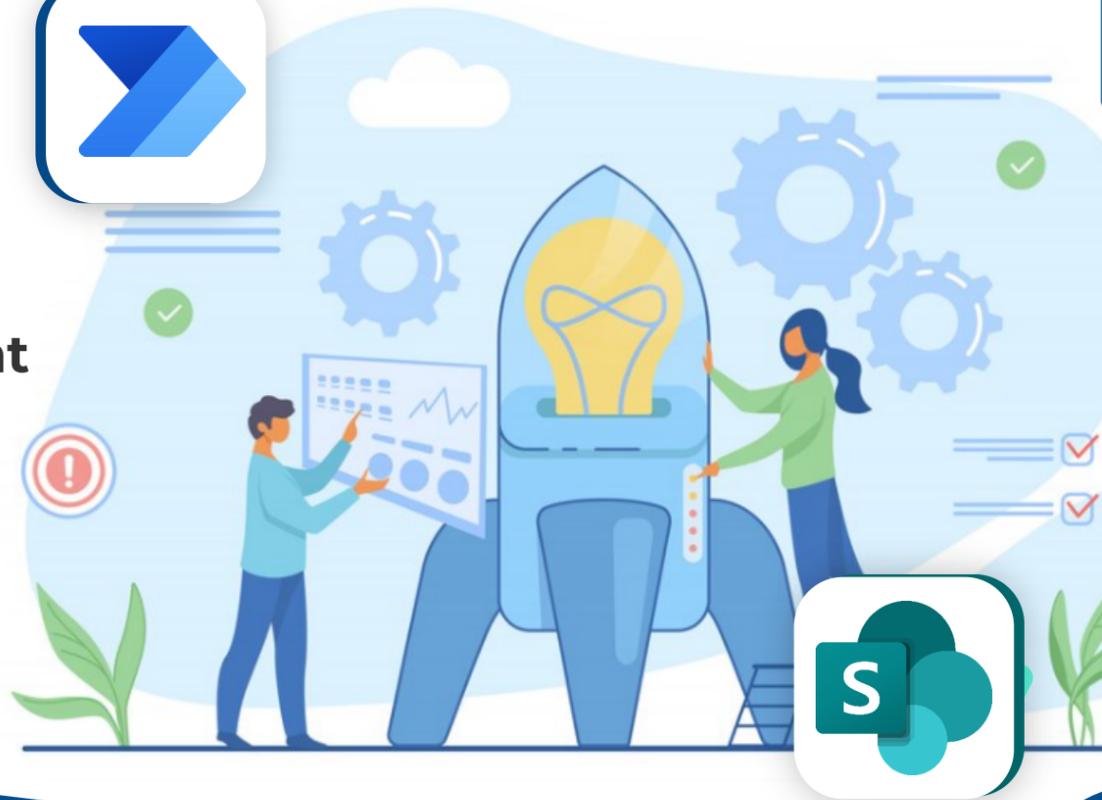




Transforming
Approval Management with
**Power Automate & SharePoint
Online**



Overview

Beyond Key, a Microsoft Partner organization renowned for delivering tailored consulting services, collaborated with a leading organization to enhance their employee onboarding and vacancy management processes. This partnership resulted in a bespoke solution that redefined approval management through innovative customization and automation.

Business Scenario

The organization was facing challenges with outdated manual processes for employee onboarding and vacancy management, including tasks like advertising open positions, reclassifying roles, and requesting new hires. The lack of an efficient approval system caused slowdowns and inefficiencies due to the need for multiple stakeholder approvals.

Before Process

Before implementing the new system, the organization relied on a platform that lacked control over the approval process. Limited functionality made managing complex approvals difficult, resulting in bottlenecks and reduced transparency. Stakeholders had minimal visibility into the process, hindering communication and accountability.



Ideal Platform for Configurable Approval Management

The combination of SharePoint and Power Platform makes it an ideal choice for implementing configurable approval management systems. Here's why:

Scalability and Flexibility:

SharePoint's robust infrastructure allows for seamless scalability, accommodating growing organizational needs. Power Platform's flexibility enables dynamic customization and configuration, empowering users to adapt processes quickly.



Seamless Integration:

The integration capabilities of SharePoint and Power Automate ensure smooth interactions between different components, enabling automated workflows and efficient data exchange.



User-Centric Design:

The platforms provide intuitive and user-friendly interfaces that simplify form creation, approval configuration, and process management, reducing the learning curve for users.



Cost-Effective Solution:

Leveraging existing Microsoft technologies minimizes additional costs while maximizing the value of investments in the Microsoft ecosystem.



Solution

Beyond Key delivered a cutting-edge solution centered around a customizable approval management system, transforming the organization's processes with unprecedented flexibility and control:

- **Custom Approval Management Configuration:** The solution's unique ability empowers the organization's team to define, configure, and manage approval stages easily. Key features include:
 - **Dynamic Stage Configuration:** Users can effortlessly create, modify, and manage approval stages. Each stage can be activated or deactivated, allowing the organization to adapt quickly to changing needs.
 - **Role-Based Approver Assignment:** For each approval stage, an admin can specify whether decisions should be made by a single individual or multiple approvers, ensuring the right stakeholders are involved at every stage.
 - **Multi-Level Approvals:** The system supports multi-level approval processes, where stages can be marked complete only after all designated approvers have given their consent.
 - **Intuitive Interface:** Developed using SPFx (SharePoint Framework), the interface is user-friendly, providing seamless navigation and configuration for users.
- **Automated Workflow Integration:** Leveraging Power Automate, the solution automates approval workflows and sends real-time email notifications, keeping all stakeholders informed and engaged.
- **Efficient Data Management:** SharePoint lists serve as a robust backend, ensuring secure data storage and easy retrieval.

Sample Screenshots

Employee Action Form Configuration

● Manager (1) ● Finance Approval (2) ● Account (3) ● HR Approval (4) [Add new stage](#)

Stage name

Stage order

Decision type
 Single Multiple

Is this stage active?
 Yes No

Stage detail

Approver managers
 Anita Panwar
 test

[Edit this stage](#) [Delete this stage](#)

Personnel Action

Note: Your form submission may go into an approval process upon submission. You can view the status of your form submission from the application home page

Action *
 New Hire Promotion/Transfer, In-Range or Market Adjustment Separation

Employee first name *
Employee last name *
Submission date

Effective date *
Submitting department *
Submitted by

Select date this action is to or has taken place. If "New Hire", this date must be a Monday, Tuesday or ...

New Hire

Has this person worked for the city before?
 Yes No

Position type
 Permanent Full Time Permanent Part Time Seasonal Temporary Termed

Position number (example: P1012.01)
Position title *
Supervisor employee will report to *

Employee's default expense code *
Should Be: Fund.Cost Center.Program.55199 (always default to 55199 for object code) Example for Finance Position: 001.117.10010.55199

Quick intro blurb for announcement *

Remaining candidates have been updated to Reviewed - Not selected?
 Yes No

IT Section

Employee location
Specific computer they will be using by name, e.g. CLK-*
Name of a Current Employee with similar job to the new user's job (in the same department)

Is this user a supervisor? *
 Yes No

Will this user be actively accessing network computers and email? *
 Yes No

Will this user's job involve handling Credit Cards? *
 Yes No

Requester's phone
Select all required
List any shared SMB mailboxes

In case we need to contact you for further information. Any users requesting Laserfiche access, must fill out [this form](#)

Will a new or existing desktop phone number be used?
 Existing New

Does this user need a new desktop phone?
 Yes No

Is the existing number personal or shared?
 Personal Shared

What existing desktop phone number will be assigned?
What cell phone number will this person inherit? (if applicable)
Any additional special IT related needs and/or comments

For any new equipment or software, please fill out a [New Equipment Form](#) This would be for Remote Access, PC, Desk Phone, Smart Phone, iPad, Tablet

HR Section

Job type
Workers comp code

[Submit](#) [Cancel](#)

Impact and Benefits

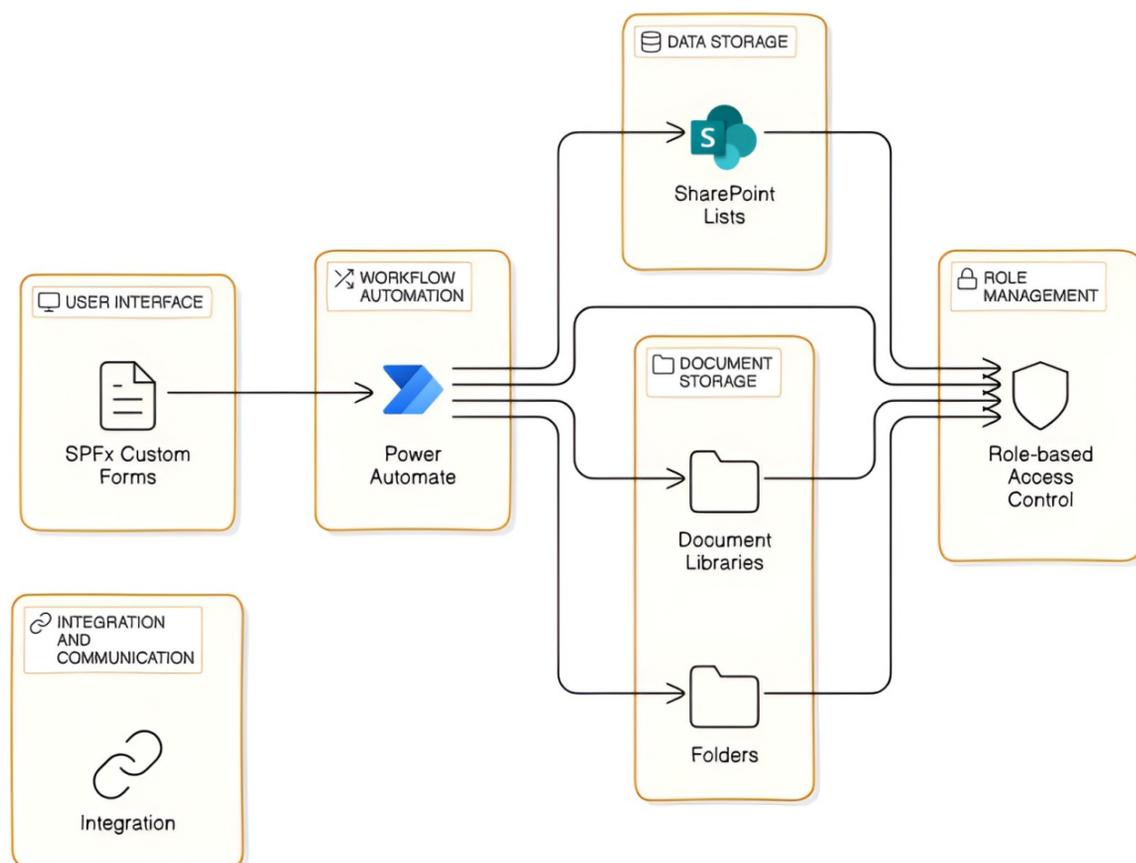
The implementation of the new system brought significant benefits to the organization:

- Increased Efficiency:** The automation of workflows reduced processing time and minimized bottlenecks, leading to faster approvals and improved turnaround times.
- Enhanced Visibility and Control:** Stakeholders gained real-time visibility into the status of requests, improving accountability and transparency across the organization.
- Scalability and Flexibility:** The role-based forms and customizable approval levels provide the flexibility to adapt to changing needs without requiring extensive reconfiguration.
- Error Reduction:** Automation minimized human errors associated with manual data entry and tracking.
- Improved Communication:** Automated notifications ensured timely communication between stakeholders, enhancing collaboration and coordination.

Solution Architecture

The solution architecture for the onboarding and vacancy management system includes:

- User Interface:** SPFx-based custom forms providing an intuitive and responsive user experience.
- Workflow Automation:** Power Automate for orchestrating complex approval workflows and sending automated email notifications.
- Data Storage:** SharePoint lists used for storing and managing form data, ensuring security and scalability.
- Role Management:** Role-based access controls to ensure stakeholders see only relevant information, enhancing data security and privacy.
- Document Storage:** Utilize document libraries and folders to organize documents related to each form. Role-based access control is implemented to ensure that only authorized users can access these documents.



This collaboration between Beyond Key and the organization has set a new standard for efficiency and innovation in approval management, empowering the organization to streamline its operations and better serve its internal stakeholders.