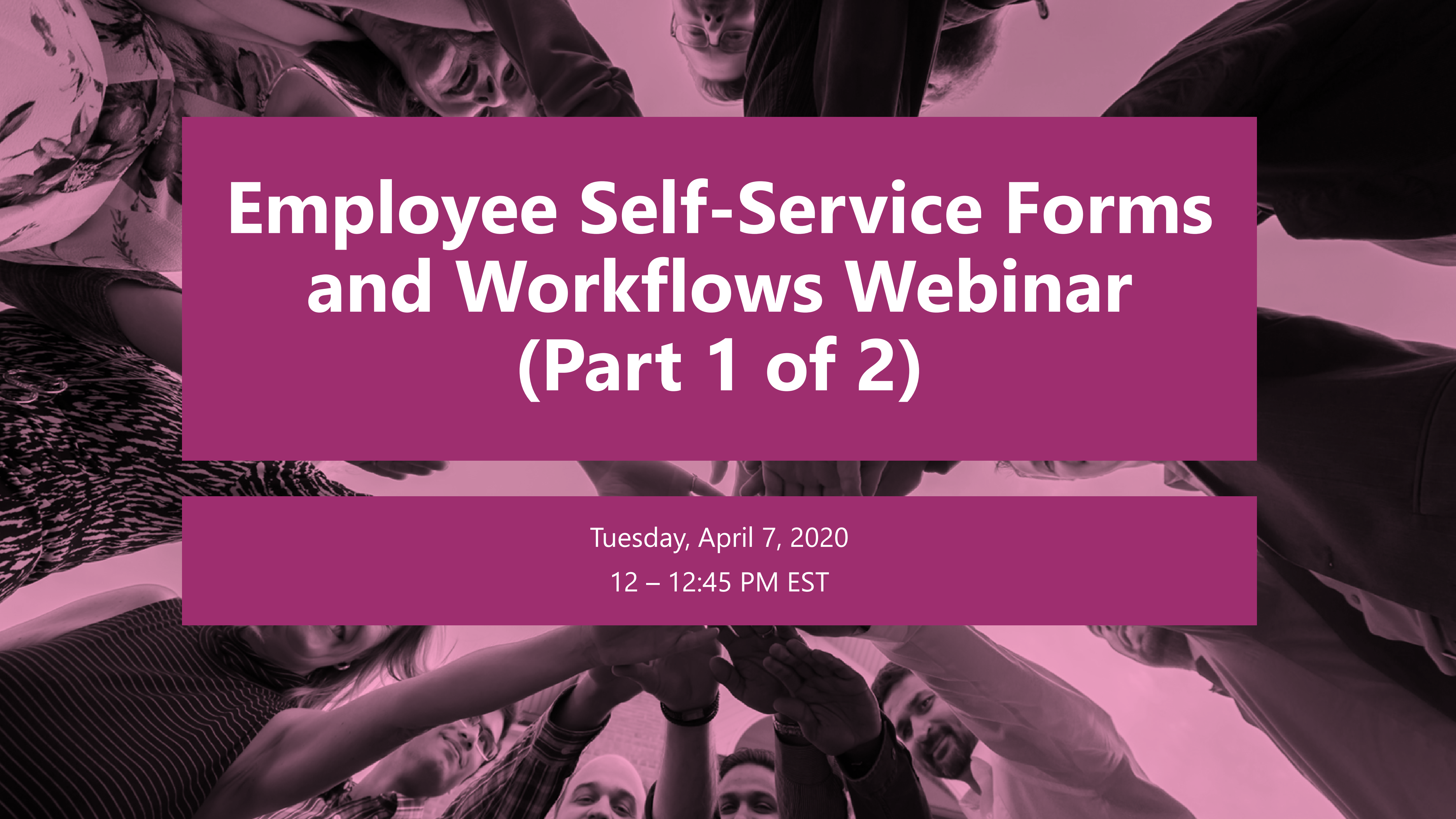

Employee Self-Service Forms and Workflows Webinar (Part 1 of 2)

Tuesday, April 7, 2020

12 – 12:45 PM EST

Peter Carson

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- Office Apps and Services Microsoft MVP
- peter.carson@extranetusermanager.com
- blog.petercarson.ca
- www.extranetusermanager.com
- Twitter @carsonpeter
- President Toronto SharePoint User Group

Microsoft Most Valuable Professional

Logan Guest

Sales

- e: logan.guest@extranetusermanager.com
- p: (647) 265-8256

Poll 1

Which of the following do you use today?

- **Office 365**
- **Power Automate (Flow)**
- **Power Apps**
- **Azure Logic Apps**

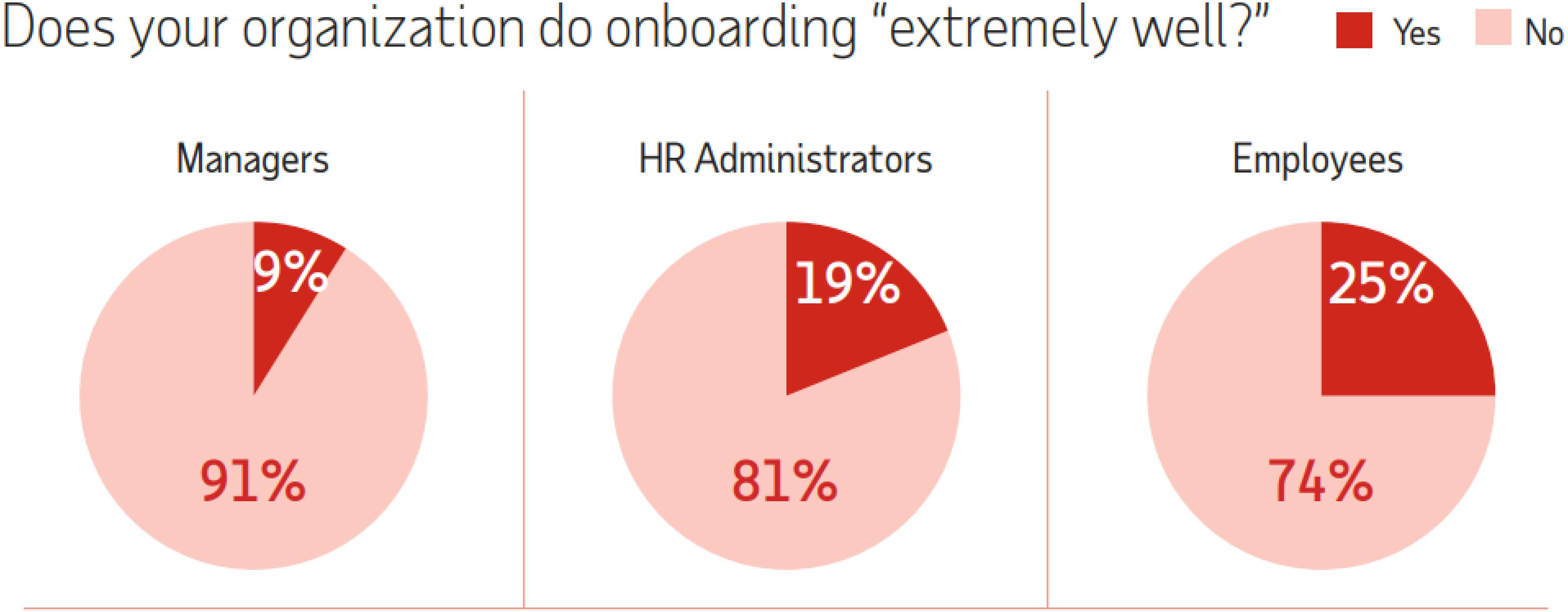
Agenda

- Background
- Customer Scenarios
- Q & A

Employee Self-Service Examples

- Onboarding
- Job Change
- Offboarding
- Employee Personal Data
- Expense Reports
- Leave Requests
- Benefits
- Pension Calculator
- Tax Slips
- Training
- Performance Management
- Time Tracking
- Wellness Surveys
- P-Card Requests and Limit Changes
- Petty Cash
- Shift Changes

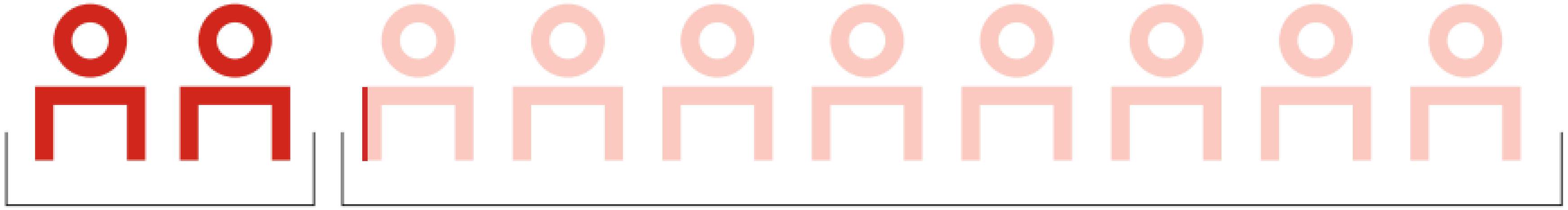
Does your organization do onboarding "extremely well?"



56% of HR administrators feel their onboarding solutions are "somewhat structured" to "not at all structured."

Source: ADP Survey

Employee satisfaction with organization's onboarding process:



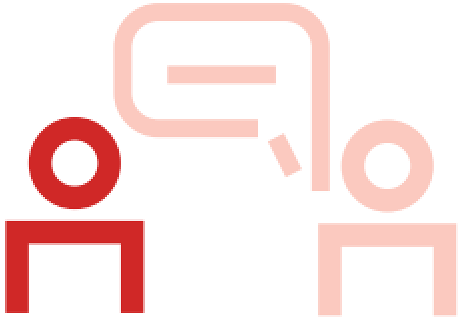
21% extremely satisfied

79% feel there is room for improvement

Source: [ADP Survey]

80% **of HR administrations** report that paperwork is still completed in person at a desk or in conference room, or both.

Fewer than **12%** **of employees** can access any single type of onboarding paperwork from a mobile device.



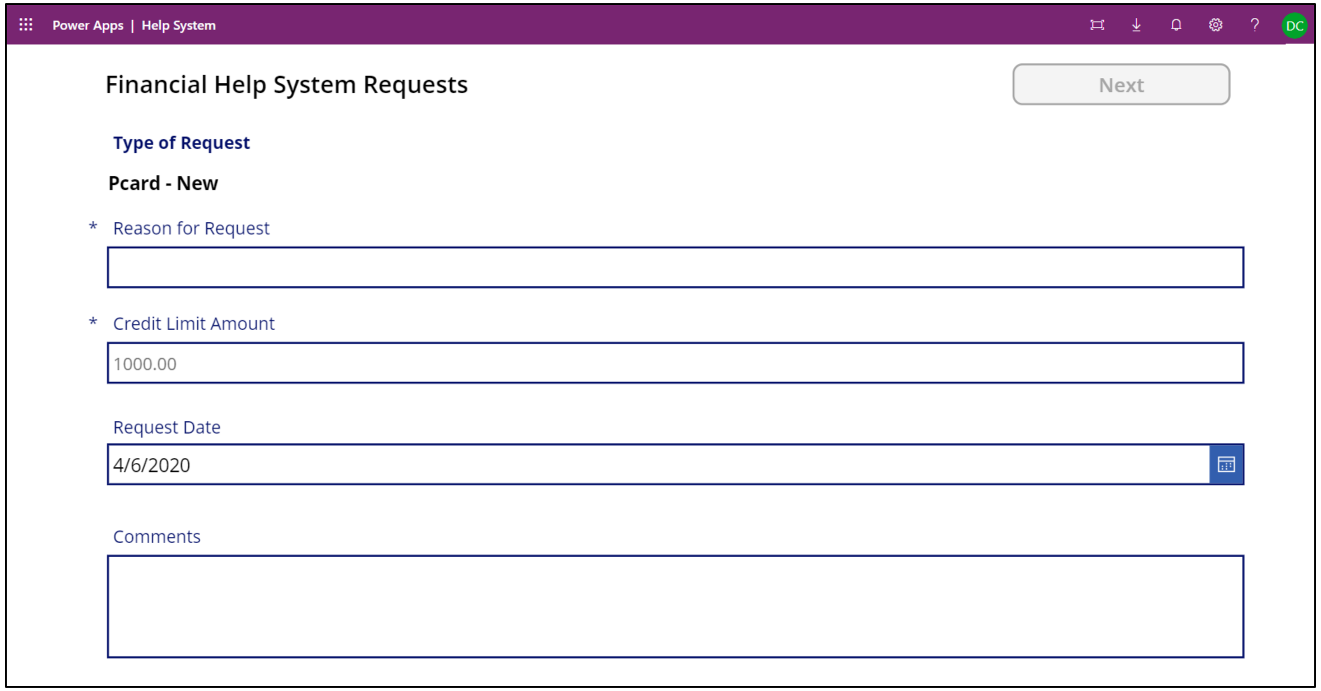
Only **21%** **of employees** are **"extremely satisfied"** with their organization's onboarding process.

Employees "highly satisfied" with their onboarding program were **three times as likely to feel comfortable after their first day** than those who were not satisfied, and almost twice as likely to feel comfortable later on in their first year.

Source: ADP Survey

Scenario One – Community Living Toronto

- https://cltoronto.ca/
- **Finance Help System**
- **P-Card and Petty Cash requests and changes**
- **Employee data is imported from PeopleSoft and Active Directory**
- **Two stage approval workflow**
  - Manager
  - Finance
- **Reporting dashboard**



Community Living Toronto Workflow

- Employee fills out Finance request form
- Triggers Flow workflow
- Goes to manager for approval
- Goes to Finance for approval
- Notifies employee

PowerApps

- Build apps for mobile, desktop, or responsive web
- Hundreds of connectors that can be extended with custom connectors

https://powerapps.microsoft.com/en-us/

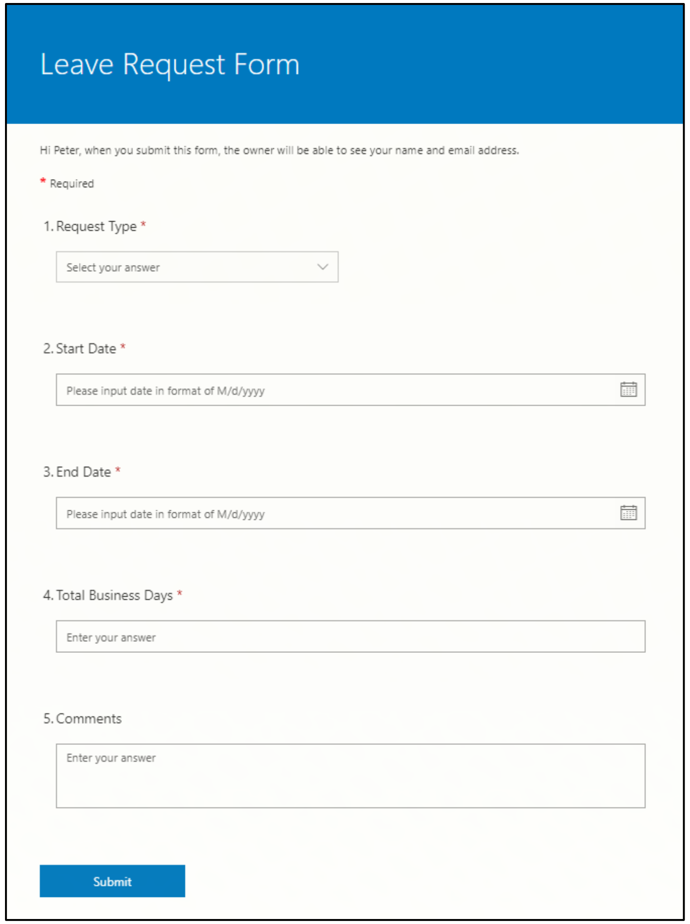
Power Automate (Flow)

- Create automated workflows between your favorite apps and services to get notifications, synchronize files, collect data, and more
- Supports both Microsoft and third party apps
- Custom connectors can connect to any system

https://flow.microsoft.com/en-us/

Scenario Two – Envision IT Leave Request Form

- **Employee fills in**
  - Request type
    - Vacation
    - Personal Day
    - Sick Day
    - Liue Day
    - Bereavement
    - Jury Duty
  - Start and End Dates
  - Days
  - Comments


Leave Request Form

Hi Peter, when you submit this form, the owner will be able to see your name and email address.

* Required

1. Request Type *

Select your answer

2. Start Date *

Please input date in format of M/d/yyyy

3. End Date *

Please input date in format of M/d/yyyy

4. Total Business Days *

Enter your answer

5. Comments

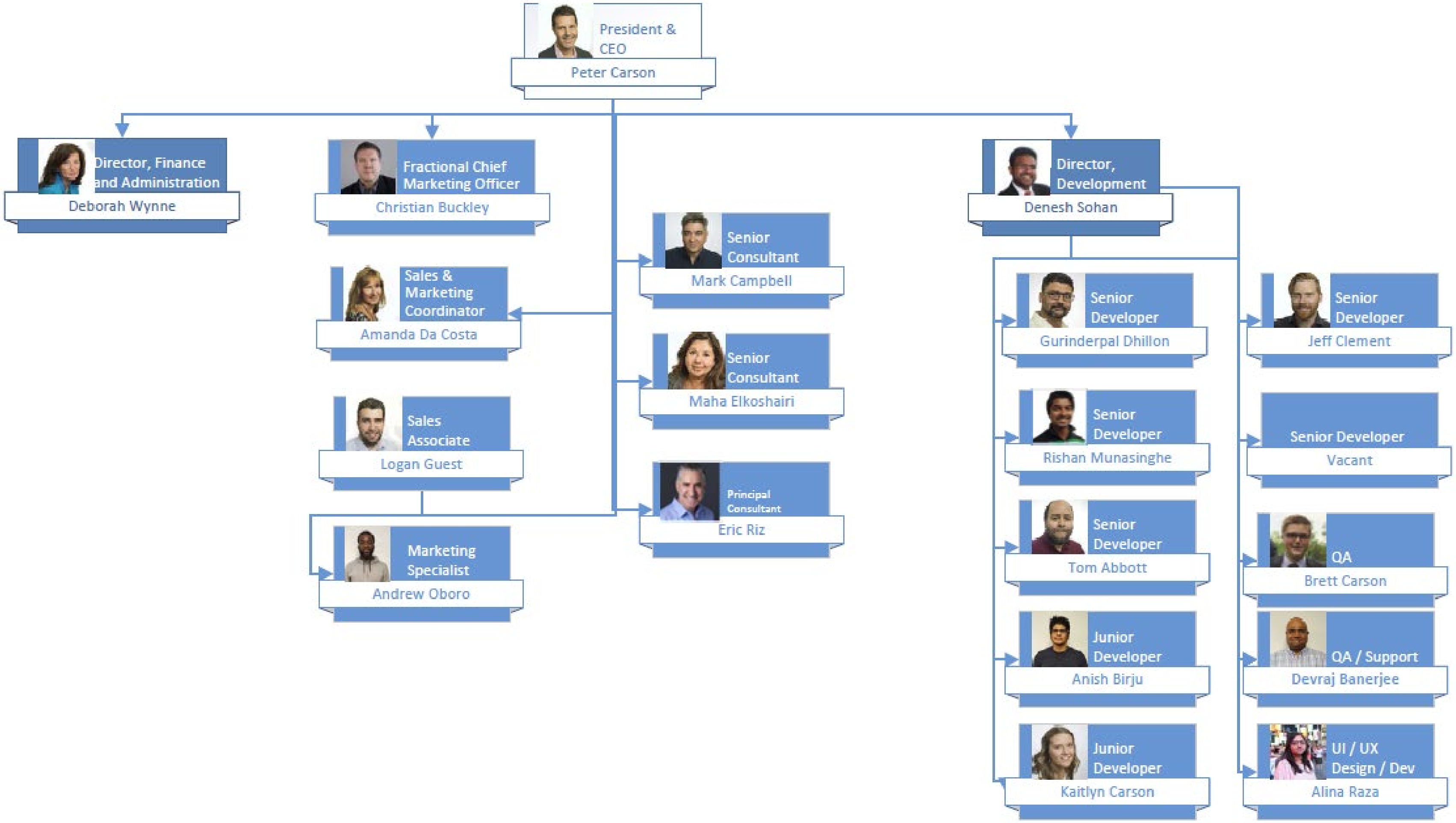
Enter your answer

Submit

Leave Request Points to Consider

- **Vacation days allocated, accrued, and already taken in current calendar year**
- **Security**
  - Staff can see their own requests
  - Managers can see their direct and indirect reports
- **Overlap with other staff**
- **Changes before or after approval**
- **Cancellations**
- **Reconciliation with time tracking system**

Org Chart


President & CEO
Peter Carson
Director, Finance and Administration
Deborah Wynne
Fractional Chief Marketing Officer
Christian Buckley
Sales & Marketing Coordinator
Amanda Da Costa
Sales Associate
Logan Guest
Marketing Specialist
Andrew Oboro
Senior Consultant
Mark Campbell
Senior Consultant
Maha Elkoshairi
Principal Consultant
Eric Riz
Director, Development
Denesh Sohan
Senior Developer
Gurinderpal Dhillon
Senior Developer
Rishan Munasinghe
Senior Developer
Tom Abbott
Junior Developer
Anish Birju
Junior Developer
Kaitlyn Carson
Senior Developer
Jeff Clement
Senior Developer
Vacant
QA
Brett Carson
QA / Support
Devraj Banerjee
UI / UX Design / Dev
Alina Raza

Microsoft Forms

- **Build web based intake forms and surveys**
- **Straightforward to use and build**
- **Integrates with SharePoint and Power Automate (Flow)**
- **Can be used by staff or anonymously externally**

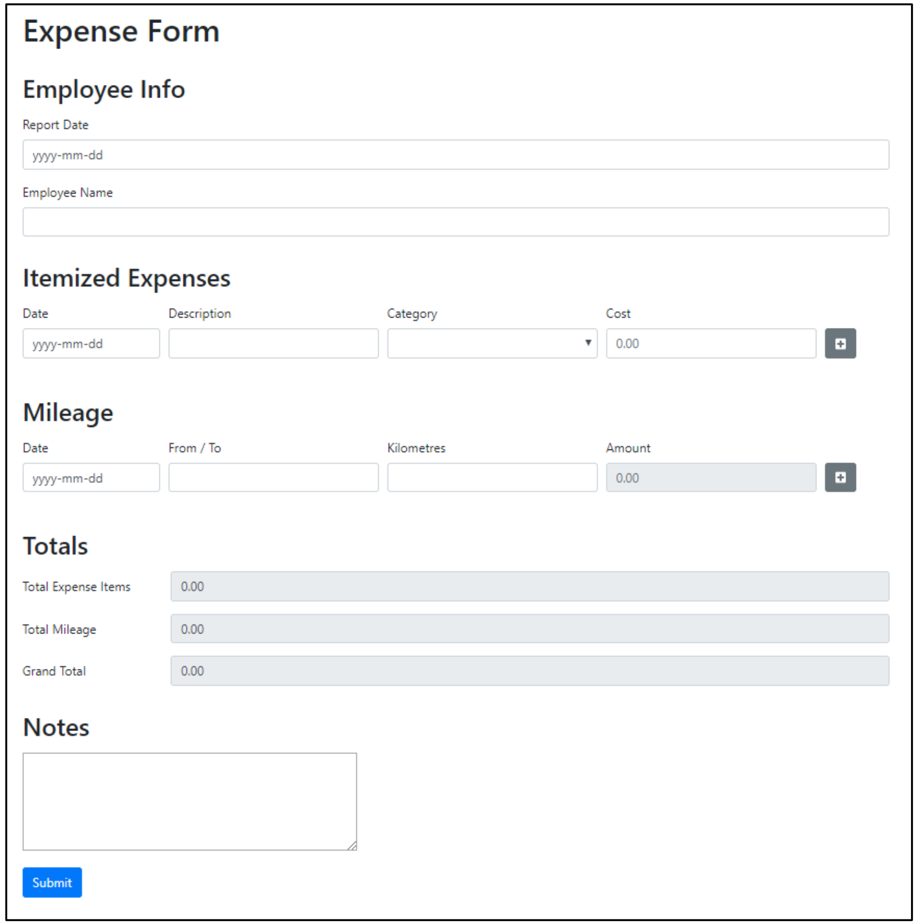
https://forms.office.com/

Leave Request Workflow

- Employee fills out Leave Request in Microsoft Form
- Triggers Flow workflow
- Goes to manager for approval
- Goes to HR for approval
- Recorded in employee file
- Posted to Staff Vacation Calendar
- Notifies employee

Scenario Three – Envision IT Expense Report

- **Employee fills in**
  - Report Date
  - Expenses
  - Mileage
  - Notes
- **Mileage is calculated at 55 cents per kilometre**
- **Totals are calculated**



Expense Report Points to Consider

- Should be able to be modified after submitting
- Lock once Finance approved
- Scan and attach receipts
- PDF the entire report (including receipts) for approval and retention
- Integrate to Telpay for electronic payments

Expense Report Workflow

- Employee fills Expense Report
- Triggers Logic Apps workflow
- Goes to manager for approval
- Goes to Finance for approval
- Recorded in employee file
- Notifies employee
- Exported to Telpay for payment

Azure Logic Apps

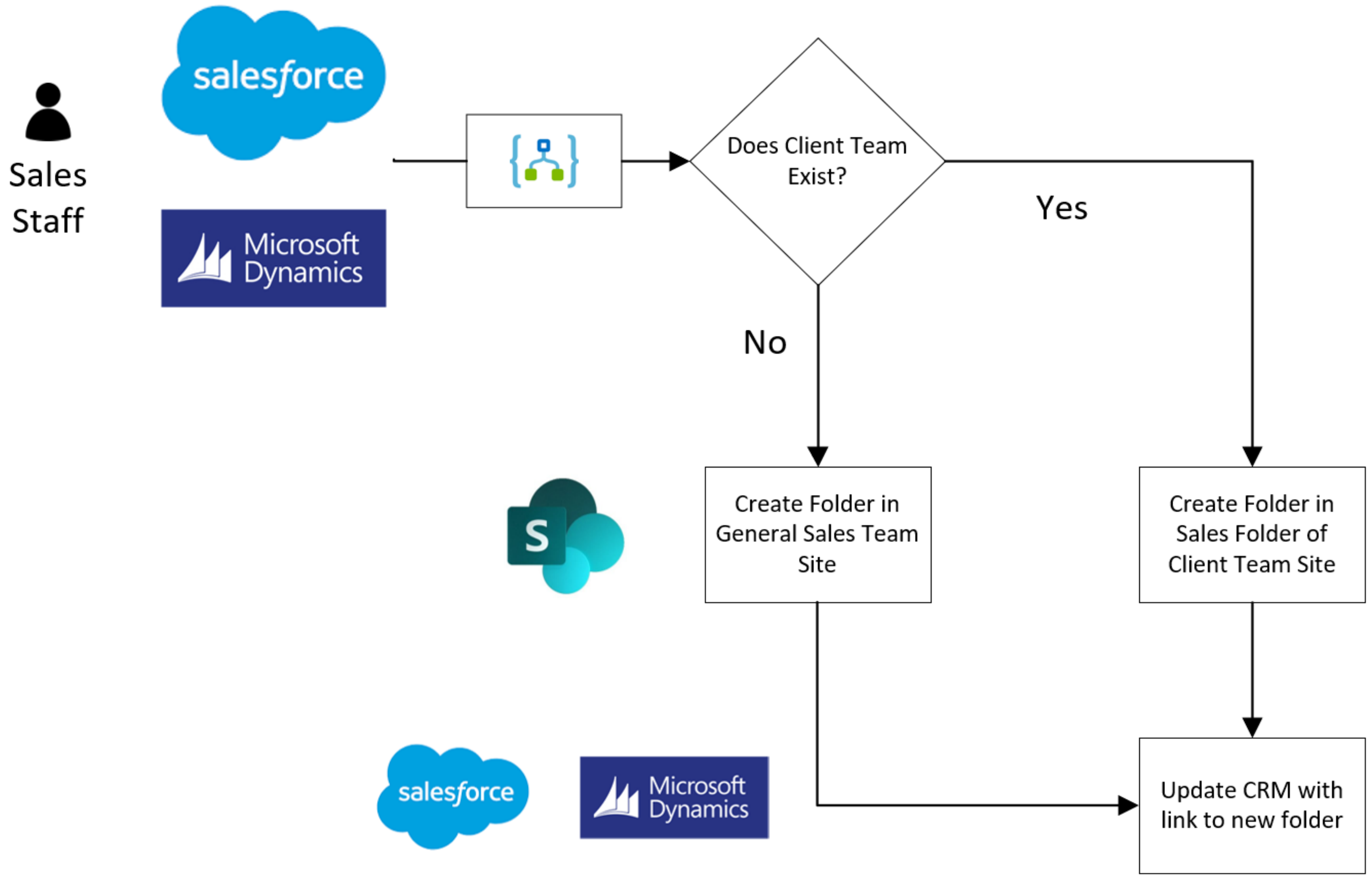
- **Platform underneath Power Automate**
- **Same designer**
- **Slightly different set of actions**
  - Simple built-in approval step
- **Visual Studio integration**

https://azure.microsoft.com/en-ca/services/logic-apps/

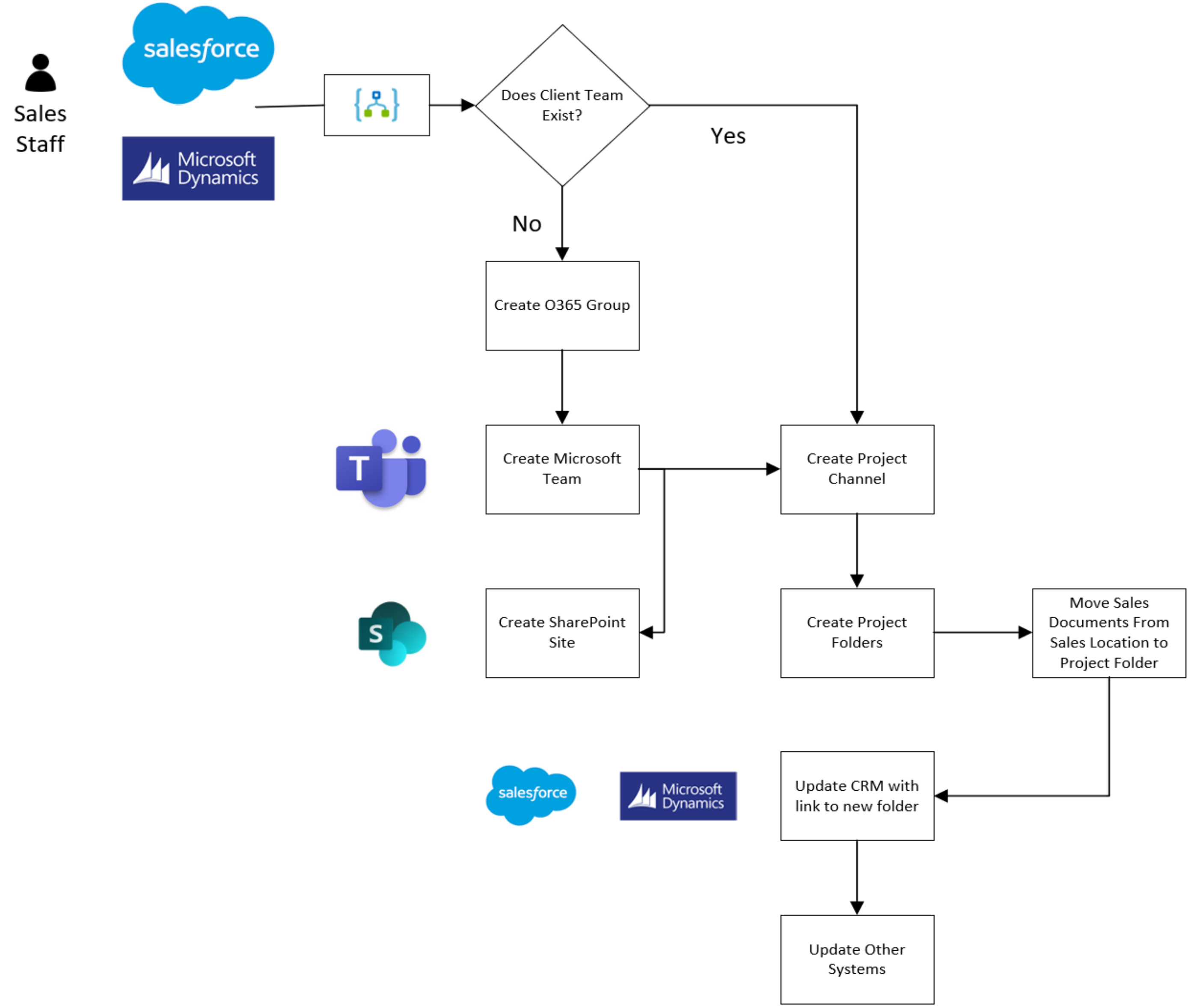
Scenario Four – Consulting Company Teams Provisioning

- Built on EUM's Team and Site Provisioning open source solution
  - http://eum.co/teams-provisioning
- Governance around the request, approval, and provisioning of Microsoft Teams and SharePoint sites
- Azure Logic Apps workflow
- Premium connectors to Azure Automation and Salesforce
- Standard Azure Logic Apps approval process

New Opportunity



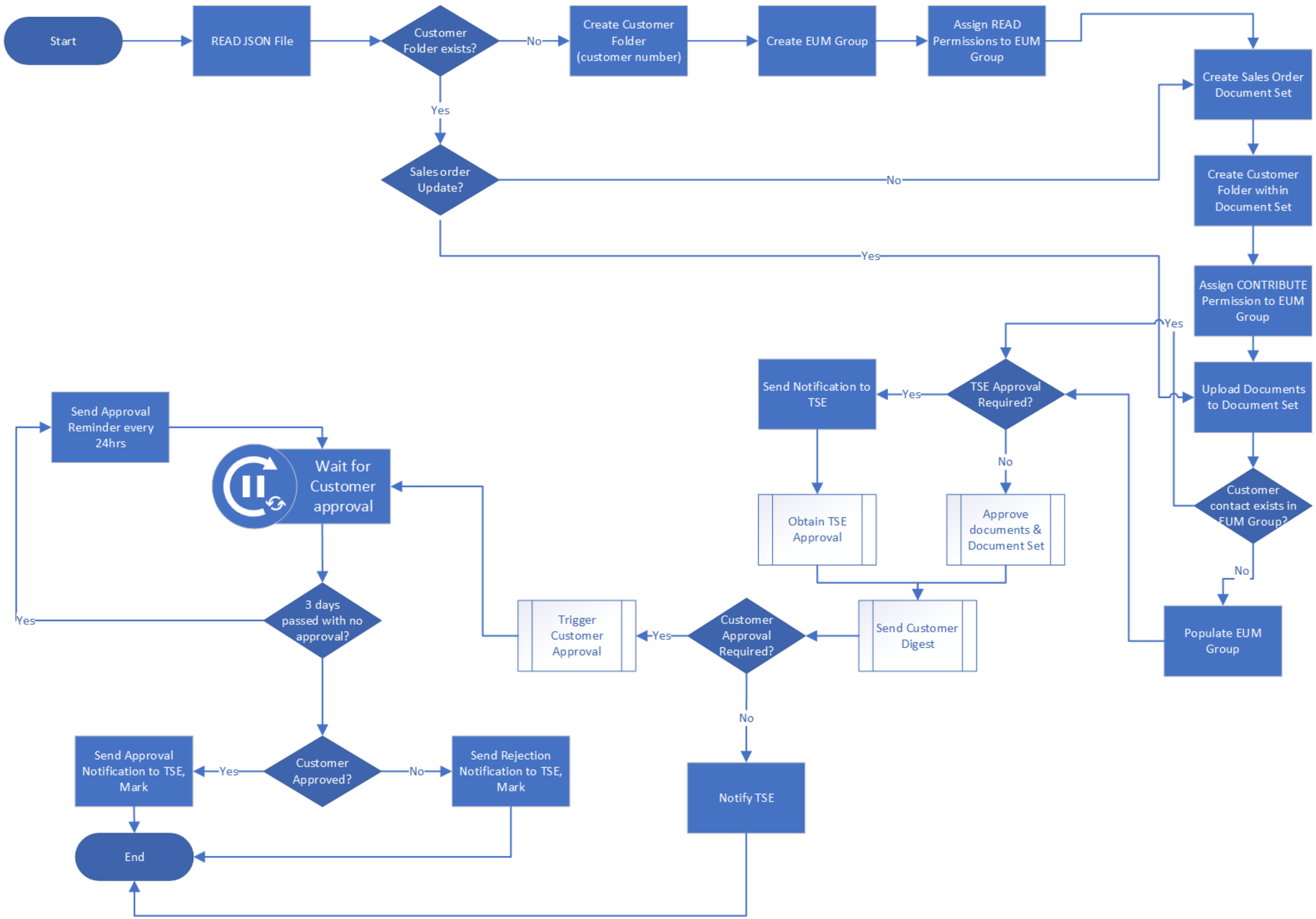
Closed Opportunity



Scenario Five – Engineering Extranet Drawing Approval

- Extranet for review and approval of engineering drawings
- Sales orders managed through SAP
- Drawing packages generated programmatically
- Zip package deposited in SharePoint library
- Documents extracted and approval workflow with external customer is initiated
- SAP updated to release sales order when approved

- Azure Logic Apps workflow
- Premium connectors to Azure Automation
- Custom connector to Extranet User Manager
- Adaptive Cards used to customize the approval emails
  - Sent from the vendor's email address
  - Vendor branding



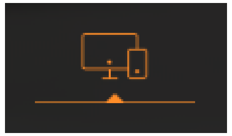
Start
READ JSON File
Customer Folder exists?
No
Create Customer Folder (customer number)
Create EUM Group
Assign READ Permissions to EUM Group
Create Sales Order Document Set
Yes
Sales order Update?
No
Create Customer Folder within Document Set
Yes
Assign CONTRIBUTE Permission to EUM Group
Yes
Upload Documents to Document Set
TSE Approval Required?
Yes
Send Notification to TSE
No
Obtain TSE Approval
Approve documents & Document Set
Customer contact exists in EUM Group?
No
Populate EUM Group
Send Customer Digest
Customer Approval Required?
Yes
Trigger Customer Approval
No
Notify TSE
Send Approval Reminder every 24hrs
Wait for Customer approval
3 days passed with no approval?
Yes
Customer Approved?
Yes
No
Send Approval Notification to TSE, Mark
Send Rejection Notification to TSE, Mark
End

Poll 2

What is your interest coming out of this session?

- **I'm planning on attending the technical session**
- **I'd like a one on one conversation with Peter**
- **I'd like to get my hands on the technical bits**

Upcoming Events



Modern Workplace Summit
April 10, 2020
Philadelphia
modernworkplacesummits.com

Forms and Workflows
Building and Deploying Technical Deep Dive
(Part 2 of 2)
April 21, 2020
Webinar

Guest MVP Webinar
6 Ways to Get Insights on your Microsoft 365 usage
April 29, 2020
Webinar

http://eum.co/events

Thank you!

Questions?