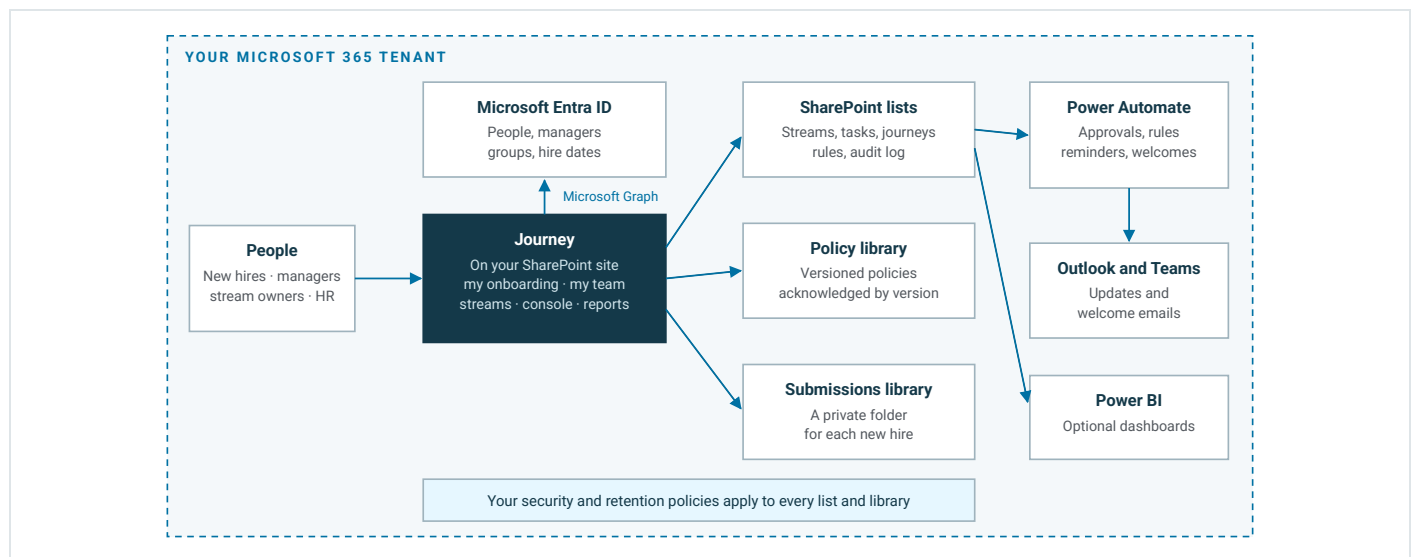


Journey for IT and Microsoft 365 admins

Journey is employee onboarding for Microsoft 365. It's a solution accelerator: iomer builds it for your organization as a single deployment package and installs it in your own tenant, on SharePoint lists and libraries, Entra ID and Power Automate. There is no new vendor platform, no second sign-in, and no onboarding data leaving Microsoft 365.

ARCHITECTURE

How Journey fits into Microsoft 365



Your administrator manages streams, tasks, rules, roles, permissions and the theme from Journey's Management console. Changes beyond those settings come as a new version of your package, built and installed by iomer.

WHAT IOMER INSTALLS

One package, built for you

- ✓ The Journey front end on a dedicated SharePoint site
- ✓ Journey's lists and libraries, set up with your streams, tasks, policies, approval routes, rules, roles and theme
- ✓ Power Automate flows for approvals, assignment rules, reminders, welcome emails and delivery by email or Teams, on standard connectors, built for your site
- ✓ Nothing hosted by iomer: once installed, Journey runs entirely in your tenant

WHERE YOUR DATA LIVES

In your tenant, as SharePoint content

- ✓ Journeys, tasks, acknowledgements, approvals, documents and the audit log are SharePoint list items and library files, under your security, retention and data residency settings
- ✓ Task records visible only to the new hire, their manager and stream owners; a private upload folder per new hire
- ✓ No separate database, server or vendor cloud
- ✓ Sign-in with Microsoft 365 accounts; people, managers and groups from Entra ID through Microsoft Graph

Lists and libraries

WHAT PEOPLE SEE	WHERE IT LIVES
Streams and audiences	Streams list: title, description, image, audience, owner, permissions matrix, approval levels
Task collections	Task templates list: stream, order, type, who does it, prerequisite task, due offset in days, policy to acknowledge, documents to collect, approval route, link
Assigned journeys	Journeys list: person, streams, start date, assigned by, and whether from a person, group or rule
Task cards and matrix dots	Task instances list: status, completion, acknowledgement name, time and version, who recorded it and why, approval trail. Item-level security
Assignment rules	Rules list: a condition on a group or Entra ID property, mapped to streams, evaluated by Power Automate
Policies	Policy library: versioned documents, acknowledgements recorded per version
Uploaded forms	Submissions library: a folder per new hire with its own permissions (new hire, manager, HR); each file accepted or returned with a reason
Questions, cover, roles, updates, audit	Lists for questions and answers, delegated approvals, Journey roles, notifications, and every acknowledgement, decision and change (can't be edited)
Reference data and settings	Departments, locations, roles and approver lists; the theme and how people are told

DELIVERY

How iomer builds and installs Journey

1 Plan Streams, tasks, approvals, policies and forms, from offer accepted to day 90.	2 Build Your organization's deployment package, with your settings built in.	3 Install In your tenant with your Microsoft 365 admin, flows included, under a service account you own.	4 Pilot With a group of real new hires and their managers.	5 Launch Training for administrators, stream owners and managers, and rules switched on.
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SAME IN EVERY BUILD

A foundation reviewed once

- ✓ The front end and the list and library design
- ✓ Item-level security and the private document folders
- ✓ Approval, rule, reminder and welcome email flows
- ✓ Separation of duties, the acknowledgement and approval records, and the audit log

SPECIFIC TO YOUR BUILD

Your settings, built in

- ✓ Streams, tasks, policies and forms
- ✓ Audiences and rules mapped to your Entra ID groups and properties
- ✓ Approval routes, approver lists and the permissions matrix
- ✓ Theme, site location and how people are told

MICROSOFT 365 UPDATES

Built to keep working through Microsoft 365 updates

Journey uses supported interfaces: SharePoint lists and libraries, Microsoft Graph and Power Automate standard connectors. When Microsoft retired SharePoint alerts in July 2026, Journey wasn't affected, because it tells people through Power Automate. Any change that does affect it reaches you as a new version of your package, built, tested and installed by iomer.

Microsoft 365 plans Journey works with

PLAN	JOURNEY, APPROVALS, REPORTS	UPDATES BY EMAIL OR TEAMS	RULES ON GROUPS AND PROPERTIES	POWER BI DASHBOARDS (OPTIONAL)
E5	Included	Included	Included	Included
E3	Included	Included	Included	Power BI Pro to share
Business Premium	Included	Included	Included	Power BI Pro to share
F3 (frontline)	Included	Included	Included	Power BI Pro to share

Journey's flows use standard connectors (SharePoint, Office 365 Outlook, Office 365 Users, Approvals, Microsoft Teams), so a standard deployment needs no premium licences. Everyone taking part needs a Microsoft 365 account. Some HR system connectors are premium. Checked in September and October 2026; Microsoft changes plan contents, so check before you buy.

BEFORE YOU START

What you need

- ✓ Microsoft 365 with SharePoint Online and Power Automate
- ✓ An account for everyone taking part, new hires included
- ✓ Managers recorded in Entra ID, or approver lists
- ✓ A licensed service account with a mailbox to own the flows, in the Journey site's members
- ✓ A Power Platform environment where that account can own flows
- ✓ A Microsoft 365 admin to approve the installation with us

SECURITY AND COMPLIANCE

What Microsoft's certifications cover

Your Journey records are stored by Microsoft 365, which Microsoft independently audits against standards such as ISO/IEC 27001 and SOC 2. Those reports cover Microsoft 365 itself, not iomer, and are available in Microsoft's Service Trust Portal (servicetrust.microsoft.com).

PLAIN FACTS TO PLAN AROUND

The flows

Three optional flows run as the service account. SharePoint, Outlook and Teams must share a data group in any DLP policy; Teams delivery needs the Workflows app allowed. Add a co-owner to each flow.

Timing and limits

On a standard licence the trigger checks about every five minutes. Each update uses about ten actions. Approval records are stored in your default Dataverse environment.

Manager data

Approvals resolve the manager through Microsoft Graph. Where the field is empty, Journey falls back to named approver lists.

Volume and permissions

SharePoint recommends at most 5,000 uniquely secured items per list, about 165 journeys at 30 tasks each. Each deployment is sized to your hiring volume, with archiving where needed.

Electronic acknowledgement

Journey records who acknowledged, when and which version. Canadian and US e-signature laws generally accept records like these; ask your counsel to confirm. Not legal advice.

Accessibility and removal

Reviewed against WCAG 2.2 AA. Built from standard parts: set Journey to tell people only in the app, turn off its flows, and keep or archive the site.