Microsoft Cloud for Financial Services in a Day

Lab 04: Collaboration Manager for Loans

Step-by-Step Lab

November 2021

Contents

Overview

Learning Objectives

In this lab, you will learn how to do the following:

- Explore the Collaboration Toolkit Data model
- Setup the Collaboration Manager for Loans app
- Navigate the Collaboration Manager for Loans application
- Create a new Collaboration Manager app

Prerequisites

- None

Collaboration Manager for Loans

This application allows loan officers and the broader loan team to manage the status of a Loan from within Microsoft Teams. As part of the application, users can see data provided by the other applications in the financial services cloud, like the Loan Tracking app. Additionally, Collaboration Manager for loans provides integrations with Microsoft Planner and Microsoft Bookings to afford deeper integration while inside of Microsoft Teams.

Key capabilities for Care Management include the following:

- **Loan processing business process flow:** Keep track of a loan as it progresses from origination, processing, underwriting, and finally, closing.
- **Microsoft Planner tasks:** Create tasks that are assigned to members of the loan so that they can view a consolidated list of remaining items within the Tasks app within Microsoft Teams.
- **Meetings:** Schedule meetings with both customers and internal employees and seamlessly connect with others with Microsoft Teams with a click of a button.

Exercise 1: Explore the Collaboration Toolkit Data Model

In this exercise, you will learn about the core Collaboration Toolkit data tables which power the Collaboration Manager for Loans.

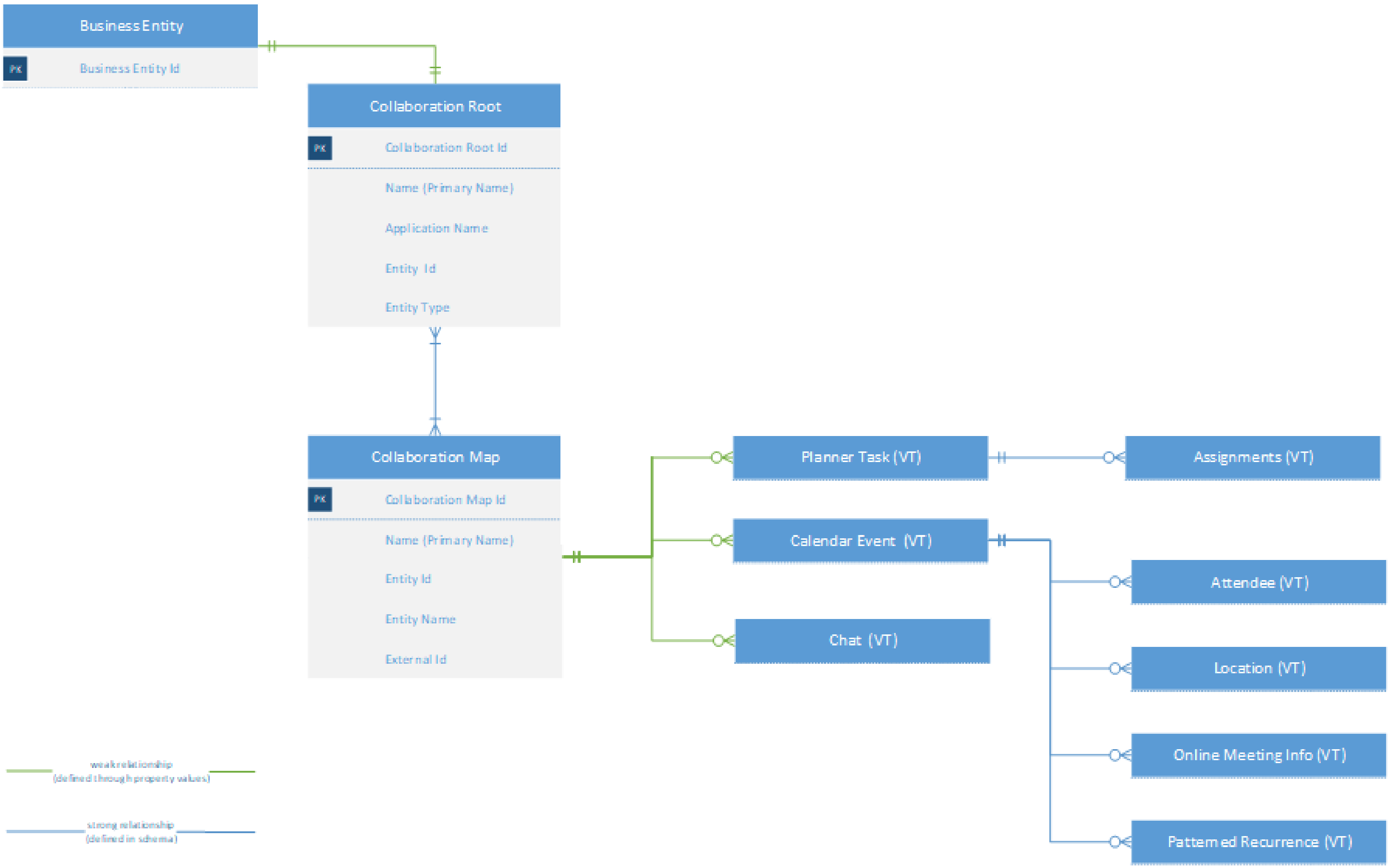
Task 1: Navigate Collaboration Toolkit Tables and Relationships

In this task, you will explore the main tables that power the Collaboration Toolkit and how it augments business entities like Loan Applications.

Collaboration Toolkit Definitions

Core entities	
Collaboration Root	The parent record that maintains the linkage between all the collaboration activities and a Business Entity.
Collaboration Map	A many-to-many table that relates an M365 collaborative activity to a Collaboration Root. Currently, the Collaboration Map entity merely holds pointers to records in Microsoft Graph; in the future, it will have relationships to the analogous virtual tables.
Business Entity (e.g. Loan Application)	The core business entity that is being collaborated on. For Collaboration Manager for Loans, this business entity is the Loan Application.
Virtual tables (coming soon, not included in GA)	
Planner Tasks (VT)	All the tasks in Microsoft Planner a user has access to.
Calendar events (VT)	All the Outlook events (meetings, bookings, etc.) that a user has access to.
Chat (VT)	All relevant Teams chats
SharePoint Files (VT)	All the SharePoint files a user has access to

See next page for the Collaboration Toolkit Relationship Diagram.



Business Entity
PK
Business Entity Id
Collaboration Root
PK
Collaboration Root Id
Name (Primary Name)
Application Name
Entity Id
Entity Type
Collaboration Map
PK
Collaboration Map Id
Name (Primary Name)
Entity Id
Entity Name
External Id
Planner Task (VT)
Calendar Event (VT)
Chat (VT)
Assignments (VT)
Attendee (VT)
Location (VT)
Online Meeting Info (VT)
Patterned Recurrence (VT)
weak relationship
(defined through property values)
strong relationship
(defined in schema)

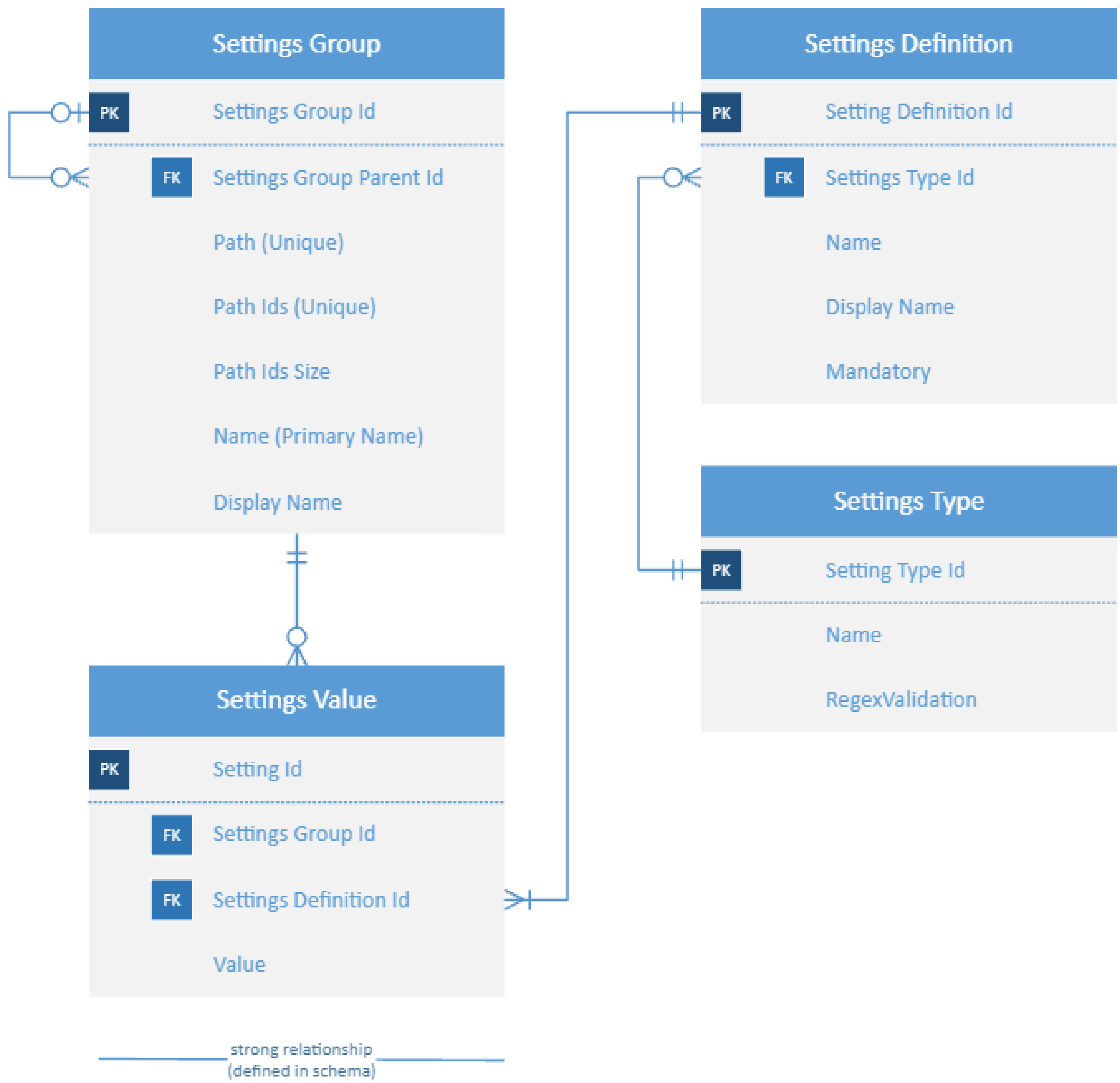
Task 2: Navigate Collaboration Toolkit Settings and Relationships

In this task, you will explore the main tables related to Collaboration Toolkit settings. The settings tables allows you to define how M365 services (e.g. Planner, Outlook, Bookings, etc.) map to business entities within Dataverse. All of the settings tables are solution-aware objects, so they can be packaged within a solution and participate in solution import and export.

Collaboration Toolkit Settings Definitions

Settings Group	The parent record that maintains the logical grouping of settings value that pertain to a specific business entity. For example, there is a single Settings Group record that represents all the settings for the
Settings Value	The value of a settings definition. These values can be exported across environments to ensure that all environments use the same configuration.
Settings Definition	Defines the types of settings that a maker can populate. The toolkit comes with two settings out-of-the-box: • Group ID – The ID of the Azure Active directory security group that is used to create new Planner boards. • Bookings Business ID – The alias of the Bookings Business calendar; this is used to allow users to create new bookings with customers.
Settings Type	A table that defines regex validation for Settings Values.

See next page for the Collaboration Toolkit Settings Relationship Diagram.


Settings Group
PK
Settings Group Id
FK
Settings Group Parent Id
Path (Unique)
Path Ids (Unique)
Path Ids Size
Name (Primary Name)
Display Name
Settings Definition
PK
Setting Definition Id
FK
Settings Type Id
Name
Display Name
Mandatory
Settings Type
PK
Setting Type Id
Name
RegexValidation
Settings Value
PK
Setting Id
FK
Settings Group Id
FK
Settings Definition Id
Value
strong relationship
(defined in schema)

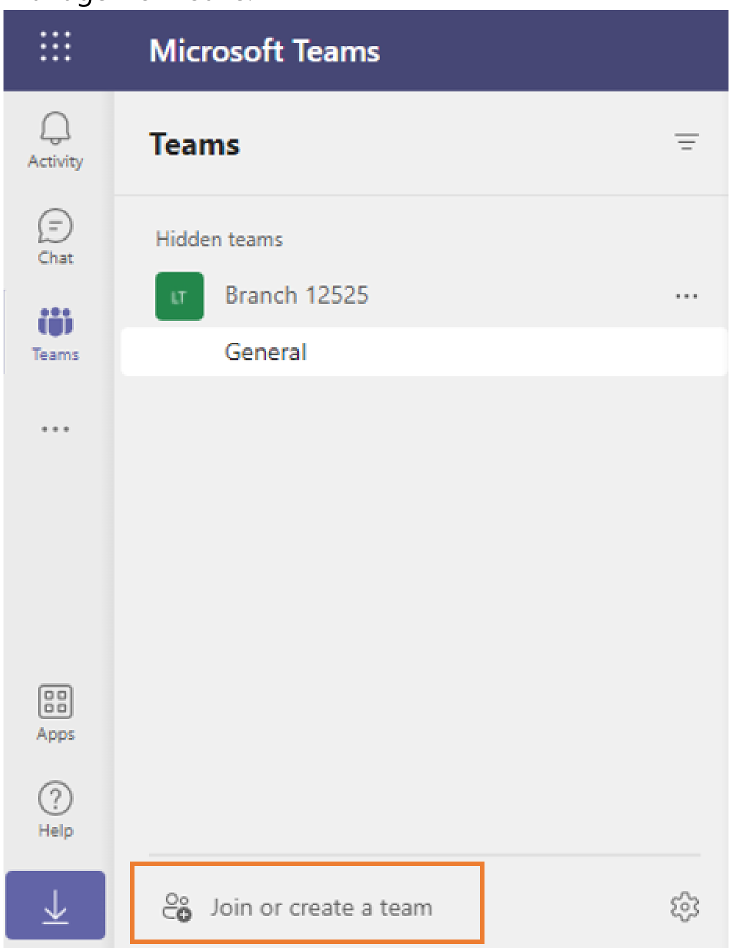
Exercise 2: Setup Collaboration Manager for Loans Settings

In this exercise, you will configure the settings for Collaboration Manager for Loans so that it correctly works with Microsoft 365 services like Teams, Bookings, and Planner. In this case, we will examine how you can bind Collaboration Manager to a new Microsoft Teams team and Bookings business for a bank branch that would like to use the product.

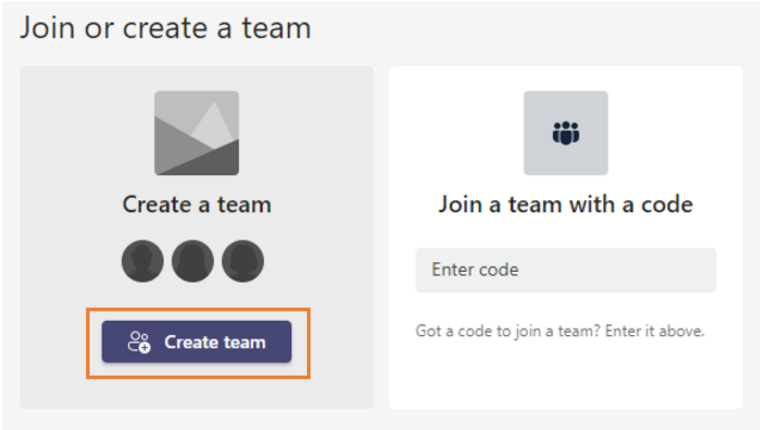
At the end, you'll then learn how you can take a model-driven app like Collaboration Manager for Loans and embed it in Teams as both a teams tab and as a personal app.

Task 1: Create a new Microsoft Teams team

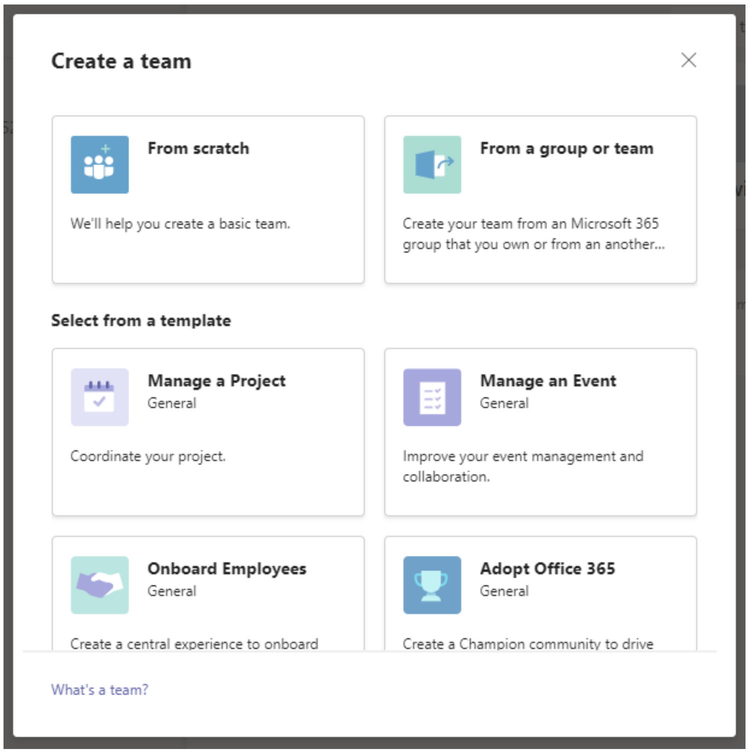
1. Open **Microsoft Teams** and navigate to **Teams** in the left app bar.
2. Select **Join or create a team** so that we can create a new branch that will be leveraging Collaboration Manager for Loans.



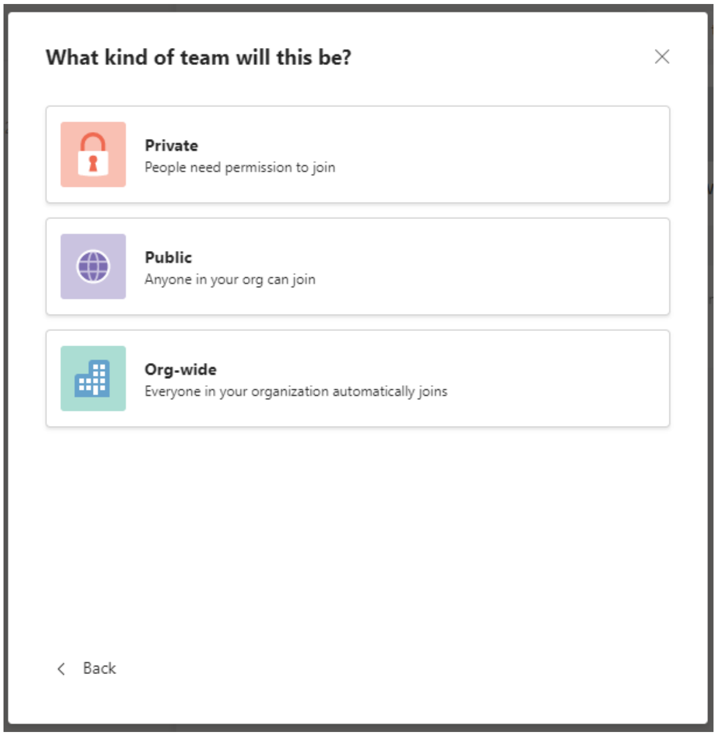
3. Select **Create team** to open the new team creation modal.



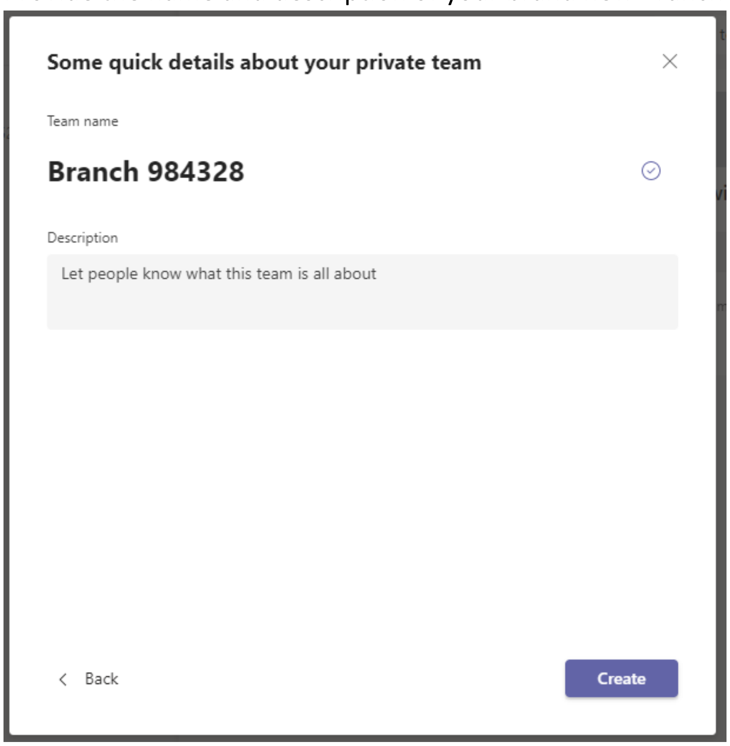
4. Select **From scratch** to create a brand new Teams team.



5. Since this team will only be accessible to users that belong to this branch, make the new team **private**.



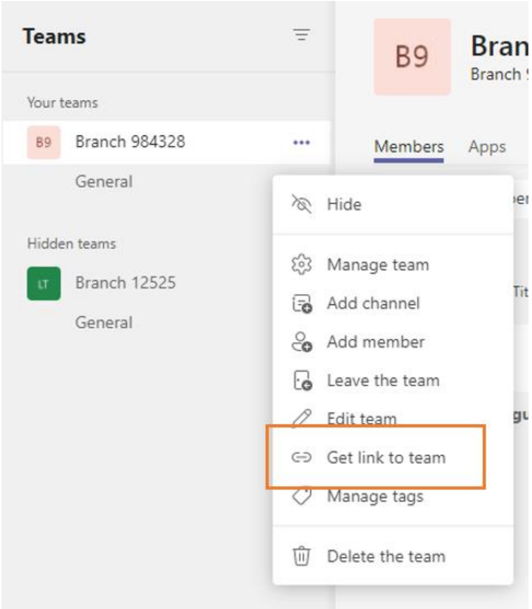
6. Provide the name and description of your brand new Branch before finally selecting **Create**.



Task 2: Retrieve the internal ID of the new Teams team

7. Now that we have a new Microsoft Teams team, we'll want to record its ID so that we can leverage it later. To get the ID, start by finding your new team in your list of teams.
8. Select the **...** button

9. Select **Get link to team**.

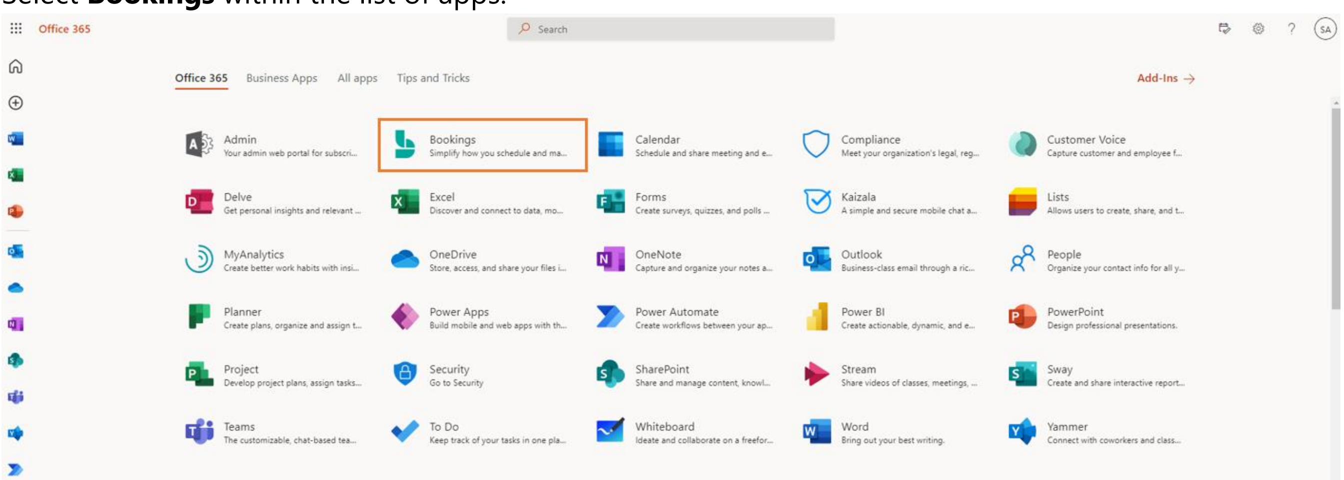


10. Record the value of **groupid** from within the URL somewhere safe. You will use this value in a future step while defining the settings of your solution.

    https://teams.microsoft.com/l/team/19%3akk_TuKhjXu92yJvg4TZ10S6rouLSCgvHIb5NOOTfRjg1%40thread.tacv2/conversations?groupId=4310f270-1aa5-4089-99f3-47eb3b4d69ad&tenantId=b699419b-e0df-47e3-9909-24076fdcf68b

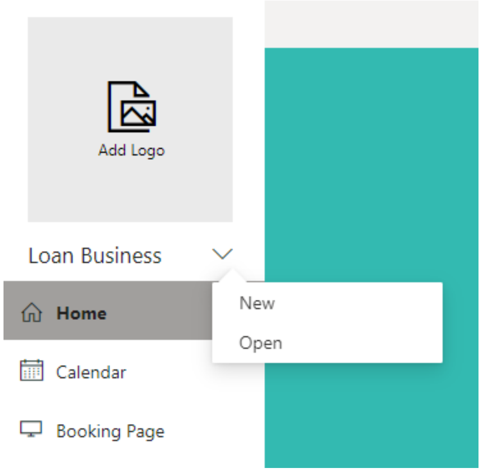
Task 3: Create a new Bookings business for the branch

11. To leverage the virtual visit features within Collaboration Manager for Loans, we must also provide a Bookings business. To create a new Bookings business, start by going to http://office.com/apps.
12. Select **Bookings** within the list of apps.

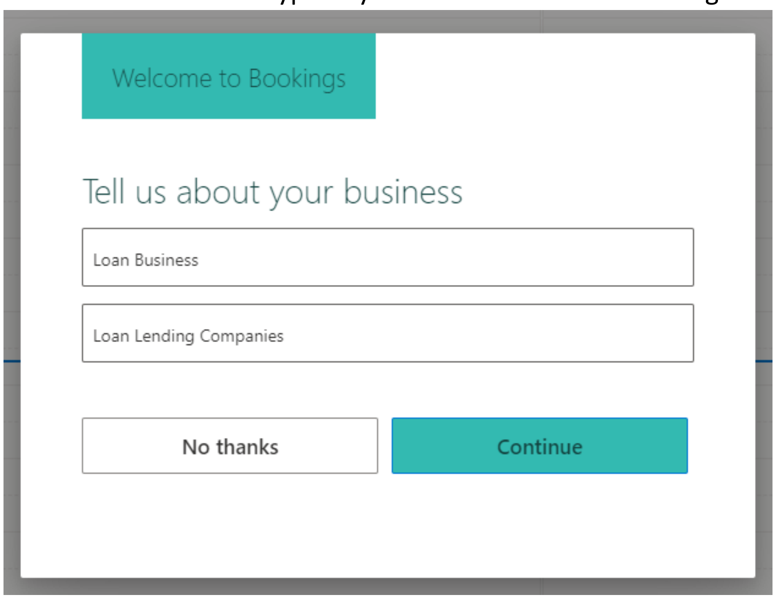


13. If this is your first time using Bookings, you may be prompted with a **Get it now** button, select that to continue. If you already have a Bookings business and need to create an additional one, select the chevron next to your

currently active Bookings business and select **New**.



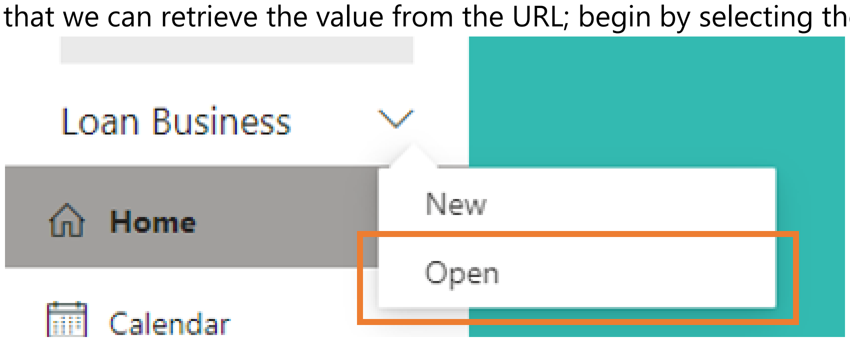
14. Provide the name and type of your business before selecting **Continue**.



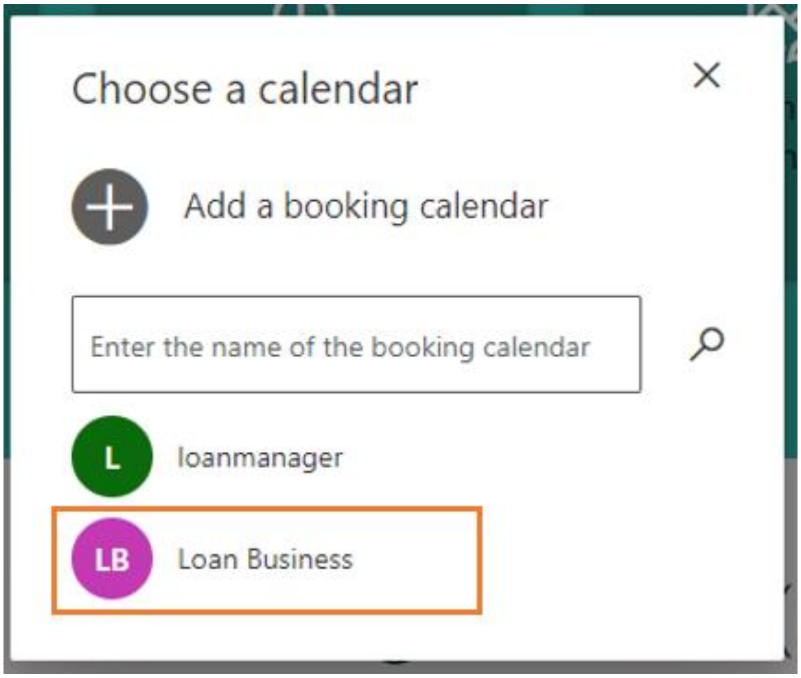
15. You may now provide additional details for your Bookings business by configuring the **Booking page**, **Staff**, **Services**, and **Business Information** pages by selecting them in the left navigation.

Task 4: Retrieve the alias of the new Bookings business

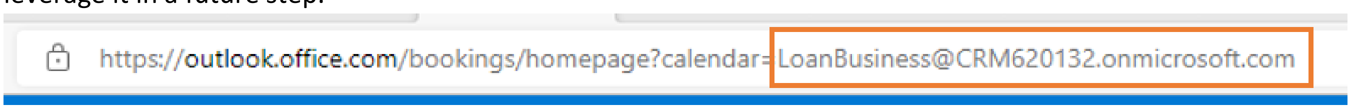
16. To get the alias of your new Bookings business, we'll need to reopen the current Bookings business so that we can retrieve the value from the URL; begin by selecting the chevron and selecting **Open**.



17. Once the dialog appears, re-select your new Bookings business.

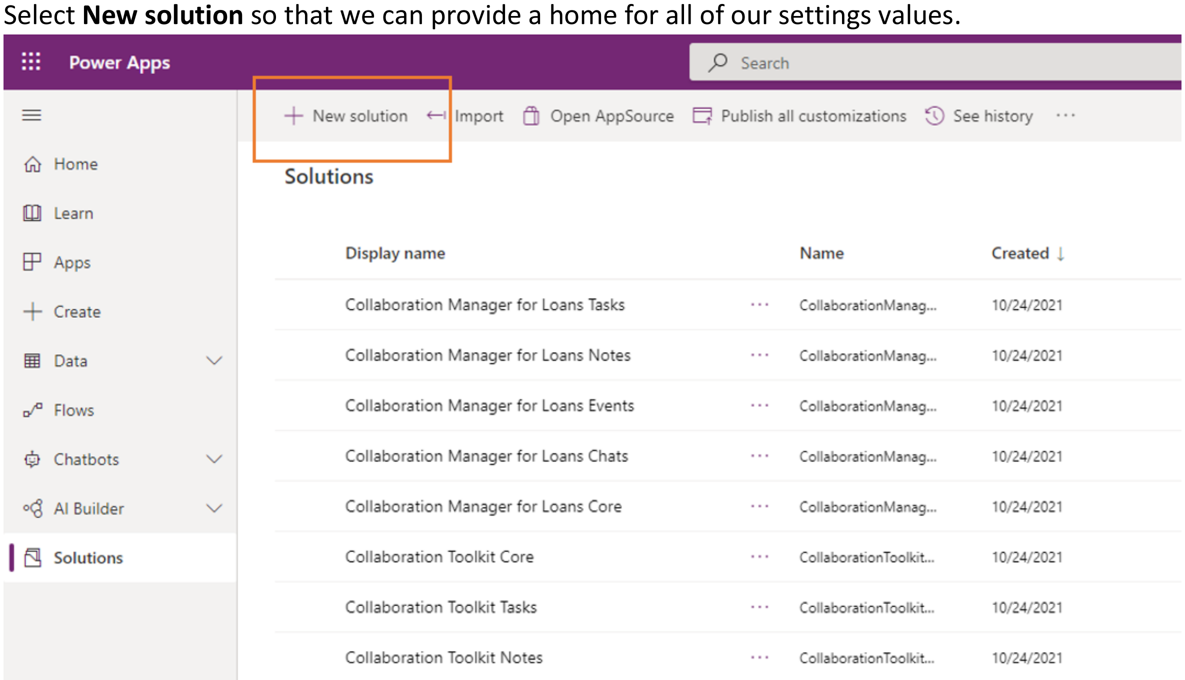


18. This will reopen the Bookings business and cause the URL of the page to change. Copy the value of the calendar parameter in the URL. It should look like an email address. Record this value somewhere safe so that we can leverage it in a future step.

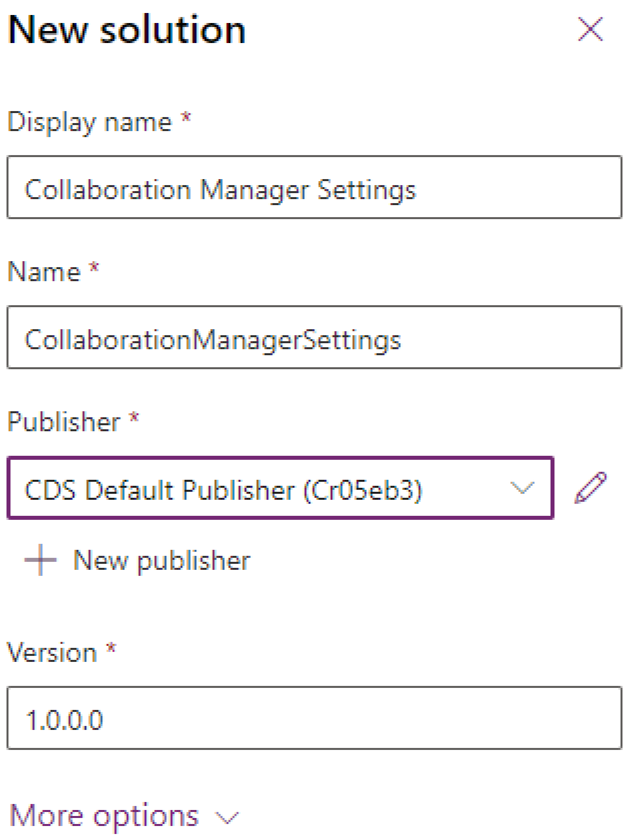


Task 5: Provide the settings to Collaboration Manager for Loans

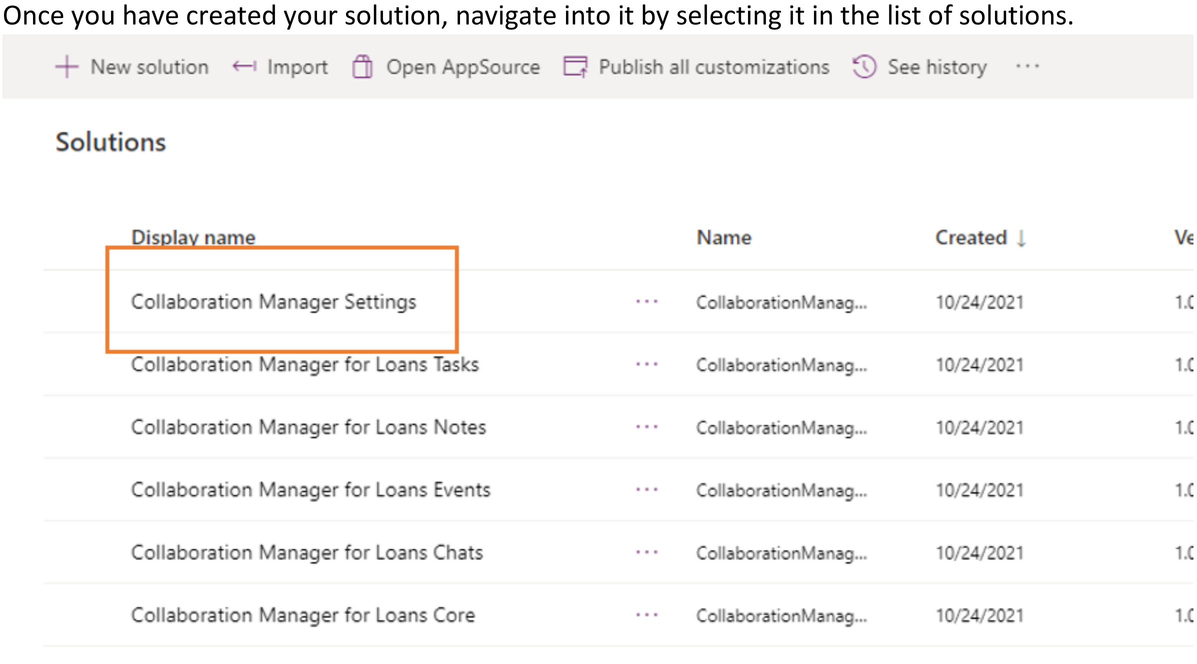
19. Now that we have both the Group ID and the Bookings business ID, we can set them as values within the Collaboration Toolkit settings. To begin, open up https://make.powerapps.com/.
20. Ensure you are in the correct environment by using the environment picker in the top right.
21. Navigate to the **Solutions** page in the left navigation.
22. Select **New solution** so that we can provide a home for all of our settings values.



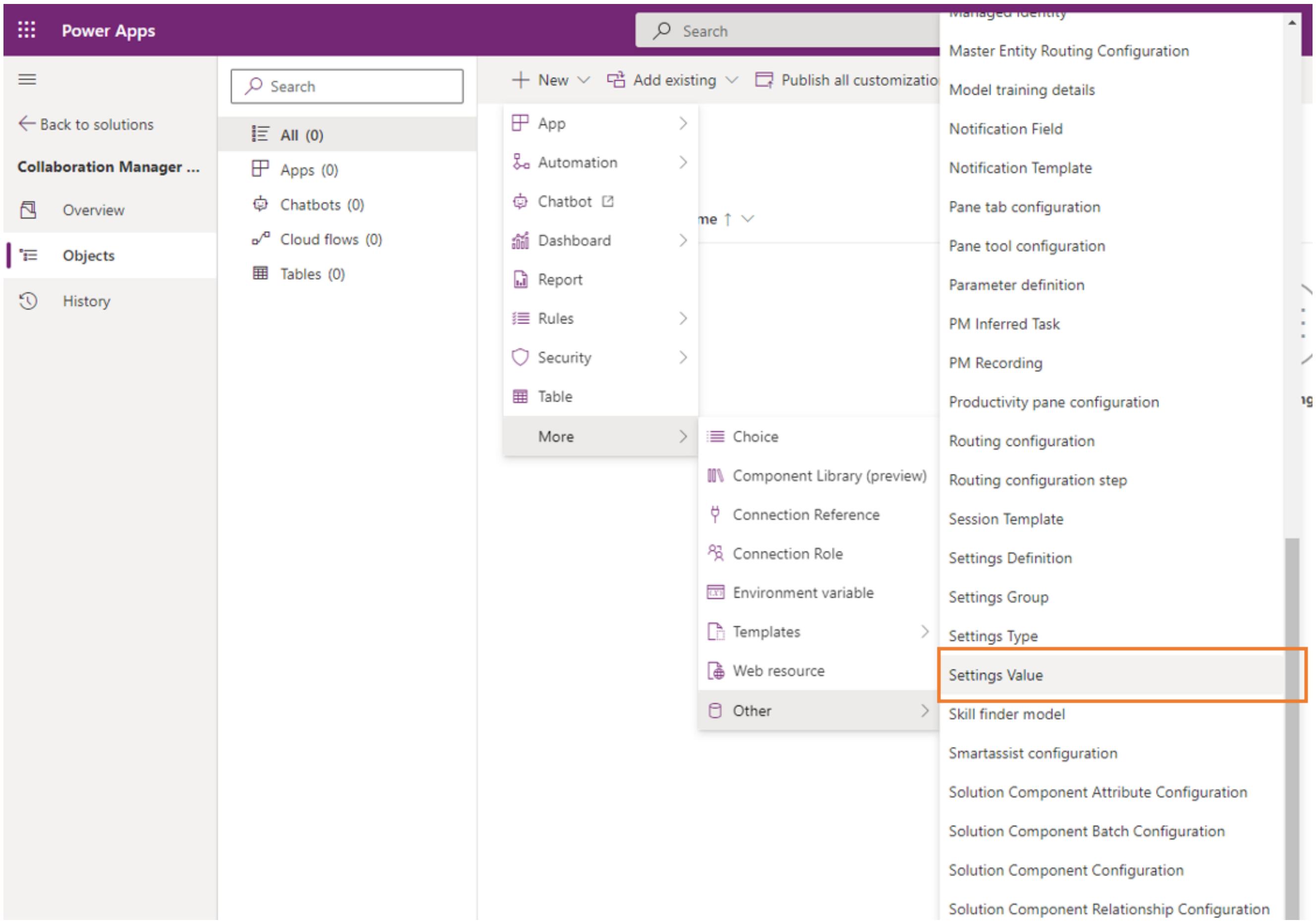
23. Provide the name and publisher of your new solution. Since this solution is merely holding the values of Collaboration Manager, we can call it “Collaboration Manager Settings."



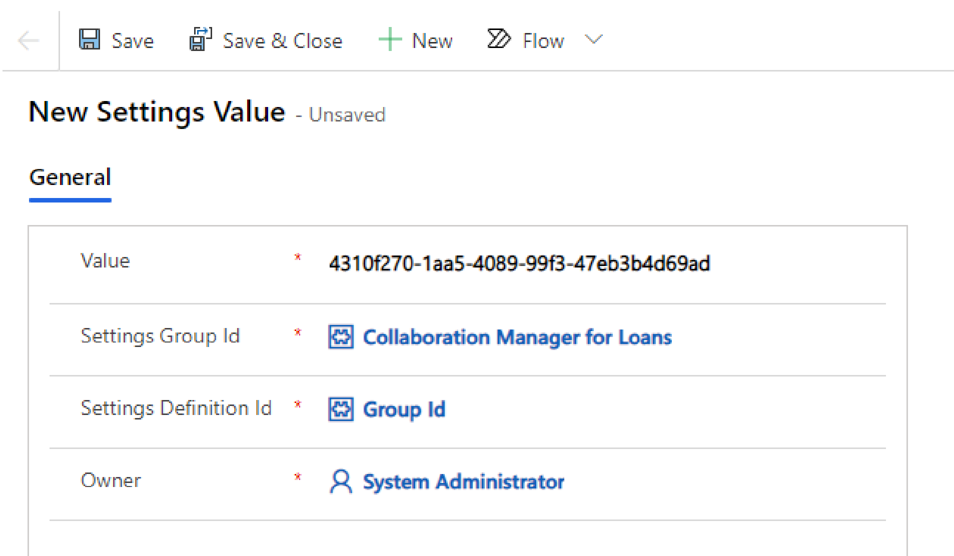
24. Once you have created your solution, navigate into it by selecting it in the list of solutions.



25. Provide the first settings value by selecting **New** > **More** > **Other** > **Settings Value** from within the solution explorer.

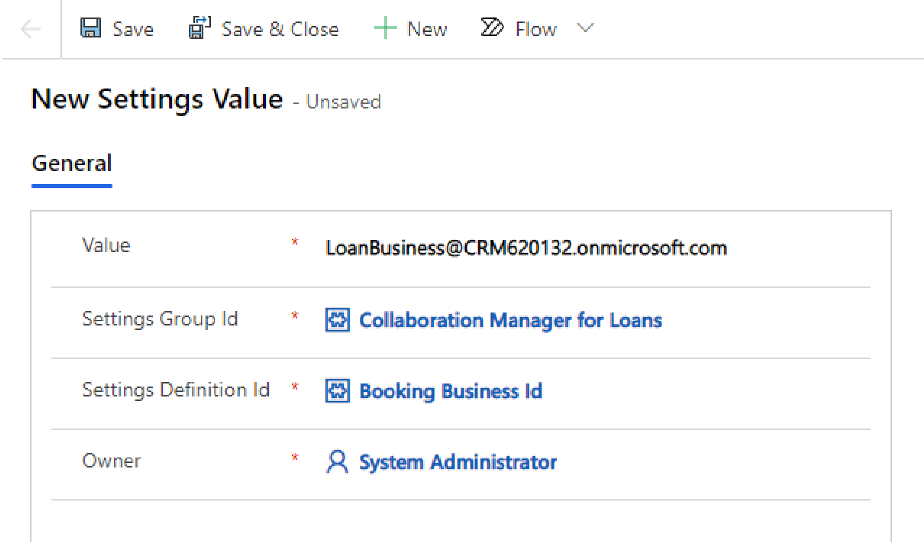


26. For our first settings value, we will provide the value of our teams group. Paste the value you retrieved from step 10 in the **Value** field. Set **Settings Group ID** to "Collaboration Manager for Loans" and **Settings Definition ID** to "Group ID."



27. Select **Save & Close** once you're complete.
28. Repeat step 25 to create a new settings value.

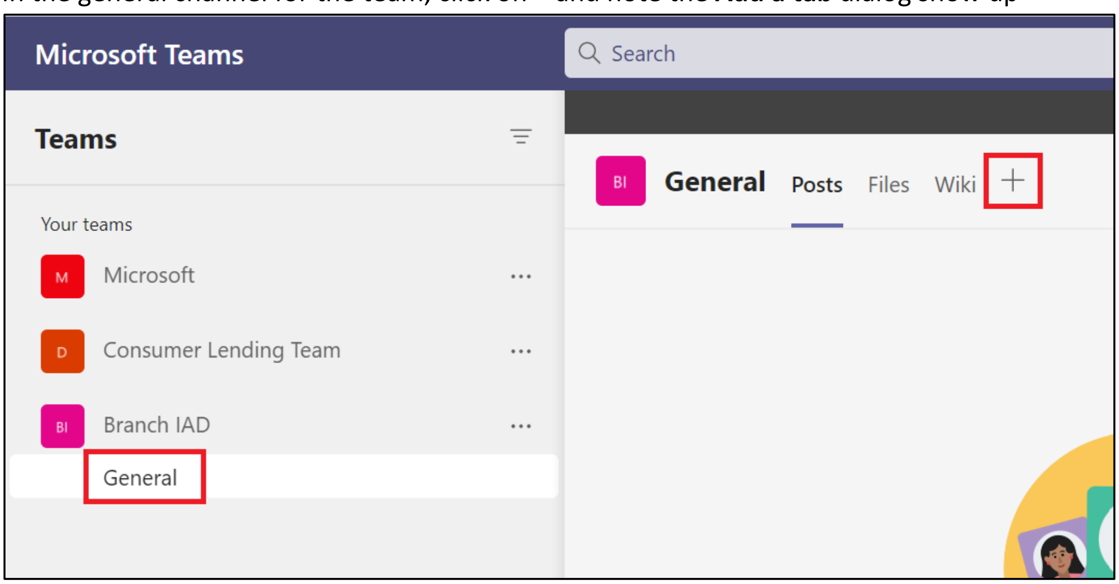
29. Now populate the new settings value with the Bookings business ID you retrieved on step 18. Set **Settings Group ID** to "Collaboration Manager for Loans" and **Settings Definition ID** to "Bookings Business ID".



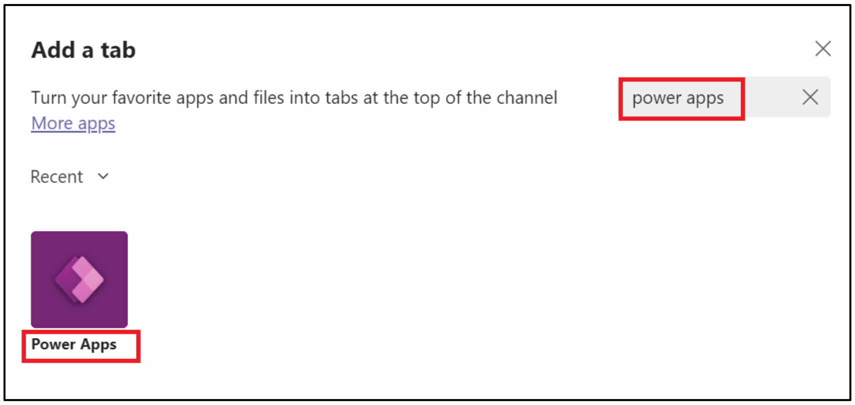
30. Select **Save & Close** once you're complete. You've now successfully defined the settings for Collaboration Manager for Loans.

Task 6: Adding the app to the Microsoft Teams channel

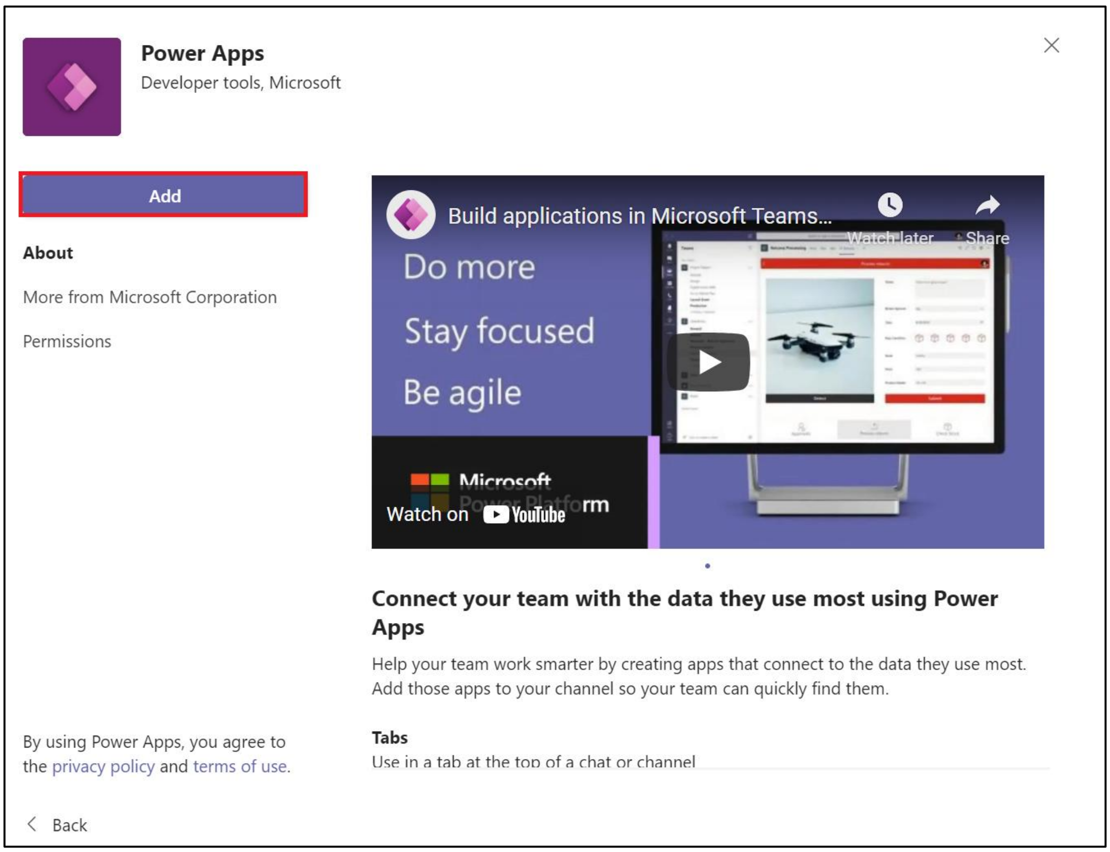
31. Now that the settings are defined, we can now add the app to Microsoft Teams. To begin, navigate to the **teams.microsoft.com** using your lab credentials
32. Once you are there, find the team you created in Task 1 above**.**
33. In the general channel for the team, click on **+** and note the **Add a tab** dialog show up



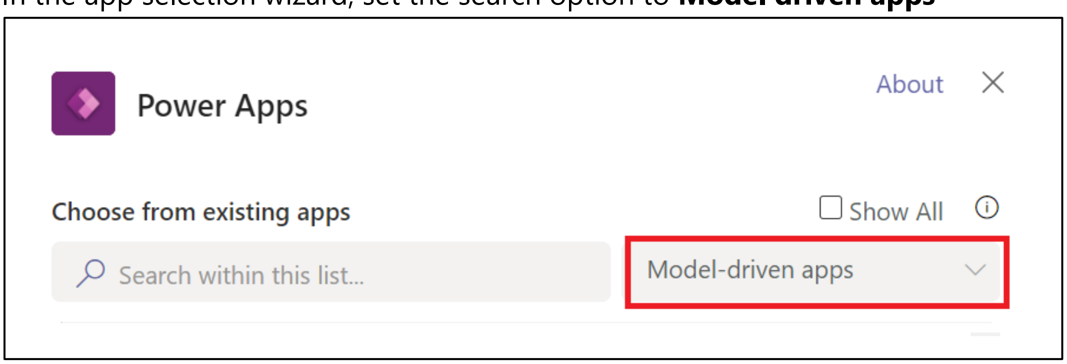
34. In the **Add a tab** dialog, search for **Power Apps** click on the **Power Apps** icon that appears in search results



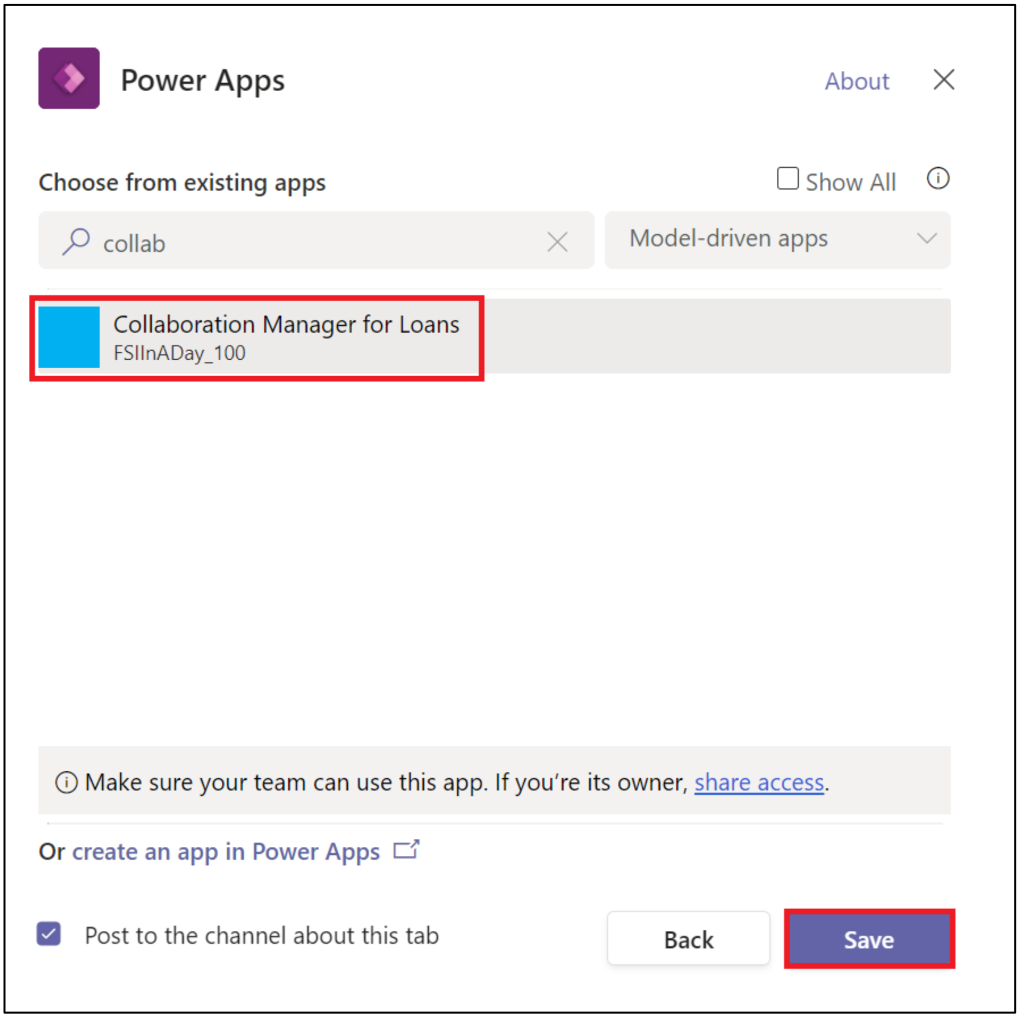
35. This will open up the **Power Apps** add in. Click on **Add** to open the app selection wizard



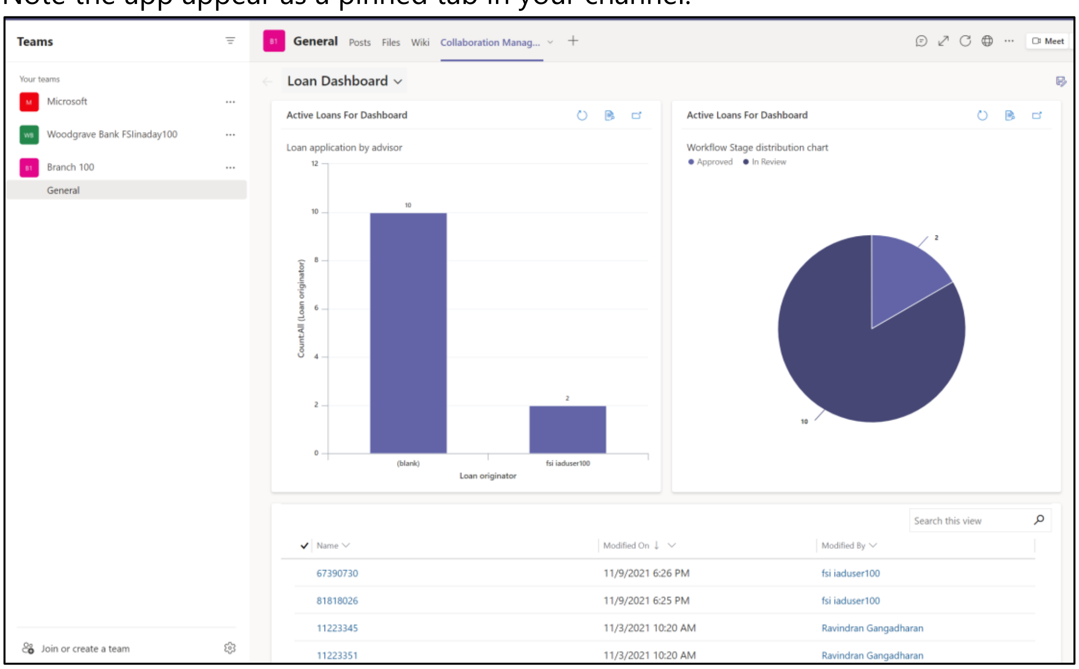
36. In the app selection wizard, set the search option to **Model driven apps**



37. Now search for **Collaboration Manager** and select the app that corresponds to your dedicated environment. For example, if you are working with environment 100, you would select the app with environment FSIInADay_100 against its name
Select the Collaboration Manager app and click on **Save**



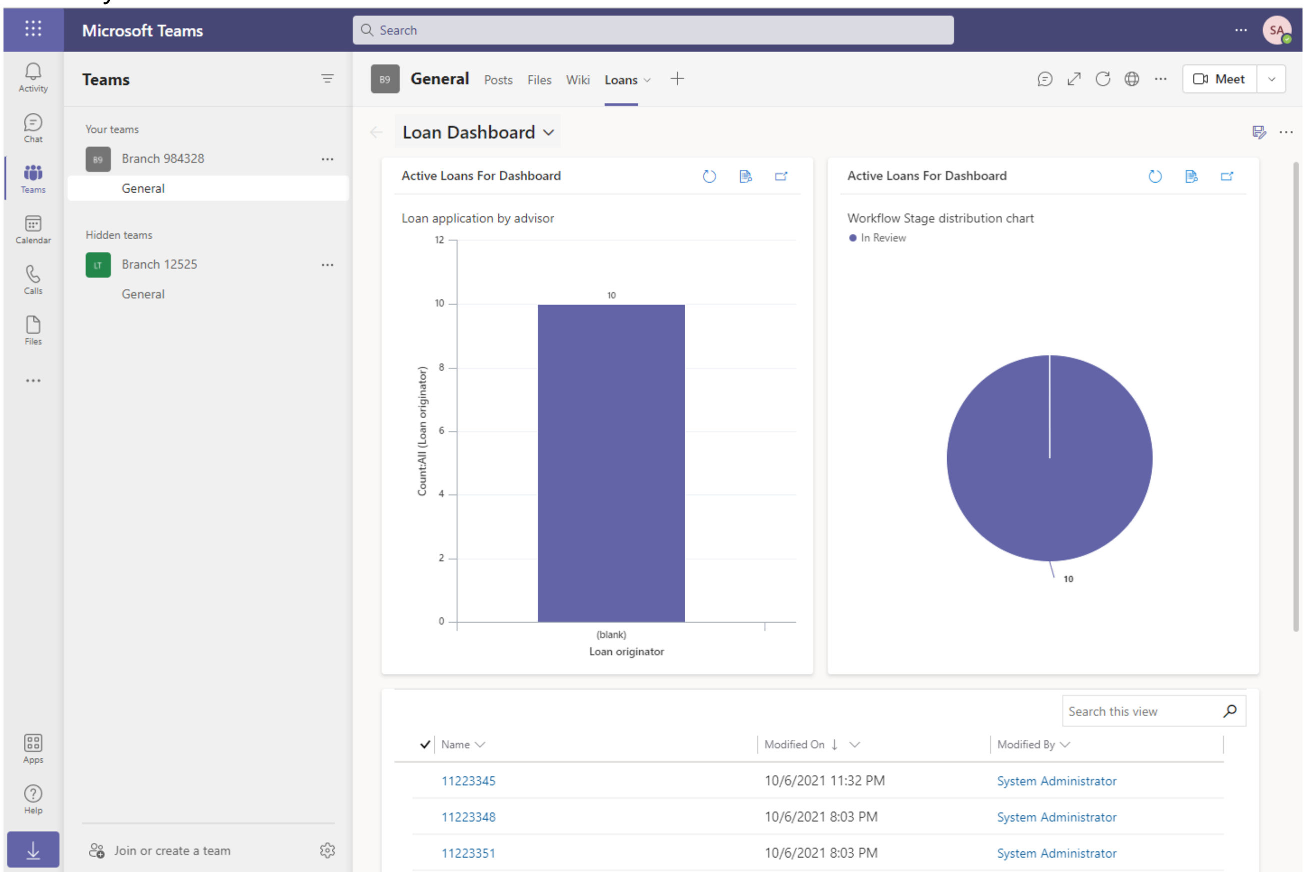
38. Note the app appear as a pinned tab in your channel.



Exercise 3: Navigate Collaboration Manager for Loans

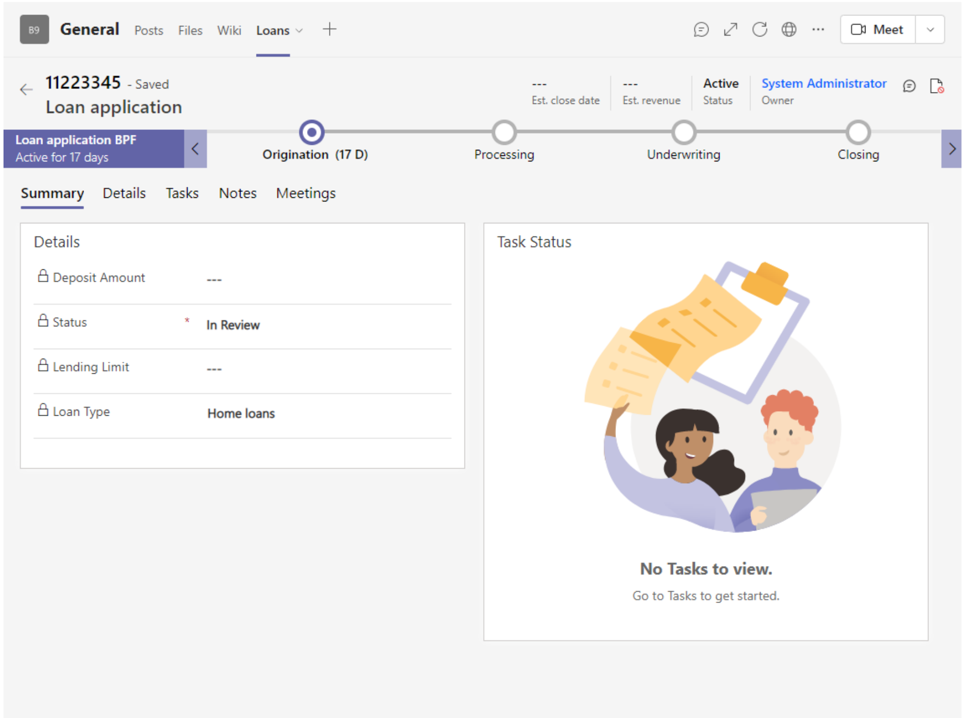
In this exercise, you will navigate Collaboration Manager for Loans and explore the collaborative features it provides. In this case, we will examine the home loan for Hayden Reyes to see how a loan team could collaborate with each other to ensure completion of the loan.

1. To begin, open up the teams channel that you pinned your app to in the previous exercise. You should see a dashboard page where you can see graphs of the relevant data along with a list of loans that are currently active.



2. To see the status of one of the loans, simply select it's name from the list of loans. Since we're interested in Hayden Reyes's loan, select **11223345**.

3. This will bring you to the Summary tab that provides a glimpse of the relevant information about the loan application.

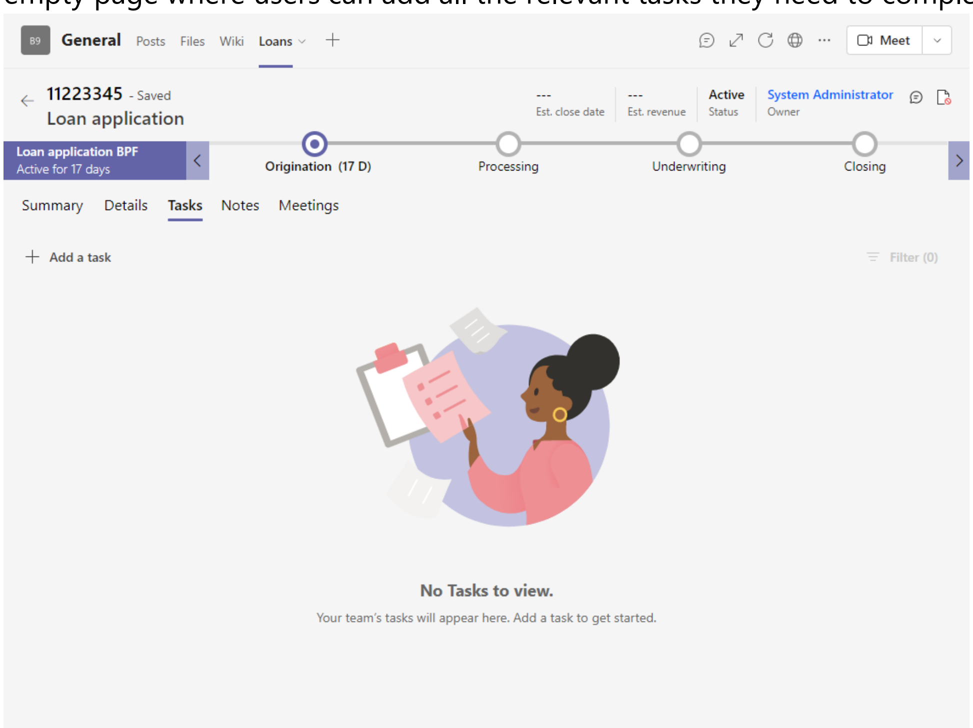


4. To see more information about the loan, you can select the **Details** tab.

Note: As part of the fourth exercise, you'll learn how to bring in the rich controls from the Loan Tracker app into Collaboration Manager for Loans so that you can have a more holistic picture of the loan application.

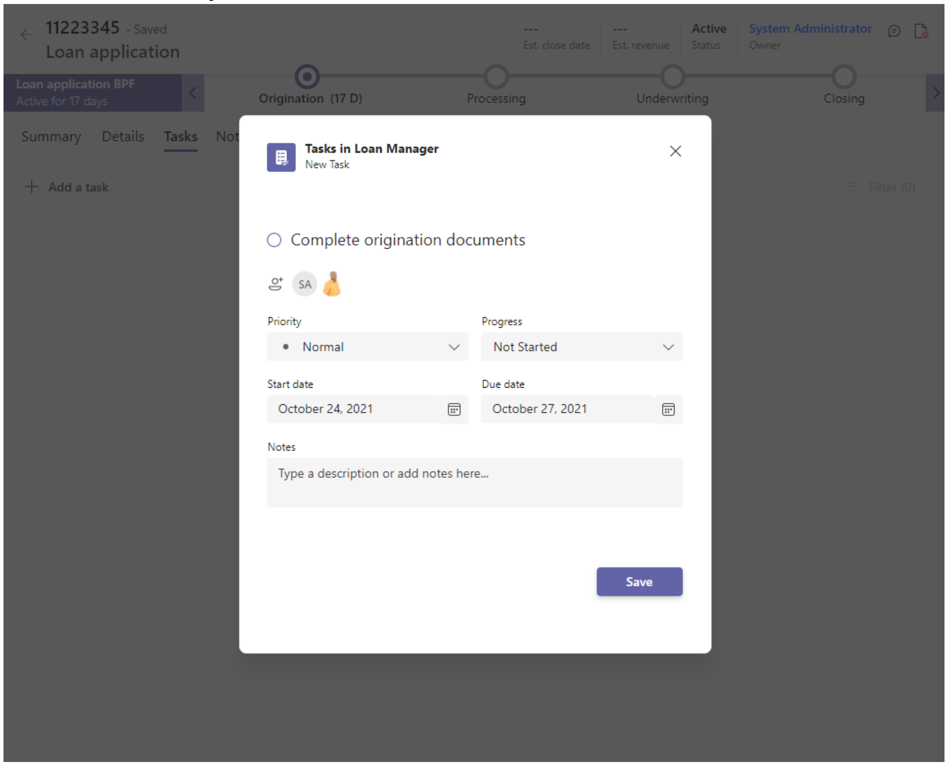
Task 1: Creating tasks in Collaboration Manager for Loans

5. The first tab that we will explore that provides collaboration is the **Tasks** tab. Selecting it will reveal an empty page where users can add all the relevant tasks they need to complete.

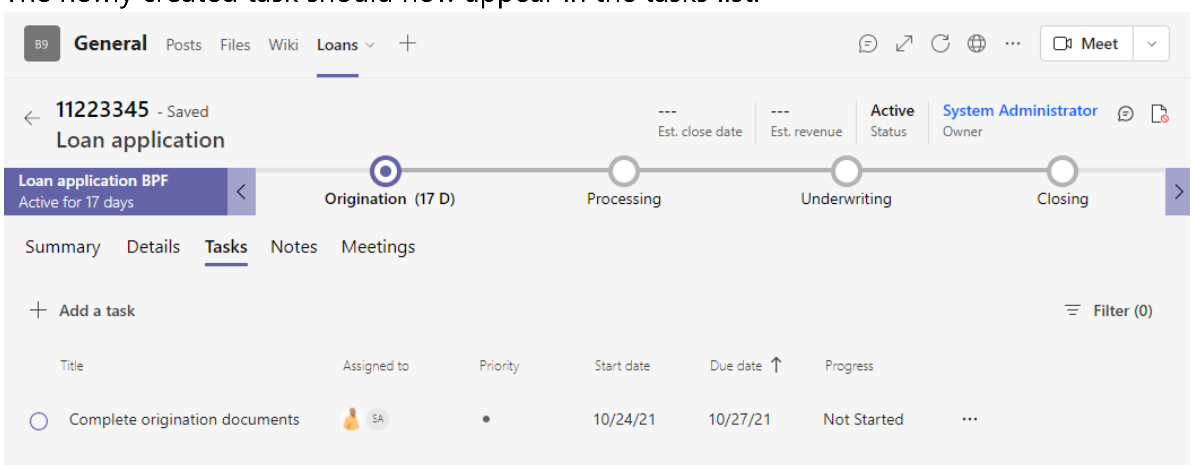


6. To create a new task for the team, select **Add a task**.

7. On the resulting dialog, you can provide specifics about the task and assign it to the relevant people on the team. Once you're done, select **Save**.

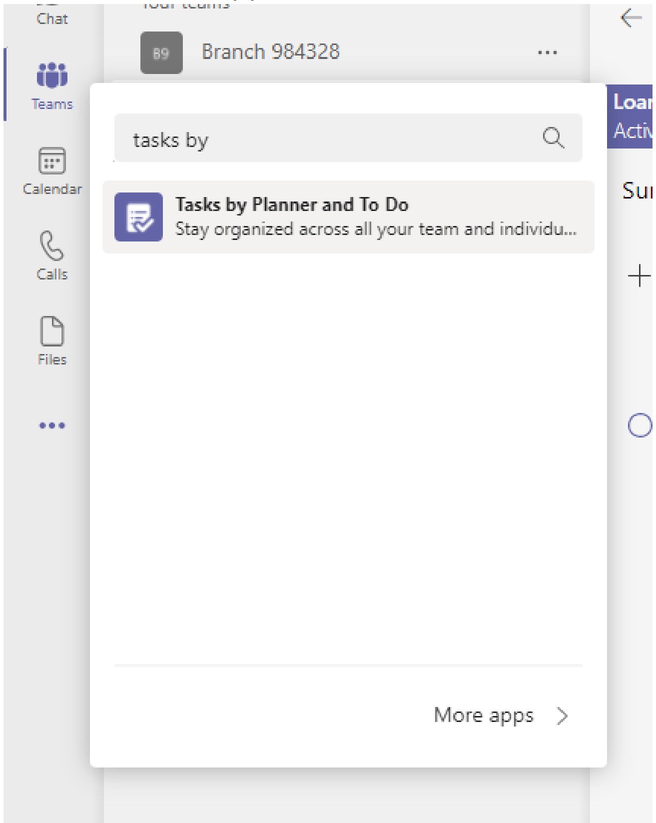


8. The newly created task should now appear in the tasks list.

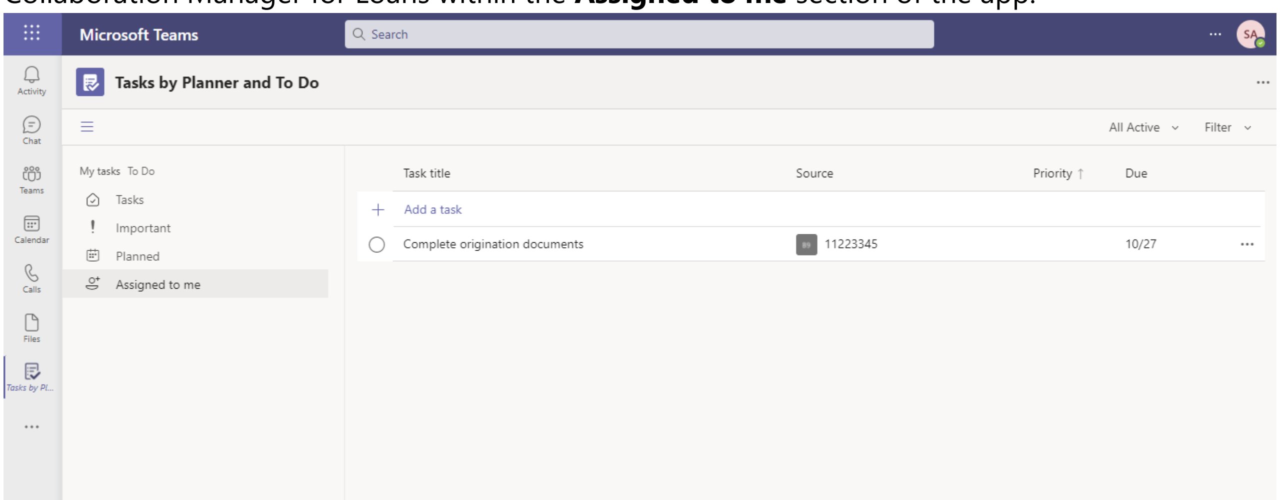


9. Because all of the tasks are backed by Microsoft Planner, as a user, you can leverage the Tasks app within Microsoft Teams to see all of the tasks that are assigned to you. To get started, select the **...**

menu in the left app bar and search for and select **Tasks by Planner and To Do**.



10. Once the **Tasks by Planner and To Do** app opens, you should see all the tasks that were created in Collaboration Manager for Loans within the **Assigned to me** section of the app.

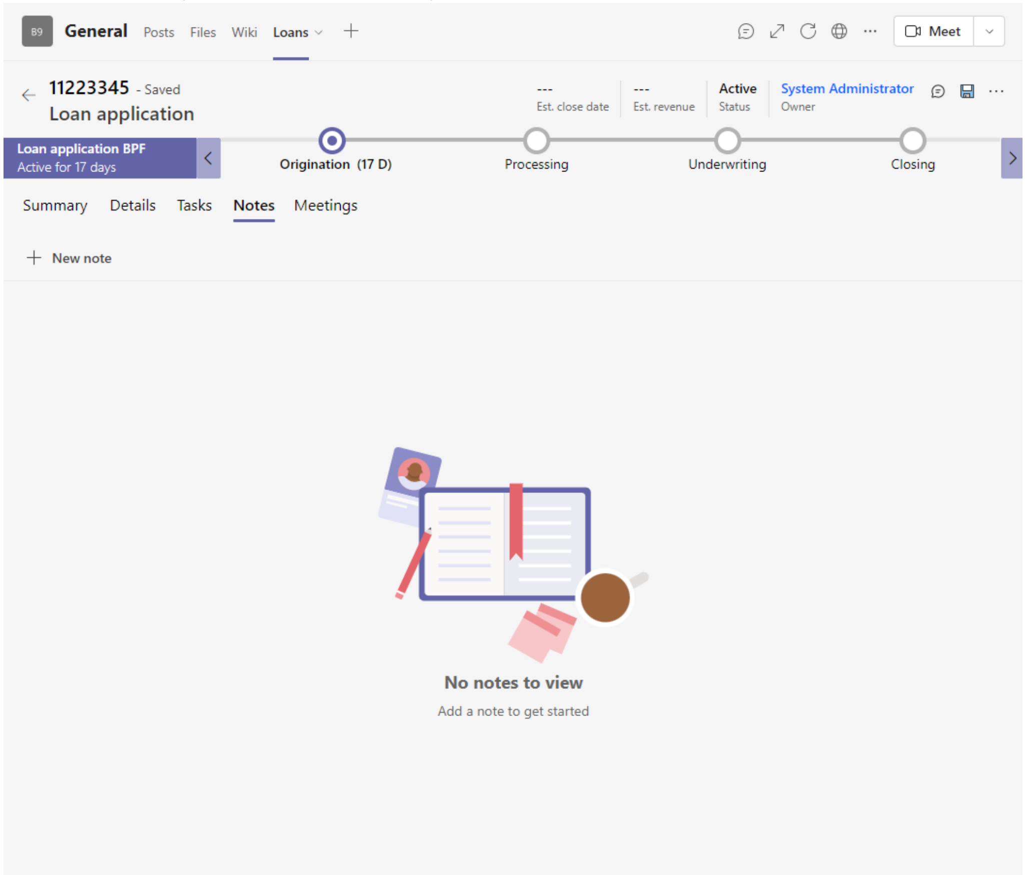


11. From within the **Tasks by Planner and To Do** app, you can view the details of a task, add attachments, and mark them as complete.

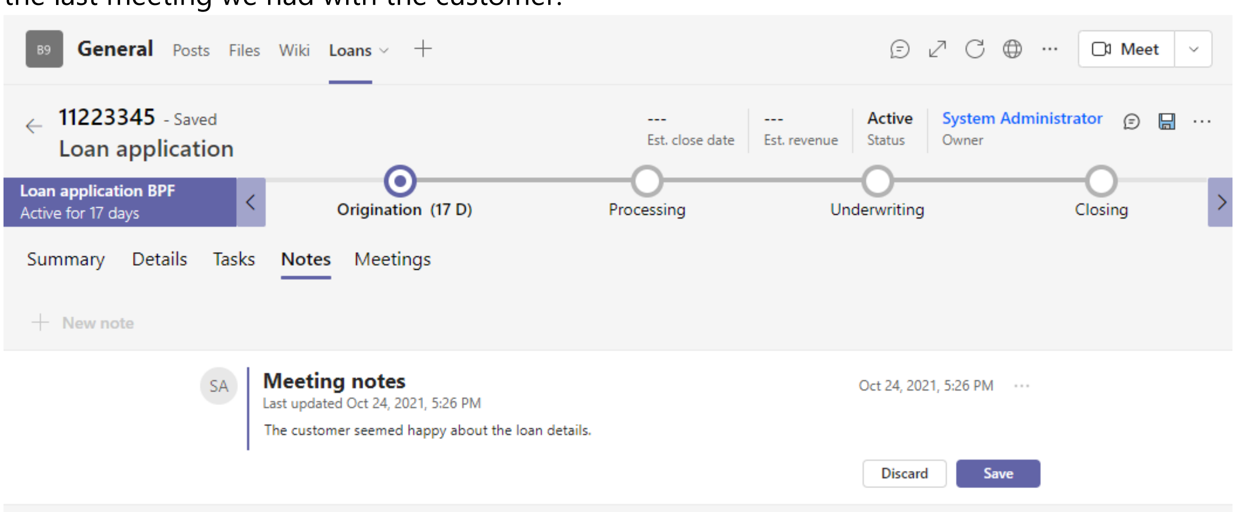
Note: with Power Automate, you can automatically create new tasks to ensure that loan teams always know what they need to do next.

Task 2: Creating notes in Collaboration Manager for Loans

12. From within Collaboration Manager for Loans, select the **Notes** tab. This will bring you to an empty screen where you can provide any relevant information.



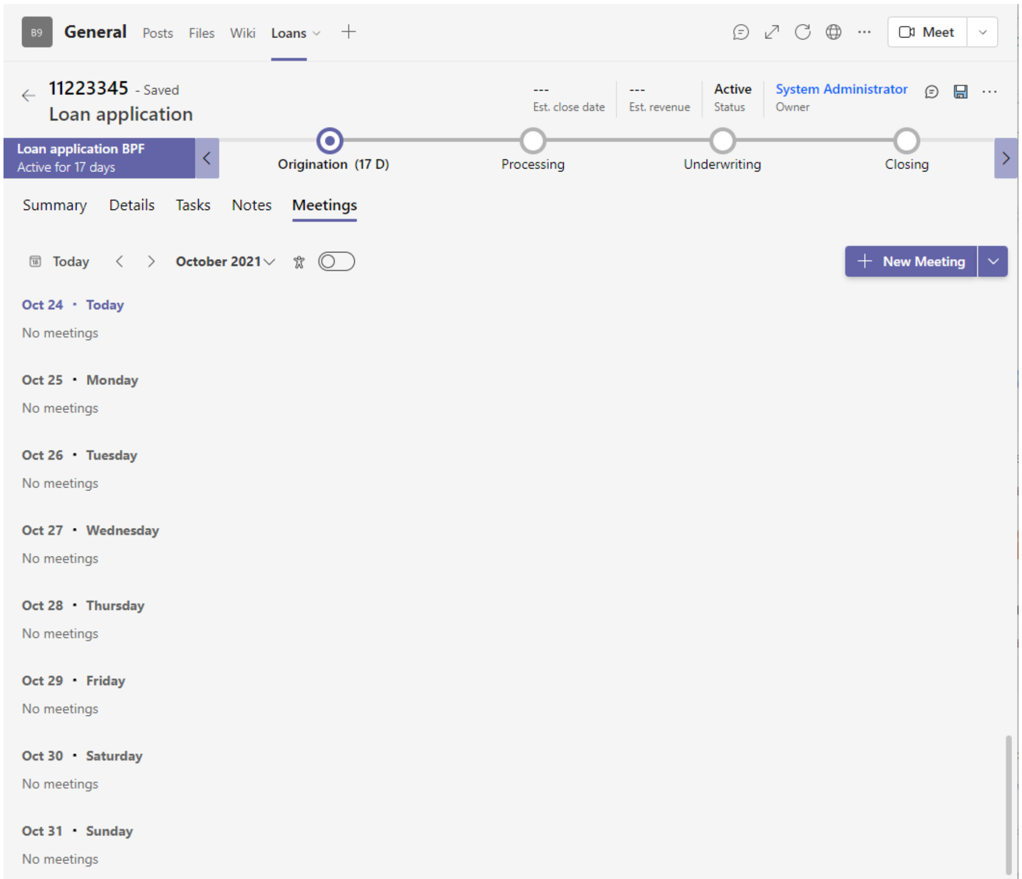
13. To add a new note, select **New note**.
14. You can then provide details regarding the loan. In the example below, we're providing notes regarding the last meeting we had with the customer.



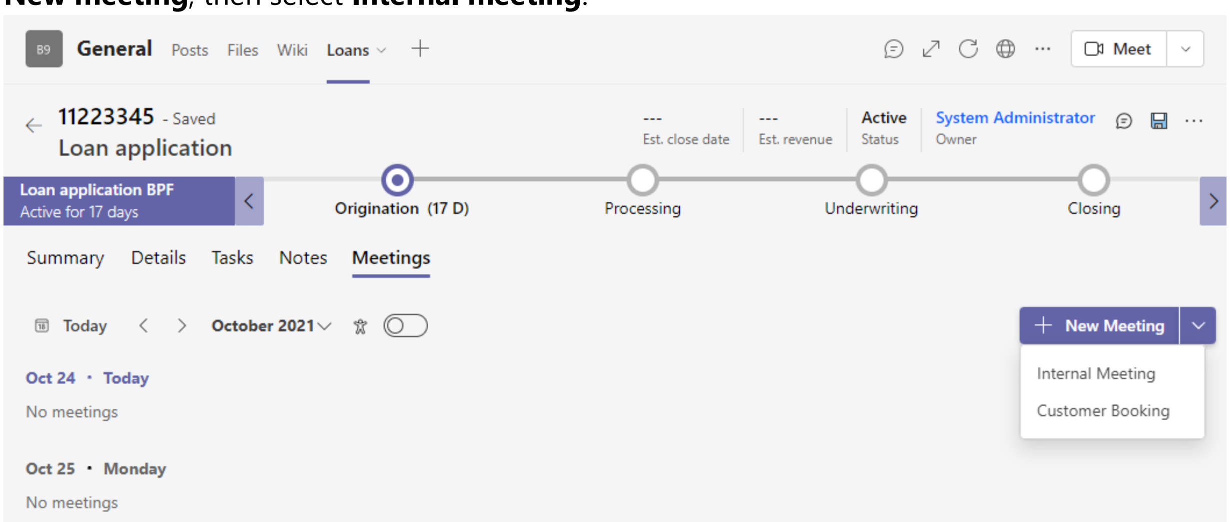
15. Once you're complete with typing the notes, select **Save**.

Task 3: Creating meetings in Collaboration Manager for Loans

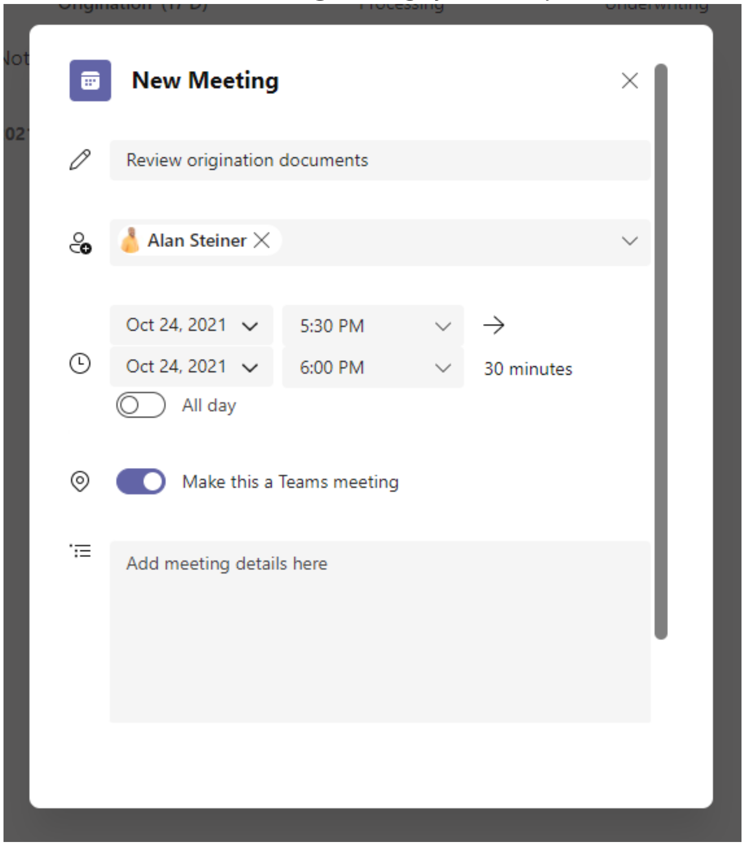
16. To schedule both internal and external meetings regarding the loan, start by selecting the **Meetings** tab for a loan record.



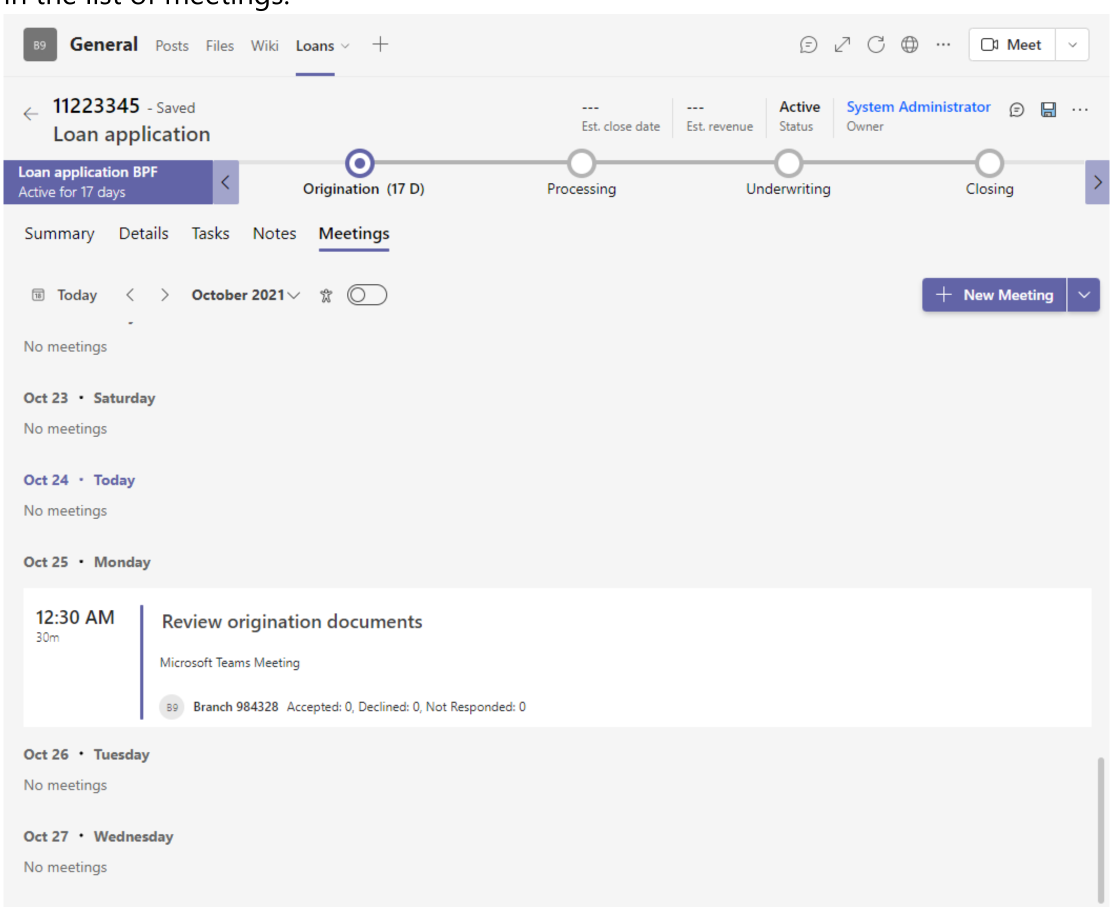
17. To schedule an internal meeting with the rest of the loan team, start by selecting the chevron next to **New meeting**; then select **Internal meeting**.



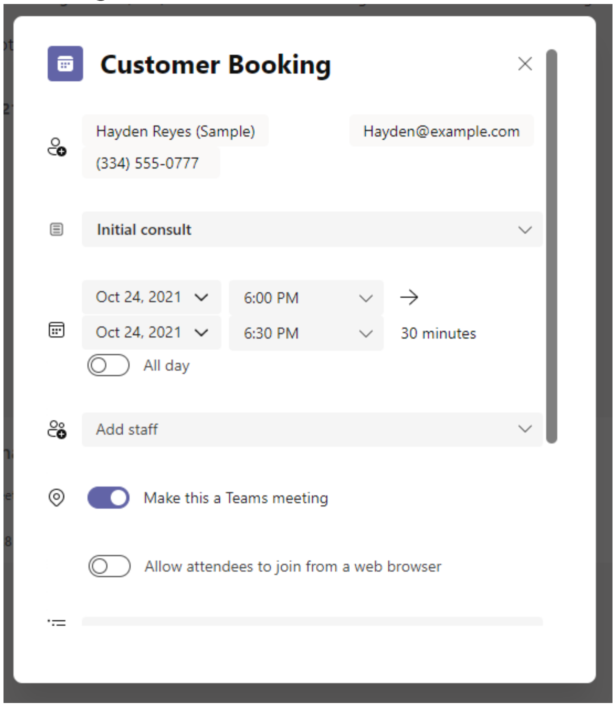
18. Within the **New meeting** dialog, you can provide all the relevant information about the sync.



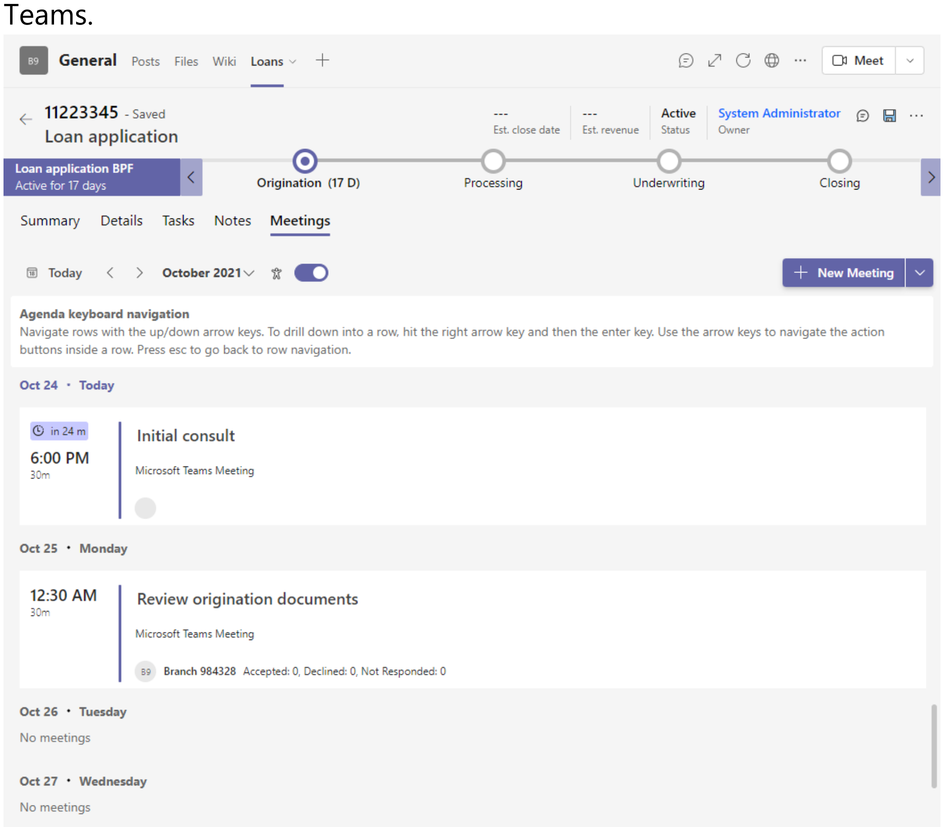
19. Scroll to the bottom of the dialog and select **Save** once you're complete. The meeting will now appear in the list of meetings.



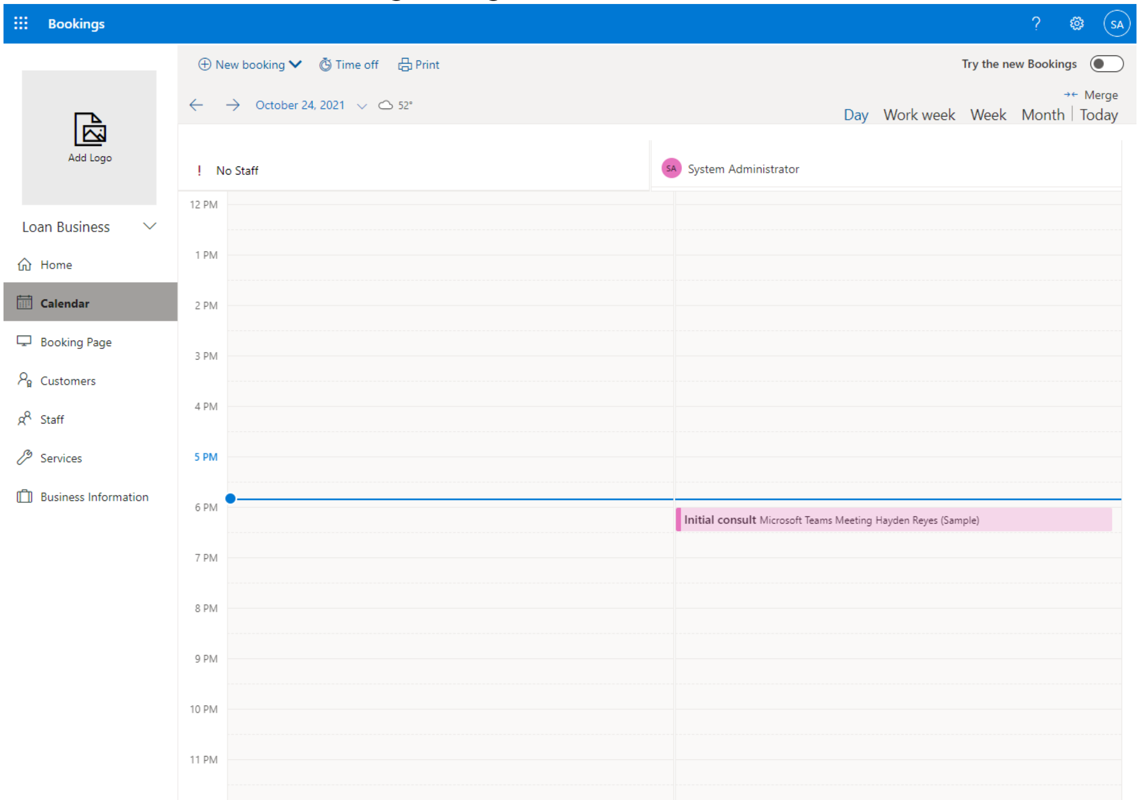
20. To schedule an external meeting with the customer, select the chevron next to the **New meeting** button and select **Customer booking.**
21. In the **Customer booking** dialog, the relevant customer is already prepopulated using the information in the Loan Application. You can provide additional information about the meeting before selecting **Save**. Note that you can add additional booking types by adding additional services within your Bookings business.



22. Once you're complete, you should see both meetings in your meeting list. Once the meeting has started you can join it by selecting the **Join** button; this will open the meeting directly within Microsoft Teams.



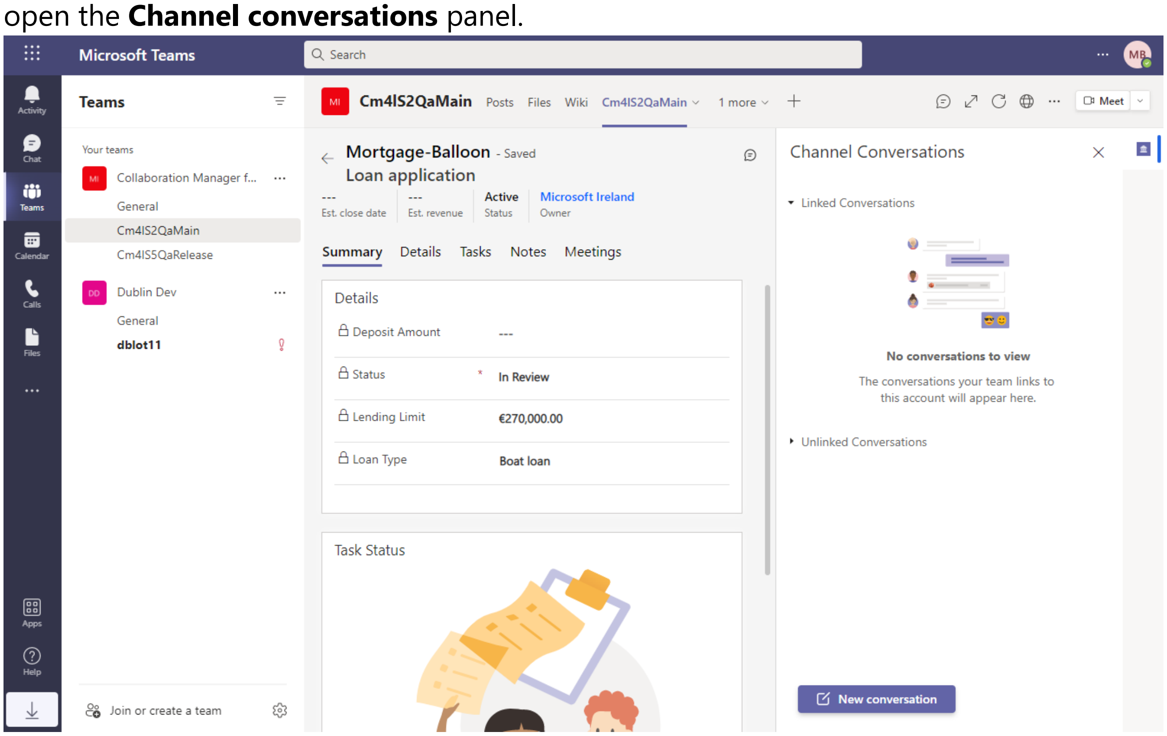
23. Because all the meetings are backed by Outlook, you can navigate to either Bookings or your Outlook Calendar to see all the meetings a single calendar.



Task 4: Creating chats in Collaboration Manager for Loans

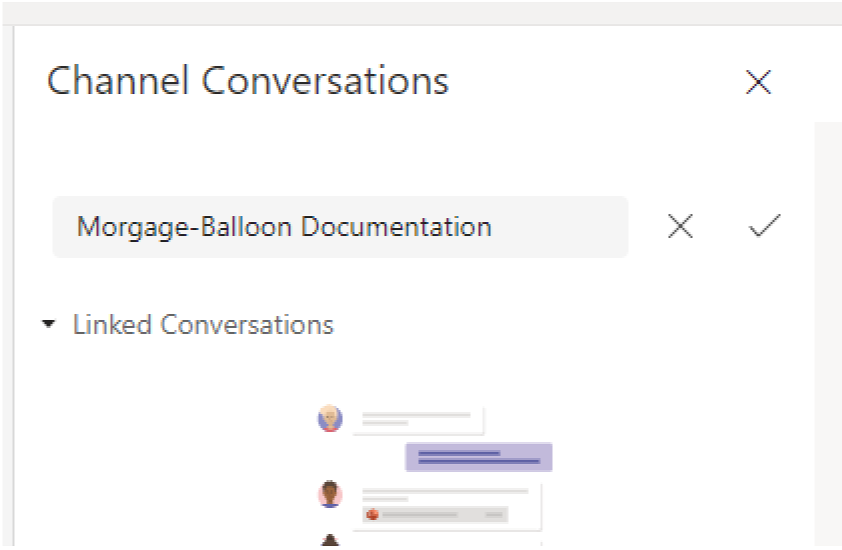
Note: The following functionality only works from within a teams channel. Chats for personal apps will come in a future release for Collaboration Manager for Loans.

24. To view the linked chats for a particular loan, select the chat icon in the header of the loan. This will open the **Channel conversations** panel.



25. To create a new conversation in the channel, select **New conversation**.

26. Provide a name for the conversation and select the check icon.



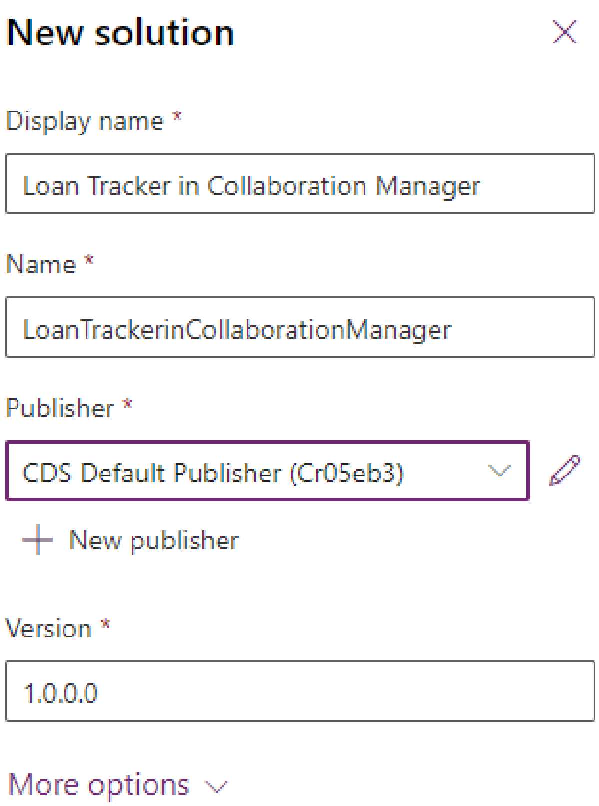
27. Once the conversation has been created, you can provide replies by typing in the chat pane that appears on the right.
28. You can also see and reply to chats from within the **Posts** tab for the Teams channel.

Exercise 4: Add controls from Loan Tracker

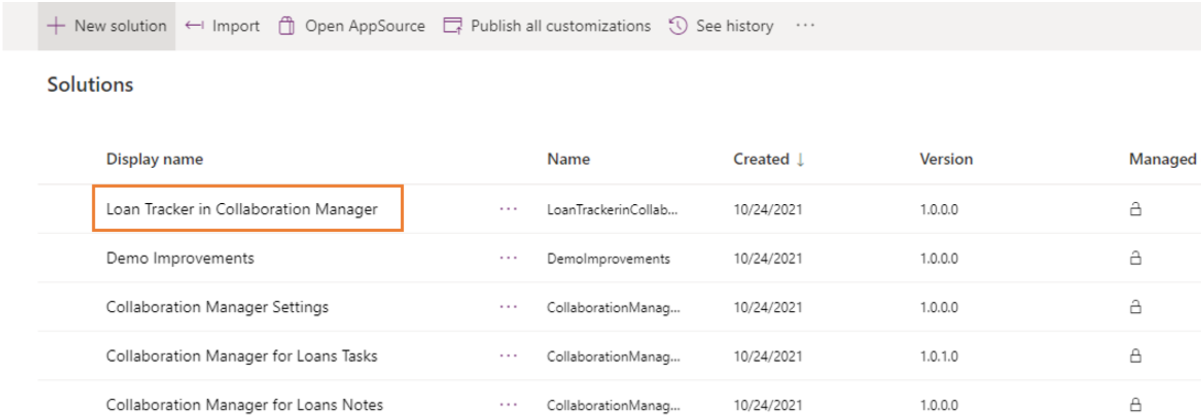
Because all the apps in the Microsoft Cloud for Financial Services uses the same data model, you can mix-and-match the experiences of the various apps. In this exercise, you will be embedding the Loan Application form from the Loan Tracker app so that your users can have access to even more information within Collaboration Manager for Loans.

Task 1: Replace default form within Collaboration Manager

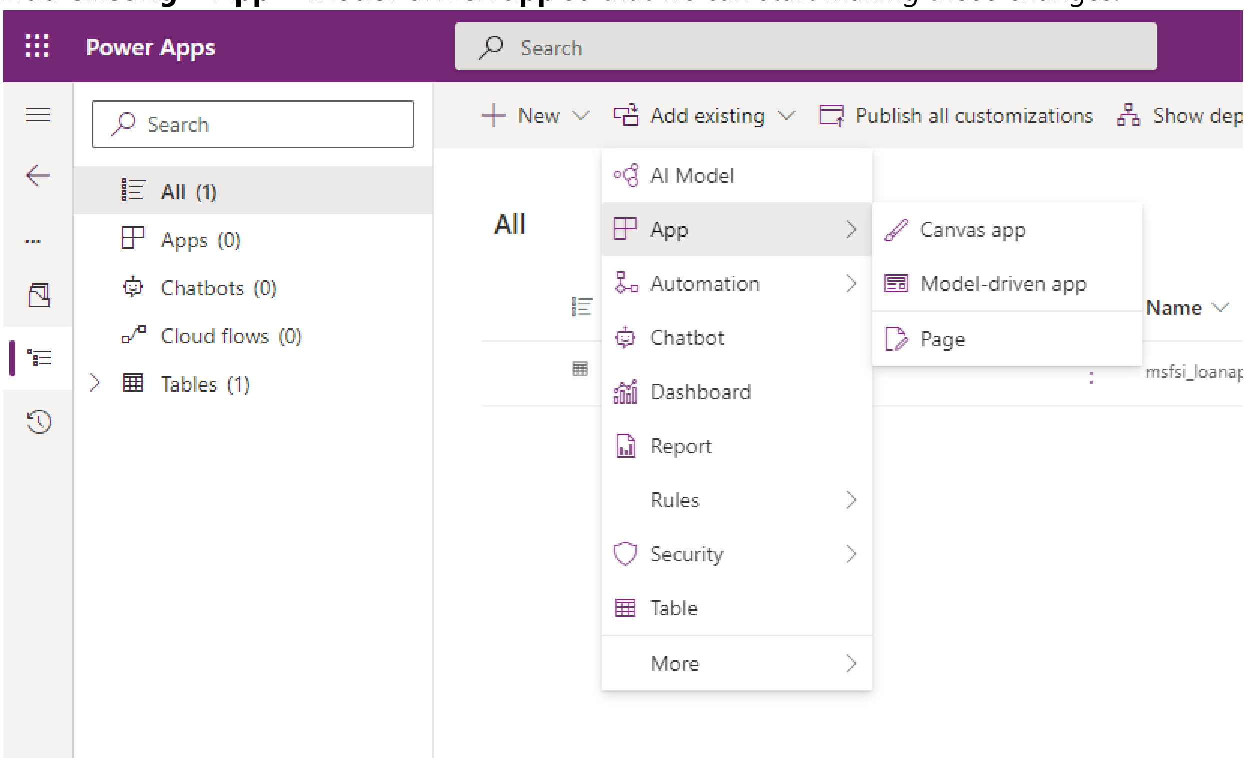
1. Before beginning to create your customizations, we first need to create a solution to house all the changes. Begin by first navigating to https://make.powerapps.com and select **Solutions** in the left navigation.
2. Select **New solution** to create a new solution.
3. Provide information for the required fields and then select **save**.



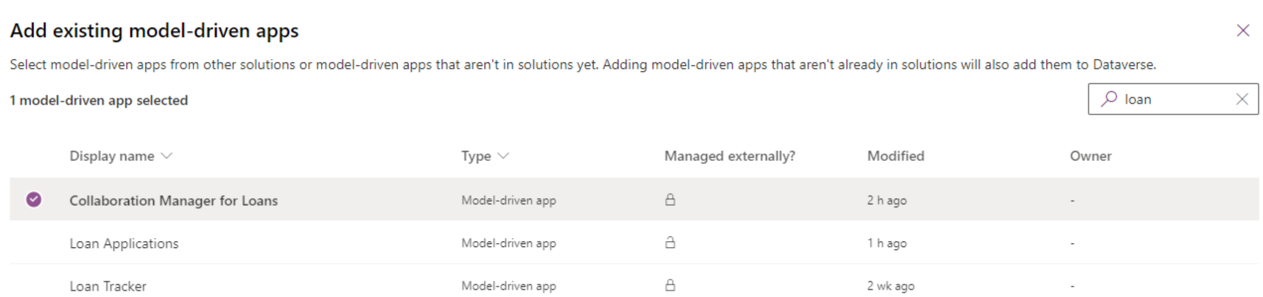
4. Open the solution you just created.



5. Since we want to show the Loan Tracker form instead of the default Collaboration Manager form, we want to update the app module so that it shows a different Loan Application form. Start by selecting **Add existing** > **App** > **Model-driven app** so that we can start making those changes.

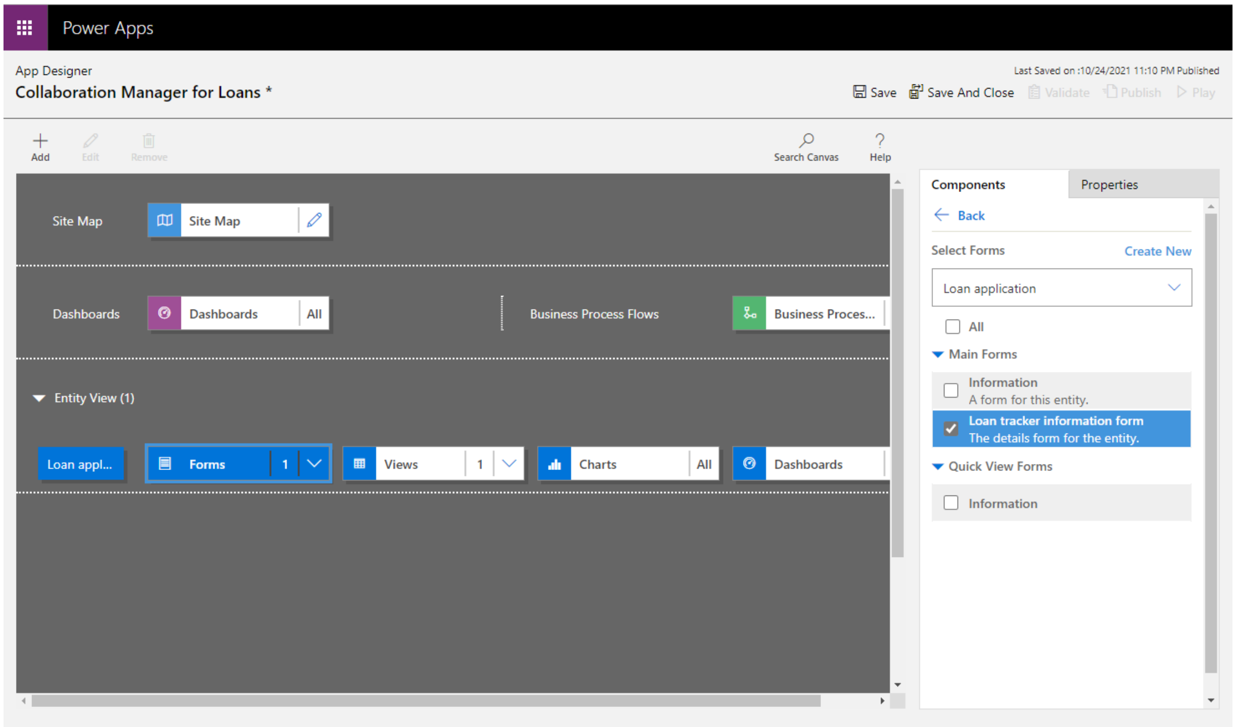


6. Select **Collaboration Manager for Loans** and then select **Add** to bring the app into your solution.



7. Once the app is in your solution, select it to open it in the classic app designer.
8. Select the **Form** card for the **Loan application** entity within the app designer.

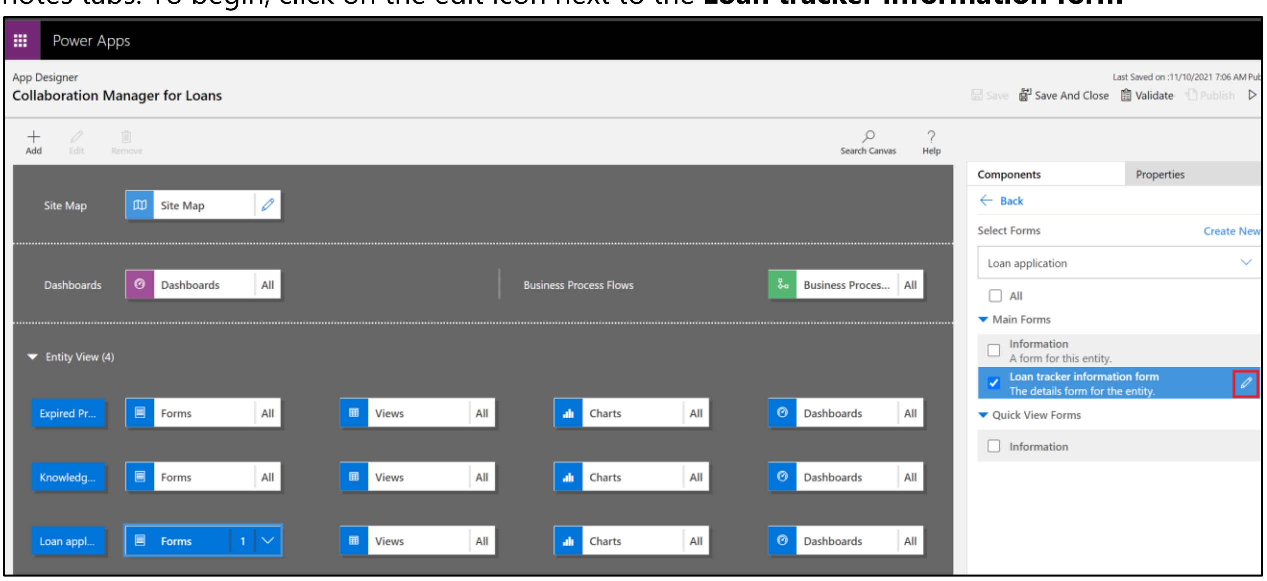
9. In the property pane on the left, uncheck **Information** and check **Loan tracker information form** instead.



10. Select **Save**.
11. Select **Publish**. If you played the app at this point within Microsoft Teams, the components from Loan Tracker will be present, but the collaborative features like tasks, meetings, and notes would not be present.

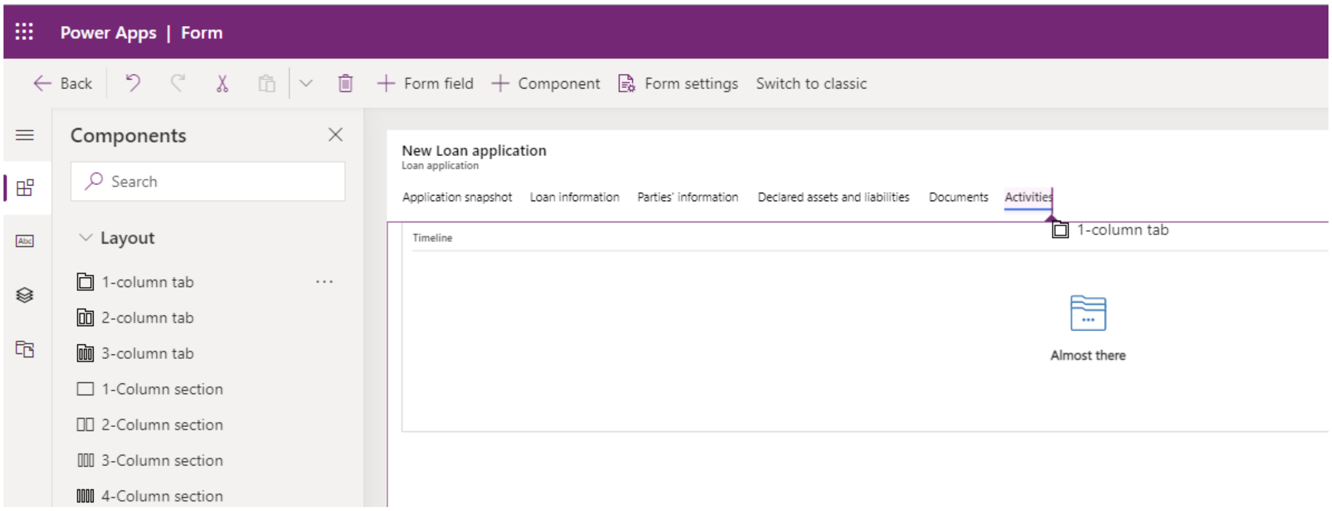
Task 2: Adding Collaboration Toolkit experiences in the Loan tracker form

12. We now want to edit the **Loan tracker information form** so that it includes the tasks, meetings, and notes tabs. To begin, click on the edit icon next to the **Loan tracker information form**

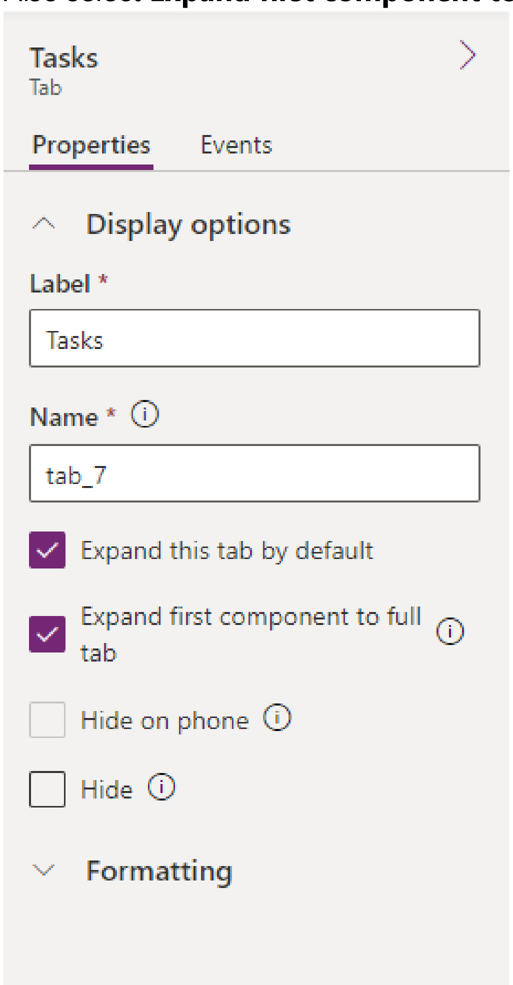


13. It will open the **Loan tracker information form** in the form designer.

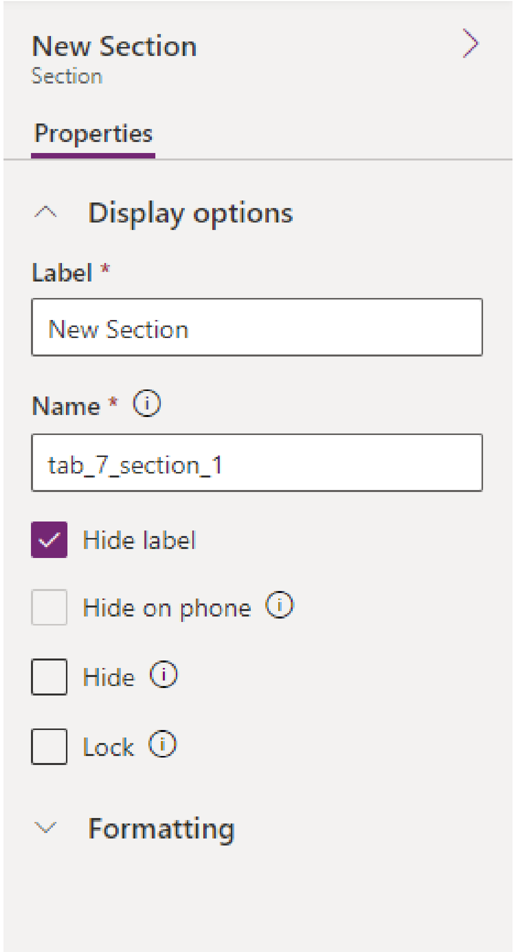
14. Once you're in the form designer, drag in a **1-column tab** from the **Components** drawer to the right of the **Activities** tab.



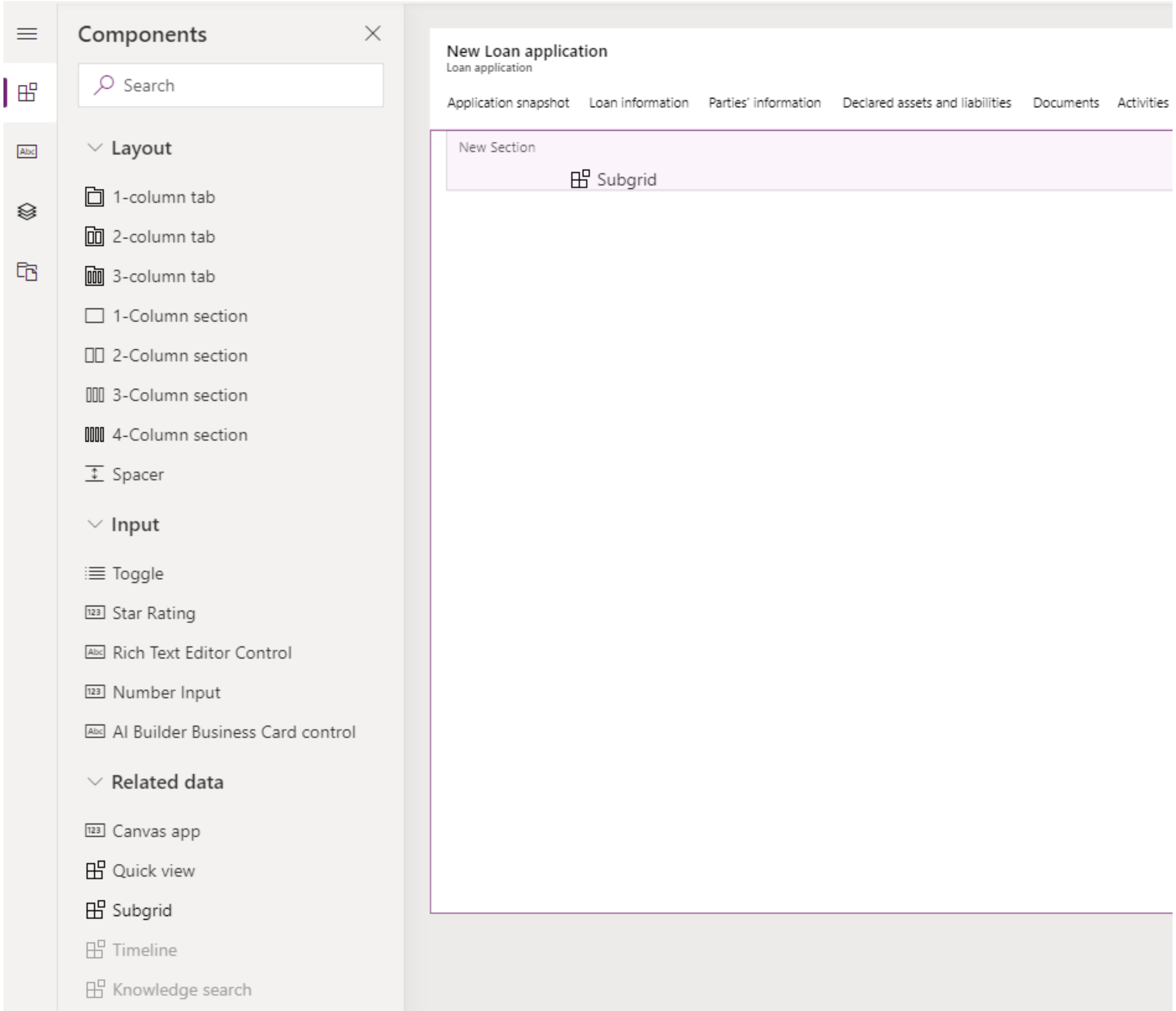
15. After dragging in the tab, rename the tab to "Tasks" in the property pane.
16. Also select **Expand first component to full tab** in the property pane.



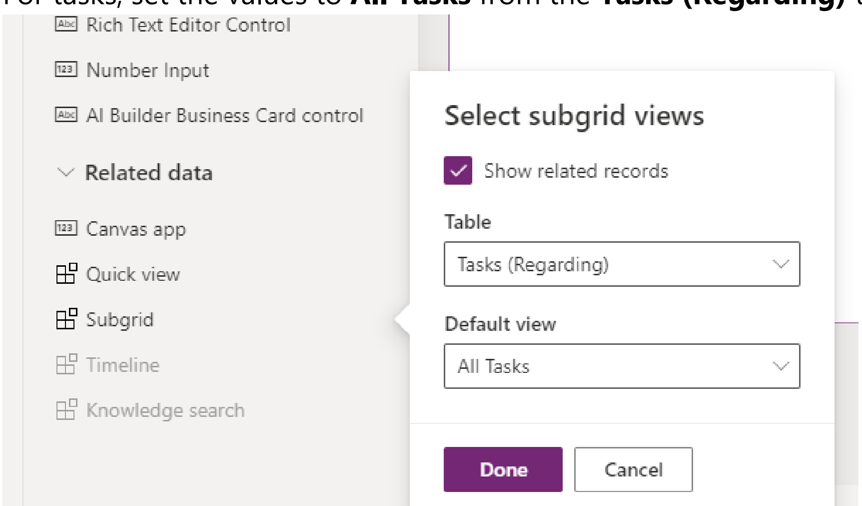
17. Now select the section within your new tab so that you can select **Hide label** within the property pane.



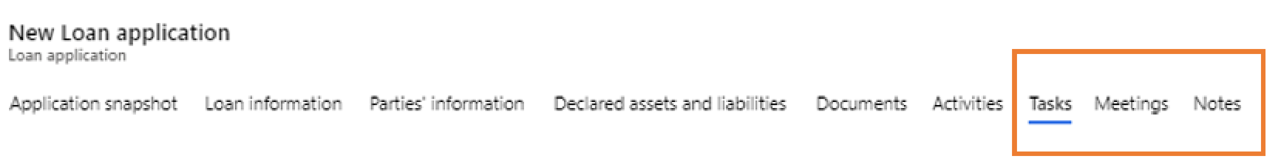
18. Finally, drag-and-drop a **Subgrid** control from the **Components** drawer into your section.



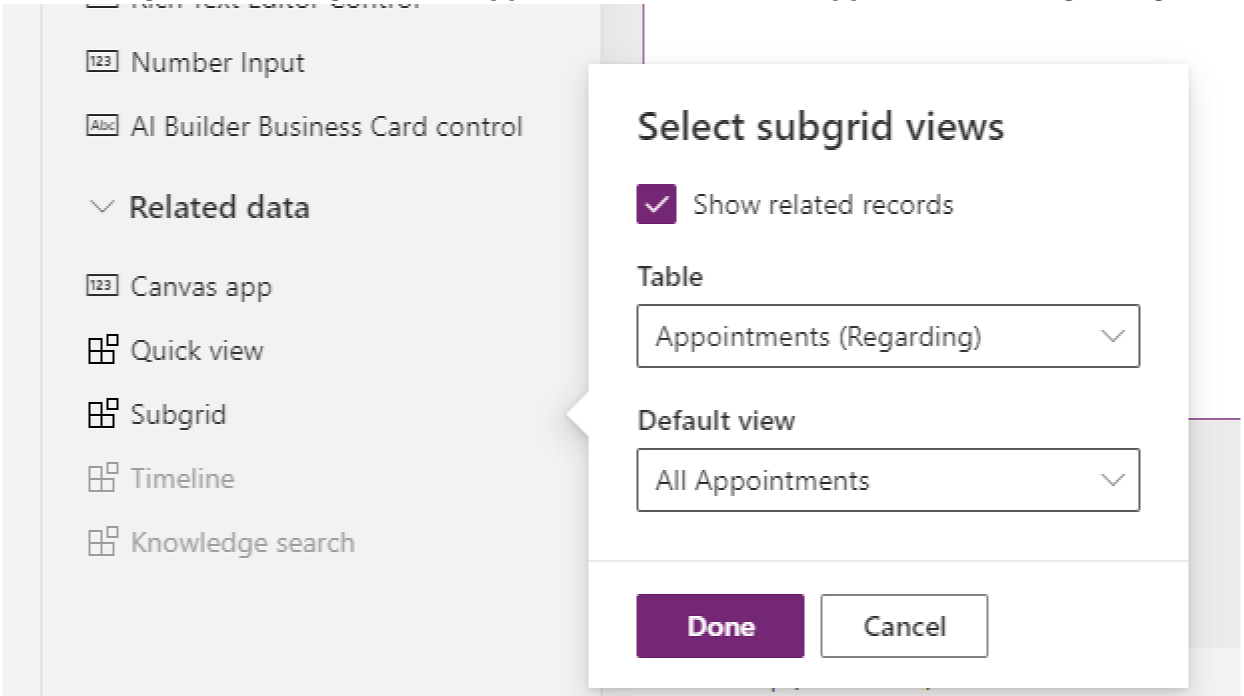
19. For tasks, set the values to **All Tasks** from the **Tasks (Regarding)** table.



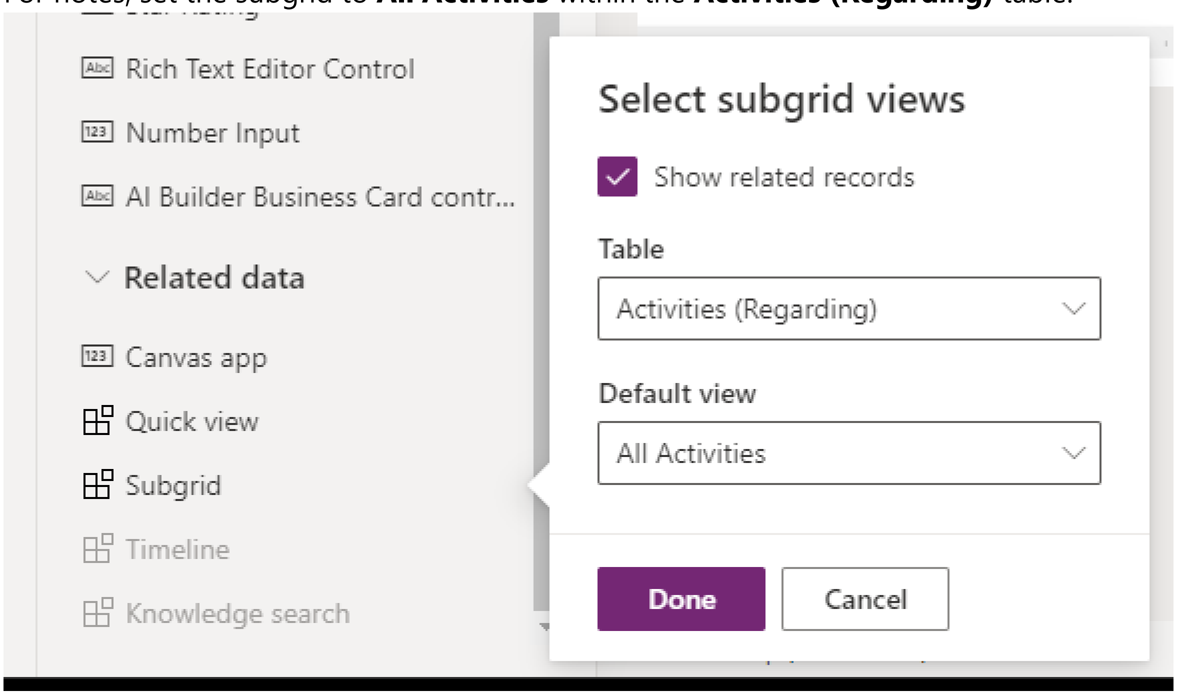
20. Repeat steps 18-23 for the Meetings and Notes tab.



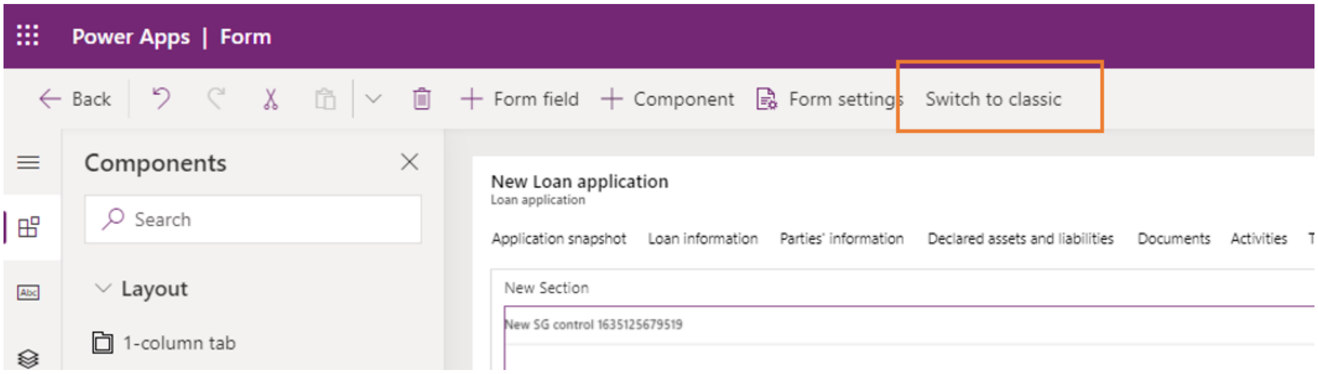
For meetings, set the subgrid to **All Appointments** within the **Appointments (Regarding)** table.



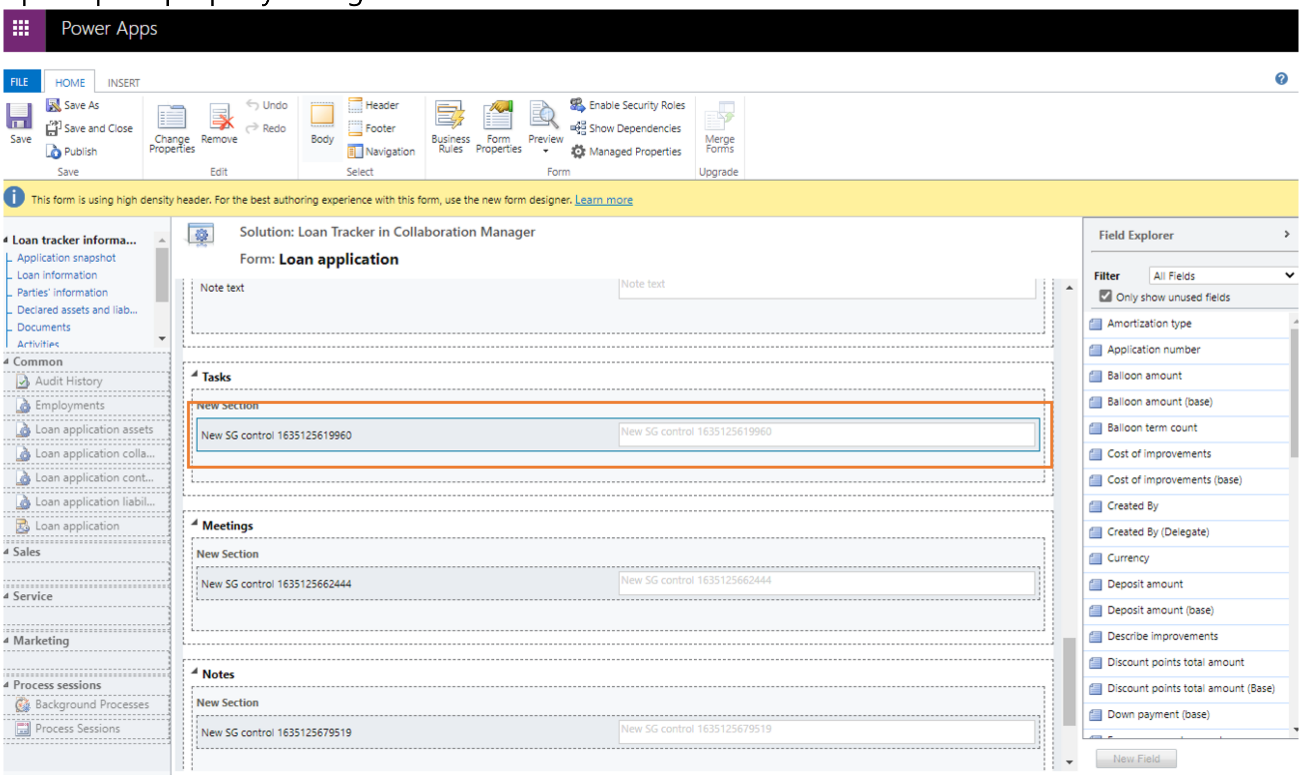
For notes, set the subgrid to **All Activities** within the **Activities (Regarding)** table.



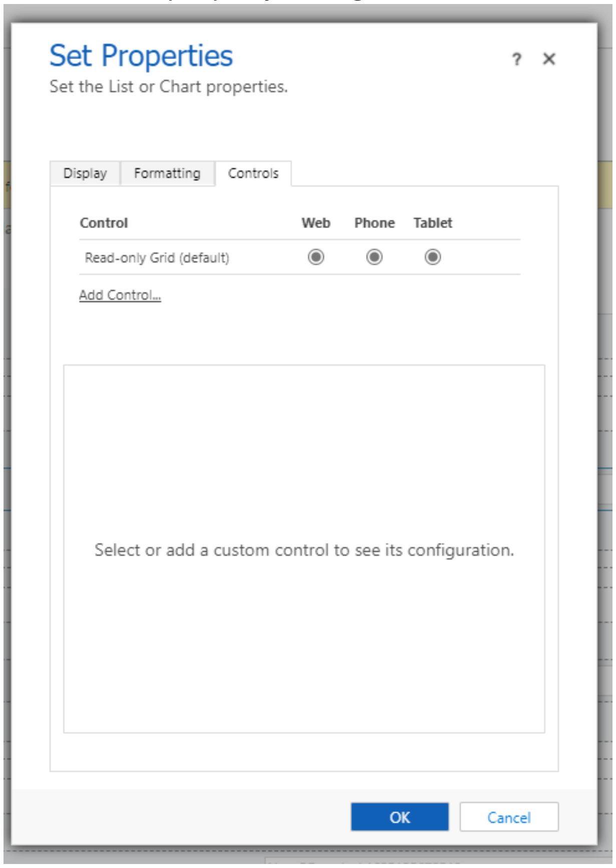
21. We now need to configure the custom controls for our subgrids within the classic form designer. Select **Save** and then select **Switch to classic**.



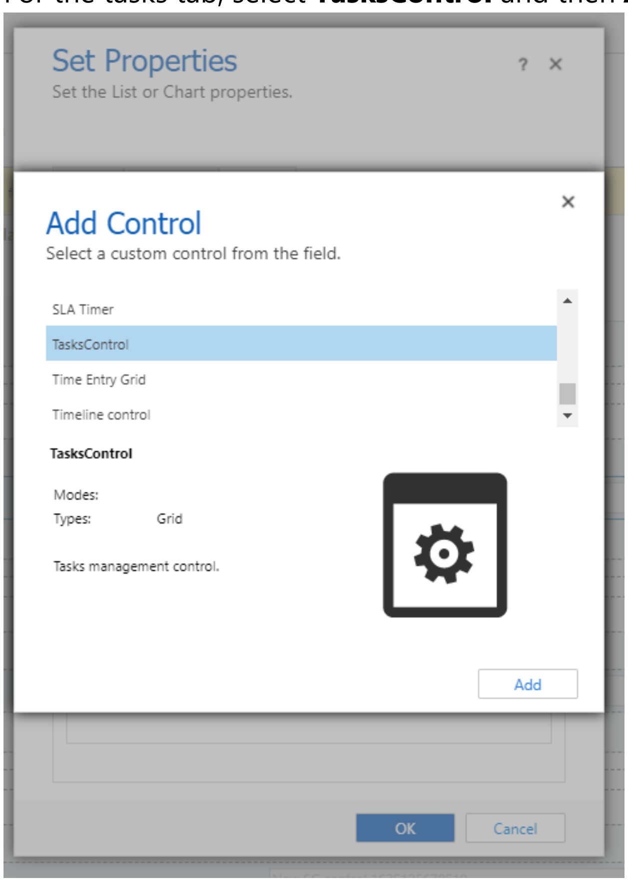
22. Scroll down in the classic form designer until you find the **Tasks** tab. Double-click on the subgrid to open up it's property dialog.



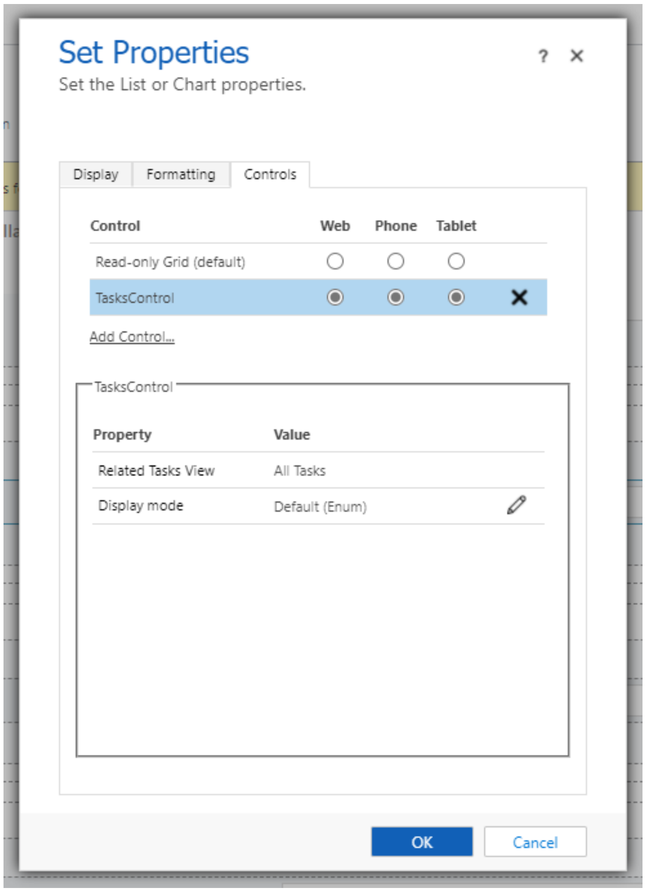
23. While in the property dialog, select the **Controls** tab to view all custom controls assigned to it.



24. Select **Add Control...**
25. For the tasks tab, select **TasksControl** and then **Add**.

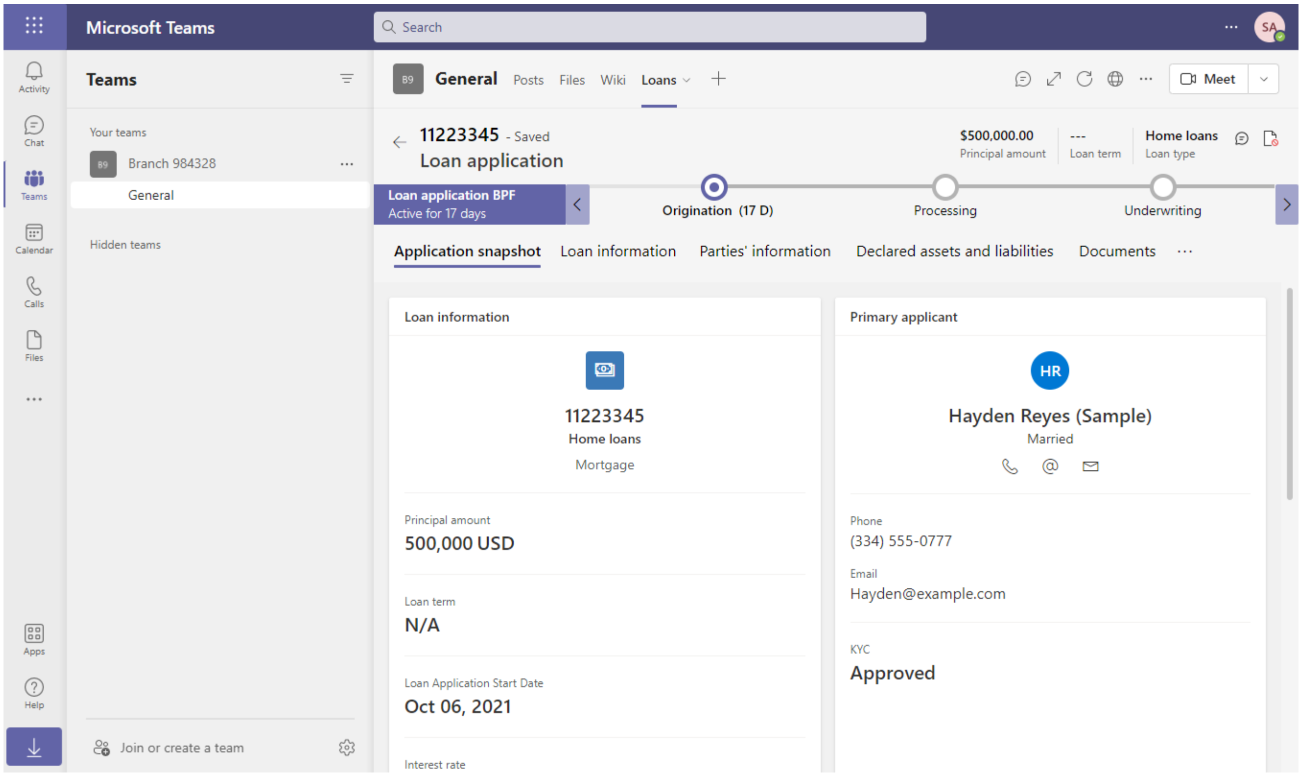


26. Finally, check the **Web**, **Phone**, and **Tablet** radio buttons for the **TasksControl** to ensure that it shows across all form factors.



27. Repeat steps 26-30 for the meetings and notes tabs. For meetings, use the **EventsControl** and for notes, use the **NotesControl**.
28. Select **Save**.
29. Select **Publish**.

30. You can now open Collaboration Manager for Loans in the Teams. You should see all of the tabs from Loan Tracker *and* the collaborative tabs from Collaboration Toolkit.



Summary

Nice work! You have completed **Lab 04 - Collaboration Manager for Loans.**

In this lab, you learned how to do the following:

1. Explore the Collaboration Toolkit data model
2. Setup the settings for Collaboration Manager for Loans
3. Navigate Collaboration Manager for Loans application and create new collaboration activities
4. Fuse the Loan Tracker app with Collaboration Manager for Loans