



Your intelligent workplace with Microsoft Teams and AI Builder

Nicole Enders • MVP Office Apps & Services

BIWUG



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I live in Germany.

I love learning new stuff and sharing my knowledge.

My focus topics are Modern Workplace, Microsoft 365 & Power Platform and xReality.

Apps & Services in Microsoft 365

 Bookings Vereinfachen Sie die Planung und Ver...	 Dynamics 365 Durchbrechen Sie die Barrieren zwisc...	 Excel Neue Daten ermitteln und Zusamme...	 Forms Umfragen, Quizze und Abstimmunge...
 Kalender Planen und Teilen von Besprechungs...	 Lists Ermöglicht Benutzern das Erstellen, Fr...	 MyAnalytics Bessere Arbeitsgewohnheiten durch E...	 OneDrive Ihre Dateien an einem zentralen Ort s...
 OneNote Ihre Notizen auf allen Ihren Geräten e...	 Outlook E-Mail auf Unternehmensniveau in ei...	 Personen Die Kontaktinformationen für alle Ihr...	 Planner Pläne erstellen, Aufgaben organisieren...
 Power Apps Erstellen Sie mobile und Web-Apps ...	 Power Automate Workflows zwischen Ihren Apps, Date...	 Power BI Umsetzbare, dynamische und anspre...	 PowerPoint Professionelle Präsentation gestalten.
 Project Projektpläne entwickeln, Aufgaben zu...	 SharePoint Inhalte, Wissen und Anwendungen te...	 Stream Videos von Kursen, Besprechungen, P...	 Sway Interaktive Berichte, Präsentationen u...
 Teams Der anpassbare, chatbasierte Teamar...	 To Do Behalten Sie den Überblick über Ihre ...	 Whiteboard An einem für Stift-, Touch- und Tastat...	 Word Ihre besten Texte verfassen.
 Yammer Mit Mitarbeitern und Klassenkamerad...			

Choose your collaboration tools



Document Management

Working together on a document
(use a central document location instead of sending copies from one person to other people)



Projects & Teamwork

Organize your tasks and share knowledge with your team in different ways (task board, wiki,...)

Business Processes

Support business processes with apps, workflows, dashboards and bots



Conversations

Exchange information with each other in an ad-hoc way via chat, phone or video calls



Company-wide information

Spread information with the whole organization (e.g. HR news or updates by the managing director)



Networking

Build a corporate network and/or external networks (follow other people or topics)



Microsoft Teams

Microsoft Teams Use Cases



Project Teams
(internal/external)



Departments & Locations



Workflows & Apps



Digital Learning



Events



Communities



Phone &
Video Calls



«We need a business application!»



The world has changed!



It's time for the citizen developers! You can build your own app!

Power Platform



Power Automate

Workflows



Power Apps

Apps



Power BI

Data Analysis & Dashboards



Power Virtual Agents

Chatbots



Data
connectors



AI Builder



Dataverse

Demo: Service Reports (PDF or in a printed format)

Service Report

This service report will be used for our invoice process.

Contract No.: YL-812-3269
Customer: Microsoft
Decision Maker (Customer): Alex Wilder
Project Name: External Website
Project Manager: Denise Summer
Project No.: 65298756
Project Timeline: 01.02.2020 - 31.10.2021
Consultant: Daniel Becket

Date	Milestone	Description	Consultant Level	Effort in Hours
02.04.2020	Development	Prototype of new website with first requirements	I	2,00
09.04.2020	Development	Prototype of new website with first requirements	I	4,00
16.04.2020	Development	Prototype of new website with first requirements	I	6,00
22.04.2020	Development	Prototype of new website with first requirements	I	8,00
23.04.2020	Development	Prototype of new website with first requirements	I	8,00
24.04.2020	Development	Prototype of new website with first requirements	I	8,00
27.04.2020	Development	Prototype of new website with first requirements	I	8,00
28.04.2020	Development	Prototype of new website with first requirements	I	8,00
29.04.2020	Development	Prototype of new website with first requirements	I	4,00
			Total	56,00



Created: 28.05.2020



Step 1: Select “Form Processing” for your AI model

The screenshot shows the Power Apps | AI Builder interface. On the left, the navigation menu is open, with 'Build' selected under 'AI Builder'. The main content area displays various AI model options: Category Classification, Entity Extraction, Form Processing, Object Detection, and Prediction. The 'Form Processing' card is highlighted with a larger preview window. This preview window shows a large circular icon with a document, a person icon, and a dollar sign, labeled 'Automatically process documents'. It also includes instructions: 'Save time on routine documents like invoices or tax forms. Use AI to review, extract, organize, and save their data automatically.' At the bottom right of the preview window are 'Create' and 'Cancel' buttons.

Power Apps | AI Builder

Search

Environment
conetnie (default)

Get AI Builder

You have 30 days and 100% capacity left in your free trial. You won't be able to use your models after your trial ends. [Learn more](#)

Enhance your business with AI

Add intelligence to your business. Create tailored AI models to automate processes and find insights. [Learn more](#)

Refine a model for your business needs

Category Classification

Entity Extraction

Form Processing

Object Detection

Prediction

Name this AI model *

What you'll need

5+ documents with the same layout

Get started Examples Best practices

Automatically process documents

Save time on routine documents like invoices or tax forms. Use AI to review, extract, organize, and save their data automatically.

Create Cancel

Step 2: Define your data model

Power Apps | AI Builder

- Choose information to extract
- Add collections of documents
- Tag documents
- Model summary

Choose information to extract

Fields Tables (preview)

You'll tag these fields in the documents.

Enter field name +

Choose information to extract

Environment conetnie (default) Service Reports TDO Save and close

Quick tips

What information do I need to enter?

List all pieces of information that you want the AI model to extract from your documents. For example: Name, Address, Total amount.

Can I define tables to extract?

You can define tables and the columns you want the AI model to extract by switching to the Tables pivot. This capability is currently in preview.

Get help or send feedback

Get the answers you need, or tell us about your experiences.

Get help

Choose information to extract

10 fields, 1 table

Fields Tables (preview)

You'll tag these fields in the documents.

Enter field name +

ProjectNo X ProjectName X Consultant X ContractNo X Customer X

Approver X ReportDate X TotalEffort X ProjectManager X

ProjectTimeline X

Next

Step 3: Select min. 5 service reports with the same layout

Power Apps | AI Builder

Standard Service Reports 0 documents

- Choose information to extract
10 fields, 1 table
- Add collections of documents
1 collection
- Tag documents
- Model summary

Add collections of documents

Add sample documents for your model to study.

Create a collection for each layout

New collection

Add documents

Standard Service Reports 0 documents

Add five sample documents for each collection

JPG, PDF

Back Analyze Add at least five sample documents for each collection

Cancel

Power Apps | AI Builder

Environment conetnie (default)

Service Reports TDO Save and close

?

Quick tips

What is a collection?

A collection is a group of documents that share the same layout. Thanks to collections, you can create a unique AI model that will extract the same information from documents with different layouts. To do so, create one collection for each distinct document layout and tag each collection.

Improve the performance of your model

You must add at least five examples of your document type for each collection. Adding up to 20 examples could yield better results.

What does analyze do?

Your uploaded documents

Step 4: Adjust your model and select the relevant piece of information

Power Apps | AI Builder

Choose information to extract
10 fields, 1 table

Add collections of documents
1 collection

Tag documents

Model summary

Show detected words

Service Report

This service report will be used for our invoice process.

Contract No.	Customer	Consultant
XZ-159-9876	Contoso	Maria Bremen
Document Mover (Customer):	Social Intranet with Microsoft 365	Nicole Enders
Project Name:	Social Intranet with Microsoft 365	
Project Manager:	Nicole Enders	
Project Status:	Planning	
Project Timeline:	01.04.2020 - 31.12.2020	
Consultant:	Nicole Enders	
Date	Activities	Comments
05.04.2020	Kick-Off	Orientation and Workshop.
01.05.2020	Kick-Off	Management Summary
08.04.2020	Information Architecture	Workshop about information types and navigation
04.04.2020	Information Architecture	Created first draft of navigation
06.04.2020	Information Architecture	Created first draft of navigation
07.04.2020	Project Management	Phone call about service reports
08.04.2020	Consulting	Meeting between project manager and metadata
08.04.2020	Consulting	Started working on concept
09.04.2020	Consulting	First draft of metadata concept finished
17.04.2020	Project Management	Meeting between project managers

Back Next

Power Apps | AI Builder

Environment conetnie (default)

Service Reports TDO | Save and close

Model summary

Review your model's details below. If everything looks good, select Train. [Learn more about training](#)

Model type
Form Processing

Owner
Nicole Enders

Collections
1

Data source
My device

Number of images
5 images

Information to extract
Fields

Details
ProjectNo ProjectName
Consultant ContractNo Customer
Approver ReportDate TotalEffort

Back Train

Quick tips

Missing something?

This page shows you a summary of what will be used to train your model. If you want to add more collections or more documents, you can go back to the previous steps to do so.

What is training?

Training prepares your model to be used, based on the information you provided.

What's next ?

Once trained, you will be able to publish your model for use in your flows and apps.

Get help or send feedback

Step 5: Publish your AI model

The screenshot shows the Power Apps | AI Builder interface. The left sidebar has a navigation menu with items like Home, Learn, Apps, Create, Data, Flows, Chatbots, AI Builder (which is currently selected), and Solutions. Below the menu, there are 'Publish' and 'Quick test' buttons. The main area displays a 'Service Reports TDO' model under 'Models'. It includes a 'Training document' preview, a 'Selected fields' list (ProjectNo, ProjectName, Consultant, ContractNo, Customer, Approver, ReportDate, TotalEffort, ProjectManager, ProjectTimeline), and a 'How your model is used' section for Power Automate and Power Apps.

Power Apps | AI Builder

Search

Edit model Share Settings Delete

Your model isn't published yet. Publish to use it in apps and flows. [Learn more](#)

Models > Service Reports TDO

Form Processing • Not published • Nicole Enders

Training document See details

Selected fields

- ProjectNo
- ProjectName
- Consultant
- ContractNo
- Customer
- Approver
- ReportDate
- TotalEffort
- ProjectManager
- ProjectTimeline

How your model is used

Power Automate [See documentation](#)

Power Apps [See documentation](#)

Use model Quick test

Step 6: Create your app to scan service reports

Power Apps

File Home Insert View Action

Service Report Scan | ? | < | > | & | ?

New screen Label Button Text Input Data table Media Charts Icons AI Builder

Fill =

Tree view

Screens Components

Search

App

Screen1

Label3

DataTable1

Label2

Label1

FormProcessor1

Consultant: Thomas Smith
Project: 52065456 - Social Intranet with Microsoft 365

Analyze

Total: 62.00

SCREEN Screen1

Properties Advanced

Action

OnVisible

OnHidden

Data

BackgroundImage

Design

Fill

The screenshot shows the Microsoft Power Apps builder interface. The top navigation bar includes 'File', 'Home', 'Insert' (selected), 'View', and 'Action'. A ribbon below the bar contains icons for 'New screen', 'Label', 'Button', 'Text', 'Input', 'Data table', 'Media', 'Charts', 'Icons', 'AI Builder', and a color picker set to 'Fill' with the value 'RGBA(232, 232, 232, 1)'. On the left, a 'Tree view' pane lists 'Screens' (App, Screen1) and components (Label3, DataTable1, Label2, Label1, FormProcessor1). The main workspace displays a card with 'Consultant: Thomas Smith' and 'Project: 52065456 - Social Intranet with Microsoft 365', an 'Analyze' button, and a total value of '62.00'. To the right, the 'Screen1' properties pane is open, showing tabs for 'Properties' (selected) and 'Advanced'. Under 'Properties', there's a search bar and sections for 'ACTION' (OnVisible, OnHidden), 'DATA' (BackgroundImage), and 'DESIGN' (Fill). The 'Advanced' tab contains a single section for 'BackgroundImage'.



Let's build a business application with AI Builder and
integrate it into Teams!

There are so many business/team processes to support with an app!

Take responsibility

Be a maker, be a citizen developer

Create a quick win solution

Build your first solution but don't start with
a too large scenario

Sharing is caring

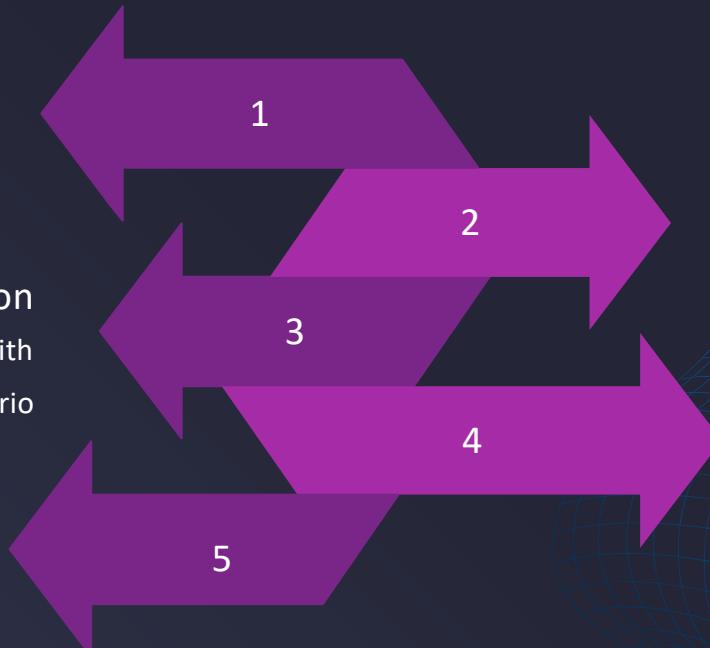
Share your knowledge and talk about
what you are doing

Learn

Learn to use the tools of the Power Platform
(e. g. Power Apps & AI Builder)

Teamwork

Inspire your colleagues
(Together we achieve more)





Thank you!