

UXBRIDGE HIGH SCHOOL'S ONLINE LEAVE REQUEST WORKFLOW SAVES TIME AND REDUCES ERRORS

UHS staff adopt online workflows that improve efficiency.

- Simple drag & drop design creates familiar, easy to use forms that users can embrace.
- Custom approval routing is easy with no coding needed.
- Delays and errors are eliminated by using web-based workflows.

Customer Profile: Uxbridge High School (UHS) in the UK prides itself on Uxbridge being a school of choice where through outstanding teaching, inspirational opportunities, and exceptional learning they open minds and develop unique individuals. They switched to **frevvo** after being disappointed by other online form options. UHS chose frevvo because Live Forms' dynamic workflow routing can mirror and streamline their previously paper-based processes, so users can quickly adopt the online forms.

Business Situation: UHS uses frevvo for many form and workflow solutions including expense reports, visit proposals, stationery order forms and staff leave requests. Previously, leave requests were completed on paper forms which took a long time to make their way through approvers and could even get lost, resulting in delays and frustration.

Solution Summary: Using **frevvo** Live Forms, UHS designed a form with a familiar look and feel to the paper form, but even simpler to use. The form conditionally shows and hides sections based on the type of leave entered, making it easier to complete than paper forms because the user only sees the relevant fields. The form automatically calculates the number of leave days and guides the user to input coverage arrangements accordingly.

Dynamic workflow routing sends the form to the user's supervisor based on their department and position. An email alerts the Principal to decide if the leave is paid or unpaid. The Leave Request conditionally routes to Finance for unpaid leave so they can adjust payroll but skips this step if it is not needed. Finally, the workflow is sent back to the HR Department for submission and record keeping.

Key Features:

1. Automatically populates logged in user's details so there is less information to type in.
2. Visual Rule Builder conditionally shows and hides fields or sections based on user input - no coding needed!
3. Workflows dynamically route to approvers based on the user's position and department.
4. Preconditions allow the workflow to skip steps based on criteria determined at runtime.

Benefits:

1. The Visual Rule Builder makes it easy to customize workflow behavior without being a JavaScript expert.
2. Digital workflows are completed much faster and with fewer errors than their paper-based counterparts.
3. Access beautiful forms and workflows through a single portal, making them easy for users to adopt.

This Leave Request process once took a week or more but can now be approved in hours with **frevvo** Live Forms. Once the UHS team saw that **frevvo** could handle their most complex forms, they wanted all of their forms online. They plan to start incorporating steps that can be performed by anonymous users - for example, in their Visit Proposal (similar to field trip) workflow they will add a step for parents to give their consent for student participation that will include a link to submit payment for the trip.

"It saves a lot of time; this is one thing I can't stress enough. It's a piece of cake - our users log in and can access all of their forms in one place."

Imran Akram
ICT & Media Coordinator