



— MICROSOFT 365

AUTOMATING HR PROCESSES

LIMITLESS POSSIBILITIES



Unlock the power of Microsoft 365

Microsoft 365 is used by a huge number of businesses around the world every day, including 330,000 in the UK alone. It's the top choice for business apps, with a 90% share of the productivity suite market. But, despite its popularity, very few of those companies use it to its full potential. At So365, we're on a mission to share the limitless possibilities of Microsoft 365, helping businesses become more efficient, productive, secure, and profitable.

In this guide, we've highlighted just a few ways Microsoft 365 helps HR departments automate their HR processes.

Transform your business with Microsoft 365



Centralised: Improved control and efficiency



Secure: Industry-leading cloud security



Compliant: Exceptional data privacy control and protection



Lifetime value: A future proof investment built to your requirements



Minimal risk: Reliable, accessible, always available



Engagement and productivity: Unrivalled employee experience

Microsoft 365 provides almost limitless possibilities for the automation of your HR processes, offering you greater efficiency, better record keeping, and an easier and more streamlined experience for your employees.

Using tools included in a standard Microsoft 365 license, such as SharePoint, Power Automate and Power Apps, you can create your own workflows and apps that will automate any number of your HR processes.

Power Automate and Power Apps

Power Automate helps HR teams automate workflows with pre-built templates or custom workflows, integrating various Microsoft 365 apps and services.

Power Apps is a low-code platform for HR teams to create custom applications to automate HR processes, with features such as SharePoint integration and customisable user interface and functionality.



EXAMPLE USE CASES

We've picked some example use cases here to show you what's possible when you really start to use the technology that you already have at your fingertips.

Track holiday and other time off

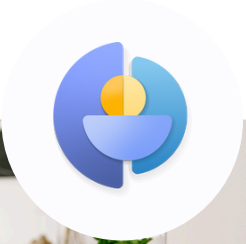
Create browser and mobile apps to allow employees to view their holiday balances, request holiday and other time-off, and track their requests submitted to managers for approval.



A screenshot of a web application interface titled "My absences". The interface is divided into several sections. On the left is a navigation sidebar with icons for Home, Profile, Calendar, Absence, Expenses, Develop, Flex, and Directory. The main content area is titled "Absence wall" and lists several absences with details like "Holiday", "Absence", and "Sickness", including dates and hours/days. To the right, there are two summary cards: "Current period balance" showing 179.16 hours remaining out of 184.16, and "Next period balance" showing 168 hours remaining out of 168. Below these is a table of "Upcoming holiday" requests, each marked as "Pending Approval" with start and end dates and hours. At the bottom, there is a section for "Prior holiday". A blue plus icon is visible in the bottom right corner of the dashboard.



EXAMPLE USE CASES



Track Sickness

Manage sickness across your organisation with apps to record and track sickness absence. Show a summary of individuals currently off sick, with metrics and sickness history. Build in alerts for triggered milestones like Statutory Sick Pay.

Employee details

Alex Wilber
Employee No. 000202
AlexW@wyhbf.onmicrosoft.com

Last 12 months

Sick qualifying days	11.5
Sickness occurrences	3
Other time-off	2

Holiday balances

Current year	18.40
Next year	0.00
Previous year	2.50

Sickness

First day out	Last day sick	Reason	Qualifying days	Status
25/03/2024	26/03/2024	Anxiety/stress/depression/ psychiatric illness	7.50	Closed
26/02/2024	27/02/2024	Back problems	2.00	Cancelled
08/01/2024	09/01/2024	Back problems	2.00	Closed

Status
Open

First day out
Thu, Apr 11, 2024

Last day sick
Fri, Apr 12, 2024

Reason
Anxiety/stress/depression/ psychiatric illness

Notes



EXAMPLE USE CASES

Track Expenses

Provide employees with simple apps to submit and track their expenses, including itemised receipts and the use of vehicles and mileage claims. Build your own approval process for managers or finance to approve expenses and give everyone their own dashboards to keep on top of open expenses.



So365 Contoso My approvals

Review / Approval wall

- Expense Pending Approval
Alex Wilber
Submitted: 2024-02-15
VALUE
29.75
- Flex
Pradeep Gupta
Submitted: 01/03/2024
HOURS
1
- Holiday Pending Approval
Christopher Kaye
First day out: 10/06/2024
Lastday out: 11/06/2024
HOURS
1
- Holiday Pending Approval
Christopher Kaye
First day out: 19/06/2024
Lastday out: 20/06/2024
HOURS
2
- Holiday Pending Approval
Christopher Kaye
First day out: 20/11/2024
Lastday out: 21/11/2024
HOURS
2

Selected request: Expense for Alex Wilber

View receipts Decision

Total value
Expense period
01/01/2024 - 31/01/2024
£29.75

Total mileage
Expense period
01/01/2024 - 31/01/2024
45.00

Total annual mileage progress
0 miles 12,000 miles
0

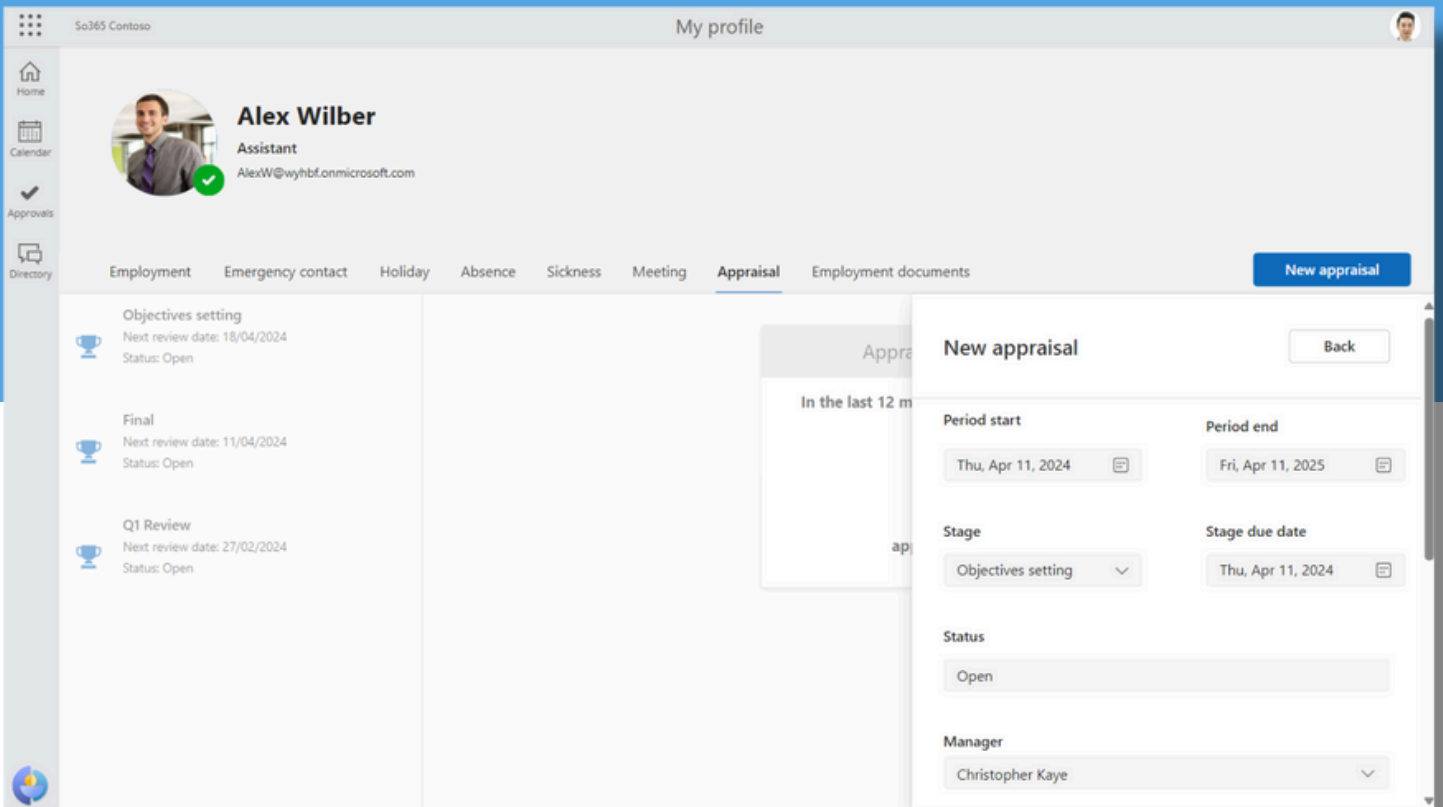
Description	Value	Expense category	Mileage
Return journey to ABC Co	£20.25	Personal Car Other	45
Coffee and tea for office	£9.50	Expense VAT Exempt	0



EXAMPLE USE CASES

Appraisal Management

Create automation for your appraisal process, using your own appraisal forms, tracking the status of your own appraisal stages, such as objectives setting, interim and final appraisals. Connect employees with line managers during the process with dashboards and securely shared documents and forms.



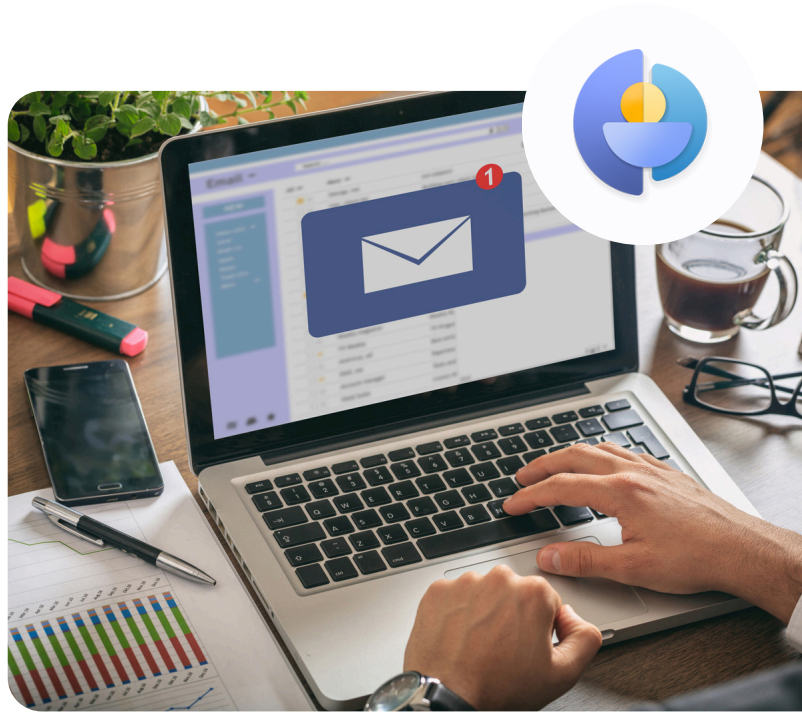
The screenshot displays a user profile for Alex Wilber, an Assistant, with the email AlexW@wyhbf.onmicrosoft.com. The profile includes a navigation menu on the left with options like Home, Calendar, Approvals, and Directory. The main content area shows a list of appraisal stages: Objectives setting (Next review date: 18/04/2024, Status: Open), Final (Next review date: 11/04/2024, Status: Open), and Q1 Review (Next review date: 27/02/2024, Status: Open). A 'New appraisal' form is open, showing fields for Period start (Thu, Apr 11, 2024), Period end (Fri, Apr 11, 2025), Stage (Objectives setting), Stage due date (Thu, Apr 11, 2024), Status (Open), and Manager (Christopher Kaye).



EXAMPLE USE CASES

One-to-one meetings

Give managers and HR the ability to create new one-to-one meetings with employees and team members and to track the detail and outcome of meetings. Make the details visible to employees in their own dashboards and automatically alert them of upcoming meetings they need to attend.

A screenshot of a web application interface for a user profile. The user is Alex Wilber, an Assistant, with email AlexW@wyhbf.onmicrosoft.com. The interface includes a navigation sidebar with Home, Calendar, Approvals, and Directory. The main content area has tabs for Employment, Emergency contact, Holiday, Absence, Sickness, Meeting, Appraisal, and Employment documents. A 'New meeting' button is in the top right. The 'Meeting' tab is active, showing a list of meetings: 'One to one' (Scheduled date: 20/02/2024, Status: Scheduled), 'Probation review' (Scheduled date: 25/01/2024, Status: Closed), and 'One to one' (Scheduled date: 14/11/2023, Status: Closed). A 'Meeting count' widget shows 'In the last 12 months they have had 3 meetings.'

Meeting Title	Scheduled Date	Status
One to one	20/02/2024	Scheduled
Probation review	25/01/2024	Closed
One to one	14/11/2023	Closed



EXAMPLE USE CASES



Track employee personal vehicle use

Make record keeping simple and compliant by enabling employees to maintain a list of the vehicles they use for business journeys that qualify for company expenses. Build an upload and tracking facility for documents required by the company, such as MOT and proof of insurance, and set alerts for expiry dates or missing documents.

So365 Contoso My profile

Christopher Kaye
Head of Finance
so365dev@wyhbf.onmicrosoft.com

Employment Personal **Vehicles**

GG12FBT - My Friendly Diesel (3) View documents

Add vehicle Add document Edit vehicle

Select vehicle

Document type

Expiry date

Attachments

Attach documents

Attach file

Registration date	Insurance	MOT	Vehicle status
Thu, Jun 18, 2015	Tue, Jun 17, 2025	Wed, Aug 30, 2023 MOT expired	Active
Wed, Jan 3, 2018	Wed, Dec 25, 2024	Select a date...	Inactive





All the benefits of Microsoft in one out-the-box HR Solution

SoHR leverages all the power of Microsoft 365 to create a fully customisable, out-the-box HR solution inside your Microsoft 365 environment.

The HR solution built for you in Microsoft 365



Designed with flexibility for your business

Unlike most HR systems, SoHR is fully customisable. It can be configured to meet your unique requirements, eliminating functionality that you don't need, and flexing and growing alongside your organisation.



Enhanced Employee Engagement

SoHR provides your employees with easy to use self-service tools and a modern compelling experience for accessing HR information, news and resources.



Fully integrated

To get the most out of your HR system, you need it to easily integrate with your other systems. SoHR is built within your Microsoft 365 environment meaning it integrates seamlessly with all your other Microsoft 365 apps.



Secure, private, accessible, and **owned by you**

HR systems should reduce risk, not increase it. Two of the biggest IT and operational risks to your organisation come from hosting your valuable and sensitive data with third parties, and from an over dependence on outside system providers who make it difficult to get your data back. With SoHR, your data will be stored securely in your Microsoft 365 environment - meaning you own the data, not a third party.



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