

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

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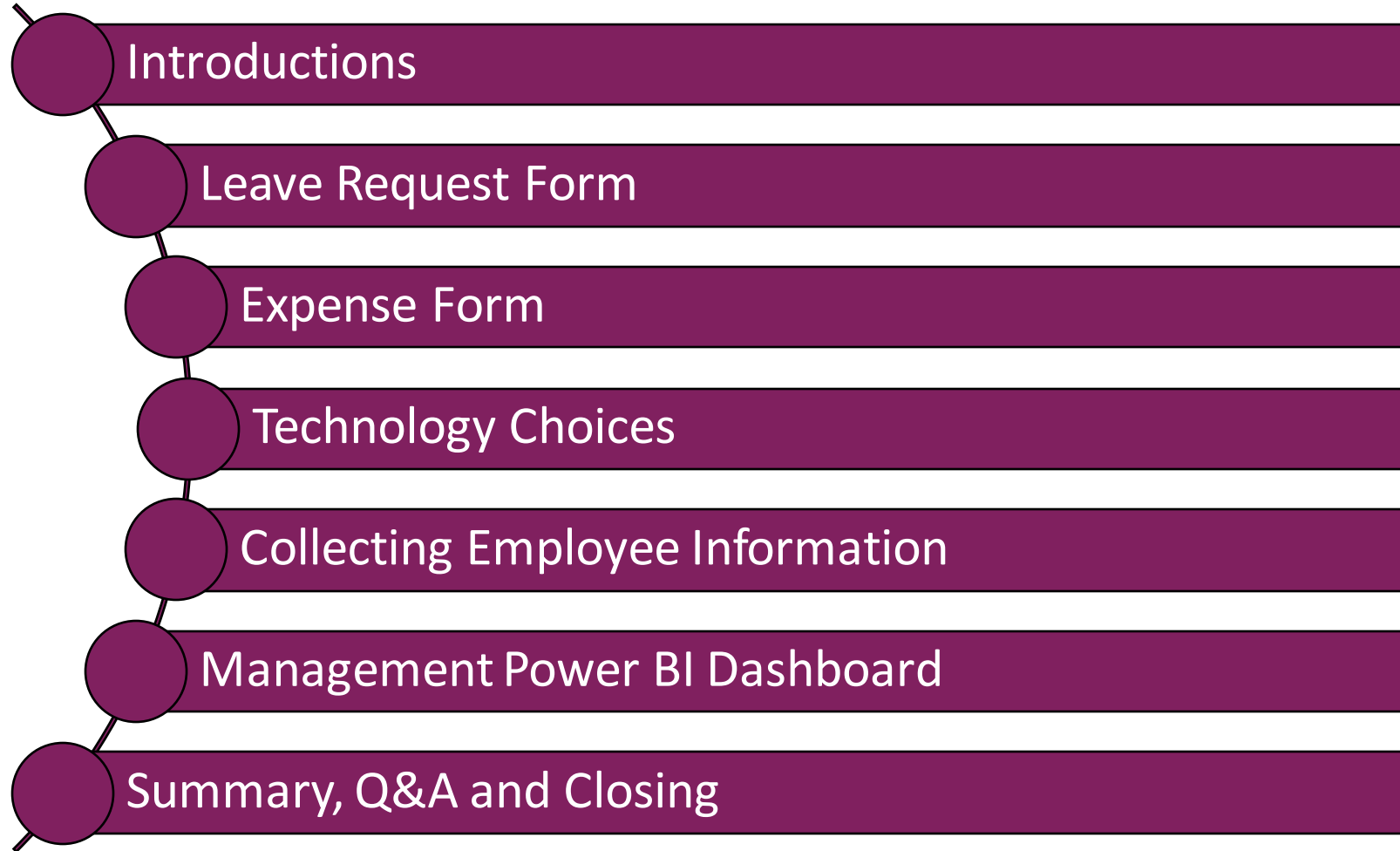




# Customers around the Globe



# 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>

# 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

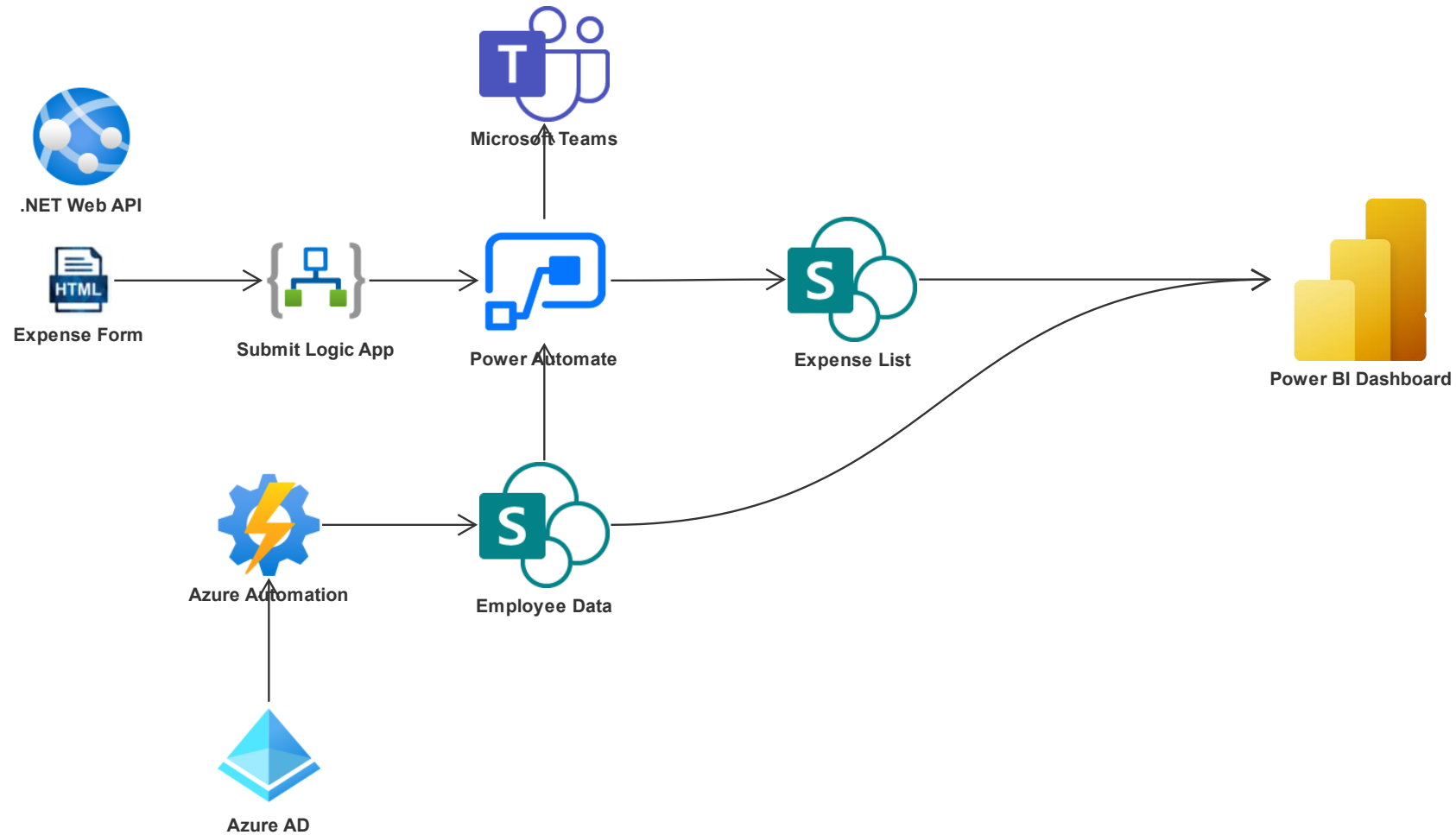
Total Expense Items	<input type="text" value="0.00"/>
Total Mileage	<input type="text" value="0.00"/>
Grand Total	<input type="text" value="0.00"/>

#### Notes

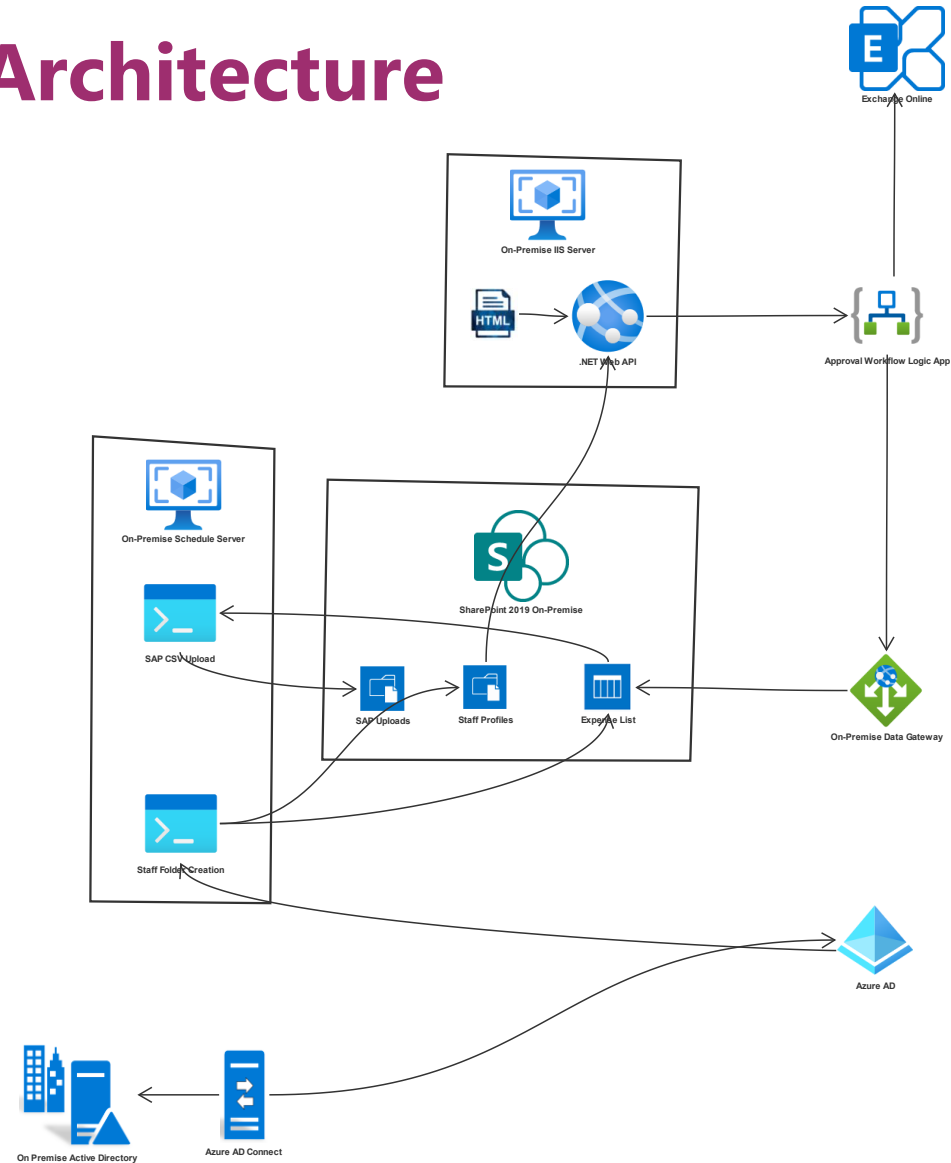
# Expense Report Points to Consider

- **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**

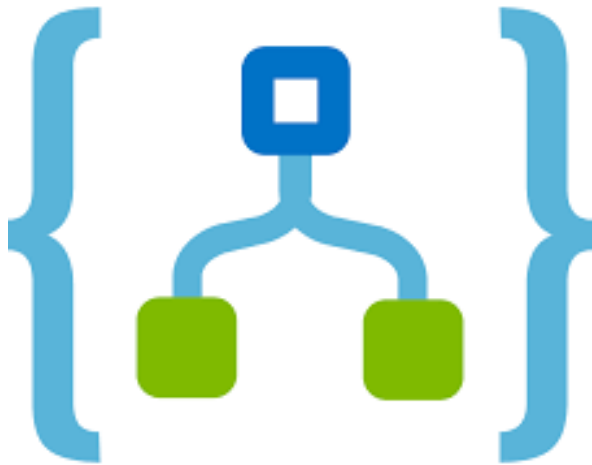
# Expense Report Architecture



# 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

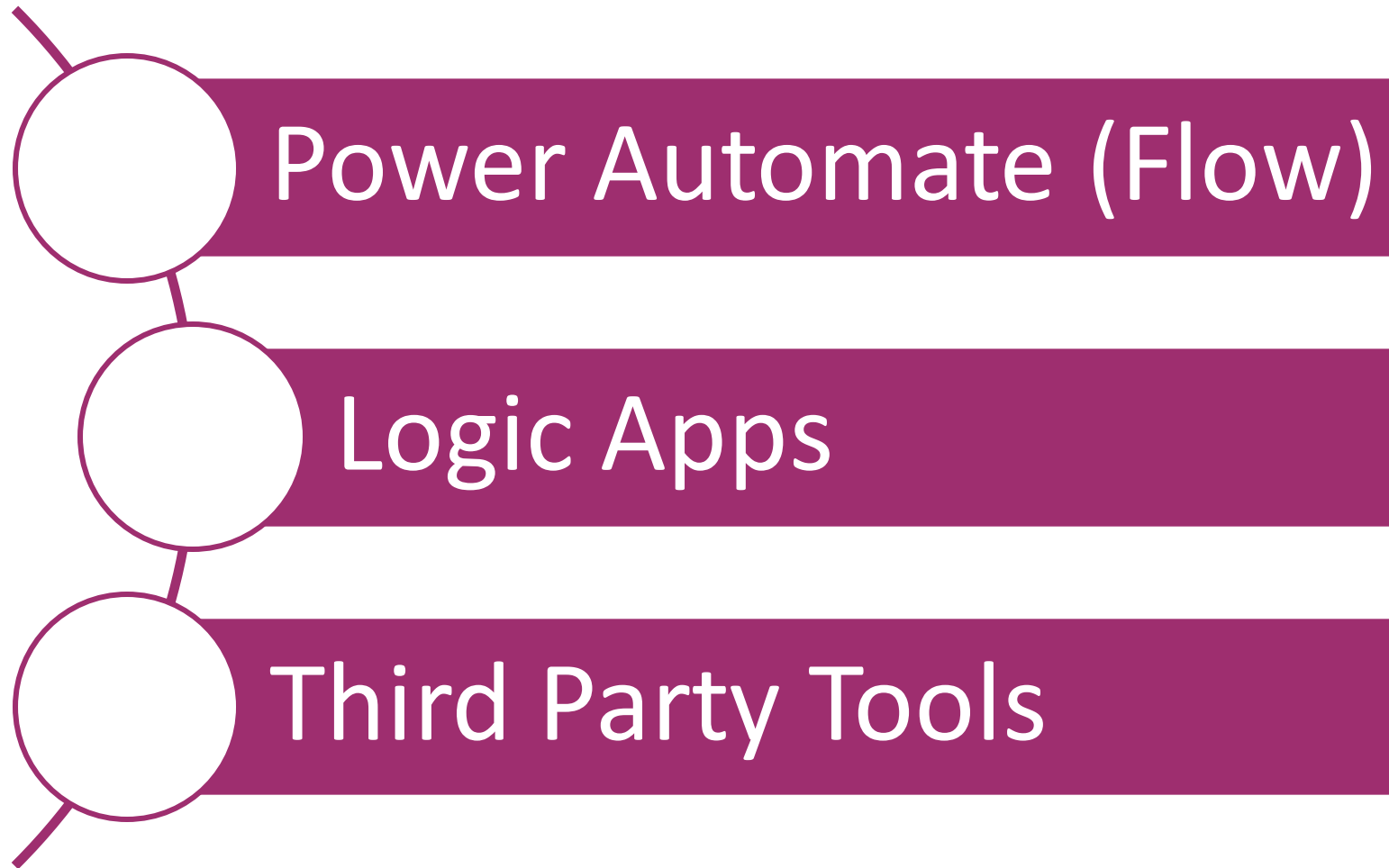


- Platform as a Service Web Apps
- Easy to deploy and scale
- No management of servers required
- Can be highly available – 99.5% uptime SLA

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

# Demo

# 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

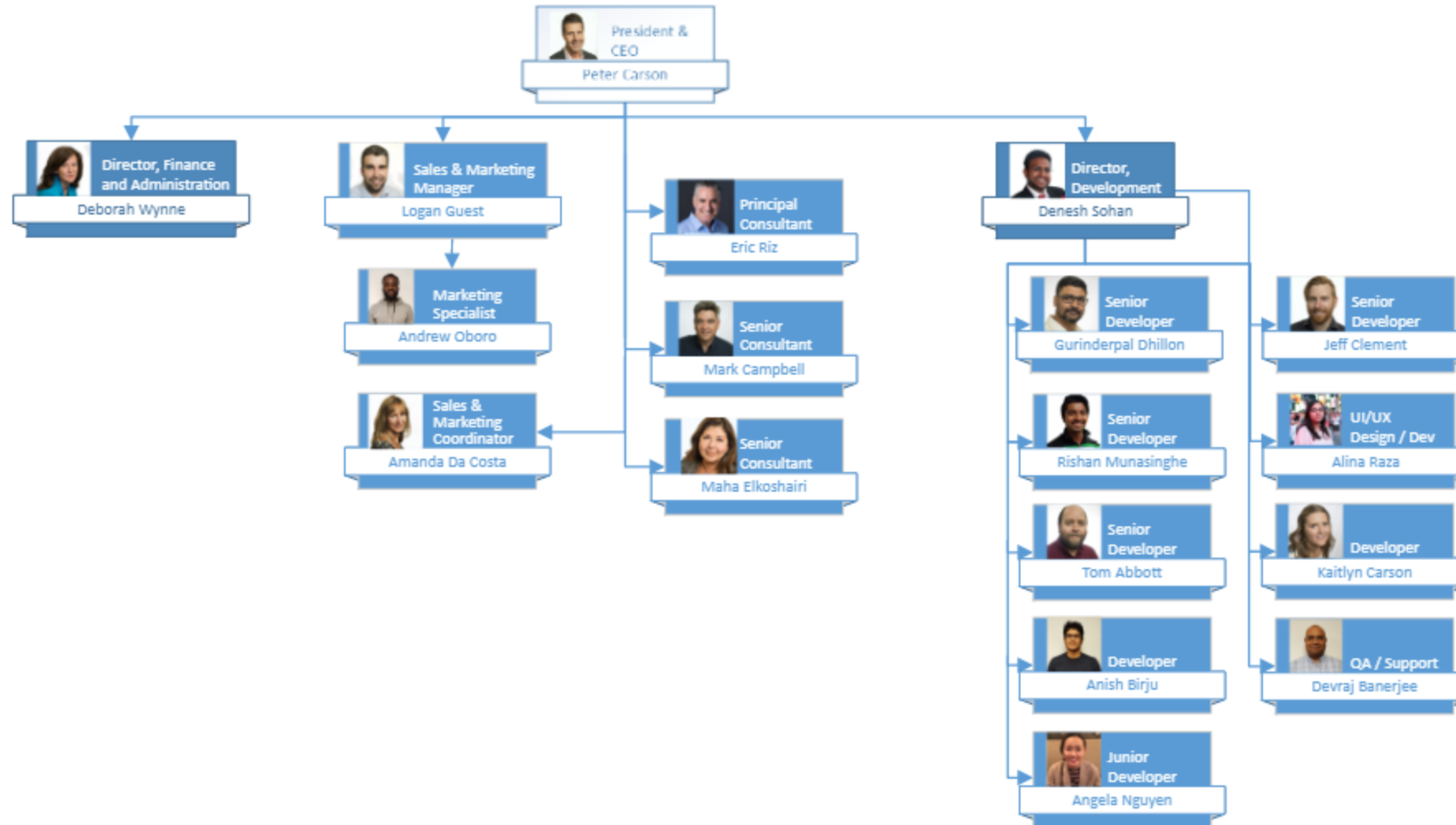
## USD Pricing

# Security Considerations

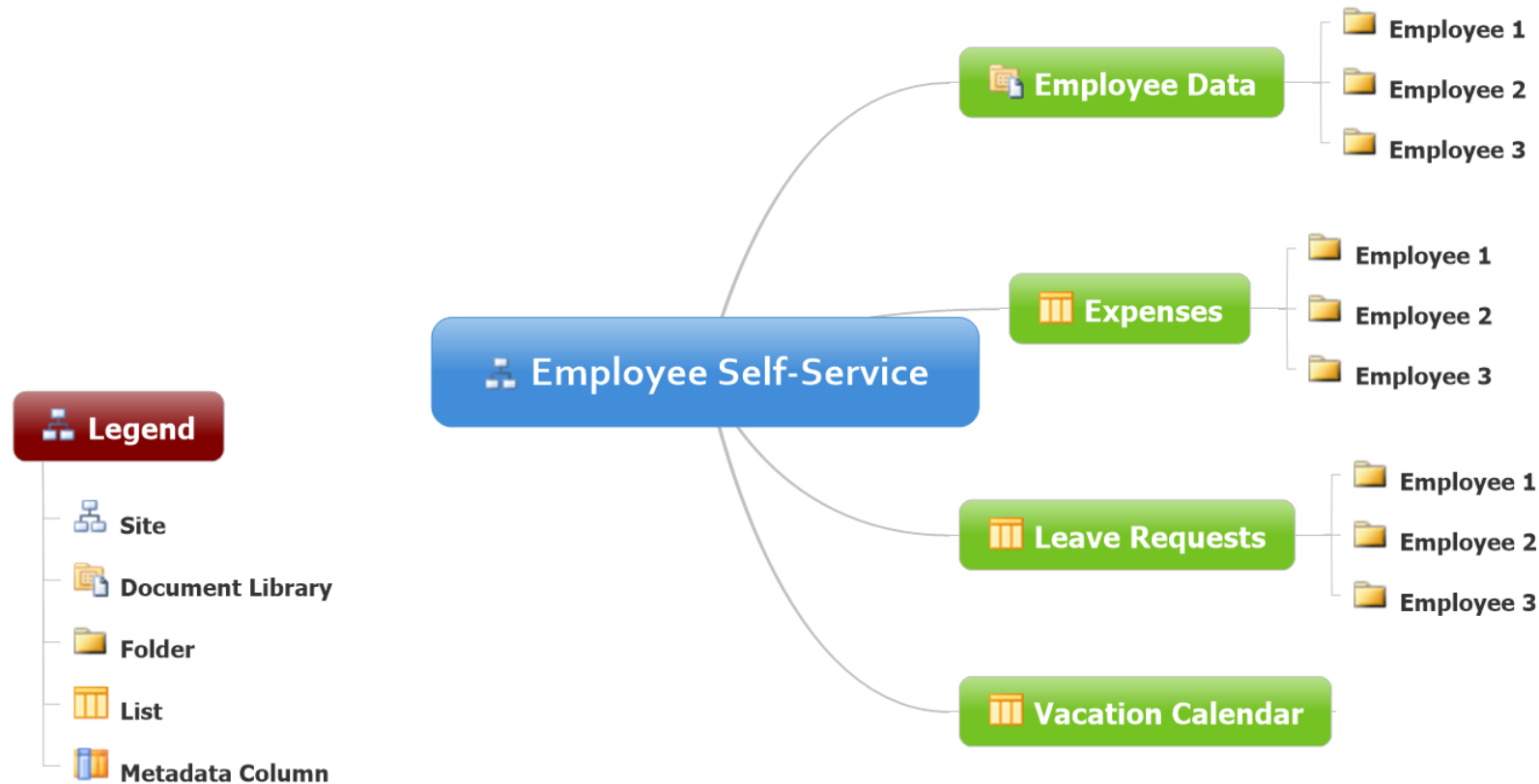
- **Don't do Security through Obscurity**
  - Properly secure your solution
- **Leverage Azure Active Directory**
  - Permissions
  - Manager reporting structure
- **Staff need to see their own requests**
  - Folders for each staff member
  - Permissions granted to them

- **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



# 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 – 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?

