



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

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12 – 1 PM EST

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# Logan Guest

## Sales

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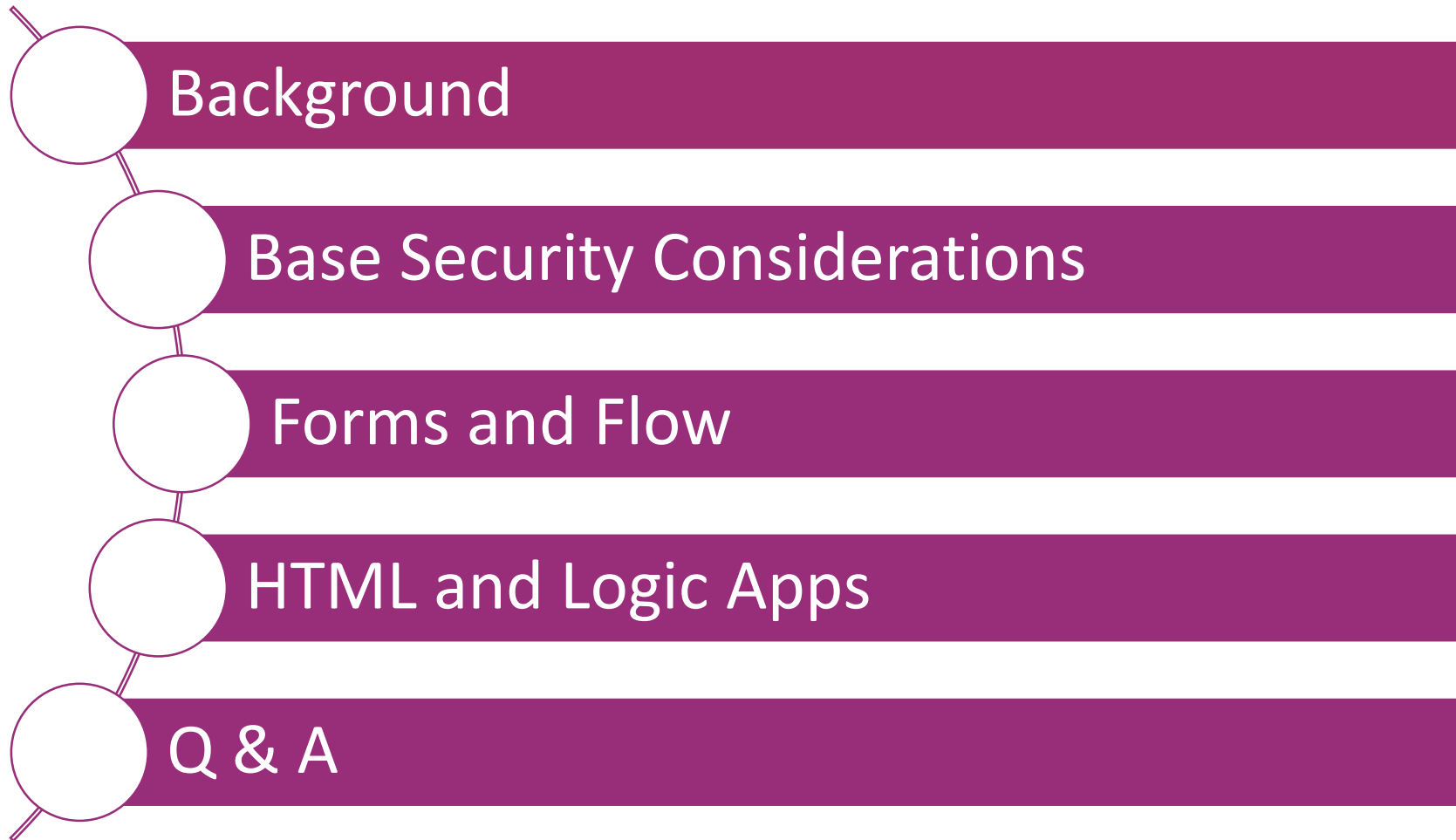


# Poll 1

**Which of the following do you develop in today?**

- **Office 365**
- **Microsoft Forms**
- **Power Automate (Flow)**
- **Web Stack (HTML / CSS / JavaScript)**
- **Azure Logic Apps**

# Agenda



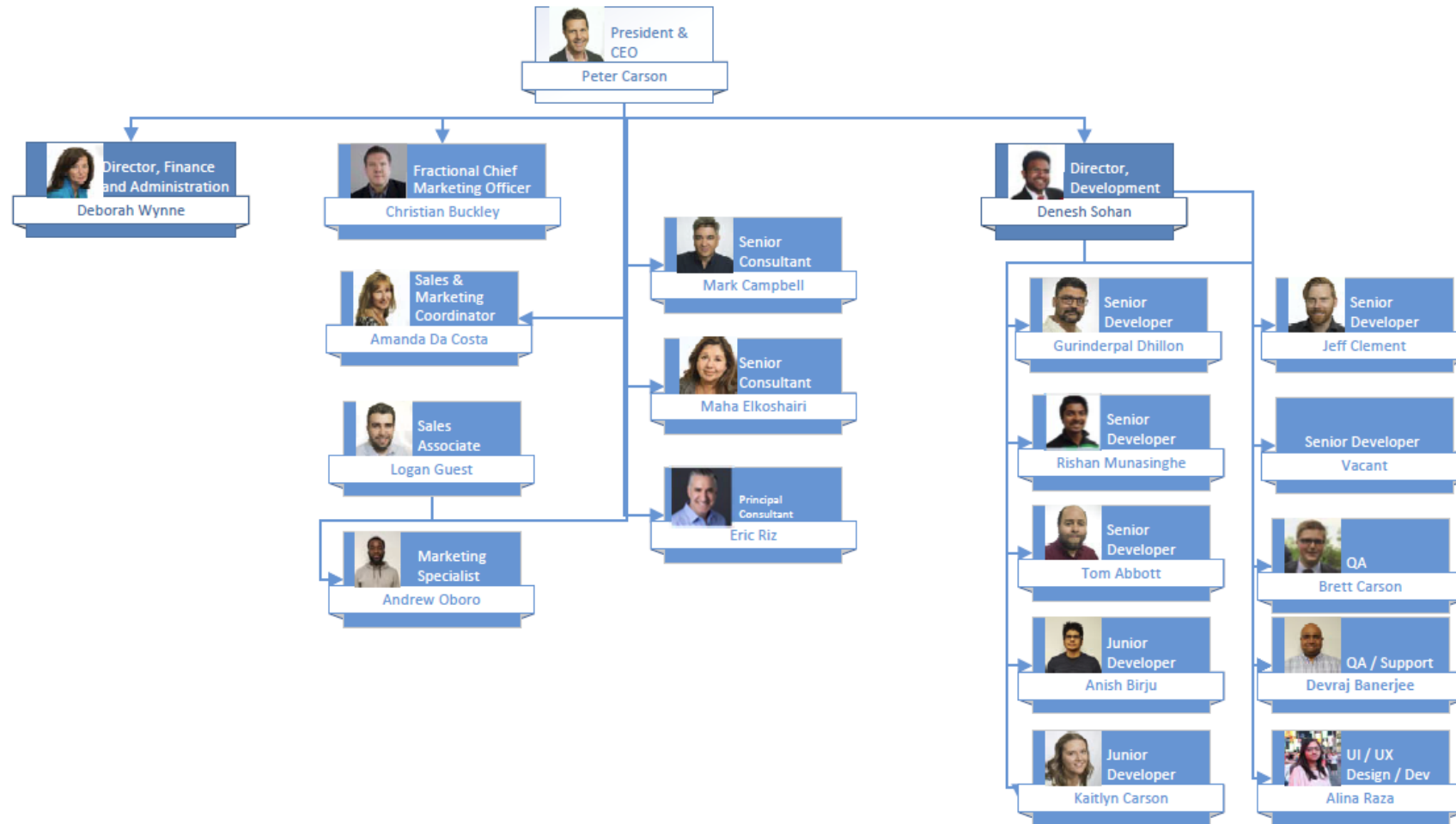
# Employee Self-Service Examples

- 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

# Security Considerations

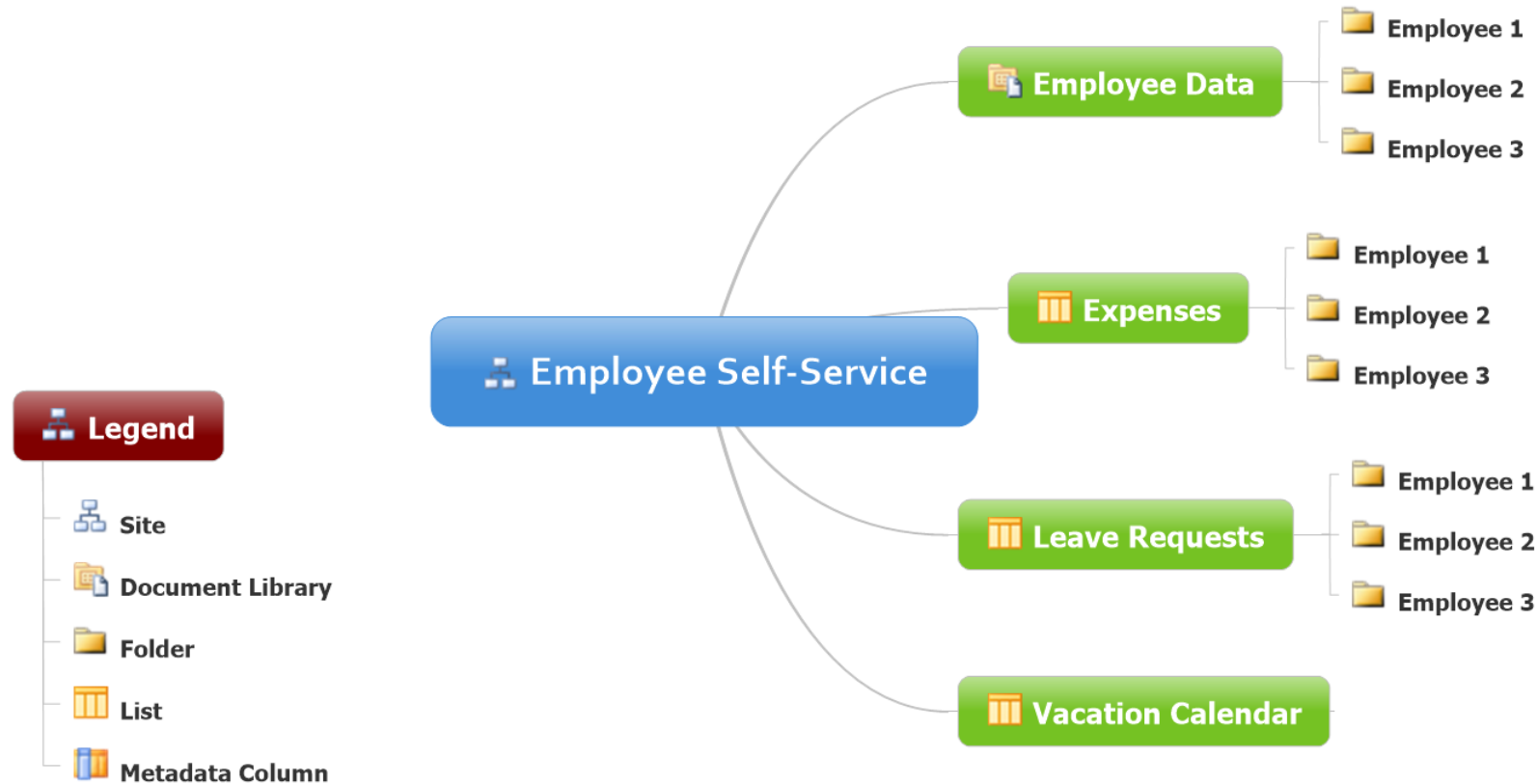
- **Staff can see their own requests**
  - Folders for each staff member
  - Permissions granted to them
- **Managers can see their direct and indirect reports**
  - Grant permissions to managers to each of their direct and indirect reports folders
- **Changes before or after approval**
- **Cancellations**

# Org Chart

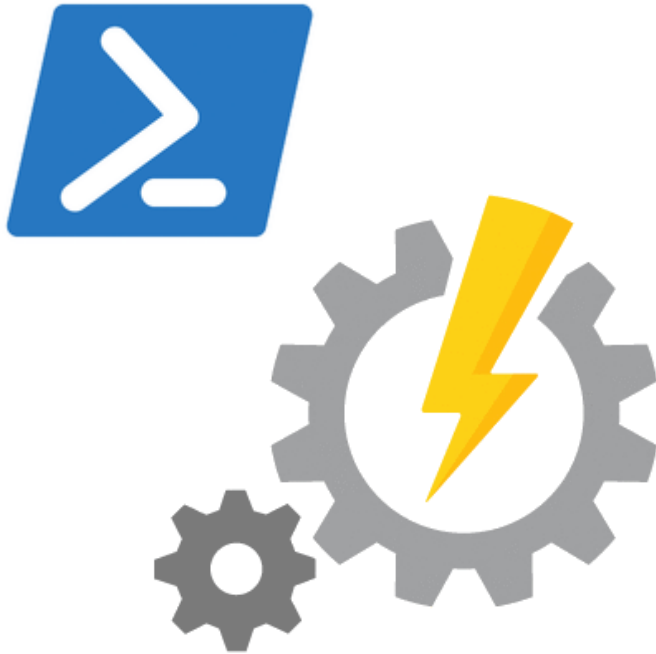




# Information Architecture



# PowerShell and Azure Automation



- **PowerShell**
  - Creates the folder structures
  - Populates the employee JSON files
  - Sets up the security
- **Azure Automation**
  - Provides a way to schedule this to run in the cloud serverless

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

# Scenario One – 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

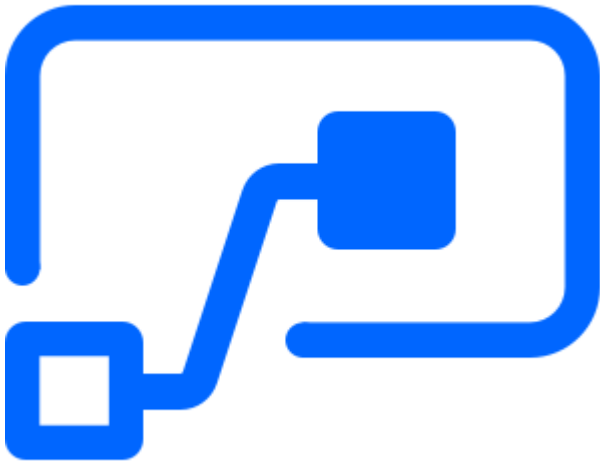
# Microsoft Forms



- 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
- Free version

<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 Workflow

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

# Leave Request Points to Consider

- **Security**
  - Staff can see their own requests
  - Managers can see their direct and indirect reports
- **Displaying vacation days allocated, accrued, and already taken in current calendar year**
  - Staff can see their own status page
  - Managers can see their direct and indirect reports
  - Including in the approval and approved emails
- **Changes before or after approval**
- **Cancellations**
- **Reconciliation with time tracking system**

# Scenario Two – Envision IT Expense Report

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



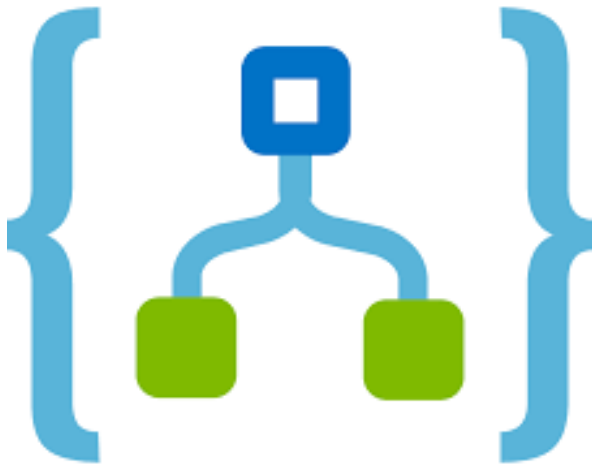
# Expense Report Points to Consider

- 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**
- **Minimal costs for these scenarios**
  - < \$1 per month

<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/>

# Azure API Management



- **Management platform for APIs**
- **Selectively expose data and services by applying authentication, authorisation, and usage limits**
- **Logic Apps HTTP endpoints can be secured behind API Management**
  - By default these are anonymously available
  - Apply Azure AD security to the API endpoints

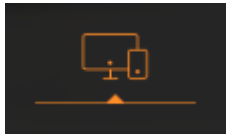
<https://azure.microsoft.com/en-ca/services/api-management/>

## Poll 2

**What is your interest coming out of this session?**

- **This is something I could see myself implementing for my organization**
- **I'd like to get my hands on the technical bits**
- **I'd like some further guidance**

# Upcoming Events



Modern Workplace Summit  
April 10, 2020  
Philadelphia

[modernworkplacesummits.com](http://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?

