Employee Undertaking App

**Introduction**

Mercedes Benz India provides company cars to its Level 4 (L4) managers as part of the employee benefits package. To facilitate the smooth functioning of this benefit, the organization allocates a dedicated budget to these managers to cover the salaries of their designated drivers. This ensures that managers have reliable personal transportation supported by assigned drivers.

Currently, the process of managing driver salary payments is carried out through the SAP Enterprise Portal (SAP EP). Each quarter, L4 managers are required to submit detailed information regarding their drivers, including salary and other relevant data, through the SAP EP system. Upon receipt of these submissions, the Human Resources (HR) department reviews the driver details and performs the necessary approval or rejection actions via the SAP EP HR Catalyst module. This process, while functional, involves multiple steps and relies heavily on the SAP EP ecosystem, which can sometimes be complex and less flexible for end users.

To improve the efficiency and user experience of this process, Mercedes Benz India aims to migrate the driver salary management workflow from SAP EP to Microsoft Power Apps. This transition is expected to offer a more intuitive, streamlined platform that allows both L4 managers and HR personnel to manage submissions and approvals with greater ease. Power Apps will enable automation, better tracking, and faster turnaround times, ultimately reducing manual efforts and minimizing errors. The move aligns with the organization’s broader digital transformation goals, focusing on leveraging modern, low-code platforms to enhance business operations and employee satisfaction.

**Tools Used**

* Microsoft Power Platform
* Power Apps
* Power Automate
* Excel Database
* SharePoint Site

**App Interface**

**Home Page**

The Home Screen serves as the landing page of the application, featuring two primary buttons:

* Employee Login
* HR Login

When a user clicks the Employee Login button, the app navigates to the Employee Login Page, where employees can enter their credentials and access driver undertaking form.

Similarly, clicking the HR Login button directs the user to the HR Login Page, allowing HR staff to authenticate and access HR verification page.

This design ensures clear user segmentation and provides tailored user experiences for both employees and HR users through dedicated login portals.

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**Employee Login Page**

The Employee Login Page is designed to restrict access to authorized users only. Employees are required to enter their Ticket Number in a Text Input Field provided on the screen.

The page includes the following elements:

* **Ticket Number Input Field:**  
  Allows the employee to enter their unique ticket number.
* **Login Button:**  
  Upon clicking the Login button, the app validates the entered ticket number against an internal list of users.
  + If the ticket number is valid and access is granted, the employee is navigated to the Driver Undertaking Form screen.

A login screen with a number and a number

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* + If the ticket number is not recognized or access is denied, an error message is displayed:  
    *“****You do not have access to this application****.”*

A login screen with a number and a number

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* **Help Button:**  
  This provides access to the User Manual, allowing users to view instructions or troubleshooting information related to the login process and app usage.

This approach ensures that only authorized employees can access the subsequent features of the application while offering support resources for login assistance.

**Driver Undertaking Form Page**

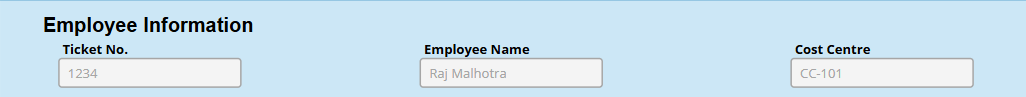
Upon successful login, the employee is navigated to the Driver Undertaking Form Page. This screen is divided into two key sections: **Employee Information** and **Driver Information**.

**1. Employee Information (Auto-Filled & Read-Only)**

As soon as the employee logs in, the following details are auto populated based on the entered Ticket Number:

* Ticket Number
* Employee Name
* Cost Centre

These details are displayed in read-only text boxes to prevent modification by the user.



**2. Driver Information (User Input Required)**

The second section captures the driver's details and includes the following fields:

* Period From *(Text box) –* from what date is the driver required.
* Period To *(Text box) –* till what date is the driver required.
* Driver Name *(Text box)*
* Driver Contact Number *(Text box)*
* Driver License Number *(Text box)*
* Driver License Validity Date *(Date picker)*

Additionally, the screen includes three checkboxes, each representing one month of the current quarter (e.g., April, May, June).

* The checkboxes control the "Period From" and "Period To" fields. The period from and period to cannot be manually input, they can only be input by selecting the months.

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**3. Button Logic**

* After all required fields are filled in, the user clicks the **Save** button.
  + Upon saving:
    - All text fields and checkboxes become **non-editable** (read-only).
    - A **summary table** is displayed below, showing all entered data for user verification.
    - The **Submit** button becomes **visible**.

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* If any corrections are needed:
  + The user can click the **Edit** button.
    - This makes all fields and checkboxes **editable** again.
    - The **Submit** button is **hidden** until **Save** is clicked again.

A screenshot of a computer screen

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* Once the user is satisfied with the data and clicks **Submit**:
  + The form data is **finalized and sent to the HR department**.
  + The entry is saved to the employee’s record.

After all required fields are filled in, the user can click the **Preview** button at any time to view an **Undertaking Letter**.

* This letter formats and displays all the employee and driver details in a formal document style, providing a clear overview of the information before saving or submitting.

At the bottom of the screen, a **List of Undertaings table** displays all previously submitted undertakings by the logged-in employee. Key features:

* Entries are listed in **reverse chronological order**-the **most recent submission appears at the top**.
* Includes the current submission immediately after it's submitted.
* Helps users track and review all their previous declarations.

A screenshot of a list of information

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The below image shows the entire driver undertaking form page when data is saved.

A screenshot of a computer

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Once submitted, the user will be navigated back to the home screen, or they can do so manually by clicking the back button.

**HR Login Page**

The **HR Login Page** is designed to authenticate HR personnel before granting access to HR-Verification Page. The page includes the following components:

* **User ID Text Field:**  
  Allows the HR user to enter their unique User ID.
* **Password Text Field:**  
  Allows the HR user to enter their password securely.
* **Login Button:**  
  After entering credentials, clicking the **Login** button initiates the authentication process.

A login screen with a blue and white text

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* **Error Handling:**
  + If the **User ID** entered is not recognized or the user does not have access, an error message is displayed:  
    *“****You do not have access to this application****”*

A screenshot of a login screen

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* + If the **Password** is incorrect, the message *“****Incorrect password****”* is shown.

A login screen with a blue and white text

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* **Successful Login:**  
  Upon entering correct credentials, the HR user is navigated to the **HR Verification Page** for further processing.
* **Help Button:**  
  Provides access to the **User Manual** to assist HR users with login or app usage instructions.

**HR Verification Page**

The **HR Verification Page** serves as the primary interface for HR personnel to review, verify, and take appropriate actions on driver undertaking submissions made by employees. The page is thoughtfully organized into two main sections: the **Search and Filter Section** at the top, and the **Submission Review Gallery** below.

**1. Search and Filter Section**

At the top of the page, HR users are presented with a **search bar** and multiple filter options to efficiently locate specific submissions from the dataset. This section includes the following fields:

* **Ticket Number**: Allows input of an employee’s unique ticket number.
* **Employee Name**: Filters submissions by the employee’s full or partial name.
* **Cost Centre**: Filters entries according to the employee’s associated cost centre.
* **Submission Date Interval**: Enables HR to specify a date range to find undertakings submitted within particular dates.

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**Search Functionality:**

* HR users can populate **any combination** of these fields; filling all is not mandatory.
* Upon clicking the **Search** button, the system filters the dataset accordingly and displays only the matching records in the gallery below.

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* The **Clear** button resets all search fields to blank, removing all filters, and reloads the entire dataset for full visibility.

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**Export Feature:**

* An **Export to Excel** button allows HR users to export all currently visible data in the gallery to an Excel spreadsheet.
* This functionality supports offline analysis, record-keeping, and sharing with other stakeholders.

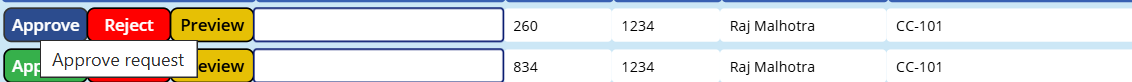
**2. Submission Review Gallery**

Beneath the search section is a **vertical gallery** that dynamically displays the filtered (or full) list of driver undertaking submissions. Each entry in the gallery contains several **read-only fields** that provide detailed submission information:

* Ticket Number
* Employee Name
* Cost Centre
* Period From
* Period To
* Driver Name
* Driver Contact Number
* License Number
* License Validity Date
* Submission Date
* HR Status
* HR Status Date

In addition to these, each submission row includes **four interactive action buttons** that enable HR to efficiently manage each undertaking:

* **Approve Button:**  
  Clicking this button approves the employee’s submission. The approval action triggers an **automated email notification** to the employee, informing them that their undertaking has been accepted and processed by HR.



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* **Reject Button:**  
  If HR determines that the submission is invalid or requires correction, they can reject it by clicking the Reject button. This prompts HR to **enter a reason for rejection** in a required text field. After submission of the rejection, an **email is automatically sent** to the employee, including the reason for rejection and any necessary instructions or next steps.
* **Reason Input for Rejection:**  
  When rejecting, the input for the rejection reason ensures clear communication with the employee and maintains a record of the rationale behind the decision.



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* **Preview Button:**  
  This button opens a **PDF version of the Undertaking Letter**, displaying all relevant employee and driver information formatted as an official document. The preview helps HR thoroughly review the submission details before making approval or rejection decisions.

**Process Flow and Notifications**

* The page ensures that all actions taken by HR (approval or rejection) are immediately communicated to the employee via **automated email notifications**, fostering transparency and timely feedback.
* Each submission’s status is updated in real-time on the gallery, allowing HR to track progress efficiently.
* The filtering, preview, and export features provide HR with robust tools to manage a potentially large volume of submissions with accuracy and ease.

The below image shows the HR Verification page.

A screenshot of a computer

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Clicking the Ok button takes the user to home page.

This Driver Undertaking Application provides a secure and efficient way for employees to submit driver details and for HR to verify and manage submissions. With dedicated login portals, automated workflows, and real-time status updates, the app ensures a smooth and transparent process that saves time and enhances accuracy for both L4 Managers and HR.

**Automated Workflows**

1. **Employee Submission Notification Email**

* **Schedule:** 1st of each quarter and 5th of each quarter.
* **Steps:**
  + On the **1st day of each quarter** (Jan 1, Apr 1, Jul 1, Oct 1), send an email to all managers with the form link and instructions to submit by the 10th.
  + On the **5th day of each quarter**, send a **reminder email** only to those managers who have NOT submitted the form yet.
  + If not submitted by the 10th, submission will be considered in the next quarter’s payroll.

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1. **Driver Undertaking PDF Creation**

* The flow is triggered from Power Apps, which sends the employee and driver data as inputs. This allows the flow to dynamically generate the relevant document content based on the user's submission.
* Using the provided data, the flow composes an HTML document representing the undertaking letter. This HTML file is saved temporarily in a designated OneDrive folder.
* Since SharePoint does not support direct HTML-to-PDF conversion, the flow uses OneDrive’s built-in conversion action to convert the HTML file into a PDF document within OneDrive.
* The converted PDF file is fetched from OneDrive and saved in the appropriate SharePoint library for long-term storage. The temporary HTML file in SharePoint and both the HTML and PDF files in OneDrive are deleted to maintain a clean environment.
* Finally, the flow returns the SharePoint URL of the created PDF document back to Power Apps. This enables the app to open and display the PDF to the user seamlessly.

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1. **HR Actions Flow**

* The flow is triggered when HR performs an **action on a submitted form** (Approve or Reject).
* The system checks the selected status:
* **If Approved**:
  + An **approval email** is composed, addressed to the manager.
  + The email includes:
    - A confirmation message
    - Submission details (Employee name, Period, Driver Name, etc.)
    - The PDF attachment of the Undertaking
  + The email is sent to the manager.
* **If Rejected**:
  + HR inputs the reason for rejection.
  + A **rejection email** is composed and sent to the **employee**.
* The flow then updates the status and response date in the data source.

A diagram of a process

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1. **Excel Data Dump Flow**

* The flow is triggered from Power Apps, usually when the HR clicks "Export to Excel" after applying filters on the screen.
* It begins by clearing all existing data from a pre-defined Excel template file stored in SharePoint.
* Since Power Automate cannot export a full data table at once directly, the filtered dataset is passed as a JSON object from Power Apps.
* The flow initializes this data as a JSON variable inside Power Automate.
* Using a “Parse JSON” action, the flow reads each record from the dataset.
* Then, using an “Apply to each” loop, each record is added as a new row to the Excel template.
* After inserting all rows, the Excel file is saved, and a public or secure link to the updated file is generated.
* This link is sent back to Power Apps through “Respond to PowerApps”, where it is opened for the user to download or view the export.

A screenshot of a computer screen

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This report outlines a secure and efficient Driver Undertaking Application that streamlines the submission and verification of driver details. With separate login portals for employees and HR, the system ensures proper access control and a tailored user experience. Automated email reminders and PDF generation enhance timely submissions and document management.

The HR approval process is simplified with real-time updates and automatic notifications to keep employees informed. Additionally, the export feature supports easy data analysis and reporting. Overall, this application improves workflow efficiency, reduces errors, and promotes transparency within the organization.