



Case Study: Demo PTO Request

Overview

After working with multiple organizations to streamline internal workflows, we recognized a recurring gap in how teams manage time-off requests. To demonstrate a scalable, modern solution, we built a fully automated PTO request system using SharePoint and Power Automate — hosted in our own environment as a live demo. The solution reflects real-world business needs, including request submission, manager approvals, automated notifications, and personalized dashboards for both employees and managers.



Challenges This PTO System Solves

- Disorganized request handling that causes approval delays
- Non-uniform request forms that create confusion and conflict with standard HR procedures
- Email-based approvals that are easily missed or undocumented
- Employees unsure of request status or who to contact for updates
- Lack of centralized visibility into upcoming employee absences

Key Features & Capabilities

- **Approvals:** Submitted PTO requests are instantly routed to the appropriate manager based on employee assignment for managers to submit their decision.
- **Email Notifications:** Email notifications provide employees and managers with clear, timely updates at every stage of the request process — from submission to final decision.
- **Centralized Dashboards:** Employees, managers, and HR staff each have customized dashboards showing relevant PTO requests, statuses, and upcoming absences.
- Time accrual tracking – We integrate with most HR systems (Example: ADP, Workday, SAP)

Business Value & Impact

- Centralized dashboards
- Forgetting

Use Case Examples

Streamlined PTO Submissions

An employee needs to request time off for an upcoming trip. Instead of emailing their manager or filling out a paper form, they visit the PTO dashboard, select the dates, choose the request type, and hit submit. The request is automatically routed for approval, and they receive an email confirmation within minutes — no guesswork or manual tracking.

Clear Visibility Into Upcoming Absences

A manager wants to ensure adequate coverage for an upcoming week. Instead of checking with each team member individually, they open their dashboard and quickly see all approved PTO for the team. This helps them plan assignments and avoid overlapping absences without back-and-forth emails.

Self-Service Status Updates

An employee isn't sure if their request from last week was approved. Instead of emailing HR or their manager, they check their personal dashboard and immediately see the current status, including any comments from the approver.



Augment IT

Microsoft 365 & Power Platform Consulting

Audit-Friendly Recordkeeping

During a compliance review, HR needs a log of all PTO activity for the past quarter. They export the SharePoint list and instantly have a record of all submissions, decisions, and timestamps — no need to sift through emails or spreadsheets.

Role-Based Dashboard Access

HR staff need broader visibility, while employees only need to see their own requests. The system automatically filters what each user sees based on their role, keeping sensitive data secure and views clean and relevant.

Architecture

- **SharePoint-based data storage:**
All PTO requests are stored in a centralized SharePoint list, enabling easy access, filtering, and export for reporting. The structure supports scalability and integrates seamlessly with Microsoft 365 environments.
- **Power Automate-driven workflow:**
Request routing, approval logic, and notifications are powered by Power Automate. This ensures reliable automation, easy customization, and clear visibility into each step of the process.
- **Role-based logic and security:**
Employees, managers, and HR users interact with the system based on their roles. Permissions are configured to ensure employees can only view their own requests, while approvers and admins see filtered dashboards relevant to their scope.



Adaptability

This PTO request system is designed to scale with your organization. Whether you're managing a small team or coordinating across multiple departments, the solution flexes to support growing headcounts, changing approval structures, and evolving policies. Built entirely with SharePoint and Power Automate, it requires no custom development, making it fast to deploy and easy to modify as business needs shift. From updating request types to adjusting workflows or dashboard views, every component can be configured without code — ensuring the system remains relevant, efficient, and aligned with your operations over time.

Key Takeaway

This PTO request system demonstrates how SharePoint and Power Automate can streamline a common business process without custom code or complexity. Built entirely with out-of-the-box tools, it delivers a clear, scalable solution for managing time-off requests across teams. The system provides a uniform experience for employees, managers, and HR — ensuring everyone stays informed with real-time updates and role-specific access. With automated workflows, branded notifications, and centralized tracking, it's a practical foundation for organizations looking to modernize internal operations and reduce administrative overhead.