

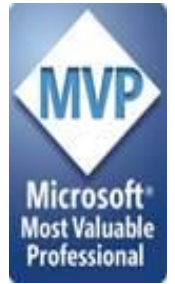
How to build a Microsoft Forms Leave Request (Part 2 of 3)

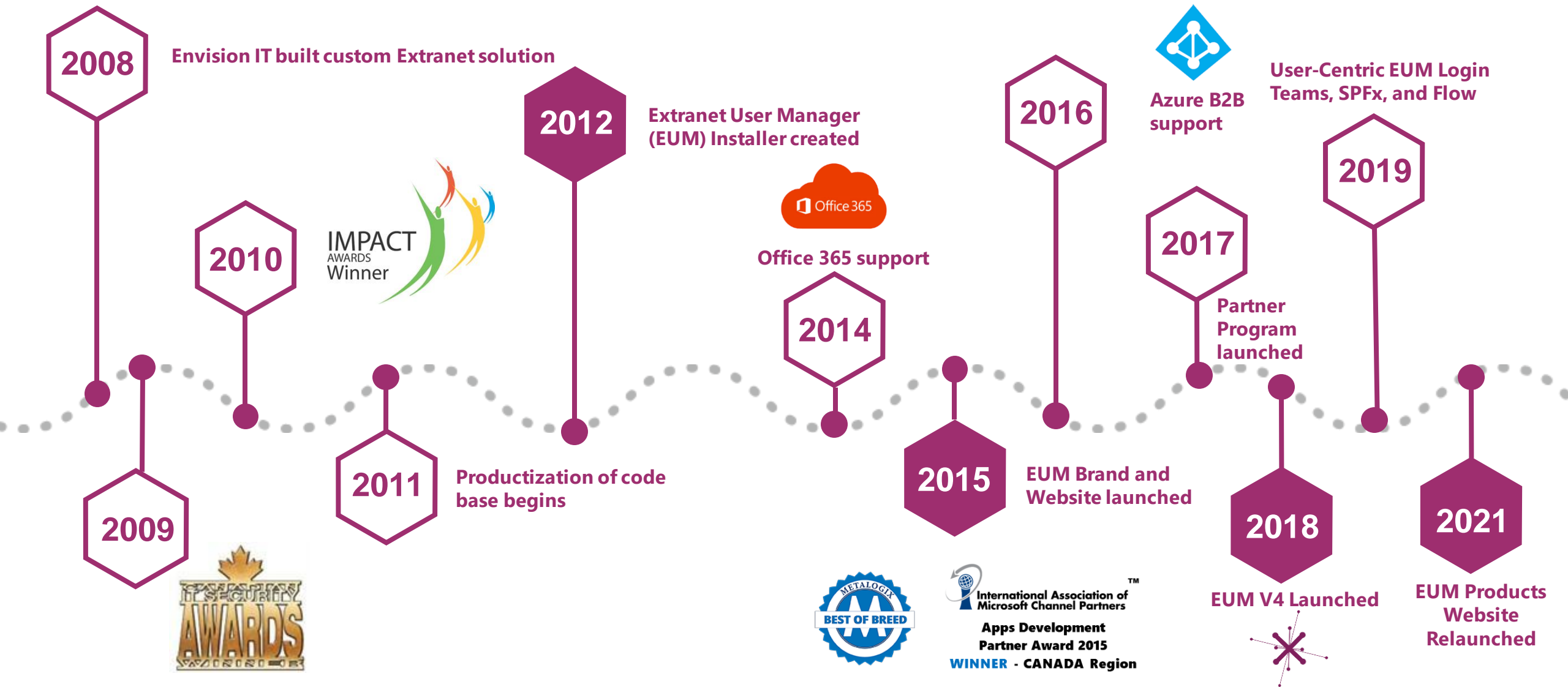
Tuesday, March 23, 2021
12 - 1 PM Eastern Time

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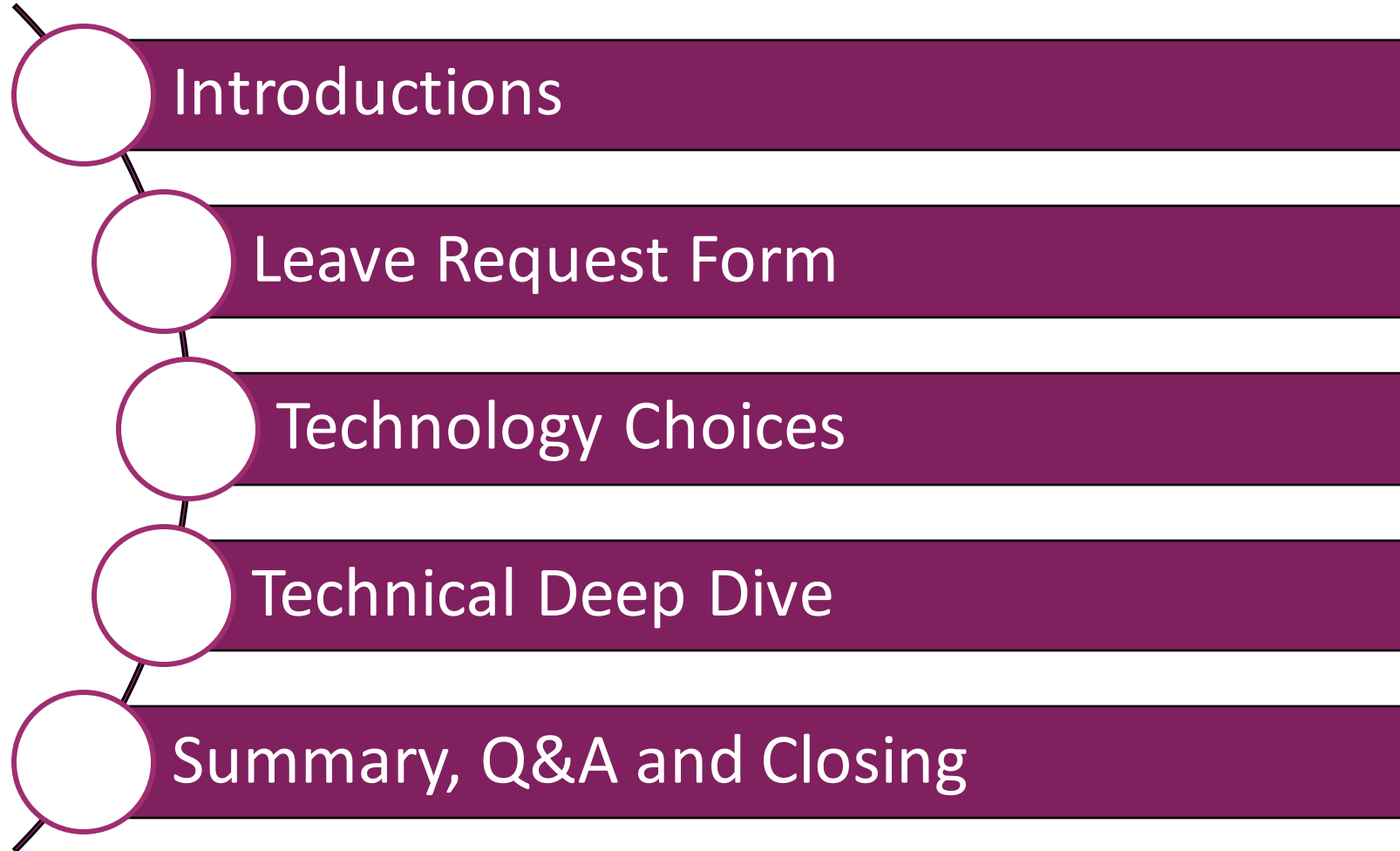




Customers around the Globe



Agenda



Microsoft Forms Poll



4. How are you using Microsoft Forms in your Organization today?

<https://bit.ly/3tJ6wNZ>

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**

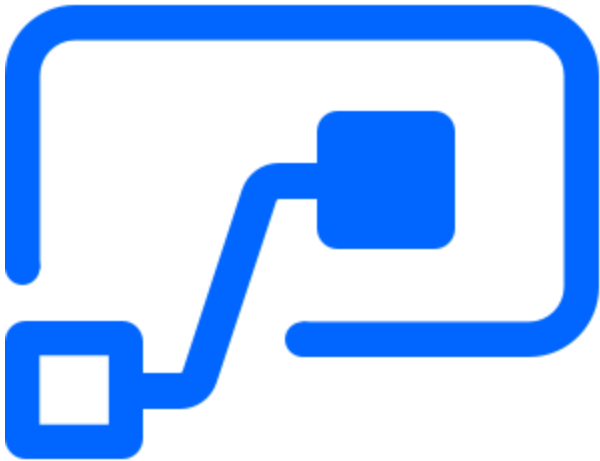
Microsoft Forms



- 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/>

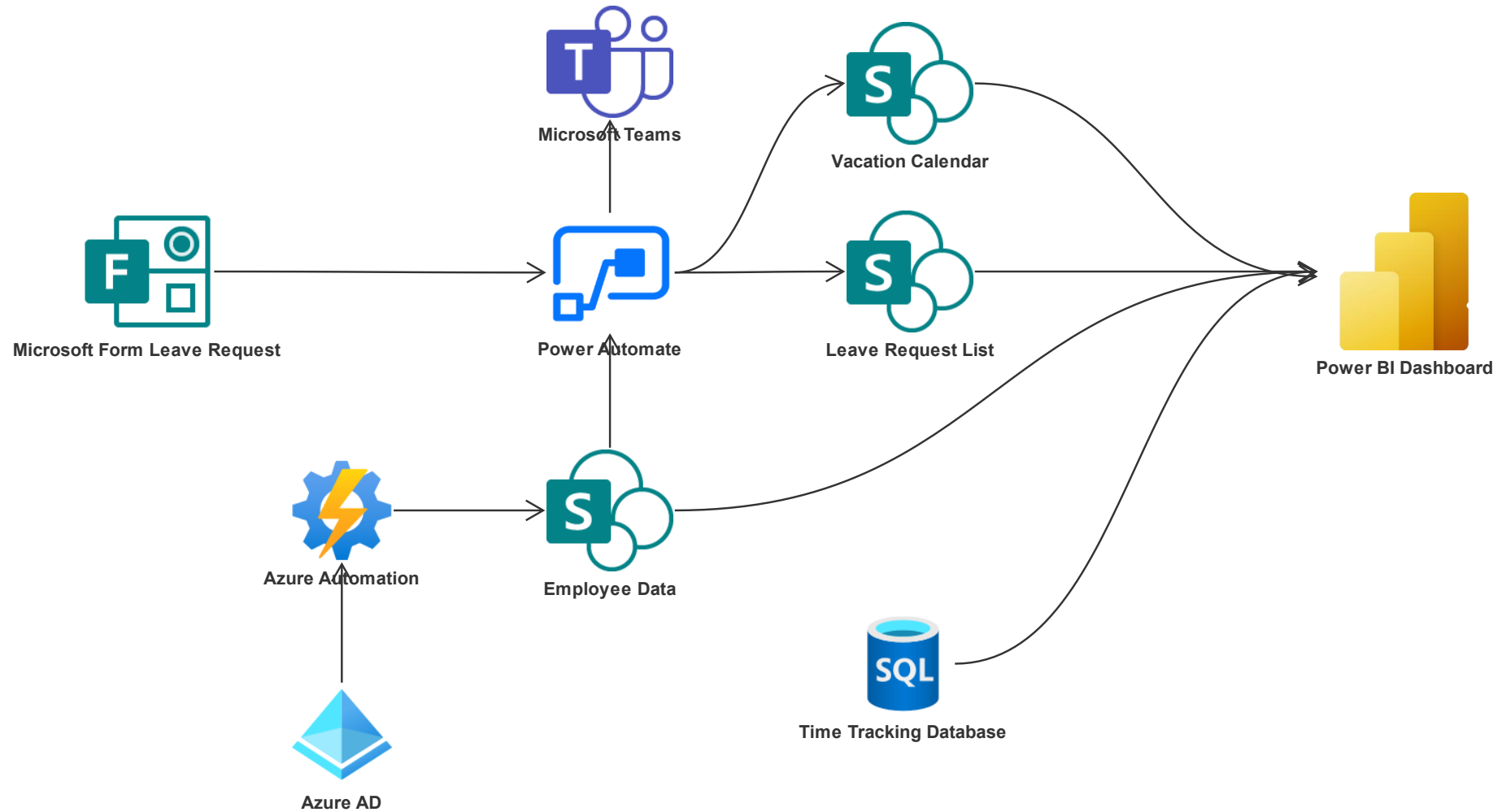
Azure Automation



- **Run PowerShell scripts in the cloud**
- **No management of the VM needed, Azure takes care of that**
- **Very cost effective**
 - 500 minutes of runtime included free per month
 - \$.002/minute USD after that

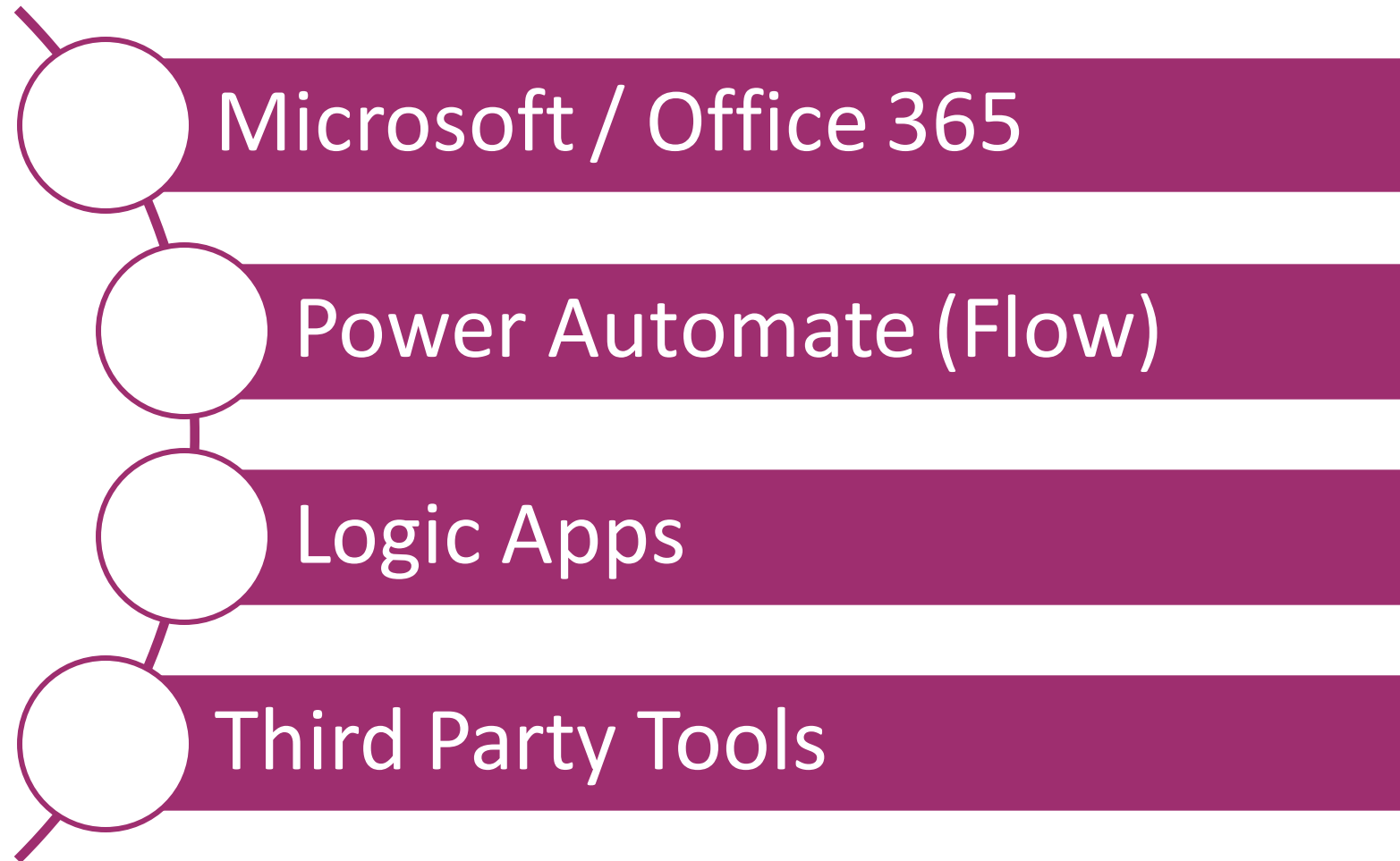
<https://azure.microsoft.com/en-ca/services/automation>











Leave Request Architecture



Demo

Technology Choices




































<p>Looking for more? See options for:</p> <p>Education</p> <p>Government</p> <p>Nonprofit</p> <p>Frontline workers</p> <p>Microsoft 365 for Enterprise</p> <p>Technical and Billing Support for administrators</p> <p>✓ Partially included ✓ Included</p> <p>⌵ Expand all</p>	<p>Microsoft 365 Apps for enterprise</p> <p>The enterprise edition of the Office apps plus cloud-based file storage and sharing. Business email not included¹.</p> <p>CAD \$16.00 user/month (annual commitment) Plus applicable tax</p> <p>Buy now Learn more ></p>	<p>Office 365 E1</p> <p>Business services such as email, file storage and sharing, Office for the web, meetings and IM, and more. Office apps not included¹.</p> <p>CAD \$10.20 user/month (annual commitment) Plus applicable tax</p> <p>Buy now Learn more ></p>	<p>Office 365 E3</p> <p>All the features included in Microsoft 365 Apps for enterprise and Office 365 E1 plus security and compliance¹.</p> <p>CAD \$26.60 user/month (annual commitment) Plus applicable tax</p> <p>Buy now Try for free > Learn more ></p>	<p>Office 365 E5</p> <p>All the features of Office 365 E3 plus advanced security, analytics, and voice capabilities¹.</p> <p>CAD \$46.60 user/month (annual commitment) Plus applicable tax</p> <p>Buy now Try for free > Contact sales > Learn more ></p>
<p>+ Office apps</p> <p>Unleash your best ideas, get things done, and stay connected on the go.</p> <p>     </p> <p>PowerPoint Word Excel OneNote</p> <p>  </p> <p>Access (PC only)</p>	✓	✓	✓	✓
<p>+ Email and calendar</p> <p>Connect and stay organized with business class email, calendaring, and contacts all in one place.</p> <p>   </p> <p>Outlook Exchange</p>	✓	✓	✓	✓
<p>+ Meetings and voice</p> <p>Deliver elevated meeting experiences with sophisticated call functionality and a central hub for meetings, chat, content, and calling.</p> <p>  </p> <p>Teams</p>	✓	✓	✓	✓
<p>+ Social and intranet</p> <p>Connect and engage across your organization with an intelligent, mobile intranet and enterprise social networking.</p> <p>   </p> <p>SharePoint Yammer</p>		✓	✓	✓










[Compare Microsoft 365 and Office 365 Enterprise Plans](#)

<p>Looking for more? See options for:</p> <p>Government</p> <p>Office 365 for Enterprise</p> <p>855-270-0615 Sales support for commercial products Available M-F 6:00 a.m. to 6:00 p.m. PST</p> <p>Contact us Technical and Billing Support for administrators</p> <p>✓ Partially included ✓ Included</p> <p>Expand all</p>	<p>Microsoft 365 E3</p> <p>Get best-in-class productivity apps combined with core security and compliance capabilities for your enterprise.</p> <p>CAD \$42.60 user/month (annual commitment) Plus applicable tax</p> <p>Contact sales Learn more ></p>	<p>Microsoft 365 E5</p> <p>Get best-in-class productivity apps and advanced security, compliance, voice and analytical capabilities for your enterprise.</p> <p>CAD \$73.00 user/month (annual commitment) Plus applicable tax</p> <p>Contact sales Learn more ></p>	<p>Microsoft 365 F3</p> <p>Formerly Microsoft 365 F1 Empower your frontline workforce with productivity apps and cloud services that allow them to do their best work.</p> <p>CAD \$10.20 user/month (annual commitment) Plus applicable tax</p> <p>Contact sales Learn more > See all frontline plans ></p>
<p>+ Microsoft 365 Apps</p> <p>Unleash your best ideas, get things done, and stay connected on the go.</p> <p>PowerPoint Word Excel OneNote Publisher (PC only)</p> <p>Access (PC only)</p>	✓	✓	✓
<p>+ Email and calendar</p> <p>Connect, stay organized, and manage your time with business-class email, calendaring, and contacts all in one place.</p> <p>Outlook Exchange Bookings</p>	✓	✓	✓
<p>+ Meetings and voice</p> <p>Deliver elevated meeting experiences with sophisticated call functionality and a central hub for meetings, chat, content, and calling.</p> <p>Teams</p>	✓	✓	✓
<p>+ Social and intranet</p> <p>Connect and engage across your organization with an intelligent, mobile intranet and enterprise social networking.</p> <p>SharePoint Yammer</p>	✓	✓	✓

[Enterprise Software | Compare Microsoft 365 E3, E5 & F3](#)

Microsoft 365 Business Basic	Microsoft 365 Business Standard	Microsoft 365 Business Premium	Only includes apps Microsoft 365 Apps
CAD \$6.40 user/month (annual commitment) Plus applicable tax	CAD \$16.00 user/month (annual commitment) Plus applicable tax	CAD \$25.60 user/month (annual commitment) Plus applicable tax	CAD \$11.00 user/month (annual commitment) Plus applicable tax
Buy now	Buy now	Buy now	Buy now
Or try free for 1 month ⁴	Or try free for 1 month ⁴	Or try free for 1 month ⁴	Or try free for 1 month ⁴
Best for businesses that need easy remote solutions, with Microsoft Teams, secure cloud storage, and Office Online (desktop versions not included).	Best for businesses that need full remote work and collaboration tools including Microsoft Teams, secure cloud storage, business email, and premium Office applications across devices.	Best for businesses that require secure, remote work solutions with everything included in Business Standard, plus advanced cyberthreat protection and device management.	Best for businesses that need Office apps across devices and cloud file storage. Business email and Microsoft Teams not included.
Premium Office apps included	Premium Office apps included	Premium Office apps included	Premium Office apps included
Web and mobile versions of Word, Excel, and PowerPoint included. ³	    Outlook Word Excel PowerPoint   Publisher (PC only) Access (PC only)	    Outlook Word Excel PowerPoint   Publisher (PC only) Access (PC only)	    Outlook Word Excel PowerPoint   Publisher (PC only) Access (PC only)
Secure cloud services included	Secure cloud services included	Secure cloud services included	Secure cloud services included
    Teams Exchange OneDrive SharePoint	    Teams Exchange OneDrive SharePoint	    Teams Exchange OneDrive SharePoint   Intune Azure Information Protection	 OneDrive

[Compare Microsoft 365 Business Plans, formerly Office 365](#)

Technical and Billing Support for administrators	Microsoft 365 F1 Lay the foundation for secure communication. CAD \$2.90 user/month (annual commitment) Plus applicable tax Contact sales Learn more >	Microsoft 365 F3 Drive productivity and collaboration. CAD \$10.20 user/month (annual commitment) Plus applicable tax Contact sales Learn more >	Office 365 F3 Engage your workforce. CAD \$5.10 user/month (annual commitment) Plus applicable tax Buy now Learn more > Try for free >
✓ Partially included ✓ Included + Expand all			
+ Office apps Get things done and stay connected to the organization.     PowerPoint Word Excel OneNote	✓	✓	✓
+ Email and Calendar Connect and stay organized with business-class email, calendaring, and contacts all in one place.   Exchange Outlook		✓	✓
+ Meetings and voice Deliver purpose-built experiences for frontline workers with one integrated hub for productivity, collaboration, and communication—including Walkie Talkie, Task Management, and Shift Management.  Teams	✓	✓	✓
+ Social and intranet Connect and engage across your organization with an intelligent, mobile intranet and enterprise social networking.   SharePoint Yammer	✓	✓	✓

[Microsoft 365 for Frontline Workers | Frontline Worker Tools](#)

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

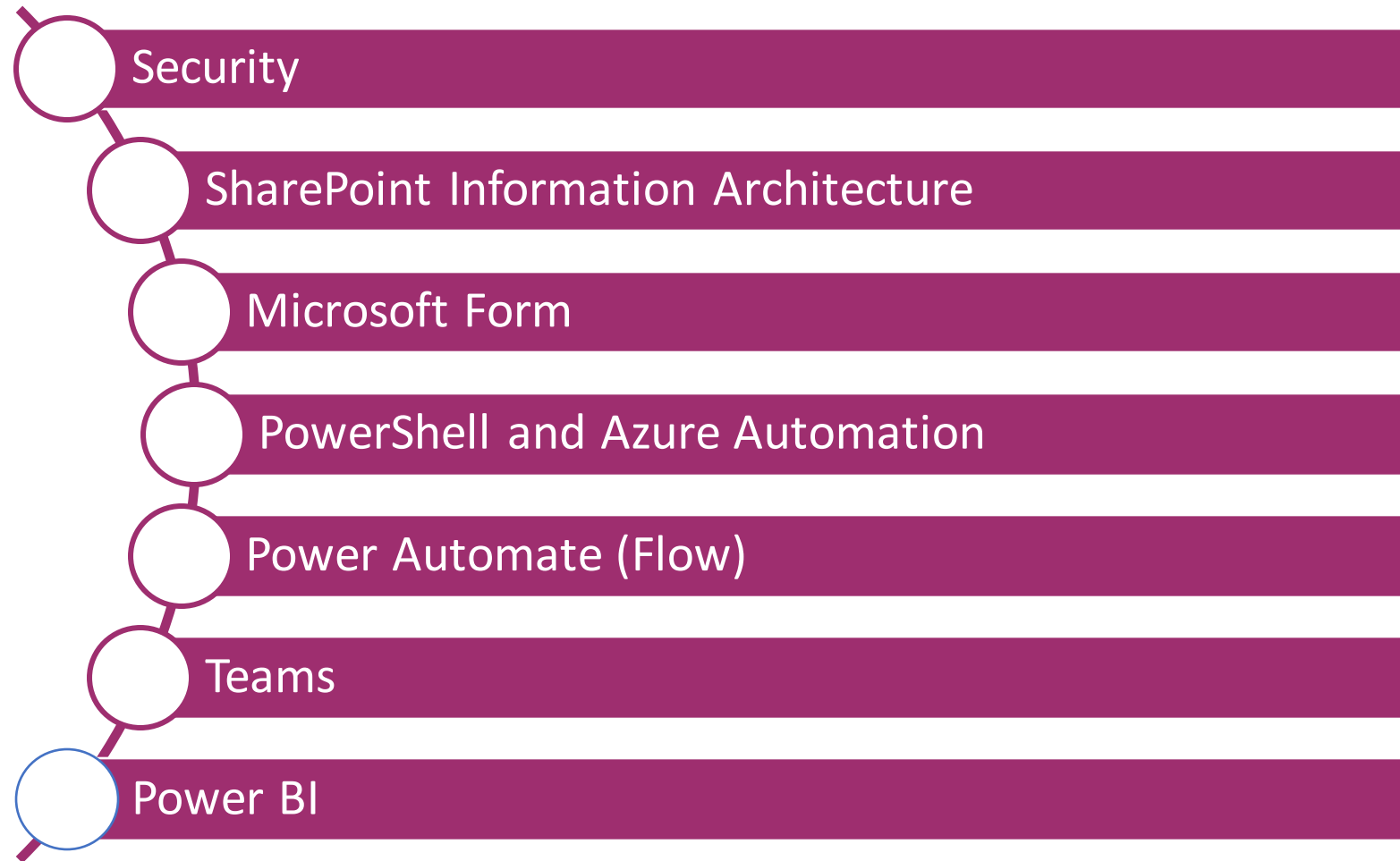
Azure Logic Apps

- 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

Technical Deep Dive

Technologies Used

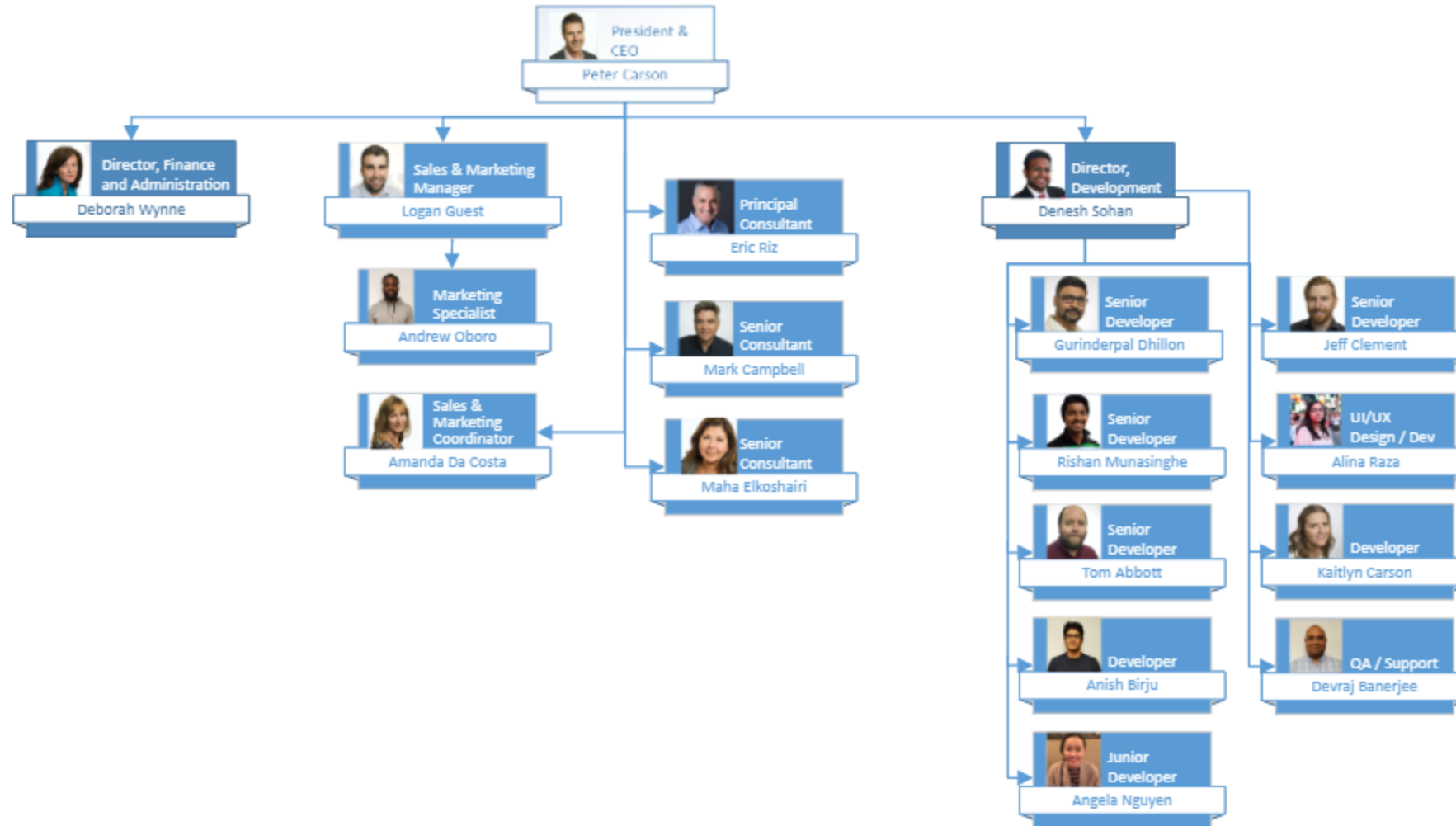


Security Considerations

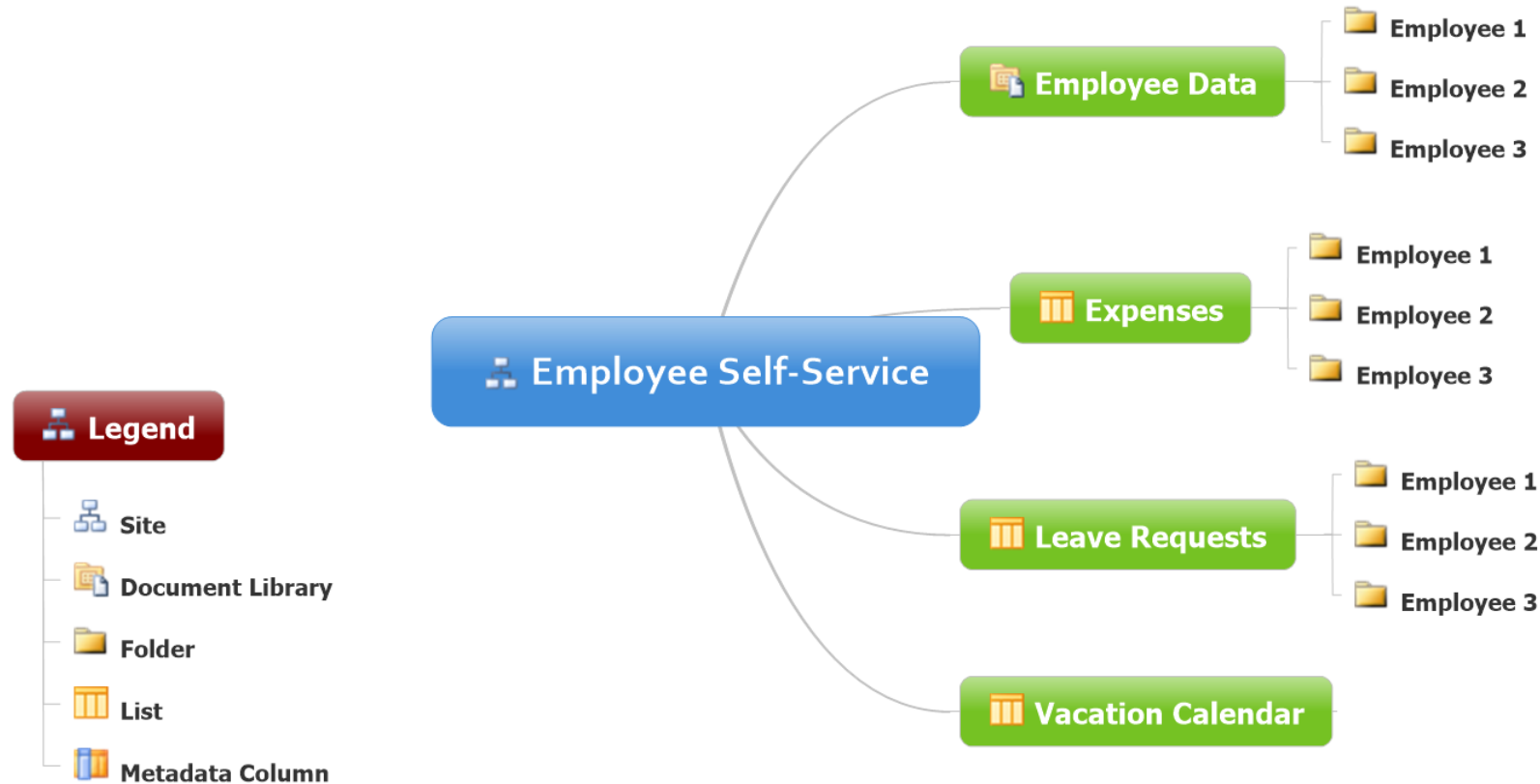
- **Don't do Security through Obscurity**
 - Properly secure your solution
- **Leverage Azure Active Directory**
 - Permissions
 - Manager reporting structure
- **Staff need to see their own requests**
 - Folders for each staff member
 - Permissions granted to them

- **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**

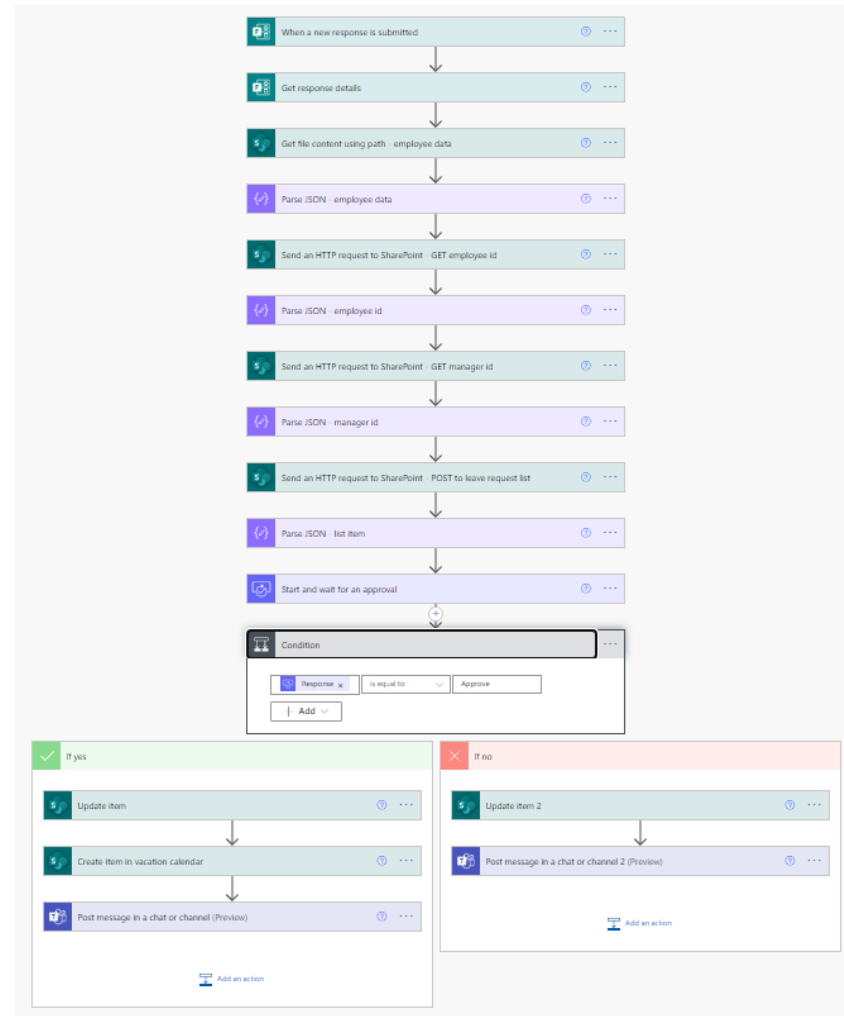
Org Chart



Information Architecture

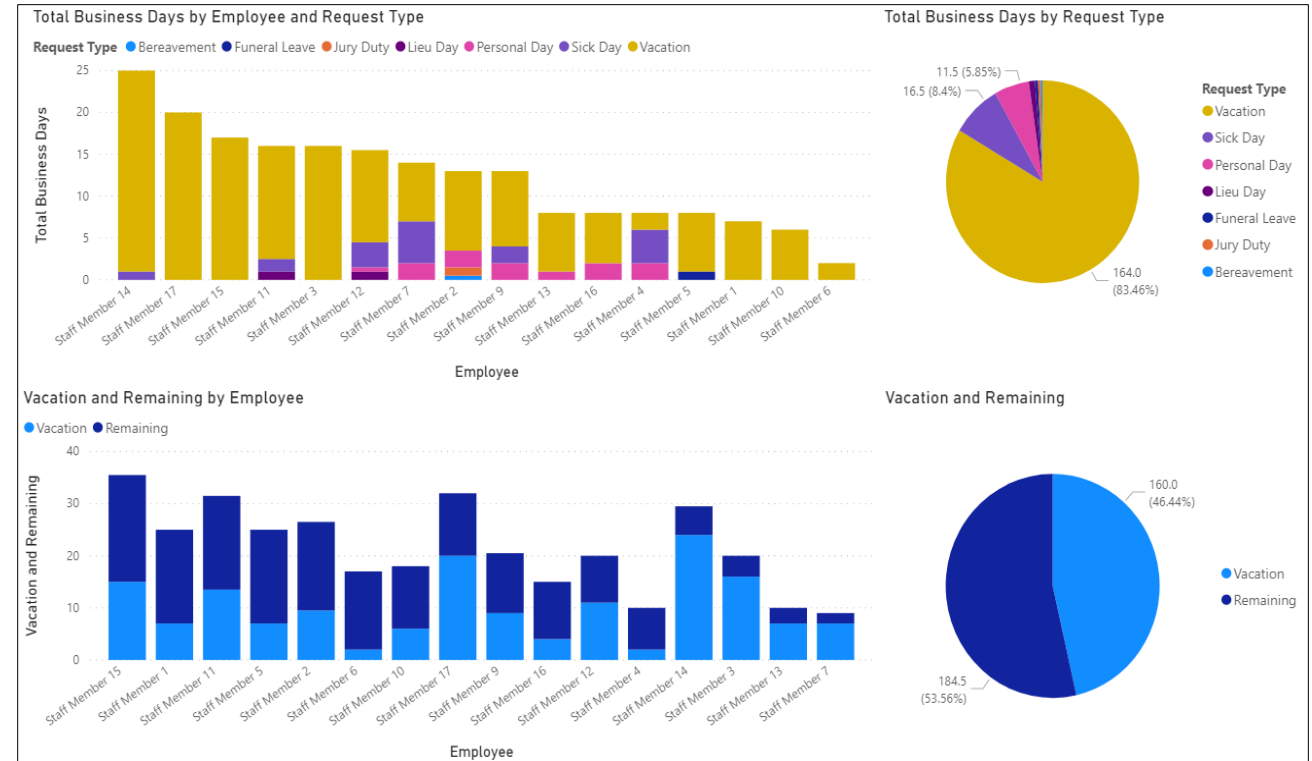


Power Automate (Flow)



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 Forms and Workflows Webinar



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?

