

Digitizing Forms and Workflows using Power Apps & Power Automate

The team at Artic worked with a publicly traded building supply company that was experiencing rapid growth and had internal processes that ran their sprawling North American operations. How the company is structured played a huge part into the efficiency of their processes: a headquarters staff in one location would track requests coming from across the company which needed to be approved by managers in branch locations and departments heads spread around the continent.

Legacy paper forms were used for employees to request and get approval to purchase physical equipment, vehicles, and other capital assets. When an employee needed to make a requisition, they would fill out the paper form, then would need to get signature approval from a branch manager, then from several department managers in sequence. For big ticket items, the form would also need to be signed by the organizations Chief Financial Officer (CFO).

As a result of this highly manual and geographically distributed process, it took days to make a simple request. If a manager or the CFO was out or unavailable, the process would grind to a halt. There had to be a better way.

After discussion with the company stakeholders, Artic Consulting suggested that the entire process be digitized by automating manual processes by creating an easy to use application. A new electronic version of the paper form could be quickly developed, and a customized workflow to route all the approvals and generate email-based notifications for all parties.

Artic Consulting's Business Management Services team organized discovery sessions by interviewing the procurement staff who owned and managed the process. Artic made sure to understand each piece of information and why it was captured on the form. We found ways to optimize and improve the layout of the form, and working with the company stakeholders, new elements that could be added to speed the actual procurement by the staff after approval.

We reviewed the new form version with an adhoc team of branch managers, department managers, and CFO's staff. Everybody was eager to use the new process.

The Artic team developed the solution using tools in the Microsoft Power Platform. The application itself was quickly created as a Power App and workflow completed using Power Automate. A prototype of the process was available *in less than 2 days*. Artic refined the email templates, created SharePoint lists to store form elements that used dropdown choices, and ensured that approvers had a simple-to-use experience to view all the submitted forms they needed to approve on a given day.

Artic's BMS team trained the company staff on how to manage the new resources, and the form was put into use by the company weeks after it was originally conceived. Now, the organizations procurements are 75% quicker due to automation, and managers able to approve from anywhere, on any device.