steps)

- Requester Pending
- Employee 1 # Pending
- Line Manager Waiting for assignment
- Finance Manager Waiting for assignment

1. **Step 1: General Information** The system automatically populates your name and Department in the employee fields. You can use the *Retrieve data from the request* dropdown to clone data from an old ticket to save time. Turn on the **Mark as Urgent (Escalate Request)** toggle if this is a high-priority item; the system will require you to enter a specific reason for the urgency.
2. **Step 2: Request Details** Fill in all required data fields. Pay close attention to fields marked with a red asterisk (*), as these are **mandatory**. You will not be able to submit the form if these are left blank. Provide a detailed explanation in the *Justification* rich-text box.

3. **Step 3: Attachments** Click the **Add Files** button to upload invoices, quotes, or supporting documents. Pay attention to the system limits displayed on the screen regarding maximum file size (e.g., 5MB) and maximum file count.
4. **Step 4: Data Tables (Cost Breakdown)** For forms requiring detailed itemization, click the blue + **New Row** button to add entries. The system automatically calculates the *Total* column based on your entered *Quantity* and *Unit Price*.
5. **Step 5: Review Process & Submission** Before submitting, check the **Approval Process** panel on the right side of the screen. This outlines exactly how many steps your request will go through and who the current approver is. Click **Submit** to officially route the request, or click **Save Draft** if you need to finish it later.

C. Request Center (My Submissions)

To search and manage all your submitted tickets, click the **My Submissions** menu on the left navigation bar.

Request Info	Submitted Date	Current Approver	Status	Actions
CAPEX - New laptop CAPEX - CAP001007	May 24, 2026	AS - Admin System	Pending LM Approve	
CAPEX - Test 1 CAPEX - CAP001005	May 24, 2026	AS - Admin System	Pending LM Approve	

Main Management Tabs










- **My Own Requests:** Contains all requests created directly by you.
- **Submitted on Behalf:** If you are an assistant or coordinator authorized to create tickets for others, those proxy submissions will appear here. The *On Behalf Of* column indicates who you are representing.
- **Shared with Me:** Contains requests where colleagues have granted you view-only access.

Tracking Status & History

- **Status Cards:** The top cards display quick counts of your tickets categorized by status: *Pending Approval*, *Approved*, *Rejected*, and *Drafts*.
- **Active vs. History Filter:** By default, the list only shows *Active* requests currently in routing. To find older, completed tickets, click the active filter dropdown and switch it to *History*.


D. Advanced Request Actions

When accessing your request list in *My Submissions*, you can perform quick actions by clicking the ellipsis icon (...) at the end of any row:





Request Info	Submitted Date	Current Approver	Status	Actions
 CAPEX - New laptop <small>CAPEX - CAP001007</small>	May 24, 2026	 Admin System	Pending LM Approve	...
 CAPEX - Test 1 <small>CAPEX - CAP001005</small>	May 24, 2026	 Admin System	Pending LM App	<div style="border: 1px solid black; padding: 5px;">  View  Get Link  Share  Print  PDF </div>

View ✕


← [CAP001007] CAPEX [Pending LM Approve](#) Print Share Recall Hide Activity

General Information		
Employee  employee1 #	Department Cloud Infrastructure	Business Unit org7e76dd41

Approval Process (3 Steps)

-  **Requester**
 employee1 #
 May 24, 2026 08:45 PM
-  **Line Manager**
 Admin System
 Pending

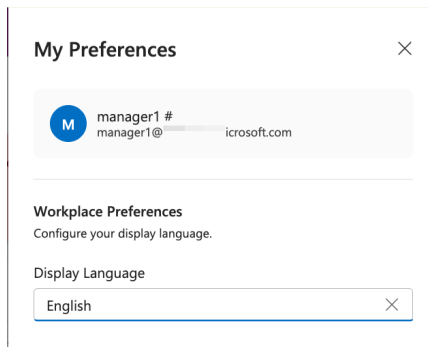
- **View:** Opens the full detailed data sheet of the ticket.
- **Get Link:** Copies the direct URL of the ticket for easy sharing via chat.
- **Share:** Grants view access of this specific ticket to another user or department.
- **Print / PDF:** Exports the form to a PDF file or prints a hard copy.

 **Important View-Level Features:** When you click **View** to open a specific request, you gain access to two powerful tools.

1. The **Recall** button (top right) allows you to pull a submitted request back to Draft status to fix mistakes, provided the manager has not yet processed it.
2. The **Activity & History** panel (bottom right) contains a **Type a comment...** box. Use this to chat directly with your approver inside the ticket, keeping all explanations and system notifications centralized.

E. Personalizing Your Settings (User Preferences)

To customize your system experience and adjust the interface to your regional needs, you can access your personal account settings menu at any time from the main dashboard.



A. Accessing the Preferences Panel

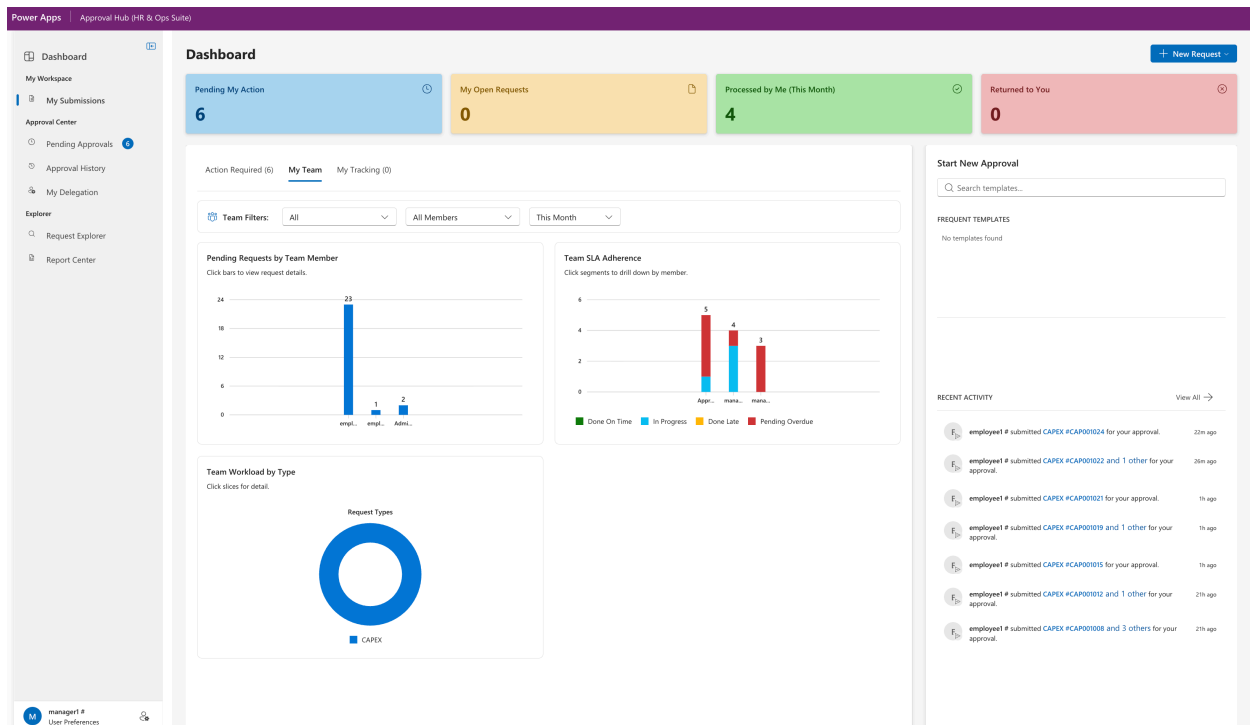
- Look at the very bottom left corner of your screen, located just below the main navigation menu.
- Click on your personal profile card (which displays your avatar, name, and a small gear icon labeled *User Preferences*).
- This action will slide open the **My Preferences** configuration panel on the right side of your screen.

B. Configuring Your Display Language Inside the preferences panel, you can manage your personal workplace settings:

- **Profile Overview:** At the top of the panel, you will see your verified identity details, including your display name and corporate email address.
- **Workplace Preferences (Display Language):** Use the dropdown menu to select your preferred interface language (e.g., *English*). Changing this setting ensures all navigation menus, action buttons, and system notifications are instantly localized to your language of choice.
- **Applying Changes:** Once you have selected your desired language, click the blue **Save Preferences** button at the bottom right corner of the panel to permanently apply the new language format across your entire Approval Hub interface.

3. Manager & Approver Workspace: Processing Tasks

This guide provides a comprehensive overview for Managers and Approvers to track workloads, communicate with team members, and process requests within the Approval Hub system effectively.



A. Monitoring via Color-Coded Cards

Throughout the system, requests are visually categorized using a color-coded card system to help you prioritize your workload at a glance. Clicking any card acts as a filter to display only the relevant requests. These tracking cards are located in two primary sections:

Dashboard Cards:

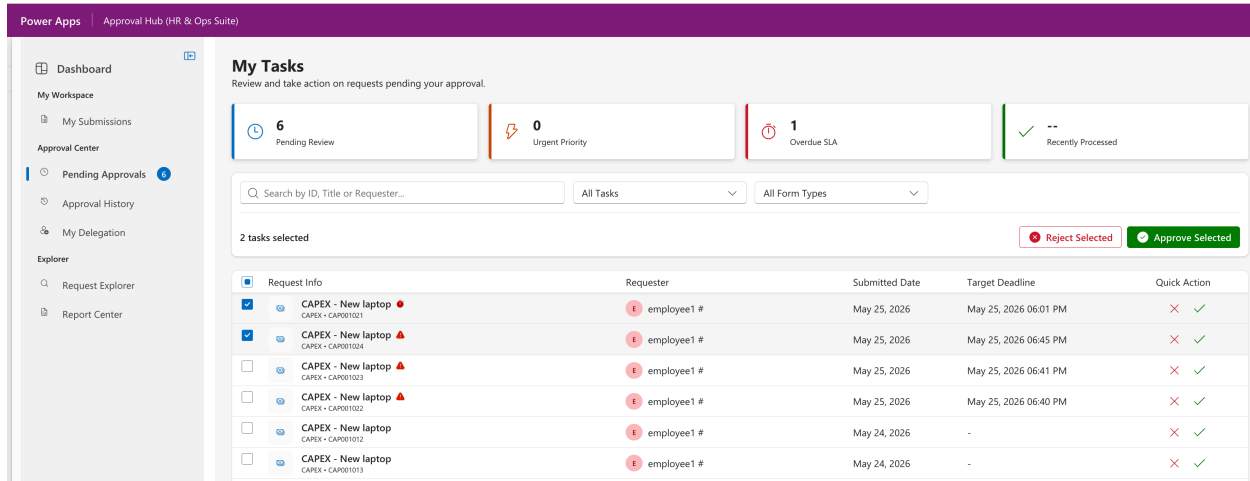
- **Pending My Action (Blue):** The number of requests currently waiting for your signature or review.
- **My Open Requests (Yellow):** The number of requests you created that are currently routed and waiting for approval.
- **Processed by Me (This Month) (Green):** The total number of tasks you have successfully completed within the current month.
- **Returned to You (Red):** Requests that were rejected by a manager and sent back to you for revision.

My Tasks Cards (Pending Approvals):

- **Pending Review (Blue):** The active queue of requests waiting for your direct approval or rejection.
- **Urgent Priority (Orange):** Escalated requests explicitly marked as highly urgent by the requester.
- **Overdue SLA (Red):** Critical requests that have breached their maximum processing time limit and require immediate attention.

- **Recently Processed (Green):** Requests you have successfully approved or rejected in your recent sessions.

B. Quick Actions & Bulk Processing



The screenshot shows the 'My Tasks' section in Power Apps. At the top, there are three summary cards: '6 Pending Review', '0 Urgent Priority', and '1 Overdue SLA'. Below these is a search bar and filters for 'All Tasks' and 'All Form Types'. A '2 tasks selected' indicator is present above a table of requests. At the bottom right of the table are 'Reject Selected' and 'Approve Selected' buttons.

Request Info	Requester	Submitted Date	Target Deadline	Quick Action
<input checked="" type="checkbox"/> CAPEX - New laptop CAPEX - CAPO01021	employee1 #	May 25, 2026	May 25, 2026 06:01 PM	✗ ✓
<input checked="" type="checkbox"/> CAPEX - New laptop CAPEX - CAPO01024	employee1 #	May 25, 2026	May 25, 2026 06:45 PM	✗ ✓
<input type="checkbox"/> CAPEX - New laptop CAPEX - CAPO01023	employee1 #	May 25, 2026	May 25, 2026 06:41 PM	✗ ✓
<input type="checkbox"/> CAPEX - New laptop CAPEX - CAPO01022	employee1 #	May 25, 2026	May 25, 2026 06:40 PM	✗ ✓
<input type="checkbox"/> CAPEX - New laptop CAPEX - CAPO01012	employee1 #	May 24, 2026	-	✗ ✓
<input type="checkbox"/> CAPEX - New laptop CAPEX - CAPO01013	employee1 #	May 24, 2026	-	✗ ✓

For standard requests that do not require deep-dive inspection, you can process them directly from the Dashboard or the Pending Approvals menu without opening every single form:

- **Inline Action:** On the far right of each request row, click the **Green Checkmark (✓)** to instantly approve or the **Red Cross (X)** to instantly reject a specific item.
- **Bulk Processing:** For routine tasks reviewed offline, check the boxes next to multiple request rows. Then, click the **Approve Selected** or **Reject Selected** button at the top of the grid to process the entire batch with a single click.

C. Detailed Review & Decision Making

For complex requests (e.g., high-value CAPEX budgets) that require thorough inspection, click anywhere on the request row to open the Detailed View.

Approve

← [CAP001021] CAPEX

[Mark as Urgent \(Escalate Request\)](#)
[Reassign](#)
[Reject](#)
[Approve](#)
[Hide Activity](#)

General Information

Employee E employee1 #	Department Cloud Infrastructure	Business Unit org7e76dd41
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Request Details

Capex Title New laptop	Category IT	Budget Type Yes
Currency AUD	Cost Center CC-PROD-01	ROI / Payback
Expected Date May 21, 2026	Priority High	

Justification
This CAPEX request is to replace the current laptop which has been in service for 6 years and is now past its useful life. Maintenance costs have increased by [X]% over the last year, and unexpected breakdowns have caused [X] hours of production downtime. Investing in the new equipment will eliminate these inefficiencies, reduce annual maintenance costs by \$2000, and ensure operational continuity.

Attachments
No files attached

Cost Breakdown

#	Item Description	UoM	Quantity	Unit Price	Remarks	Total
1	1	Set	2	2	2	4.00
						4.00

Approval Process (3 Steps)

Requester
✔ employee1 #
May 21, 2026 05:01 PM

Line Manager
⏸ manager1 #
Pending
⚠ Overdue

Finance Manager
⏸ Waiting for assignment

Activity & History

⌚ employee1 # submitted the request.
an hour ago

Type a comment...

Decision Tools In the top right action bar, you have four primary controls:

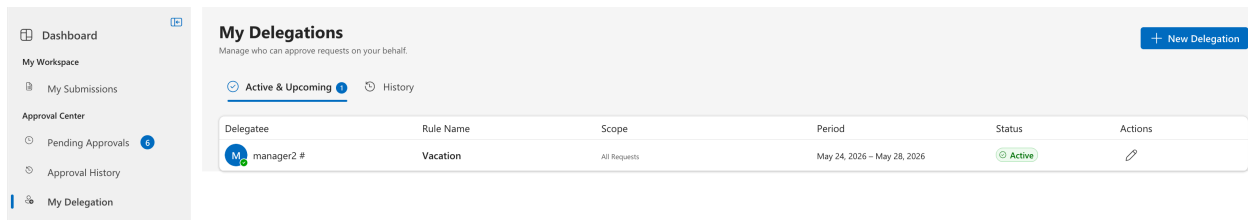
- **Approve:** Authorizes the request and moves it to the next workflow tier or finalizes it.
- **Reject:** Denies the request. (*Note: Before clicking Reject, scroll to the Process > Comment box at the bottom of the form to provide an official reason for the rejection.*)
- **Reassign:** If the request is outside your scope, click **Reassign** to transfer the task to another qualified manager or team lead.
- **Mark as Urgent:** Escalates the ticket priority, ensuring the next approver in the chain treats it with high urgency.

Internal Collaboration (Activity & History) Avoid fragmented email or chat threads by using the Activity & History panel on the right side of the form:

- Type your clarification questions or notes in the **Type a comment...** box and click send.
- The system automatically logs these comments and notifies the requester, keeping all project communication centralized within the request ticket itself.

D. Managing Your Out-of-Office Proxies (My Delegations)

The My Delegations module is a vital business continuity tool tailored for managers and approvers. It allows you to legally assign your signing authority to a designated proxy when you are away from the office due to annual leave, business travel, or emergency absences. Setting up a timely delegation ensures that your team’s requests are not blocked or delayed in your queue while you are out, protecting overall operational velocity.



The My Delegations Dashboard To review or establish your proxy signing instructions, navigate to **Approval Center > My Delegation** on the left navigation menu. The primary hub provides several filtering and setup options:

- **Segmented Execution Tabs:** Toggle your workspace between *Active & Upcoming* to oversee currently active rules or scheduled future assignments, and *History* to review past, expired delegation configurations.
- **New Delegation Action:** Click the blue **+ New Delegation** button in the top right corner to open a blank property panel and configure a new proxy routing assignment.
- **The Delegation Ledger Grid:** The central tracking matrix indexes your instructions across five specific data columns:
 - **Delegatee:** The profile card and name of the proxy user you have appointed to act on your behalf (e.g., *manager2 #*).
 - **Rule Name:** The formal title given to the delegation context (e.g., *Vacation*).
 - **Scope:** The functional authority boundary granted to the proxy (e.g., *All Requests*).
 - **Period:** The explicit timeframe during which the delegation is active (e.g., *May 24, 2026 – May 28, 2026*).
 - **Status:** Renders a green *Active* badge or status indicator to show if the rule is currently handling active live-process redirection layers.
 - **Actions:** Displays an inline edit pencil icon allowing you to update parameters on the fly or adjust dates.

Configuring a New Delegation Profile Clicking the new delegation instrument launches the focused *New Delegation* modal pane. To guarantee seamless workflow automation, you must configure the following metrics properly:

New Delegation ×

Setup Delegation Active

Appoint someone to handle tasks on your behalf.

From (Delegator)

manager1 #
manager1@italabs.onmicrosoft.com

The delegator (that's you)

To (Delegatee) *

manager2 # ×

Select the person who will approve on your behalf.

Start Date * End Date *

Mon May 25 2026 Mon May 25 2026

Scope *

CAPEX ×

Which request types does this delegation apply to?

Rule Name / Title *

Vacation

× Cancel Save Delegation

- **Active Toggle Switch:** Located at the top of the panel under *Setup Delegation*. Keep this switch flipped to Active to let the engine recognize the rule. If you wish to stage a future rule without initializing it immediately, you can temporarily toggle it off.
- **From (Delegator):** A read-only, hardcoded profile container confirming your identity as the primary task owner handing off signing privileges (e.g., *manager1 #*).
- **To (Delegatee):** A mandatory dropdown selection lookup field. Search for and select the precise employee or proxy manager who will officially approve tasks on your behalf (e.g., *employee2 #*).
- **Start Date & End Date:** Mandatory date pickers establishing the exact calendar duration of your absence.
 - *System Automation Logic:* The system's routing engine automatically redirects any task landing in your queue to the delegatee starting at 12:00 AM on your designated Start Date and seamlessly revokes their proxy access at 11:59 PM on your designated End Date.
- **Scope:** A mandatory multi-select dropdown bounding the functional reach of your proxy.
 - *All Requests Selection:* Grants blanket proxy authority, permitting your delegatee to approve or reject any form category that routes through you.
 - *Targeted Selection:* Allows you to check specific forms only, ensuring that highly confidential or sensitive process lines remain locked from proxy access.
- **Rule Name / Title:** Enter a mandatory, descriptive text string indicating the reason or business context for the delegation rule (e.g., *Vacation*).

Submission Rule: Once all proxy parameters, targeted scopes, and date boundaries are finalized, click the blue **Save Delegation** button at the bottom right corner of the pane to



permanently publish your delegation instruction to the workflow engine. If you need to discard your inputs, click **Cancel**.

E. Tracking Approval History

Approval History
Audit log of all requests you have processed.

4 Total Processed | 4 Approved by Me | 0 Rejected by Me

Search by ID, Title or Requester... | All Decisions

Request Info	Requester	My Decision & Date	Overall Status
CAPEX - New laptop CAPEX - CAP001011	employee1 #	Approved on May 24, 2020	
CAPEX - New laptop CAPEX - CAP001010	employee1 #	Approved on May 24, 2020	
CAPEX - New laptop CAPEX - CAP001009	employee1 #	Approved on May 24, 2020	
CAPEX - New laptop CAPEX - CAP001008	employee1 #	Approved on May 24, 2020	

To audit your past decisions or generate performance reports, navigate to **Approval Center > Approval History** on the left navigation menu.

- **Audit Log:** This page maintains a permanent, read-only record of every request you have processed.
- **Decision Tracking:** Use the filter tabs (*Total Processed, Approved by Me, Rejected by Me*) to quickly find specific records. The grid clearly shows your decision, the date of action, and the overall status of the ticket.

F. The Auditing Vault & Team Analytics

The **Reports Center** (Auditing Vault) provides managers with powerful analytical tools to oversee team productivity, identify processing bottlenecks, and audit historical workflow data.

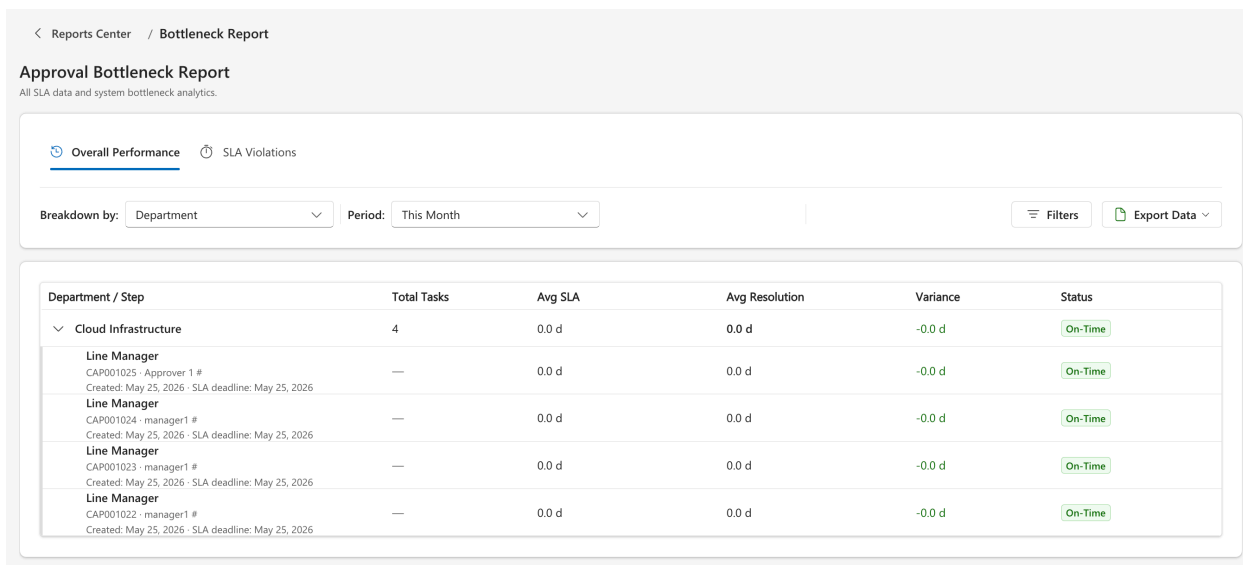
Important Security & Visibility Note: To maintain strict data privacy and structural security, standard Managers are restricted by Role-Based Access Control (RBAC). You can only view analytics, reports, and request data belonging exclusively to your assigned Department(s). You cannot view or audit transactions from other operational business units unless explicitly shared with you.

The **"My Team" Dashboard** Located directly on your main Dashboard under the **My Team** tab, this workspace offers a real-time visual overview of your department's current workload:

- **Team Filters:** Use the dropdown menus to filter data by specific team members, all members, or specific time periods (e.g., *This Month*).
- **Interactive Charts:** The dashboard renders several key performance indicators:
 - **Pending Requests by Team Member:** A bar chart showing exactly how many tickets each employee currently has open.
 - **Team SLA Adherence:** A stacked bar chart visualizing processing performance (e.g., *Done On Time, In Progress, Done Late, Pending Overdue*).

- **Team Workload by Type:** A visual donut chart breaking down the volume of specific request types (e.g., *CAPEX*).
- **Data Drill-Down:** These charts are interactive. Clicking on a specific bar (e.g., a red "Pending Overdue" segment) instantly opens a detailed popup grid (like *SLA Details* or *Requests by Employee*), allowing you to see the exact ticket IDs, due dates, and statuses making up that metric.

The Bottleneck Report To proactively clear workflow traffic jams, navigate to **Explorer > Report Center** and select the **Bottleneck Report**. This tool is divided into two critical execution tabs:




Reports Center / Bottleneck Report

Approval Bottleneck Report
All SLA data and system bottleneck analytics.

Overall Performance SLA Violations

Breakdown by: Department (dropdown) Period: This Month (dropdown) Filters Export Data (dropdown)

Department / Step	Total Tasks	Avg SLA	Avg Resolution	Variance	Status
Cloud Infrastructure	4	0.0 d	0.0 d	-0.0 d	On-Time
Line Manager CAP001025 - Approver 1 # Created: May 25, 2026 - SLA deadline: May 25, 2026	—	0.0 d	0.0 d	-0.0 d	On-Time
Line Manager CAP001024 - manager1 # Created: May 25, 2026 - SLA deadline: May 25, 2026	—	0.0 d	0.0 d	-0.0 d	On-Time
Line Manager CAP001023 - manager1 # Created: May 25, 2026 - SLA deadline: May 25, 2026	—	0.0 d	0.0 d	-0.0 d	On-Time
Line Manager CAP001022 - manager1 # Created: May 25, 2026 - SLA deadline: May 25, 2026	—	0.0 d	0.0 d	-0.0 d	On-Time

- **Overall Performance:** Analyzes every step of the workflow for your department. It compares the *Avg SLA* against the actual *Avg Resolution* time, displaying the *Variance* (e.g., +0.0 d) and flagging the overall *Status* (e.g., *Warning, On-Time, No SLA*).
- **SLA Violations:** This tab strictly isolates overdue tasks that have breached their deadlines.
 - **Actionable Reminders:** In the far-right column of this grid, managers can click the  **Reminder** button to instantly send an automated system nudge to the specific approver who is holding up the request.

Average Resolution Time Report This report evaluates the historical speed and efficiency of your completed departmental requests.

Average Resolution Time Report

Based on completed requests. Defaults to Finished & Closed.

Form Type / Breakdown	Total	SLA	Avg. Resolution	Fastest	Slowest
Breakdown by: Department Period: This Month Filters Export Data					
CAPEX <ul style="list-style-type: none"> Digital Transformation Cloud Infrastructure 	8	—	0.0 d	0.0 d	0.0 d
Digital Transformation	1		0.0 d	—	—
Cloud Infrastructure	7		0.0 d	—	—

- **High-Level Breakdown:** View the total volume of requests against the *Avg. Resolution* time, highlighting the Fastest and Slowest processing times across different form categories.
- **Step-by-Step Drill Down:** Clicking into a specific request type expands a *Detailed Requests* view. From here, you can audit the exact lifecycle of a form, seeing the exact timestamps of when a task was assigned to a specific tier (e.g., *Line Manager*) and exactly how many days it took them to resolve it.

Delegation & Reassignment Audit Log To maintain strict compliance and transparency regarding who signed what, the **Delegation Audit** provides a permanent ledger of proxy actions.

Delegation & Reassignment Audit Log

System activity log for tracking changes in approval authority.

Action Date	Original Approver	Delegated To	Request	Action Type	Reason
May 25, 2026 04:55 PM	manager1 #	manager2 #	CAP001020 CAPEX	Auto-Rule	Vacation
May 25, 2026 04:54 PM	manager1 #	manager2 #	CAP001019 CAPEX	Auto-Rule	Vacation
May 25, 2026 04:52 PM	manager1 #	manager2 #	CAP001015 CAPEX	Auto-Rule	Vacation

- Track every instance where approval authority was transferred within your department.
- The grid displays the Original Approver, the Delegated To proxy user, the specific Action Type (e.g., *Auto-Rule* triggered by a scheduled absence), and the Reason provided (e.g., *Vacation*).

Quick Tip - Exporting Data: Every analytical report and drill-down grid within the Auditing Vault features an **Export Data** button in the top right corner. You can use this tool to quickly download the filtered matrices for offline departmental reporting or compliance reviews.