

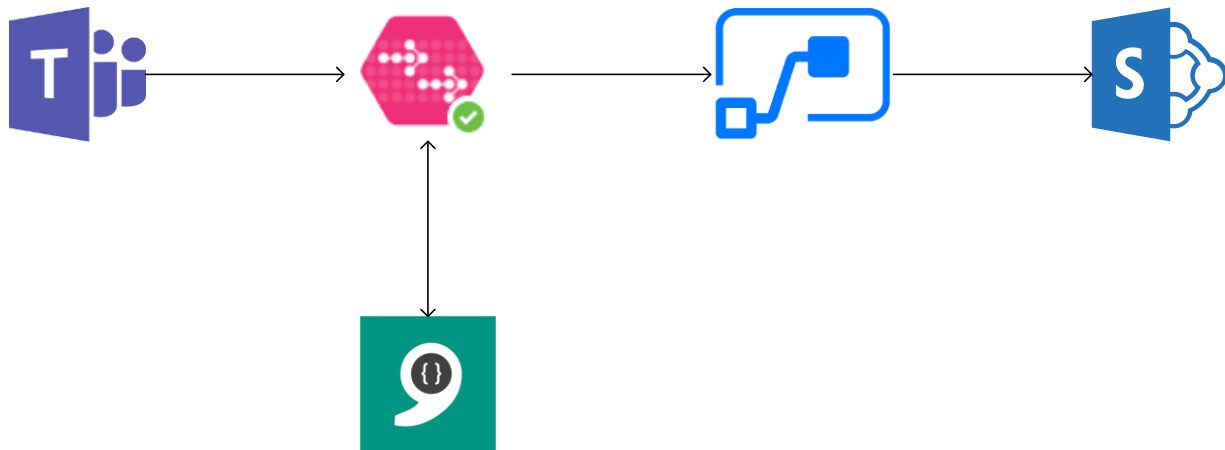
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Lab- Creating a smart expense claims bot using Flow and Bizzy

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Objective

In this lab, we will create a bot which can be used to claim our expenses. The bot will be built using [Bizzy](#), and can be started from Microsoft Teams by using natural language. When started, the bot will ask us about our expenses and will finally place the claim for approval in SharePoint.



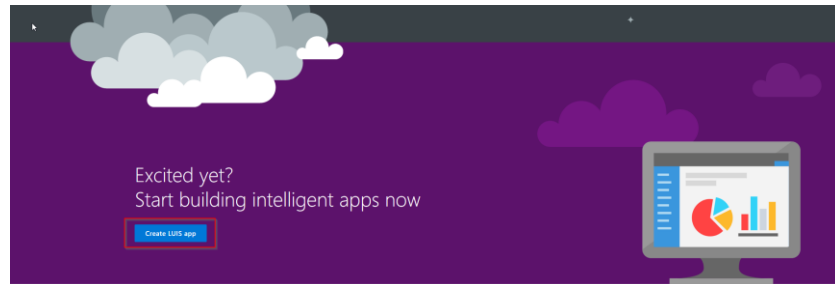
Prerequisites

- Office 365 with SharePoint Online ([trial](#))
- Azure Storage Explorer: <https://azure.microsoft.com/en-us/features/storage-explorer/>

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Setting up LUIS

We will start by setting up [LUIS](#) (Language Understanding), which will be used by Bizzy to interpret our sentences when we start talking to our bot. Sign in to LUIS using your Office 365 account.



Welcome to the Language Understanding Intelligent Service (LUIS)!

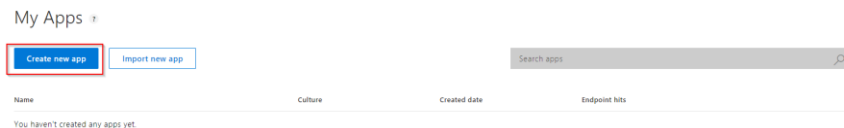
Country (Required)
Netherlands

☐ Contact me with promotional offers and updates about Cognitive Services.

☒ I agree that this service is subject to [the same terms under which I subscribe to Cognitive Services through Azure](#). If I do not subscribe to Cognitive Services through Azure, I agree that this service is subject to the [Microsoft Online Subscription Agreement](#). In each case, the terms include the [Online Services Terms](#). I acknowledge the [Privacy & Cookies statement](#).

Continue

Now create a new LUIS app. This will hold our intents which will be used to start our expense claim.



Give the app a clear name.

Create new app

Name (Required)
ExpenseClaim

Culture (Required)
English

** Culture is the language that your app understands and speaks, not the interface language.

Description
Used to claim expenses from Bizzy Bot

Done Cancel

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Create a new intent, which will be used to store and train our utterances (sentences).

The screenshot shows the 'Intents' page in the LUIS portal. At the top, there are buttons for 'Create new intent' (highlighted with a red box) and 'Add prebuilt intent'. Below these is a table with columns 'Name' and 'Utterances'. The 'Create new intent' modal is open, showing a form with 'Intent name (Required)' set to 'ClaimExpenses'. At the bottom of the modal, the 'Done' button is highlighted with a red box, next to a 'Cancel' button.

Add a couple of sentences, like *"I have expenses to claim"*. These will be used inside the machine learning of LUIS to recognize our intents, even when using different sentences. Once done, train the application.

The screenshot shows the 'Train' page for the 'ClaimExpenses' intent. The 'Train' button in the top navigation bar is highlighted with a red box. The page displays a list of utterances being added for training. Three utterances are listed: 'please claim my expenses', 'i have expenses to claim', and 'i want to claim my expenses'. Each utterance is associated with the 'ClaimExpenses -1' intent. The first utterance is highlighted with a red box.

Now that our application is trained to understand us, let's publish it. Write down your key string, as you will be needing this later on.

The screenshot shows the 'Publish' page for the application. The 'Publish' button in the top navigation bar is highlighted with a red box. The page shows the 'Publish to production slot' button, which is also highlighted with a red box. Below this, the 'Resources and Keys' section is visible, showing a table with columns 'Resource Name', 'Region', 'Key String', and 'Endpoint'. The 'Key String' for the 'Starter_Key' resource is highlighted with a red box.

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Create Bizzy Account

The next step is to create a [Bizzy](#) account. Bizzy provides an easy way to create bots using Flow. We will be using the free version in this lab.

BIZZY™ HOME FEATURES KITS PRICING DOCS BLOG CONTACT ADMIN PORTAL

Bizzy Pricing

Bizzy is licensed per named user in. All pricing is in US dollars. Volume discounts start at 11 users. Try asking Bizzy for a price estimate >

Free	Enterprise	Pro
Get started with Bizzy!	A comprehensive bot platform powered by the Bizzy engine, tailored to your organization.	Supercharge Bizzy with administrative tools and premium Flow actions.
Free	\$6.99 per user per month	\$3.99 per user per month
3 personal Skills per user*	10 personal Skills per user*	6 personal Skills per user*
6 shared Skills per tenant*	Unlimited shared Skills	Unlimited shared Skills
Add to Teams	Bizzy Admin Portal	Bizzy Admin Portal
	Permissions management	Permissions management
	Customized help dialogs	Customized help dialogs
	Premium Flow actions	Premium Flow actions
	Multiple branded Bizzy bots	Standard support
	QnA Maker Integration	
	Deploy to Teams and Web	
	Priority support	
	99% uptime SLA	

Launch the teams web app, to start working with Bizzy.

Launching Microsoft Teams

If the app doesn't open in a few seconds, [try again](#). Or, head over to the web app.

[Open web app](#) [Download](#)

Say something to Bizzy to get to the login.

11:40 AM
hello

Hover over the profile card to see information about this bot. By using Bizzy, you agree to the [Terms of use and Privacy statement](#).

Bizzy 11:40 AM
Hi, I'm Bizzy! I can do a lot of things. Try typing Help, follow the log in prompts and let's #getbizzy!

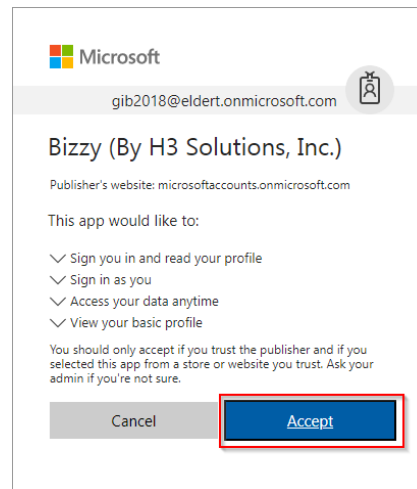
[Help](#)

Bizzy requires that you log in to your Office 365 account to access the skills created in Flow

[Login to Office 365](#)

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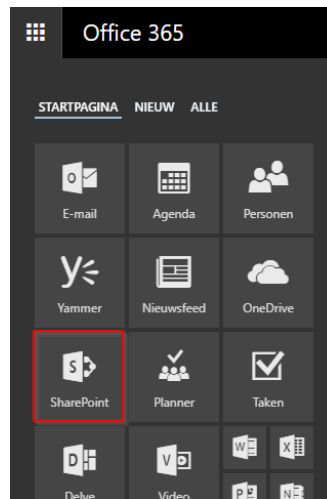
Sign in using your Office 365 account and allow Bizzy to access your profile.



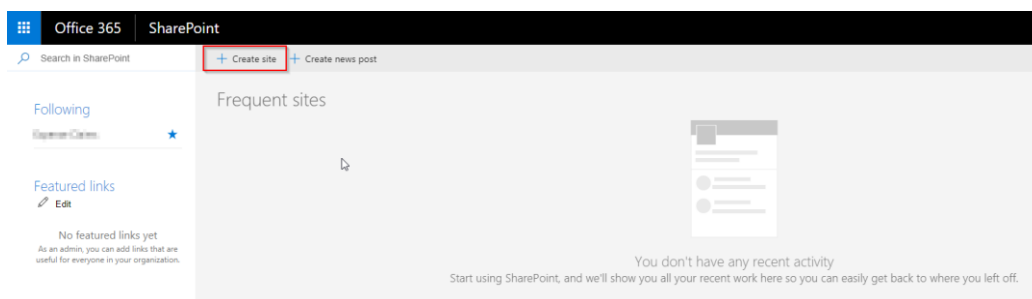
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Create SharePoint list

We will be using [SharePoint](#) to store the expense claims.

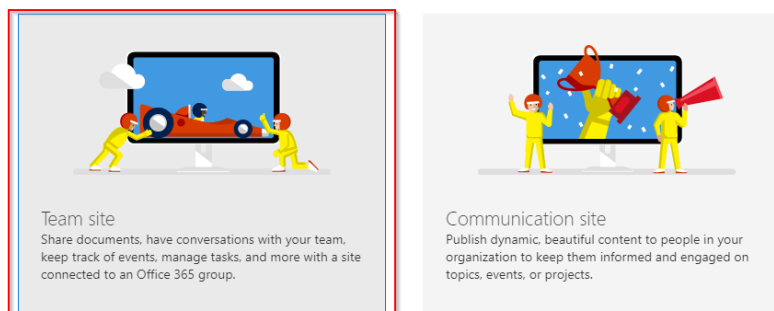


Create a new site, which will be used for this purpose.



Create a site

Choose the type of site you'd like to create



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Give your site a clear name, and write down the Site Address, as we will be needing this later on.

The screenshot shows the 'Create a new site' form in SharePoint. The 'Site name' field contains 'Expense Claim' and has a green message 'The site name is available.' below it. The 'Group email address' field contains 'ExpenseClaim' and also has a green message 'The group alias is available.' below it. The 'Site Address' field contains 'https://eldert.sharepoint.com/sites/ExpenseClaim' and is highlighted with a red rectangle. The 'Site description' field contains the placeholder text 'Tell people the purpose of this site'. The 'Privacy settings' dropdown is set to 'Public - anyone in the organization can access this site'. At the bottom, the 'Next' button is highlighted with a red rectangle, next to a 'Cancel' button.

Site name
Expense Claim
The site name is available.

Group email address
ExpenseClaim
The group alias is available.

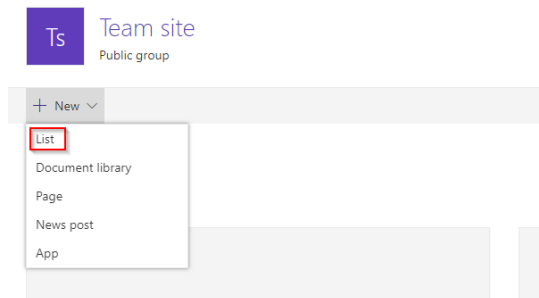
Site Address
https://eldert.sharepoint.com/sites/ExpenseClaim

Site description
Tell people the purpose of this site

Privacy settings
Public - anyone in the organization can access this site

Next Cancel

When the site has been created, add a List to it.



This list will be used to hold and approve our expense claims.

The screenshot shows the 'Create list' form. The 'Name' field contains 'Claims'. The 'Description' field is empty. The 'Show in site navigation' checkbox is checked. The 'Create' button is highlighted with a red rectangle, next to a 'Cancel' button.

Create list

Name
Claims

Description

☒ Show in site navigation

Create Cancel

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Add columns for the amount of expenses claimed and approval.

EC Expense Claim
Public group

+ New Quick edit Export to Excel Flow PowerApps

Claims

Title

Single line of text
Multiple lines of text
Number
Yes/No
Person
Date
Choice
Hyperlink
Picture
Currency
More...
Show/hide columns

There is nothing to show here
Click New to add items

Edit column

Learn more about column types and options.

Name *

Expenses Claimed

Description

Type

Single line of text

Default value

0

☐ Use calculated value ⓘ

More options

Save Cancel Delete

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Create a column

[Learn more about column creation.](#)

Name *

Description

Type

Default value

[More options](#)

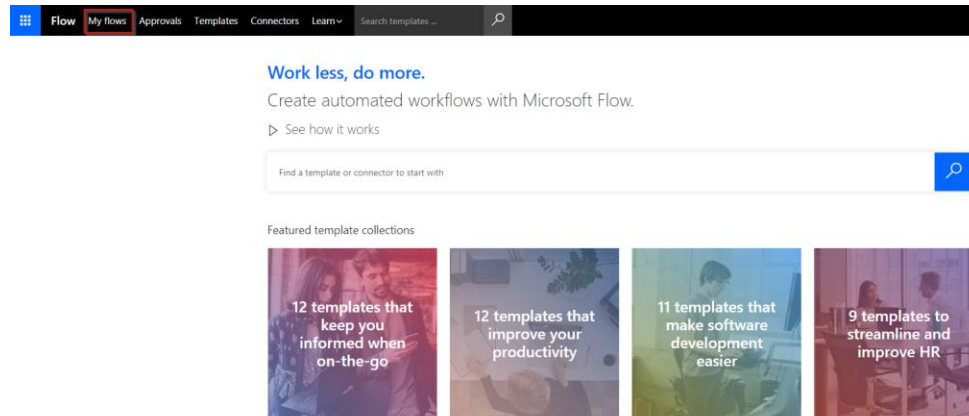
Save

Cancel

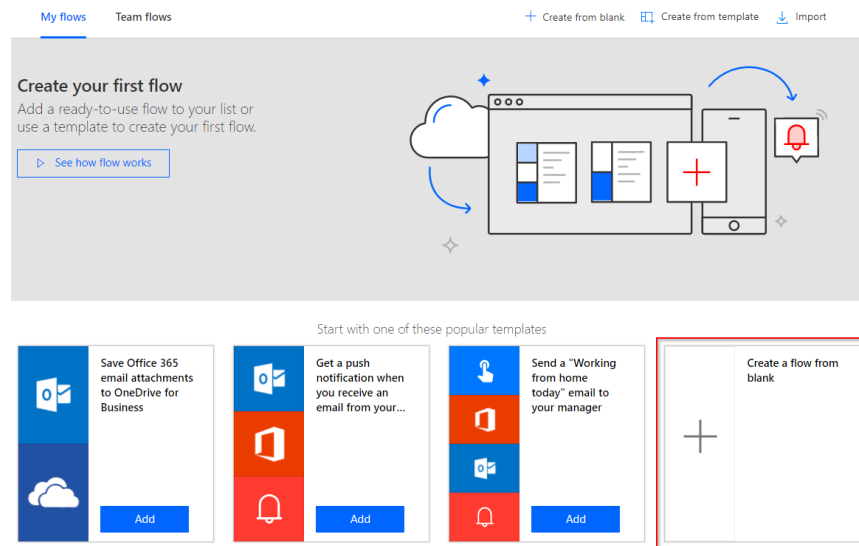
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Create Flow

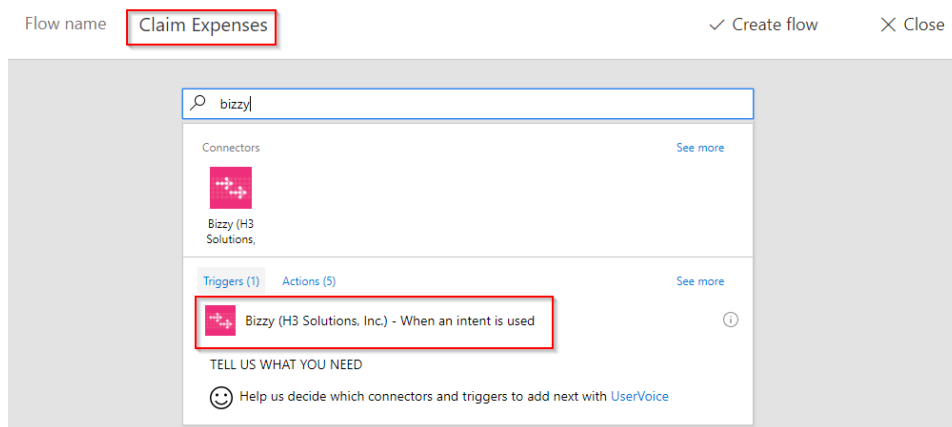
And finally, we will create a [Flow](#) which will be used to tie everything together.



Create a new flow from a blank template.

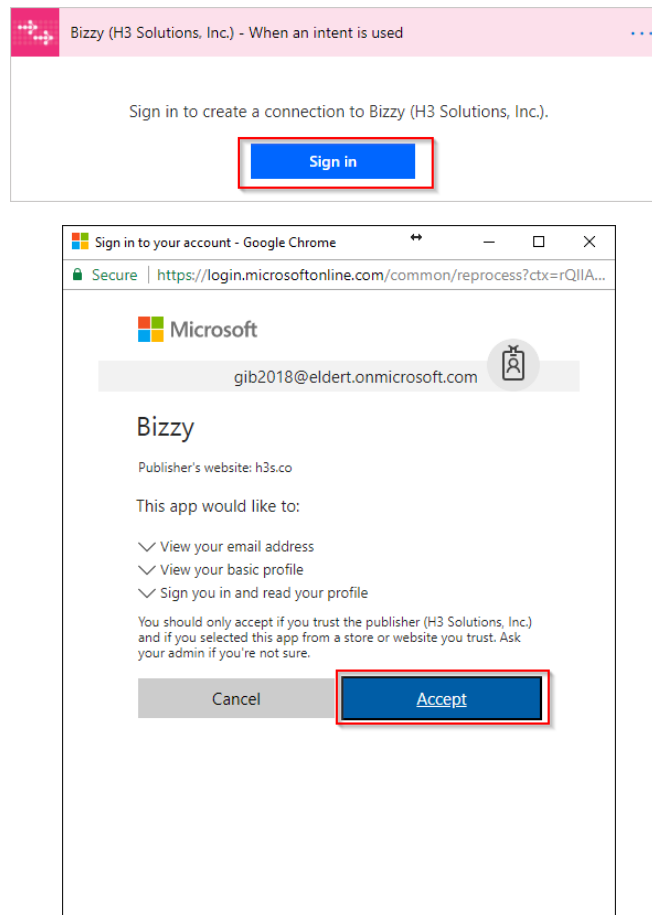


Give your flow a name, and add a Bizzy trigger.



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Sign in using your Office 365 account and allow Bizzy to access your profile.



Give a description for your bot, and set the LUIS properties by using the key you wrote down earlier on.

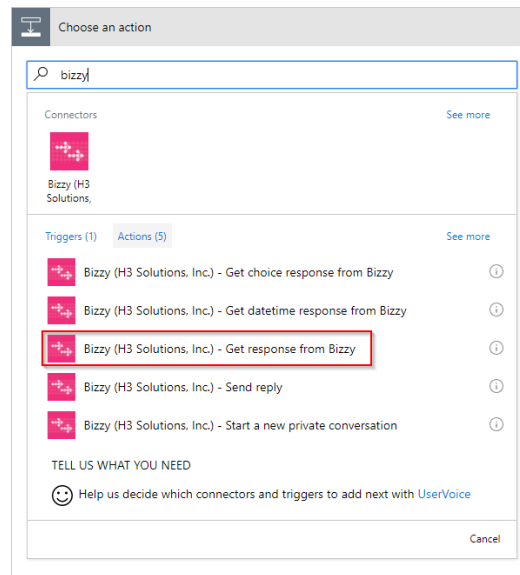
The screenshot shows a configuration form titled "When an intent is used (Preview)". It contains the following fields:

- * Trigger Description: Start expense claim
- * Bot Trigger Type: Shared (dropdown menu)
- Keywords: Enter custom keywords that will trigger the Flow.
- LUIS API Key: 13184 [redacted] d948f
- LUIS App: ExpenseClaim (dropdown menu)
- LUIS Intent: ClaimExpenses (dropdown menu)

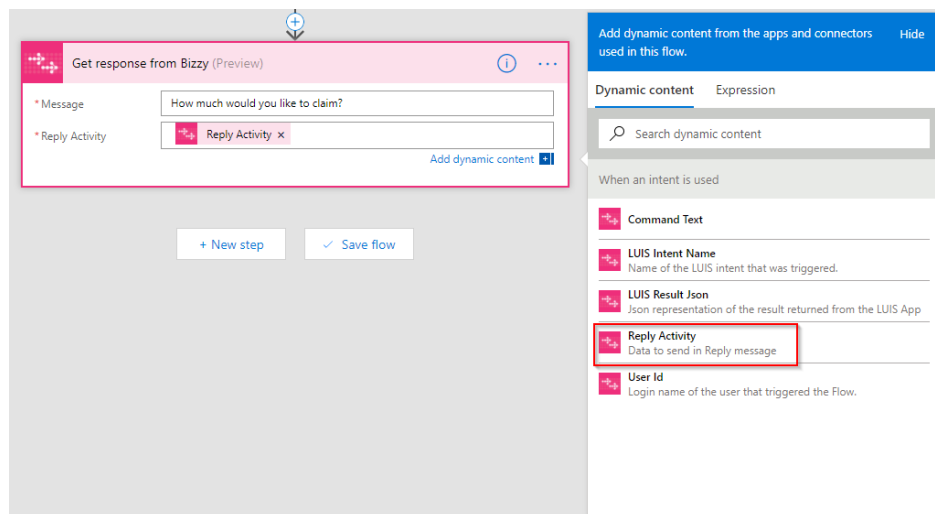
At the bottom, there is a link "Hide advanced options ^".

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Add an action to your flow, and set it to get a response from Bizzy, which will ask the user a question.

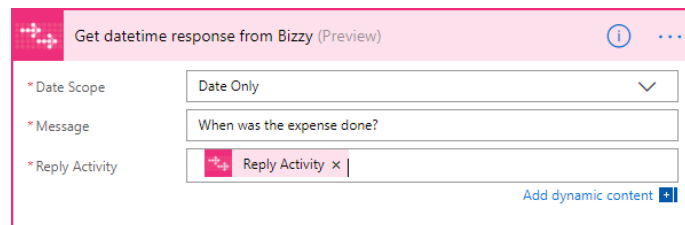
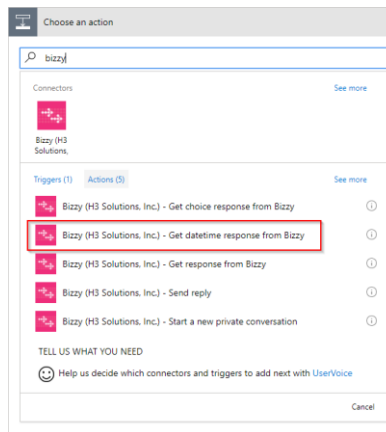


Set the message which will be sent to the user. The reply activity can be found in the properties of the trigger.

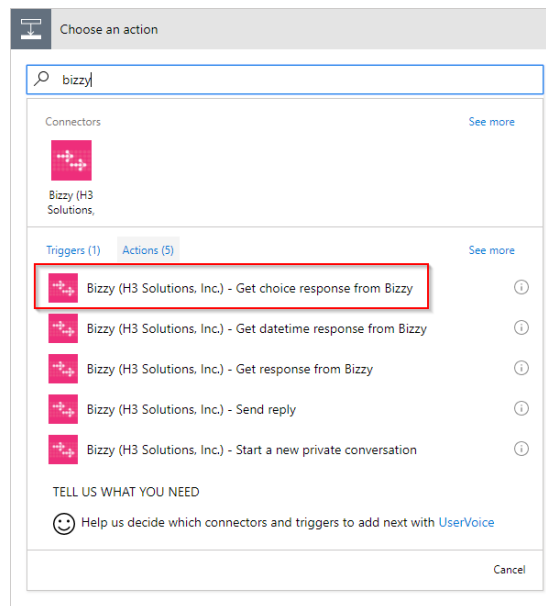


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Add another step, which will get the date the expense was made.



And another action which will get the type of expense.



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This screenshot shows a configuration window titled "Get choice response from Bizzy (Preview)". It contains three main sections: "Message" with a text input field containing "What type of expense?", "Choice Values" with a list box containing "Meal", "Hotel", and "Other", and "Reply Activity" with a button labeled "Reply Activity" and a close icon. An "Add dynamic content" link is visible at the bottom right.

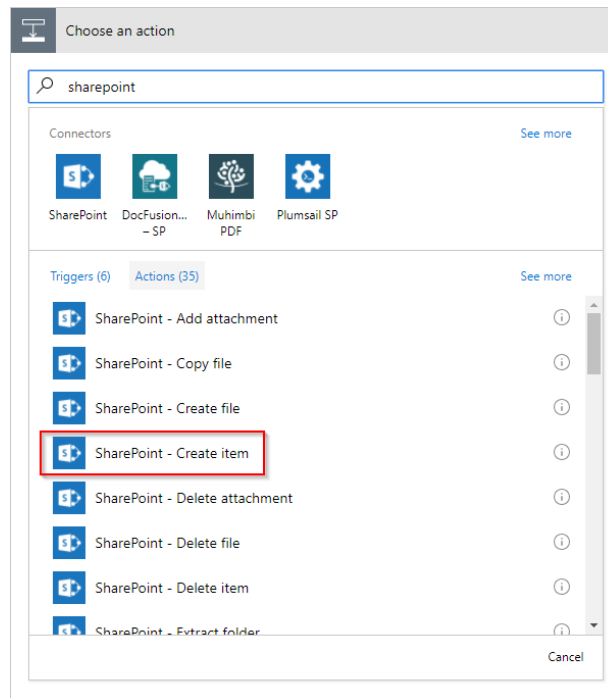
And to close the dialog with the user, we will now tell him his expense claim is created for approval.

This screenshot shows a "Choose an action" dialog. At the top, there is a search bar with "bizzy" entered. Below it, the "Connectors" section lists "Bizzy (H3 Solutions, Inc.)". The "Actions (5)" section lists five actions, with "Bizzy (H3 Solutions, Inc.) - Send reply" highlighted by a red box. Other actions include "Get choice response from Bizzy", "Get datetime response from Bizzy", "Get response from Bizzy", and "Start a new private conversation". A "Cancel" button is at the bottom right.

This screenshot shows a configuration window titled "Send reply (Preview)". It contains two main sections: "Reply Text" with a text input field containing "Thank you, we will now place your claim for approval.", and "Reply Activity" with a button labeled "Reply Activity" and a close icon. An "Add dynamic content" link is visible at the bottom right.

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And finally we will add a new item in our SharePoint list for this claim.



The screenshot shows the 'Create item' form in Microsoft Flow. The form has the following fields and values:

- * Site Address:** `https://eldert.sharepoint.com/sites/ExpenseClaim`
- * List Name:** `Claims`
- * Title:** `User Id x - Response Date x - Response Choice x`
- Expenses Claimed:** `Response Text x`
- Approved:** `No`

There is an 'Add dynamic content' link with a plus icon to the right of the Title field. At the bottom of the form, there are two buttons: '+ New step' and '✓ Save flow'. The 'Save flow' button is highlighted with a red rectangular box.

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Test the solution

To test this solution, go to your Teams web app, and tell Bizzy you would like to claim your expenses. Note that you don't have to use this exact sentence, thanks to LUIS. Follow the conversation to claim the expenses.

The screenshot shows a chat window titled 'Bizzy' with a star icon. The chat history includes the following messages:

- User:** i would like to claim my expenses (12:29 PM)
- Bizzy:** How much would you like to claim? (12:29 PM)
- User:** 110 (12:29 PM)
- Bizzy:** When was the expense done? (12:29 PM)
- User:** 10-02-2018 (12:30 PM)
- Bizzy:** Date Confirmed! (12:30 PM - Updated)
- User:** Yes (12:30 PM)
- Bizzy:** Selection Confirmed! (12:30 PM - Updated)
- User:** Hotel (12:30 PM)
- Bizzy:** Thank you, we will now place your claim for approval. (12:30 PM)

And once it is done, check your SharePoint list, to notice the claim has been added.

Expense Claim			
Public group			
+ New Quick edit Export to Excel Flow PowerApps ...			
Claims			
Title	Expenses Claimed	Approved	
gib2018@eldert.onmicrosoft.com - 10/2/2018 - Hotel	110	No	