

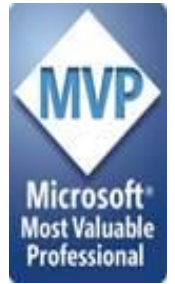
Building Employee Self Service Forms with Microsoft 365 (Part 1 of 3)

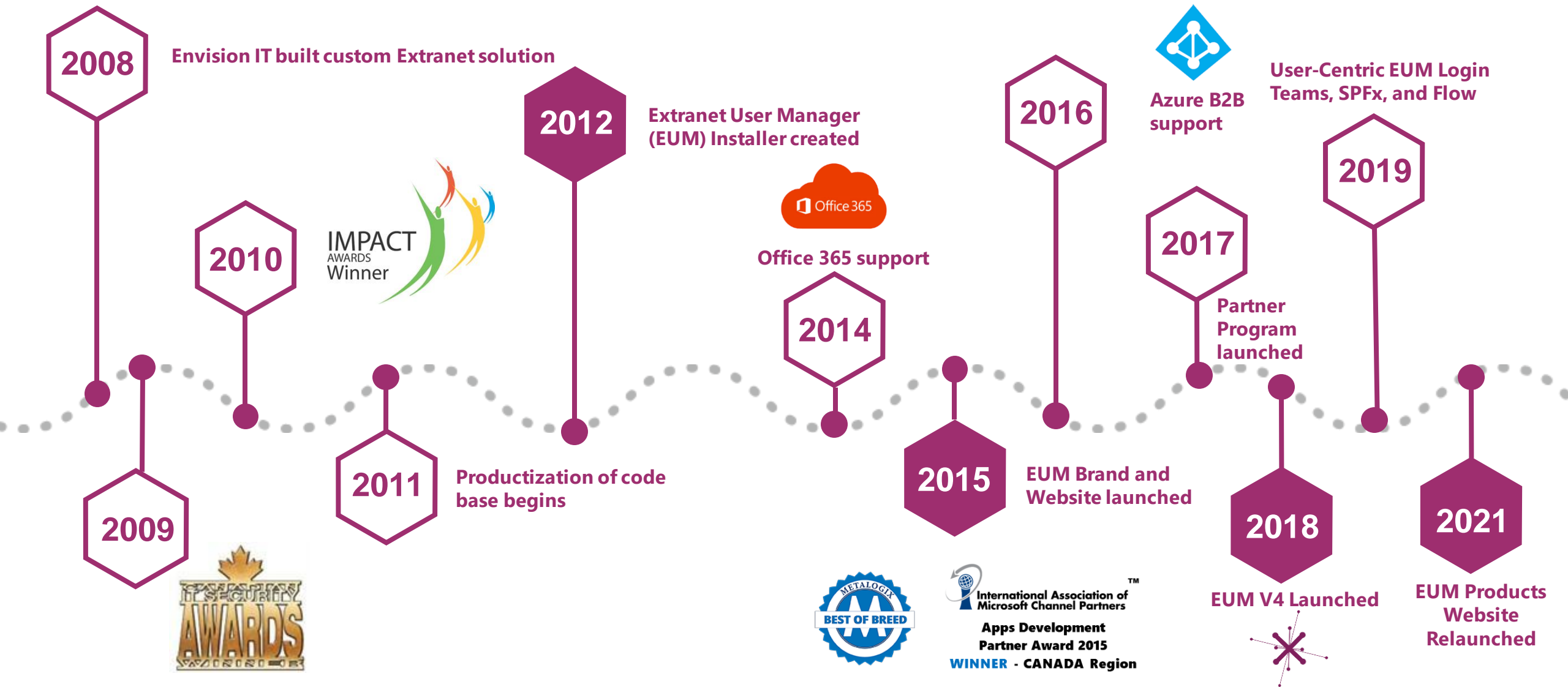
Tuesday, March 9, 2021
12 - 1 PM Eastern Time

Peter Carson



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- Office Apps and Services Microsoft MVP
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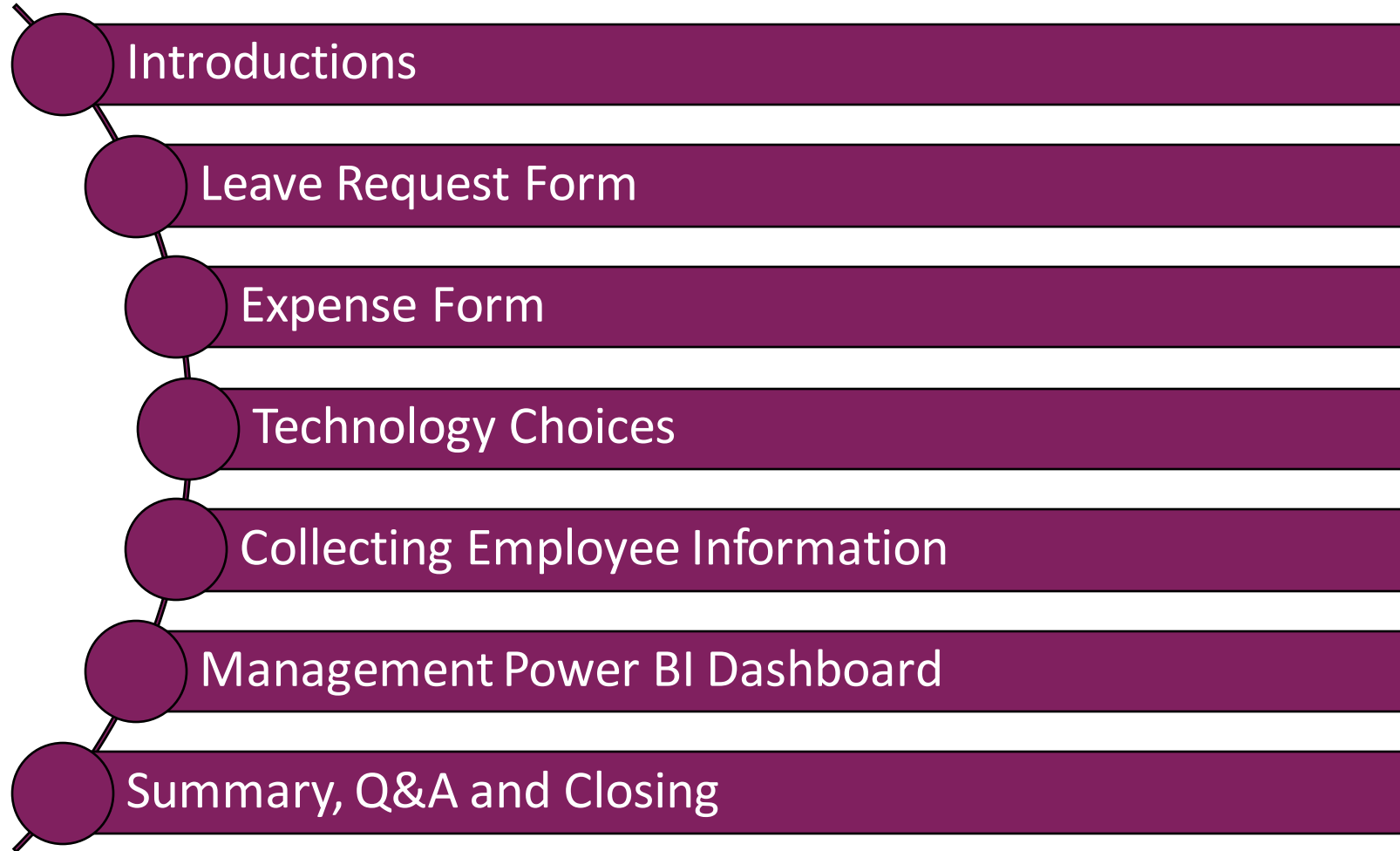




Customers around the Globe



Agenda



Microsoft Forms Poll



3. Which of the following do use today or are planning on using?

	Not sure what this is	Interested	Investigating	Actively using
Microsoft Forms	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Power Automate (Flow)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Power Apps	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Web Stack (HTML/CSS/JavaScript)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Azure Logic Apps	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

<https://bit.ly/3qtB4kw>

Ignite March 2021 – Power Platform Highlights!

- **Launch of Power Fx low-code programming language**
 - Currently used to develop canvas apps in Power Apps
 - Leverages the knowledge of Excel users to reduce barriers for citizen developers
- **Enhanced security and governance for IT pros**
 - New Power Platform Admin center
 - Key improvements in DLP
- **Power Virtual Agents released in preview**
 - Topic overlap detection
 - Finds overlaps between topics, reducing the need for the bot to ask clarifying questions
 - Topic suggestions
 - Analyzes chat transcripts from previous topics and provides suggestions for new topics

[Microsoft Ignite 2021 Book of News](#)

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

Envision IT Leave Request Form

- **Employee fills in**
 - Request type
 - Vacation
 - Personal Day
 - Sick Day
 - Lieu 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
- **Changes before or after approval**
- **Cancellations**
- **Reconciliation with time tracking system**

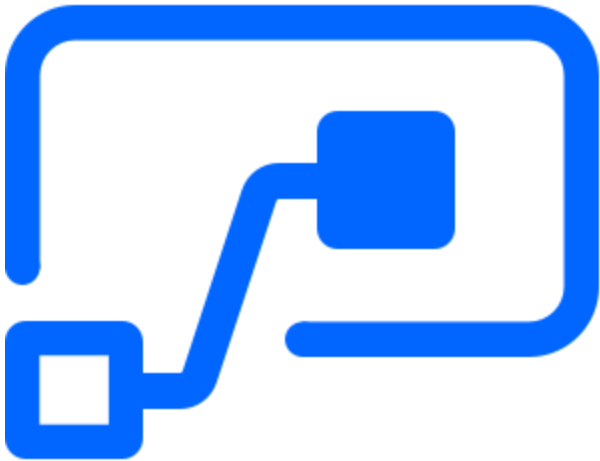
Microsoft Forms



- 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/>

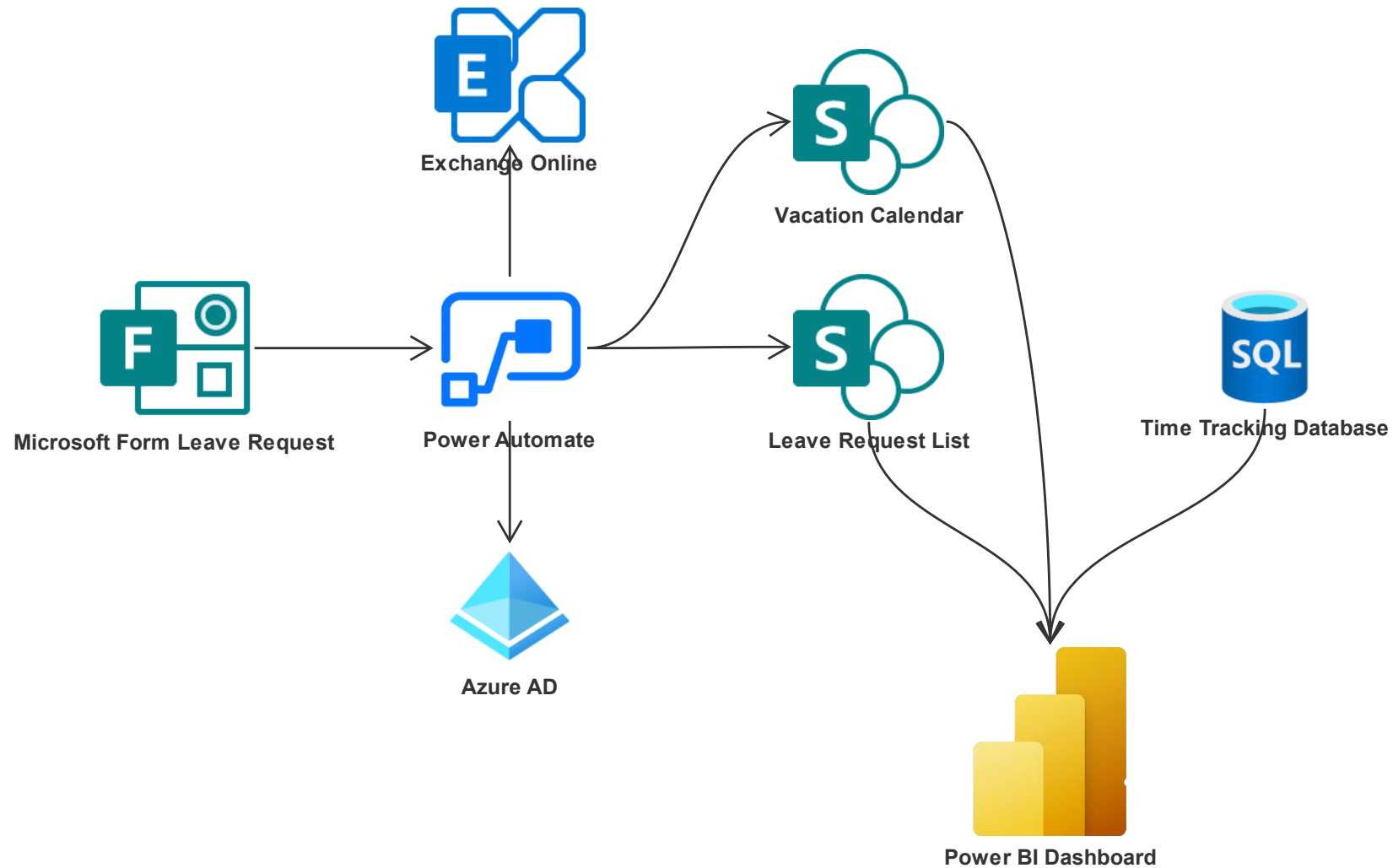
Power Automate (Flow)



- **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**
- **Standard connector Flow licensing is included with Office 365**
- **Premium connectors**
 - SQL
 - Azure
 - Dynamics
 - Custom connectors
 - HTTP endpoints

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

Leave Request Architecture



Demo

Envision IT Expense Report

- **Employee fills in**
 - Report Date
 - Expenses
 - Mileage
 - Notes
- **Mileage calculation**
 - \$0.59 first 5,000 km
 - \$0.53 above that
- **Totals are calculated**

Expense Form

Employee Info

Report Date

Employee Name

Itemized Expenses

Date	Description	Category	Cost	
<input type="text" value="yyyy-mm-dd"/>	<input type="text"/>	<input type="text" value=""/>	<input type="text" value="0.00"/>	<input type="button" value="+"/>

Mileage

Date	From / To	Kilometres	Amount	
<input type="text" value="yyyy-mm-dd"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0.00"/>	<input type="button" value="+"/>

Totals

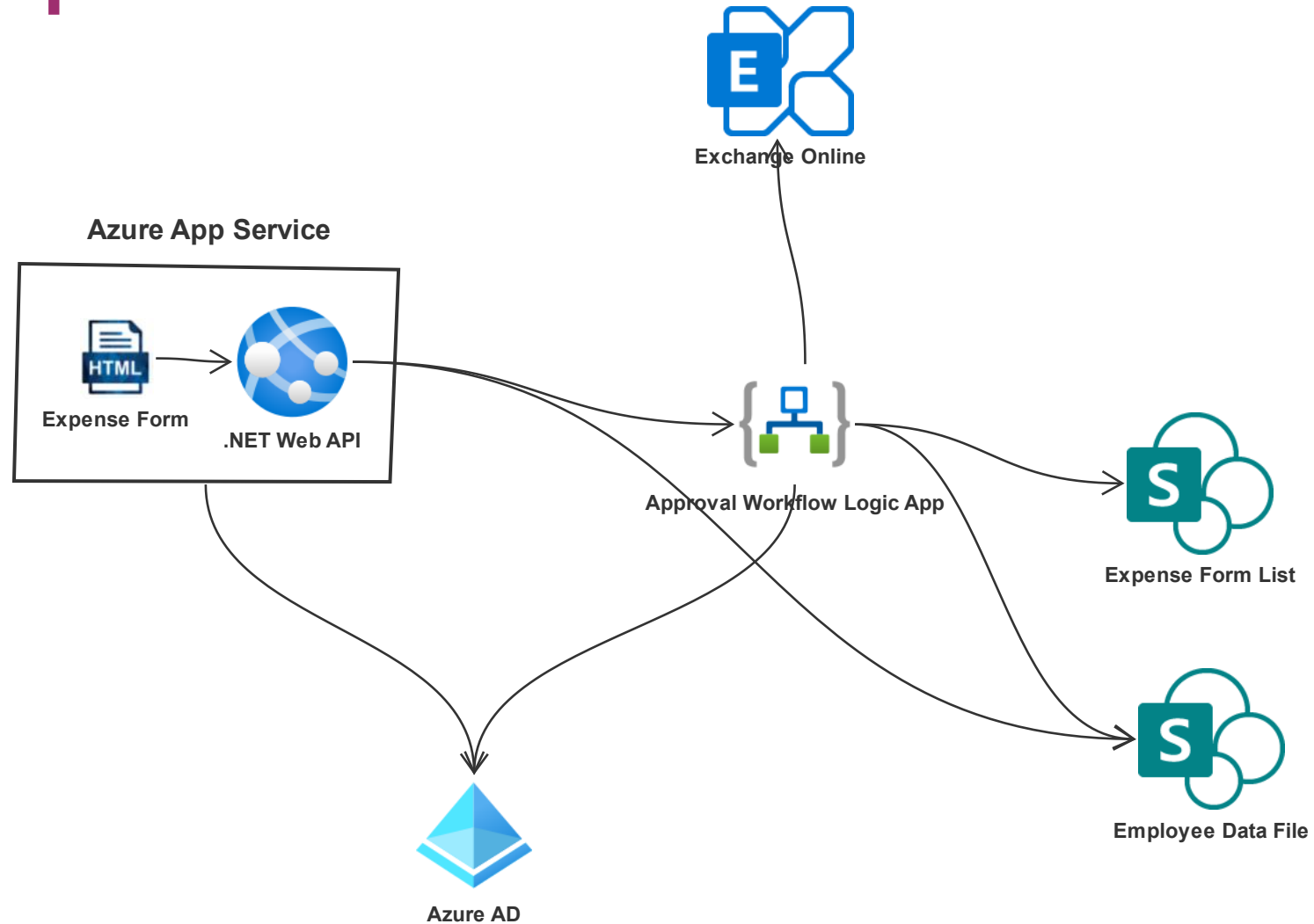
Total Expense Items	<input type="text" value="0.00"/>
Total Mileage	<input type="text" value="0.00"/>
Grand Total	<input type="text" value="0.00"/>

Notes

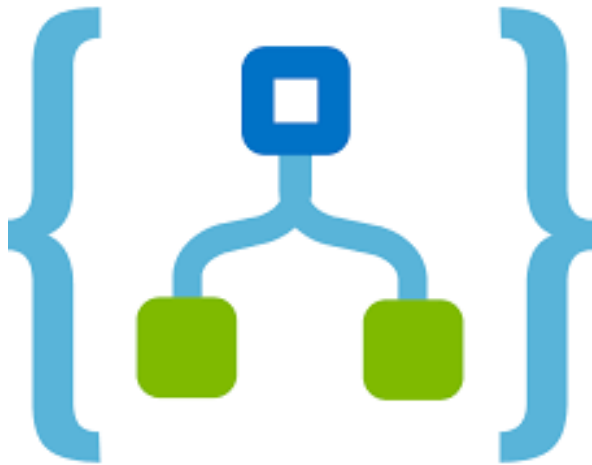
Expense Report Points to Consider

- **Modify after submitting**
- **Reject, revise, and resubmit**
- **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 Architecture



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/>

Azure App Services

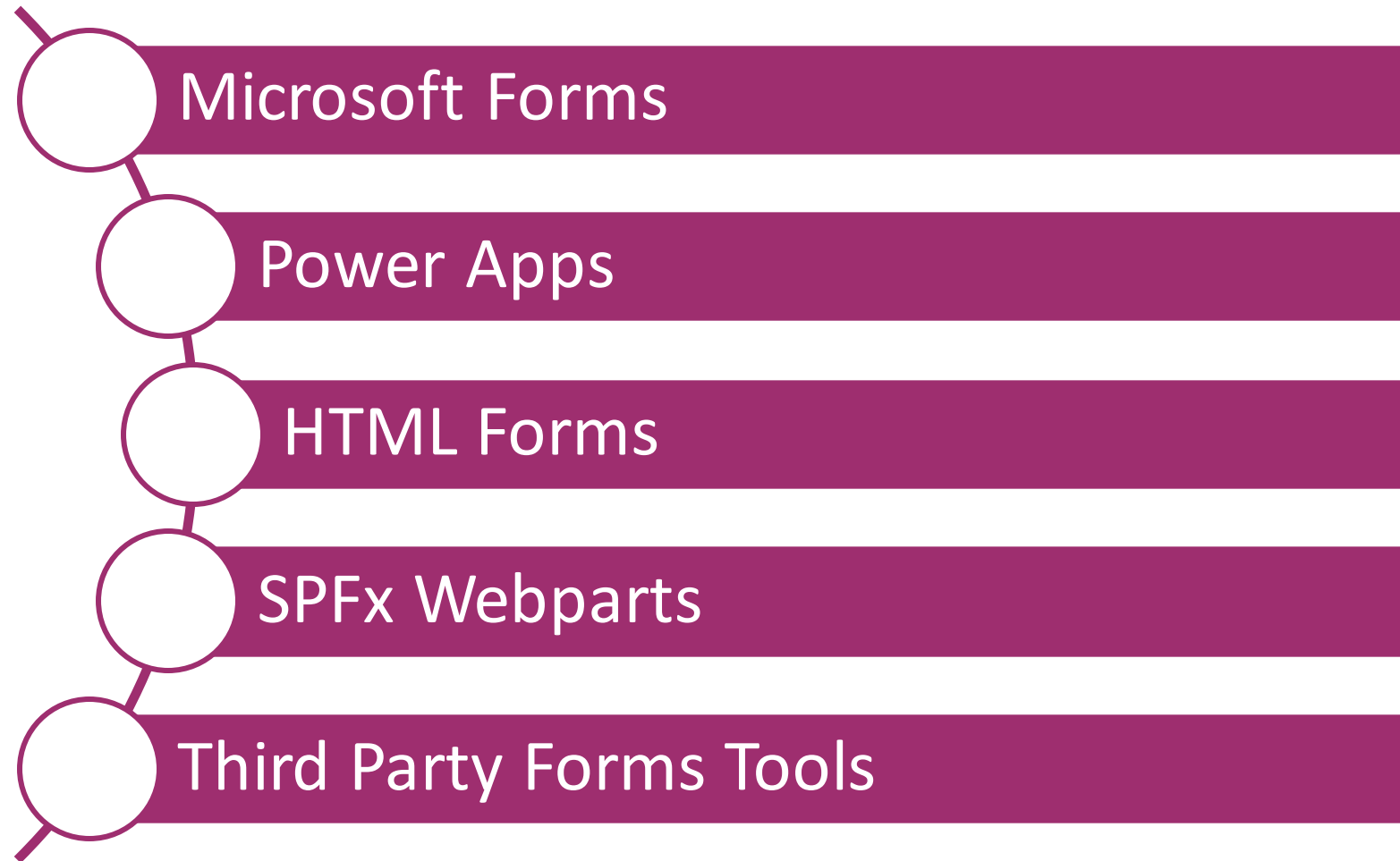


- Platform as a Service Web Apps
- Easy to deploy and scale
- No management of servers required
- Can be highly available – 99.5% uptime SLA

<https://azure.microsoft.com/en-ca/services/app-service/>

Demo

Forms Development Options



Microsoft Forms



- **Super easy to build a form (10 minutes)**
- **Simple branding and styling might increase to 20 minutes**
- **Fill out once forms**
 - No coming back to update or edit
- **No complex logic or defaults based on user data**

<https://forms.office.com/>

PowerApps



- **Build apps for mobile, desktop, or responsive web**
- **Hundreds of connectors that can be extended with custom connectors**
- **Need to be a “Citizen Developer”**
 - More than a Power User
- **Sometimes the tool gets in the way of a full web stack developer**
- **Licensing**

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

HTML Forms

Expense Form

Employee Info

Report Date

Employee Name

Itemized Expenses

Date	Description	Category	Cost	
<input type="text" value="yyyy-mm-dd"/>	<input type="text"/>	<input type="text" value=""/>	<input type="text" value="0.00"/>	<input type="button" value="✚"/>

Mileage

Date	From / To	Kilometres	Amount	
<input type="text" value="yyyy-mm-dd"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0.00"/>	<input type="button" value="✚"/>

Totals

Total Expense Items	<input type="text" value="0.00"/>
Total Mileage	<input type="text" value="0.00"/>
Grand Total	<input type="text" value="0.00"/>

Notes

Submit

- Need a full web stack developer
- Full flexibility on design, mobile experience, accessibility
- Can build a design pattern that is repeatable

SharePoint Framework (SPFx)

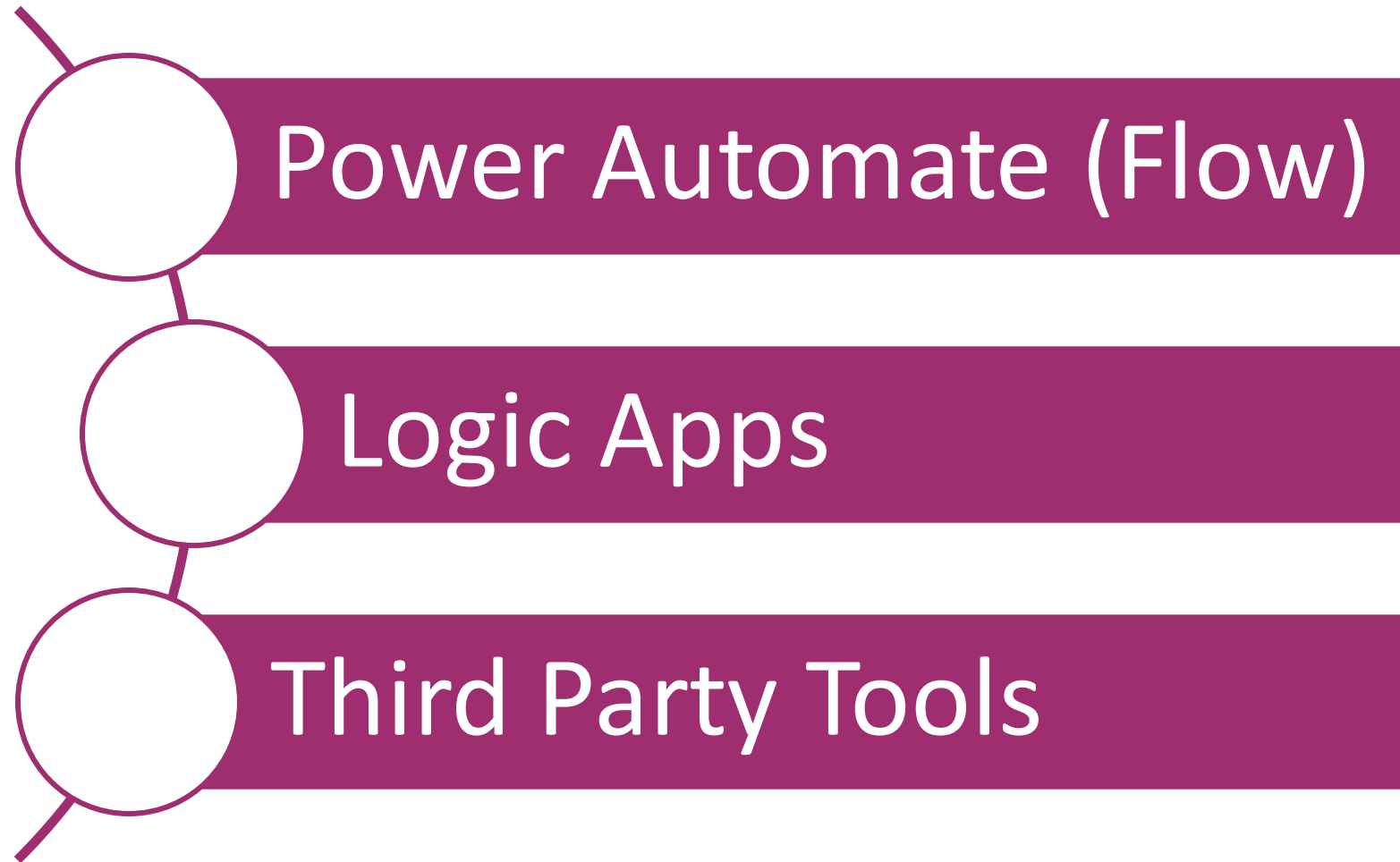


- **Need an Office / Web Stack Developer**
- **Integrated into the SharePoint and Teams experience**

Third Party Tools

- Nintex Forms
- WEBCON BPS
- KwizCom
- Sintel Forms
- Lightning Forms

Workflow Options



Comparing Power Automate to Logic Apps

- **Common Designer**
- **Common connectors, triggers, and actions**
- **Import/Export workflows**

Power Automate

- Microsoft 365 connectors covered by 365 plans
- Premium licenses by the user or workflow
 - \$15 / user / month
 - \$100 / Flow / month (five flow min)
- Rich approvals process
 - Outlook and Teams integrated
 - Approvals portal and mobile app

Azure Logic Apps

- Consumption based pricing
 - \$0.000032 per action
 - \$0.00016 and \$0.00128 per standard and enterprise connector
- ARM template deployments and Azure DevOps integration

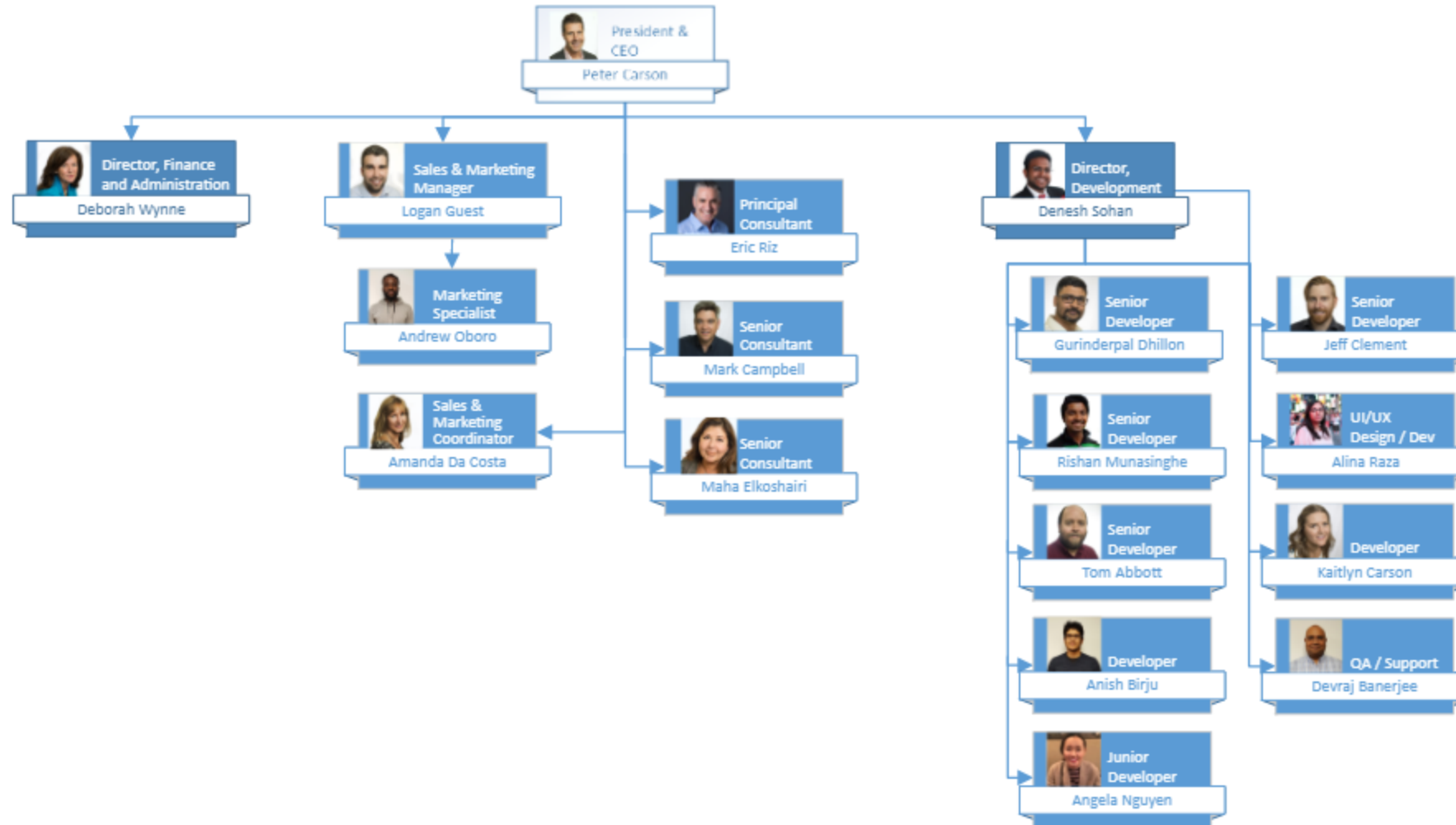
USD Pricing

Security Considerations

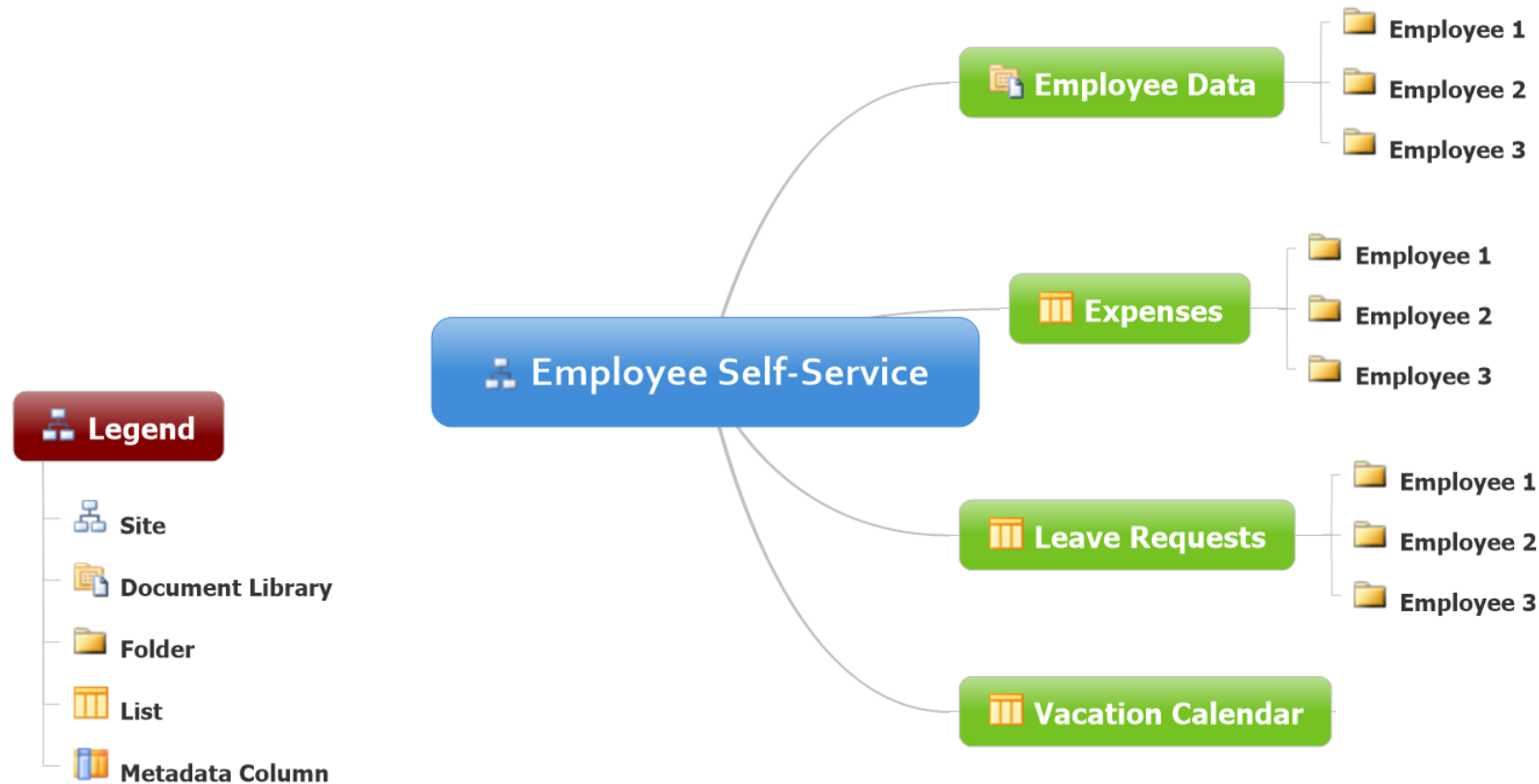
- **Don't do Security through Obscurity**
 - Properly secure your solution
- **Leverage Azure Active Directory**
 - Permissions
 - Manager reporting structure
- **Staff need to see their own requests**
 - Folders for each staff member
 - Permissions granted to them

- **Managers need to see their direct and indirect reports**
 - Grant permissions to managers to each of their direct and indirect reports folders
- **Changes before or after approval**
- **Cancellations**
- **Mobile devices, BYOD, and access from outside the firewall**

Org Chart

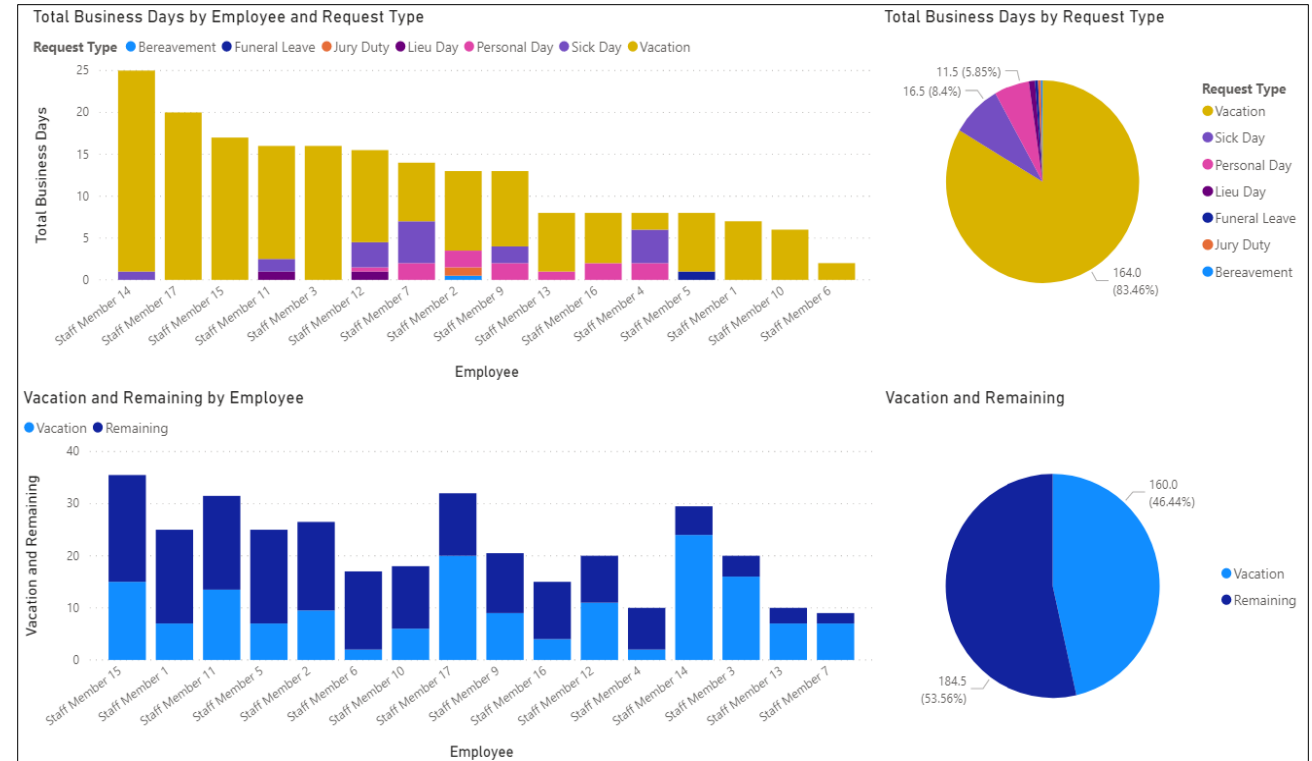


Information Architecture



Power BI Management Dashboard

- Provides a holistic view of all employee leave request submissions
- Provides breakdown of how days are utilized
- Allows for decisions to be made that relate to resource planning as a services business



Wrap-Up Points

- Tool choices don't need to be a one size fits all
- Understand the licensing
- Think about mobile, BYOD, who and how the forms will be accessed
- Do security properly
- Make sure your Azure AD is clean and fully populated
- Start simple

Upcoming Series – Forms and Workflows



How to Build a Microsoft Forms Leave Request (Part 2 of 3)

March 23, 2021

12 pm – 1 pm EST



How to Build an HTML Self Service Expense Form (Part 3 of 3)

March 25, 2021

12 pm – 1 pm EST

Register for all upcoming events at <http://eum.co/resources/events>

Upcoming Series – Secure Development and SDLC



**Strengthening Your Development Practices with
Azure AD (Part 1 of 2)**
April 20, 2021
12 pm – 1 pm EST



Microsoft 365 SDLC Best Practices (Part 2 of 2)
May 4, 2021
12 pm – 1 pm EST

Register for all upcoming events at <http://eum.co/resources/events>

Additional Webinars



Compliance and Document Collection with External Parties

April 8, 2021
12 pm – 1 pm EST



Integrating Multiple Planner Boards into a Power BI Dashboard

May 20, 2021
12 pm – 1 pm EST

Register for all upcoming events at <http://eum.co/resources/events>

Thank you!

Questions?

