Microsoft Cloud for Financial Services in a Day

Collaboration Manager for Loans

Step-by-Step Lab

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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

Prerequisite(s)

- 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 Collaboration Manager for Loans 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: Understand 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.

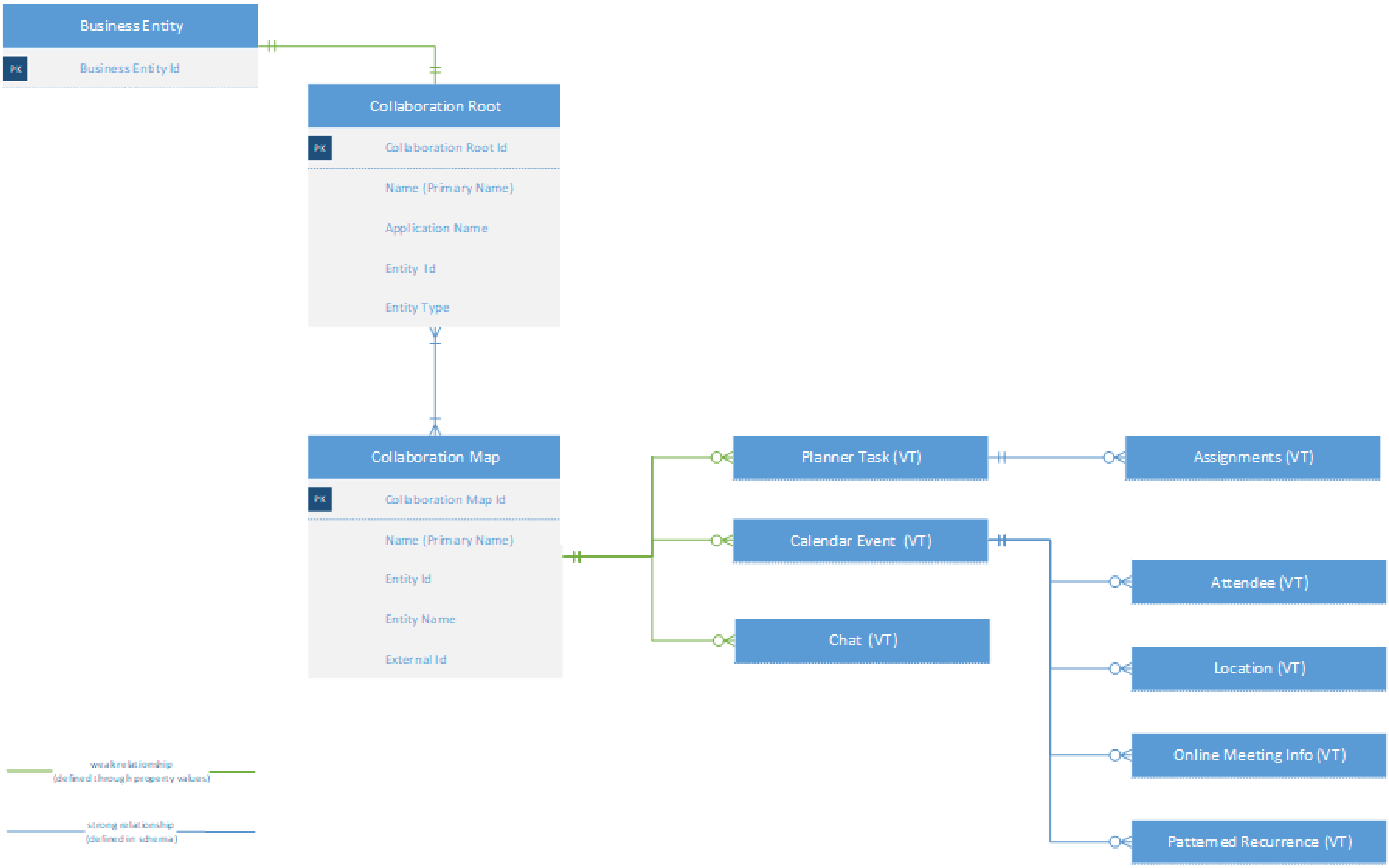
Task 1: Understand Collaboration Toolkit Tables and Relationships

In this task, you will understand 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	
Graph Planner Plan (VT)	The Graph Planner Plan table represents a Plan in Microsoft 365.
Graph Planner Tasks (VT)	All the tasks in Microsoft Planner a user has access to.
Graph event (VT)	All the Outlook events that a user has access to.
Graph Booking Appointments	Represents a customer appointment for a bookingService, performed by a set of staff members, provided by a Microsoft Bookings business.
Graph Drive (VT)	The top-level object that represents a user's OneDrive or a document library in SharePoint.
Graph Drive item (VT)	All the OneDrive 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)

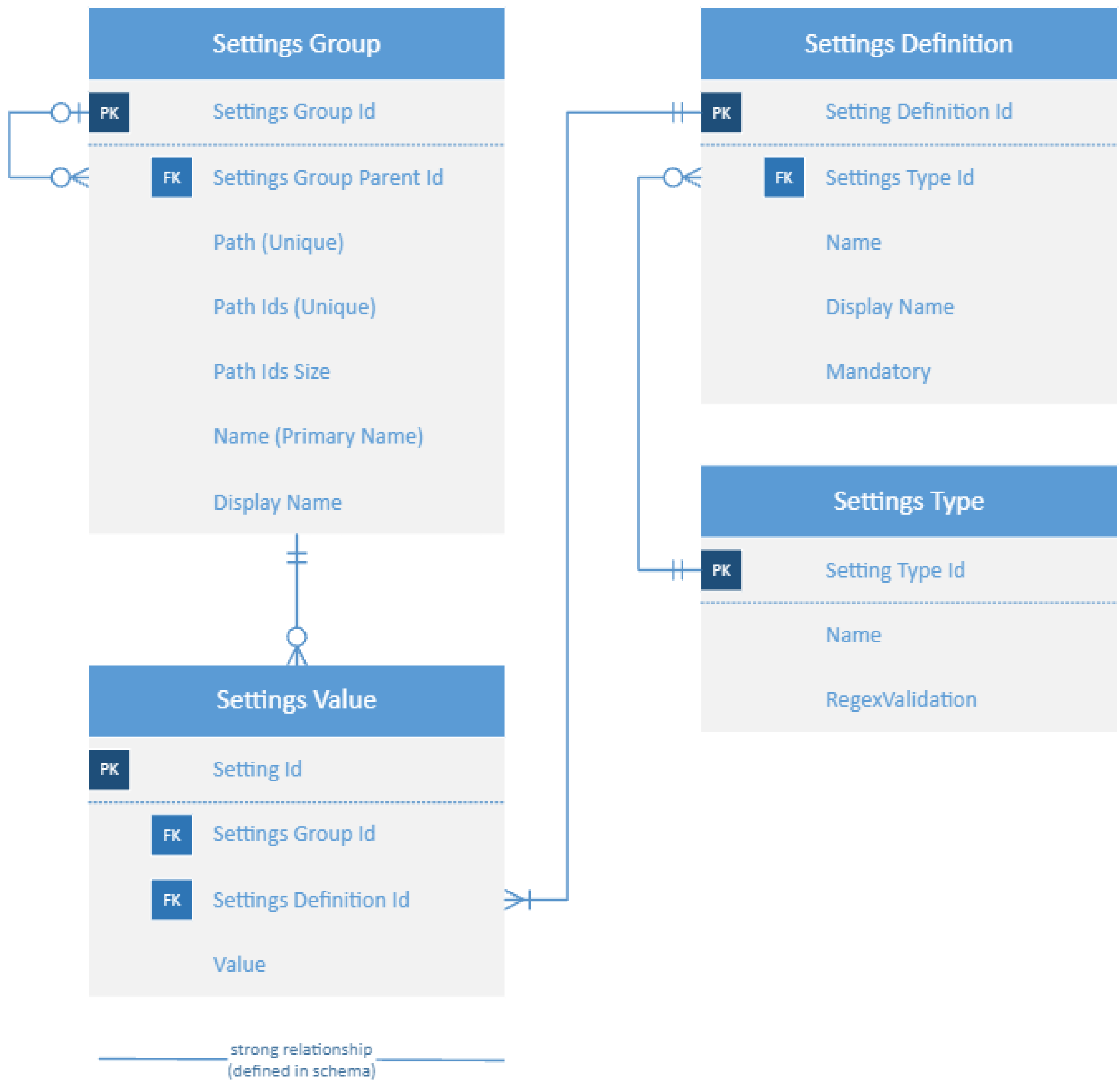
Task 2: Understand Collaboration Toolkit Settings and Relationships

In this task, you will understand 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 application
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)

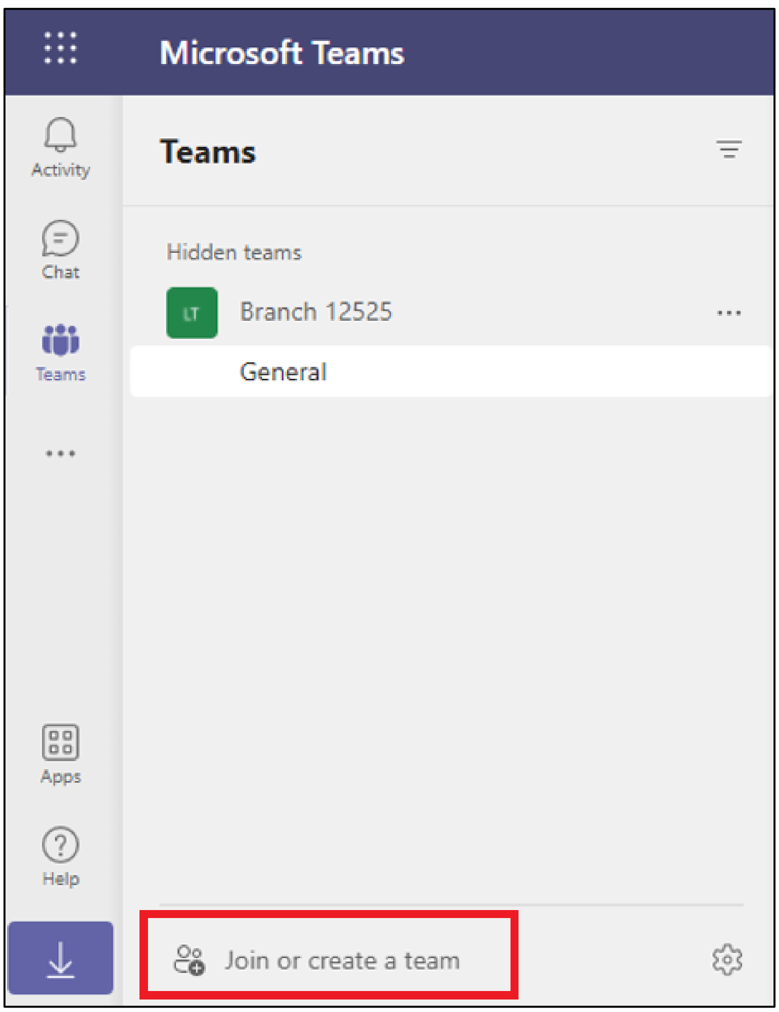
Exercise 2: Setup Collaboration Manager for Loans Settings

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.

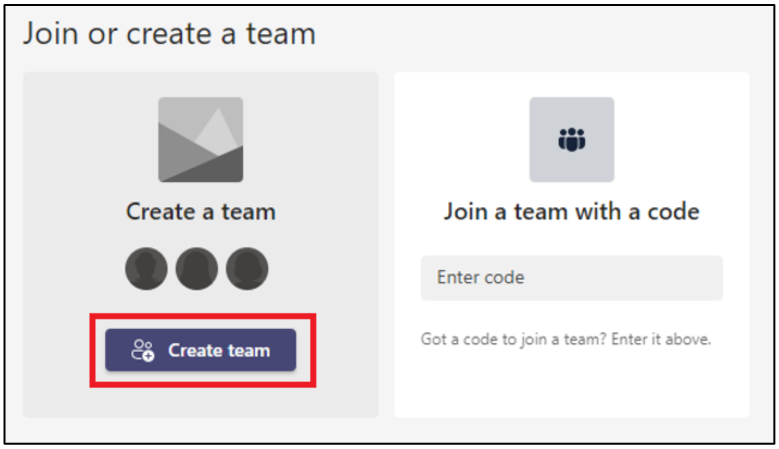
At the end, you'll then learn how you can take a model-driven app like Collaboration Manager for Loans and embed it in Teams as both a teams tab and as a personal app.

Task 1: Create a new Microsoft Teams team

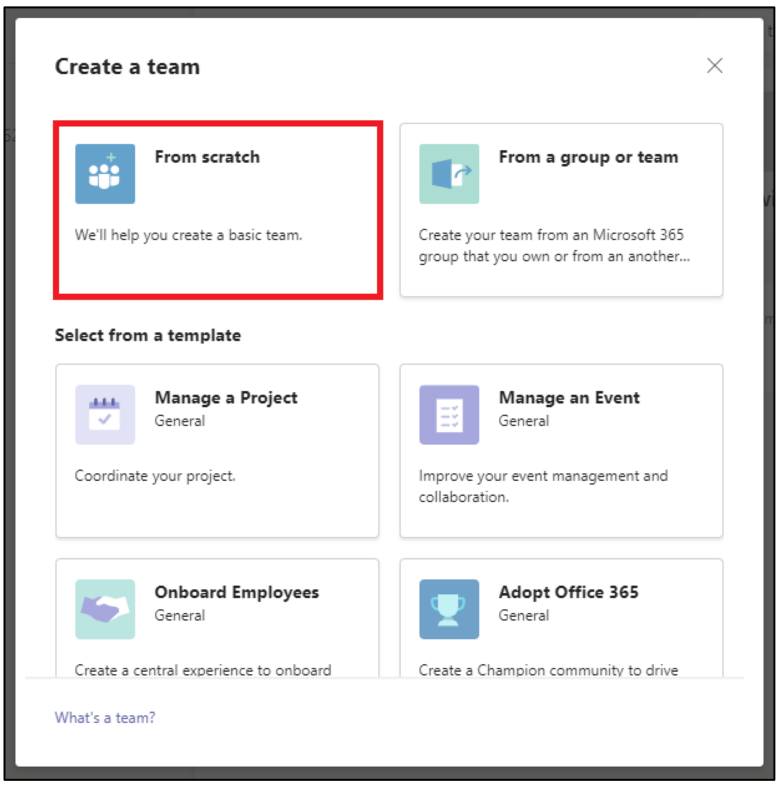
1. Open **[Microsoft Teams]** and navigate to **Teams** in the left app bar.
2. Select **Join or create a team** so that we can create a new branch that will be leveraging Collaboration Manager for Loans.



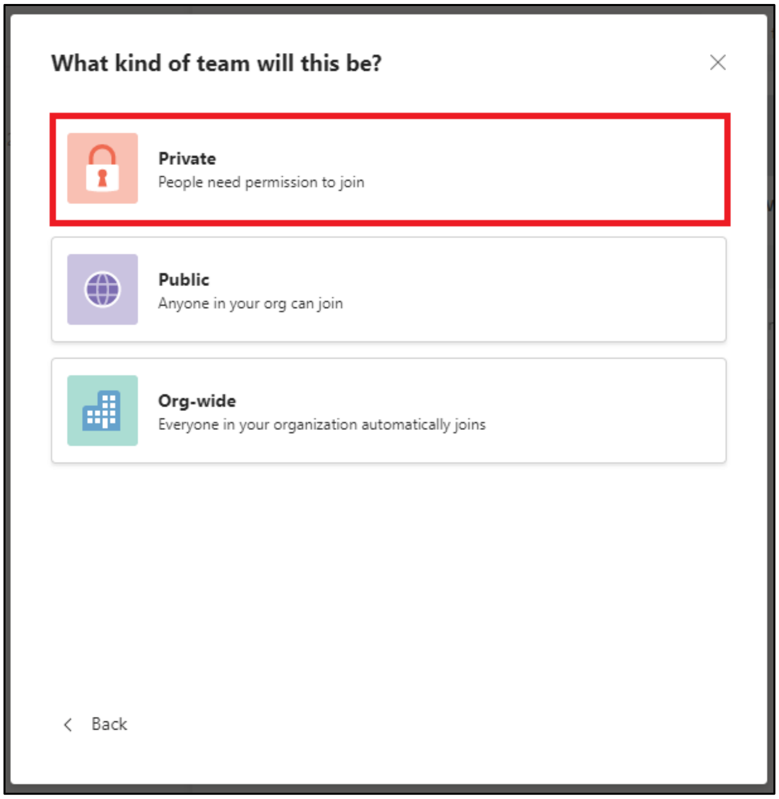
3. Select **Create team** to open the new team creation modal.



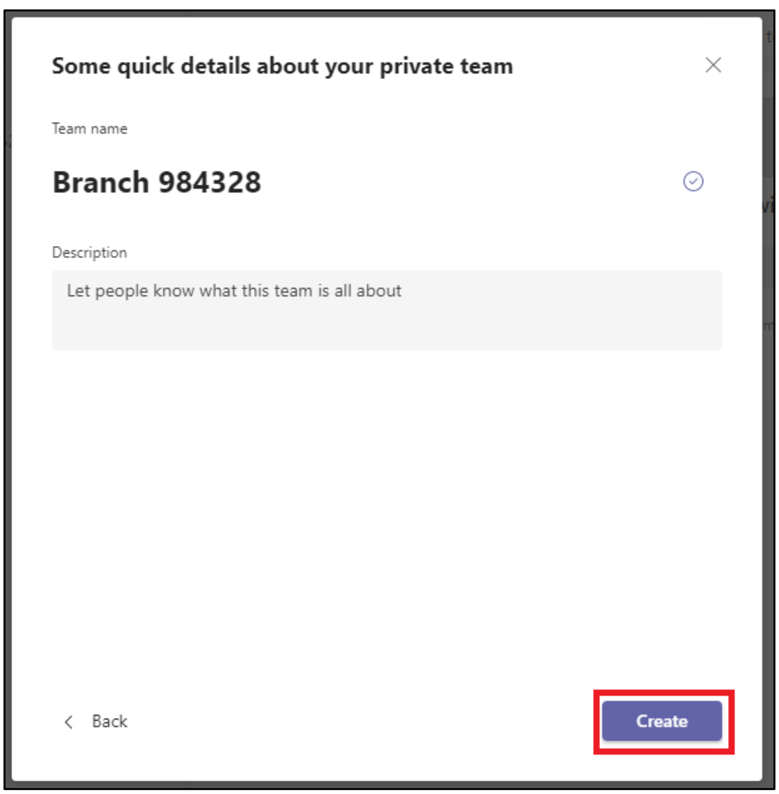
4. Select **From scratch** to create a brand new Teams team.



5. Because this team will only be accessible to users who belong to this branch, make the new team **Private**.



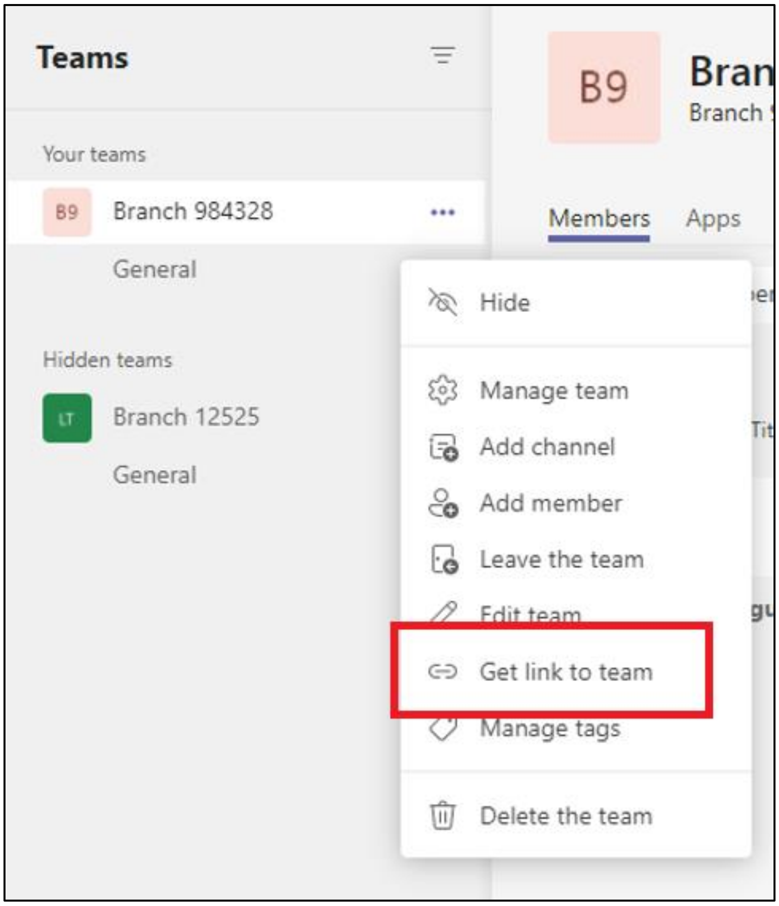
6. Provide the name and description of your brand new Branch before finally selecting **Create**.



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

Now that you have created a new team in Microsoft Teams, you'll need to record its ID so that you can use it later.

1. To get the ID, find your new team in your list of teams.
2. Select the ellipsis (...) button next to your new team.
3. Select **Get link to team**.



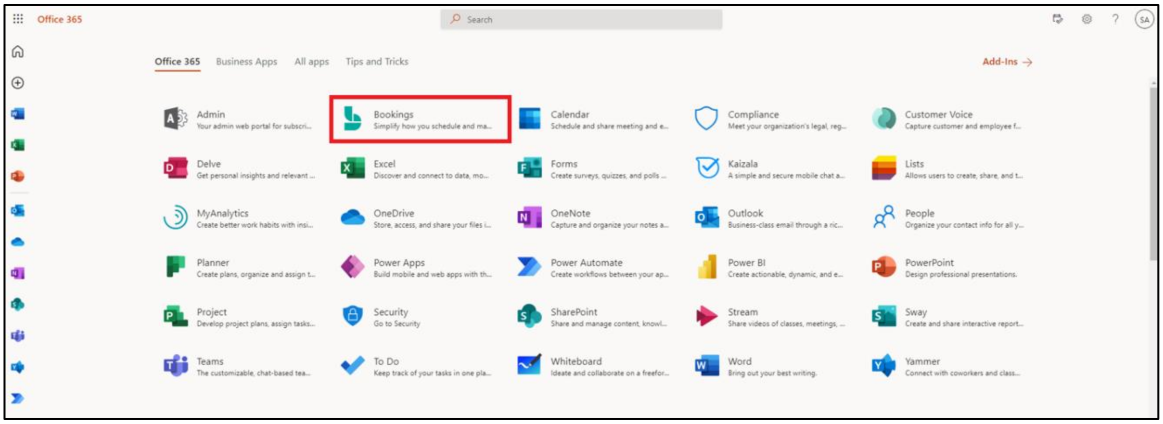
4. Record the value of **groupid** from within the URL somewhere safe. You will use this value in a future step while defining the settings of your solution.

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

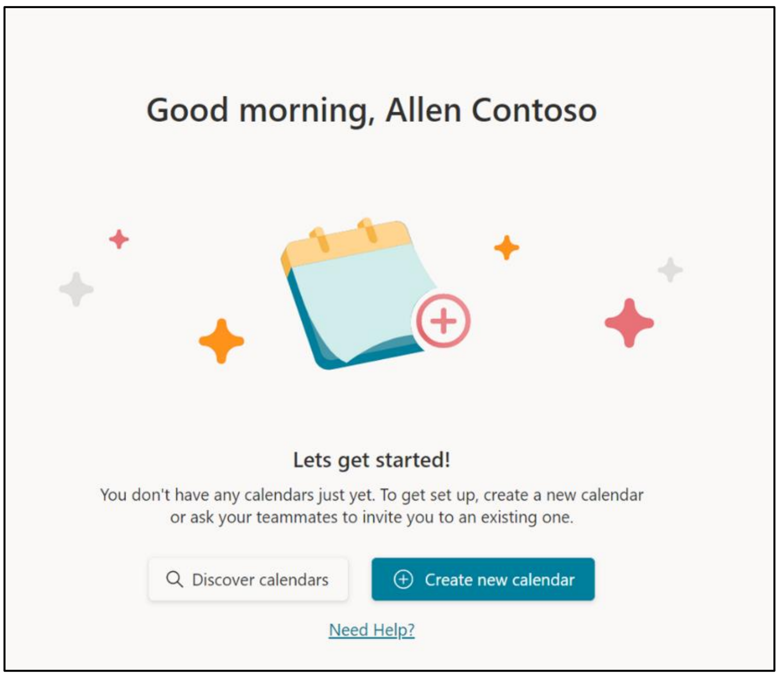
Task 3: Create a new Bookings business for the branch

To use the virtual visit features within Collaboration Manager for Loans, you must also provide a Microsoft Bookings business.

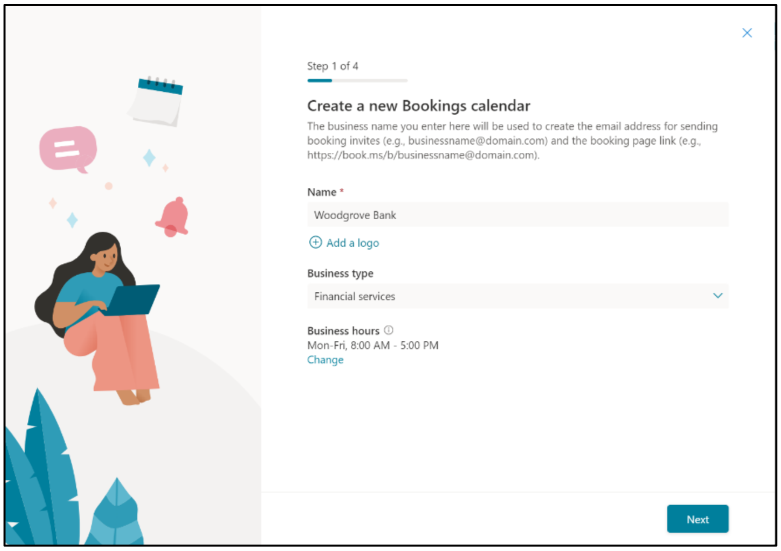
1. To create a new Bookings business, start by going to http://office.com/apps.
2. Select **Bookings** within the list of apps.



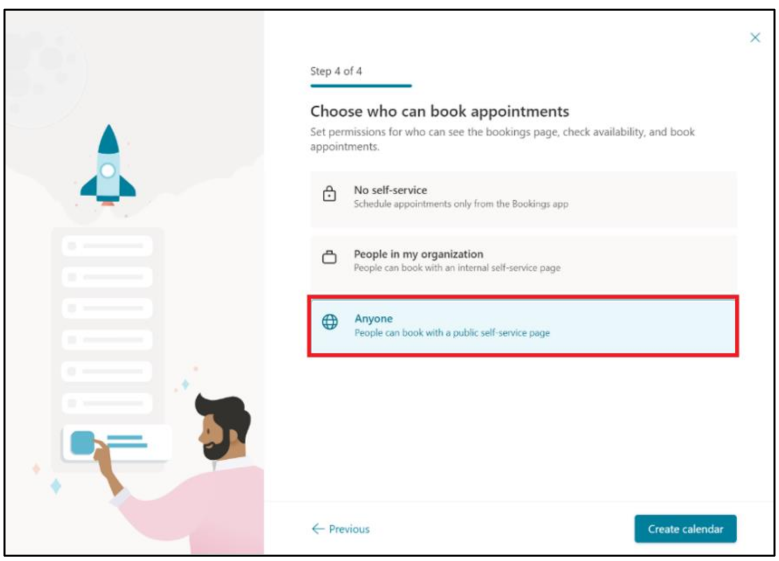
3. If this is your first time using Bookings, you may be prompted with a **Get it now** button, select that to continue. If you already have a Bookings business and need to create an additional one, select the chevron next to your currently active Bookings business and select **New**.



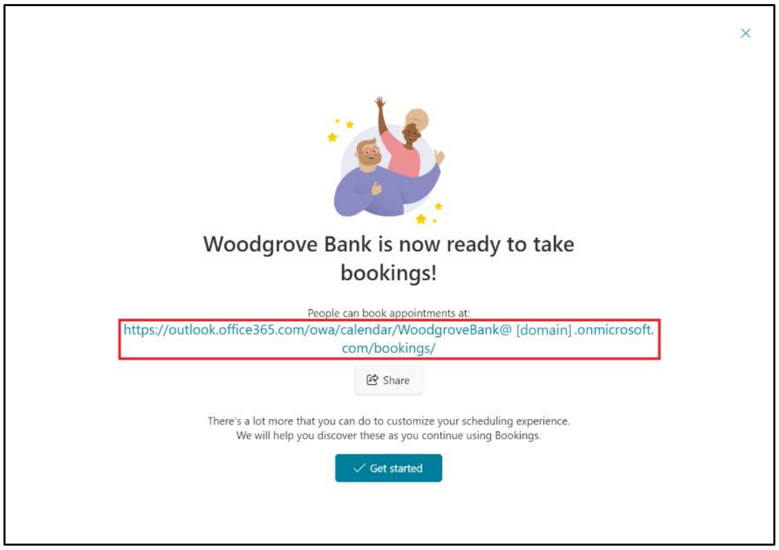
4. Provide the name and type of your business before selecting **Continue**.



5. Provide more details for your Bookings business by setting up the **Booking Page**, **Staff**, **Services**, and **Business Information** pages by selecting them in the left navigation pane. Setup the calendar to enable **Anyone** book an appointment.



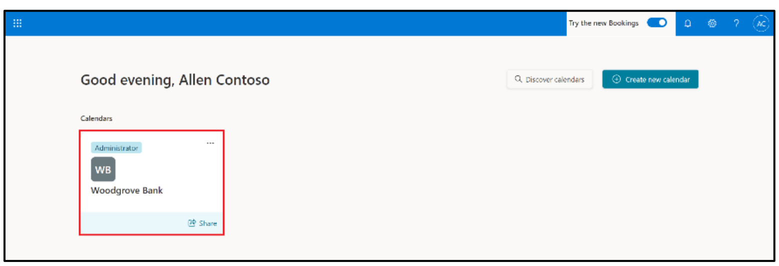
6. Once your new calendar is created, the URL will be generated, and you can copy the alias of your **Calendar**.



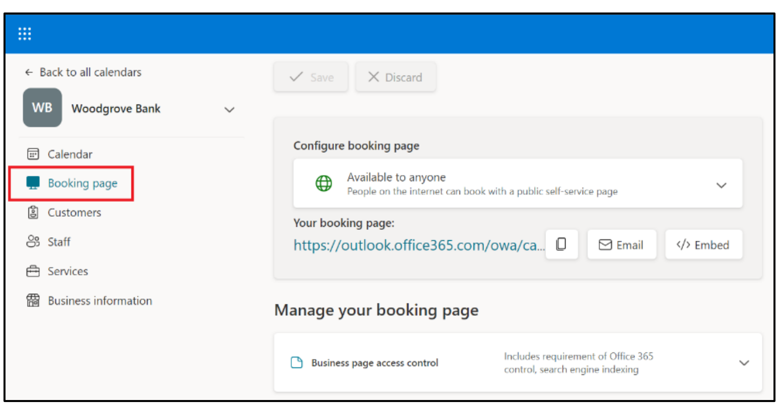
Task 4: Retrieve the alias of the new Bookings business

If you copied the alias in the previous step you can skip this task and continue with **Task 5**. To retrieve the alias of your new Bookings business, reopen the current Bookings business so that you can retrieve the value from the URL.

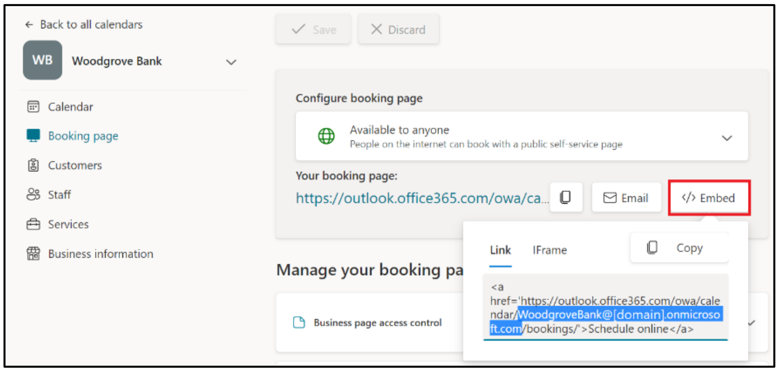
1. Open Bookings business and select the calendar you created in the previous task.



2. Once the calendar is open, navigate to the **Booking page**.



3. In the **Configure booking page** section select **</>Embed** and copy only the alias from the URL. Record this value somewhere safe so that we can leverage it in a future step.

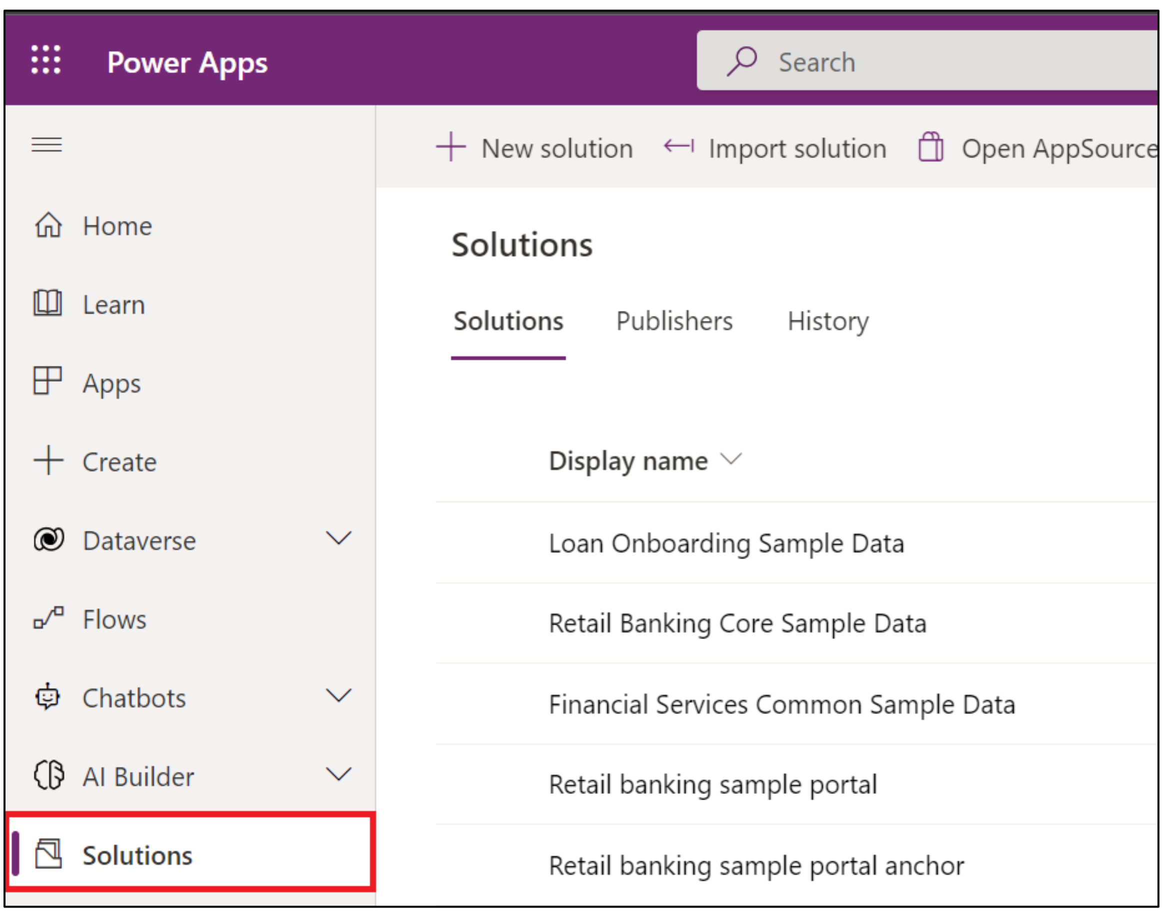


Task 5: Provide the settings to Collaboration Manager for Loans

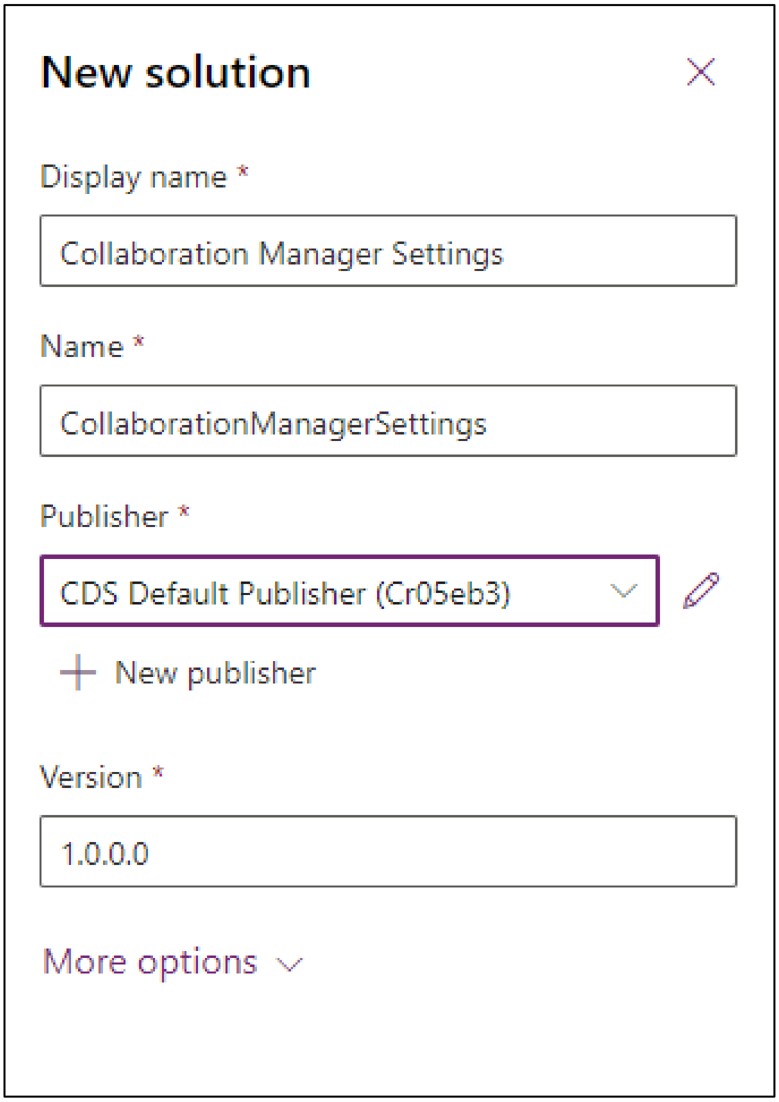
Now that we have both the Group ID and the Bookings business ID, you can set them as values within the Collaboration Toolkit settings.

1. Open https://make.powerapps.com/
2. Ensure that you're in the correct environment by using the environment picker in the upper-right corner.

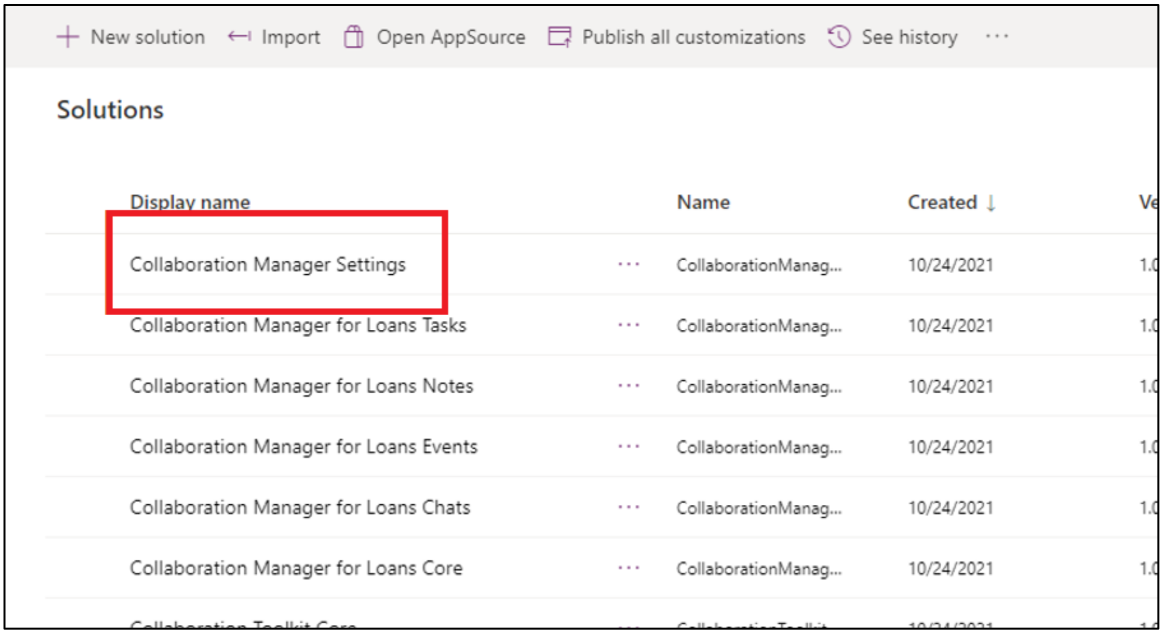
3. Go to the **Solutions** page in the left navigation pane.



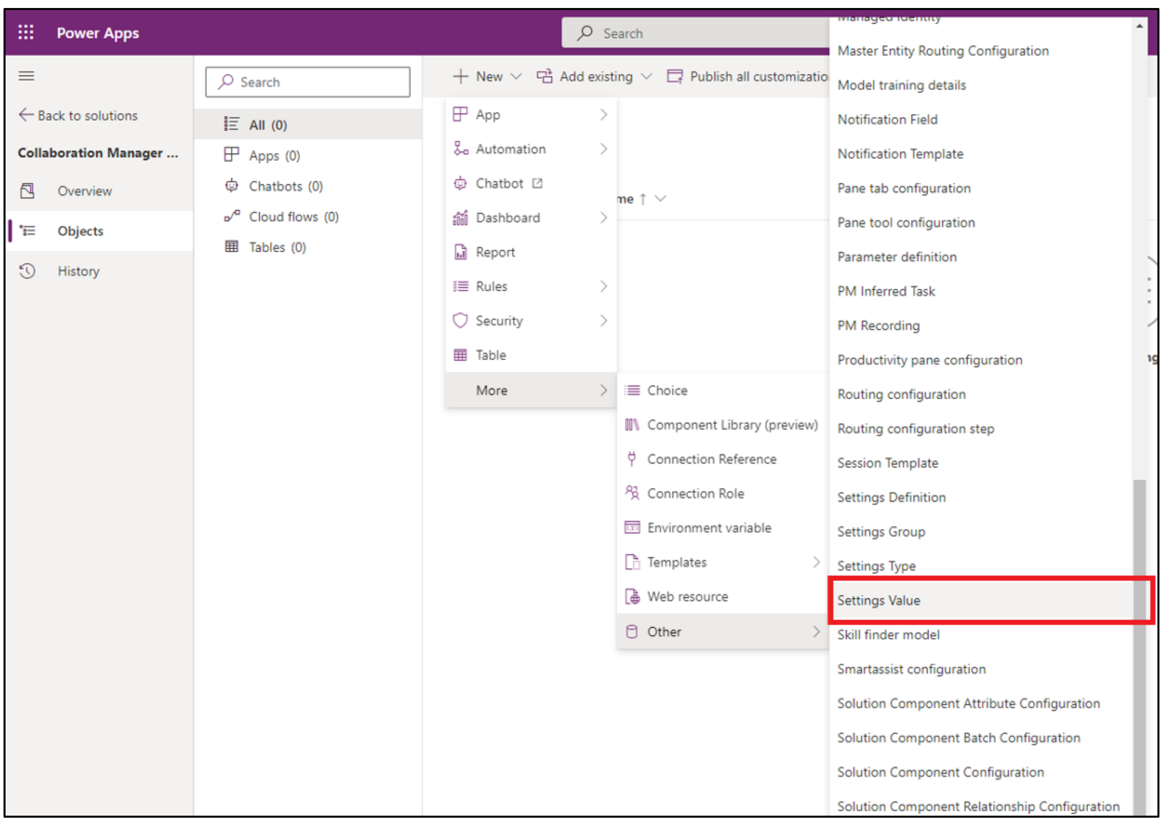
4. Provide the name and publisher of your new solution. Because this solution is merely holding the values of Collaboration Manager, you can name it **Collaboration Manager Settings**.



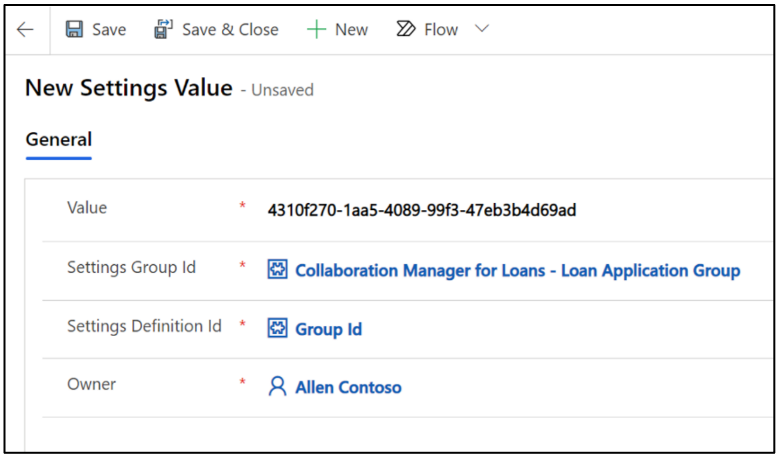
5. After you've created your solution, find and select it in the list of solutions.



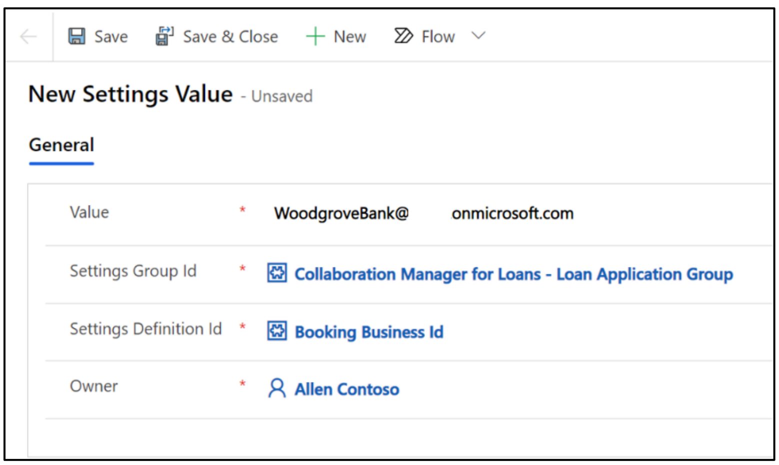
6. Provide the first settings value by selecting **New > More > Other > Settings Value** from within the solution explorer.



7. 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 – Loans Application Group** and **Settings Definition ID** to **Group ID**.



8. Select **Save & Close** once you're finished.
9. Repeat step 7 to create a new settings value.
10. Now populate the new settings value with the Bookings business ID you retrieved on Task 4 – Step 3. Set **Settings Group ID** to **Collaboration Manager for Loans** and **Settings Definition ID** to **Bookings Business ID**.



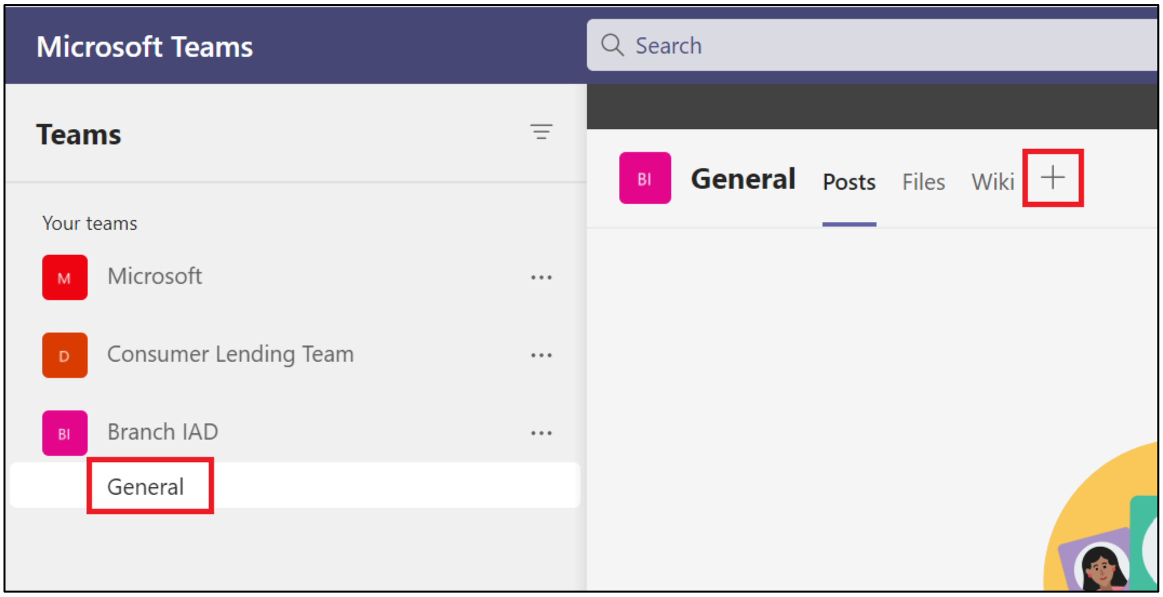
11. Select **Save & Close** once you're complete.

Congratulations, you've now successfully defined the settings for Collaboration Manager for Loans.

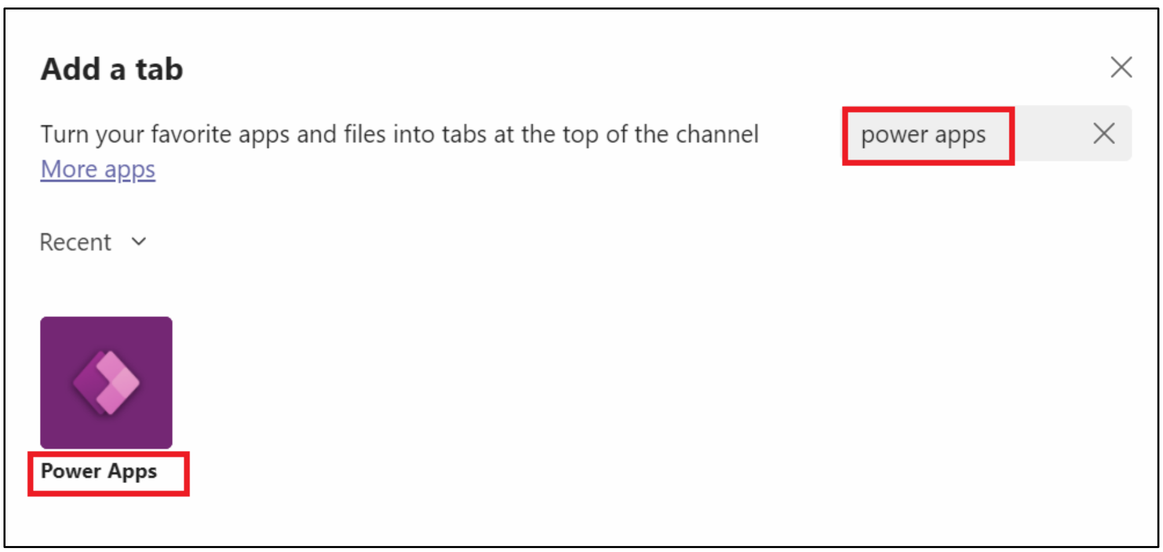
Task 6: Adding the app to the Microsoft Teams channel

Now that the settings are defined, we can now add the app to Microsoft Teams.

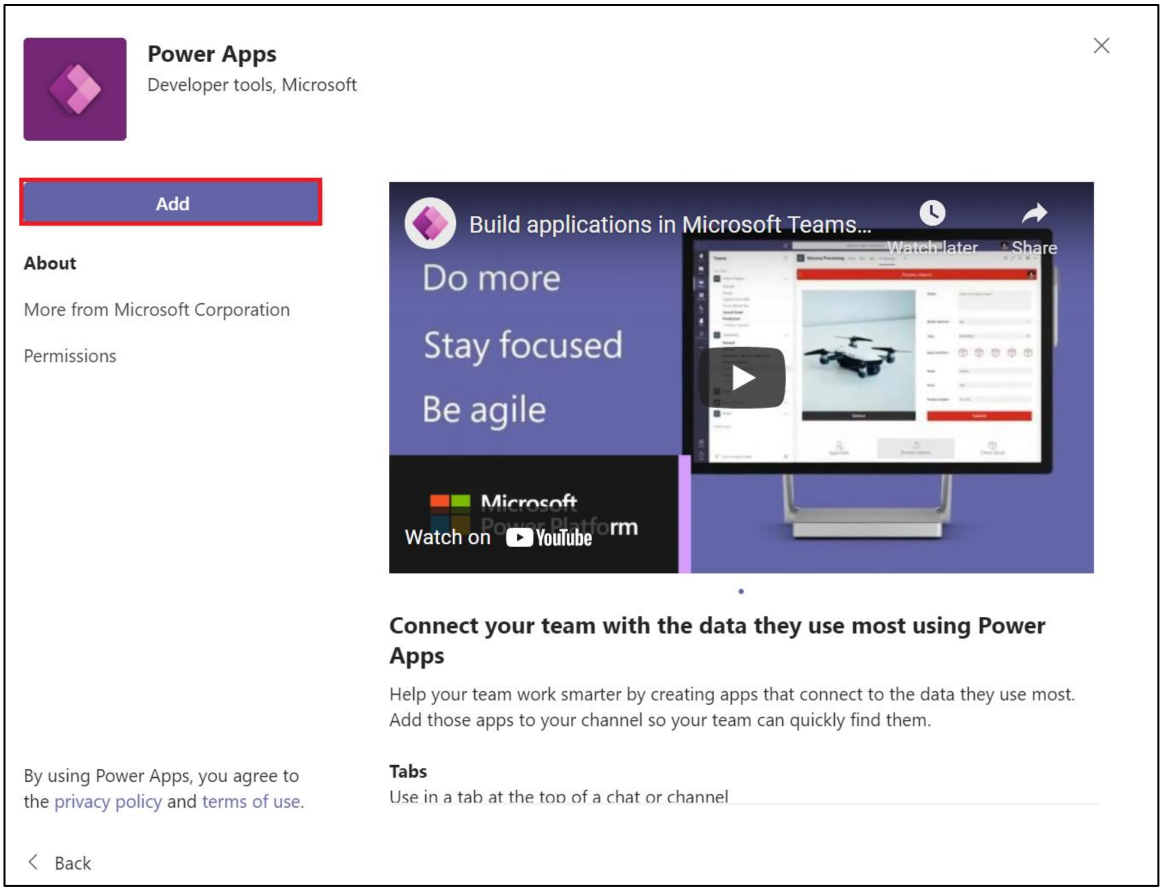
1. Go to teams.microsoft.com and use your lab credentials.
2. Find the team that you created in Task 1.
3. In the **General** channel for the team, select the plus (+) icon and note the **Add a tab** dialog that appears.



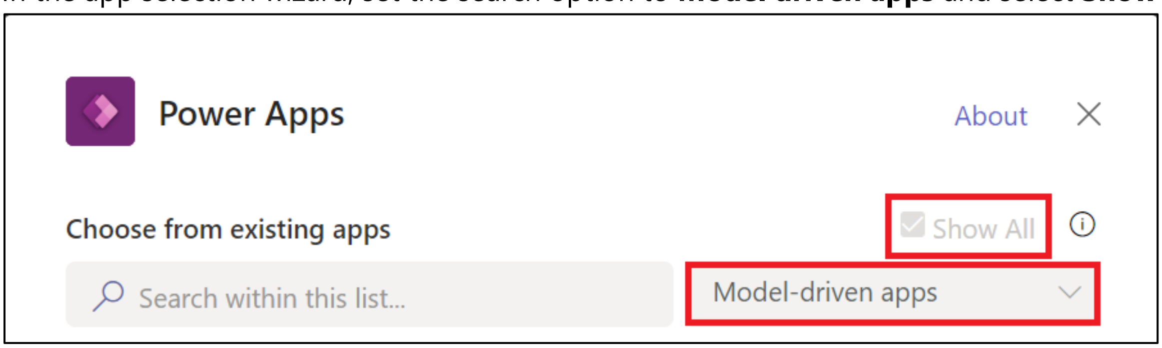
4. In the **Add a tab** dialog, search for **Power Apps** click on the **Power Apps** icon that appears in search results.



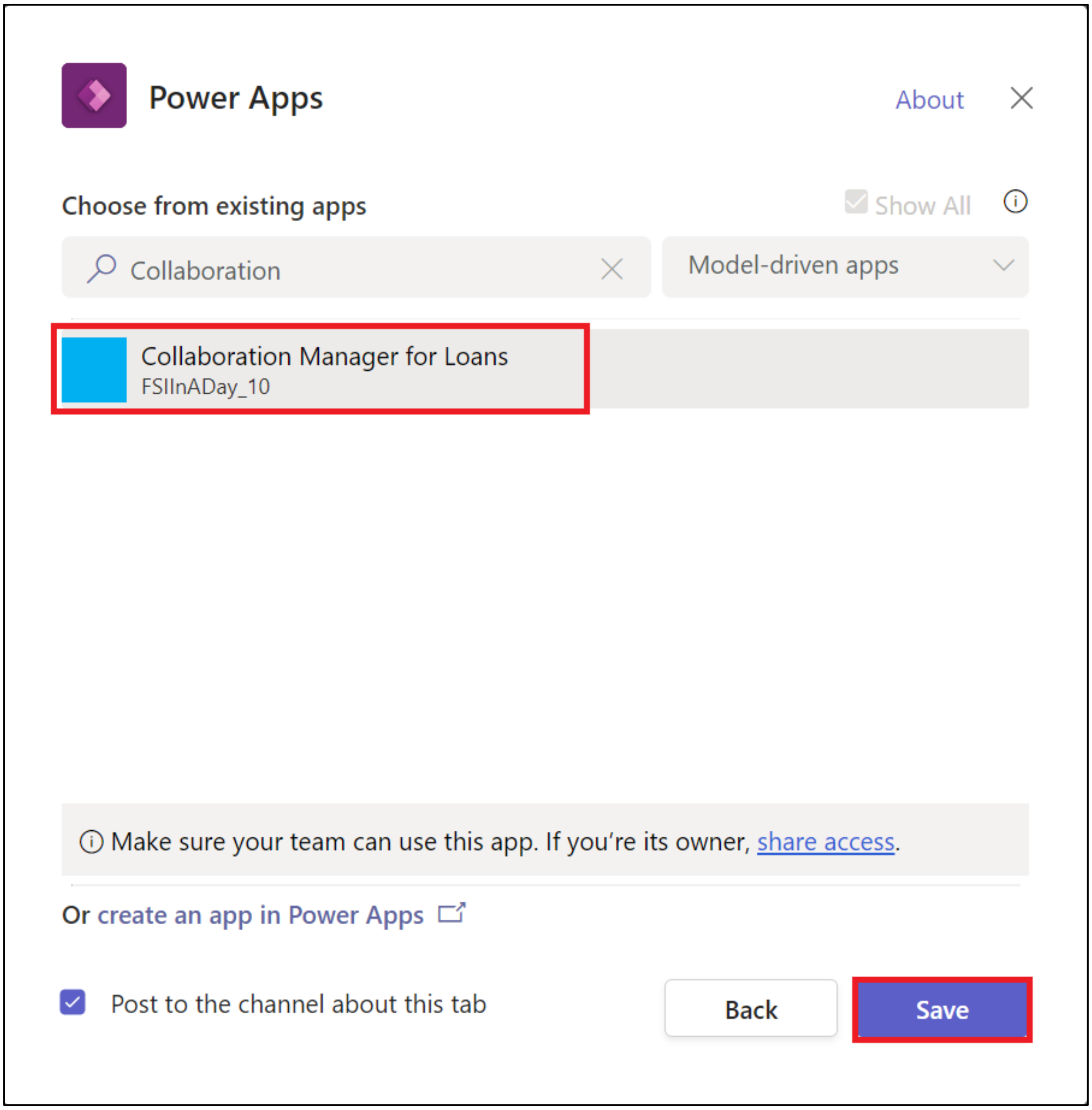
5. The **Power Apps** add in will open. Select **Add** to open the app selection wizard.



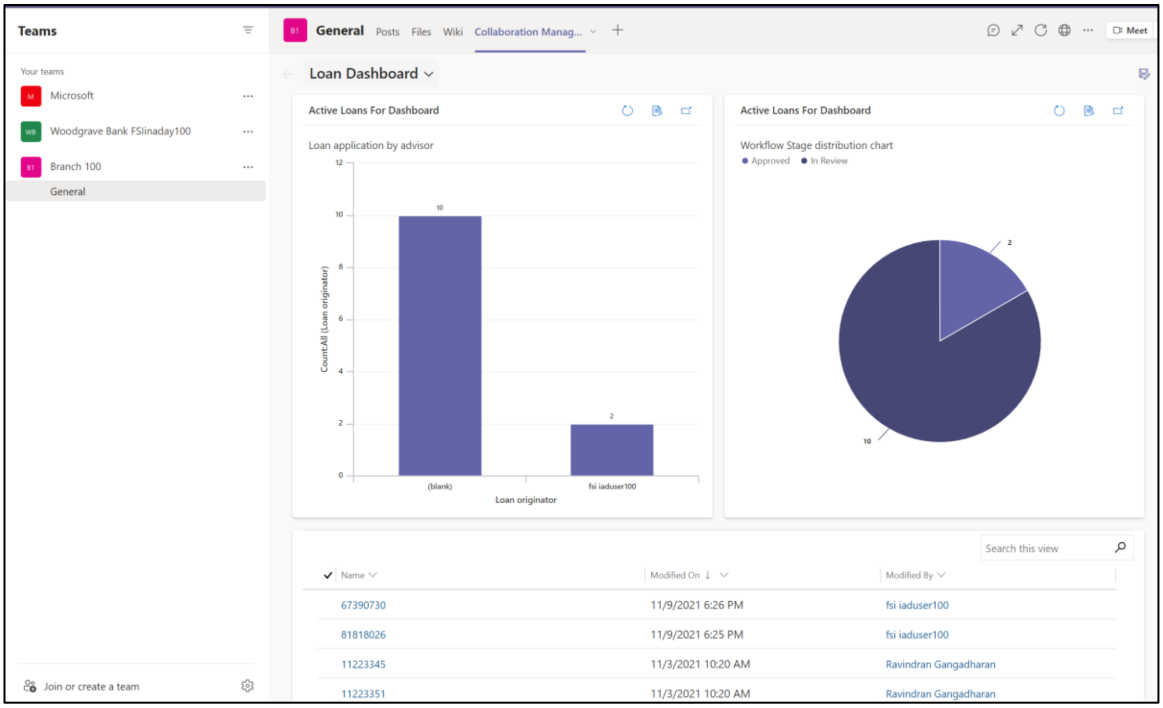
6. In the app selection wizard, set the search option to **Model driven apps** and select **Show All**



7. 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 select **Save.**



The app will appear as a pinned tab in your channel.

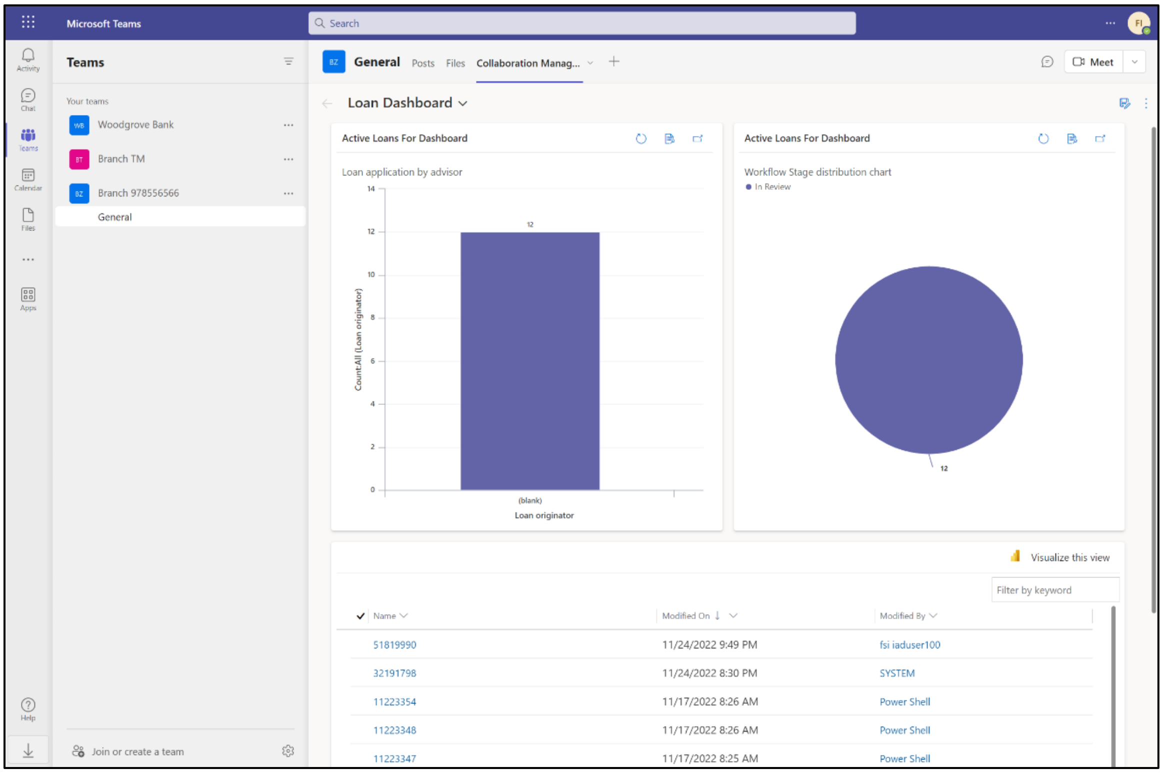


Congratulations! You have embedded the Collaboration manager app in Microsoft Teams.

Exercise 3: Navigate Collaboration Manager for Loans

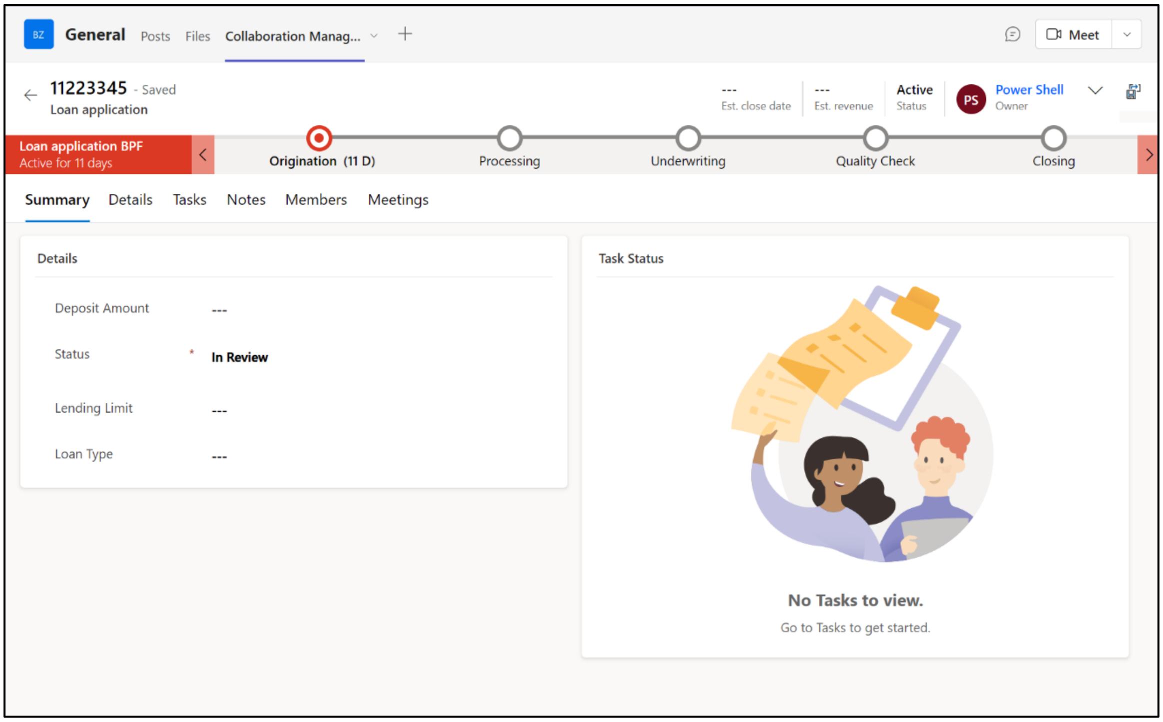
In this exercise, you will navigate Collaboration Manager for Loans and explore the collaborative features it provides. In this case, we will examine the home loan for Hayden Reyes to see how a loan team could collaborate with each other to ensure completion of the loan.

1. Open the Teams channel that you pinned your app to in the previous exercise. A dashboard page will open, showing graphs of the relevant data along with a list of loans that are currently active.



2. To view the status of a loan, select its name from the list of loans. For this exercise, select **11223345** to view the loan for Hayden Reyes.

   You will be directed to the **Summary** tab, where you can review the relevant information about the loan application.

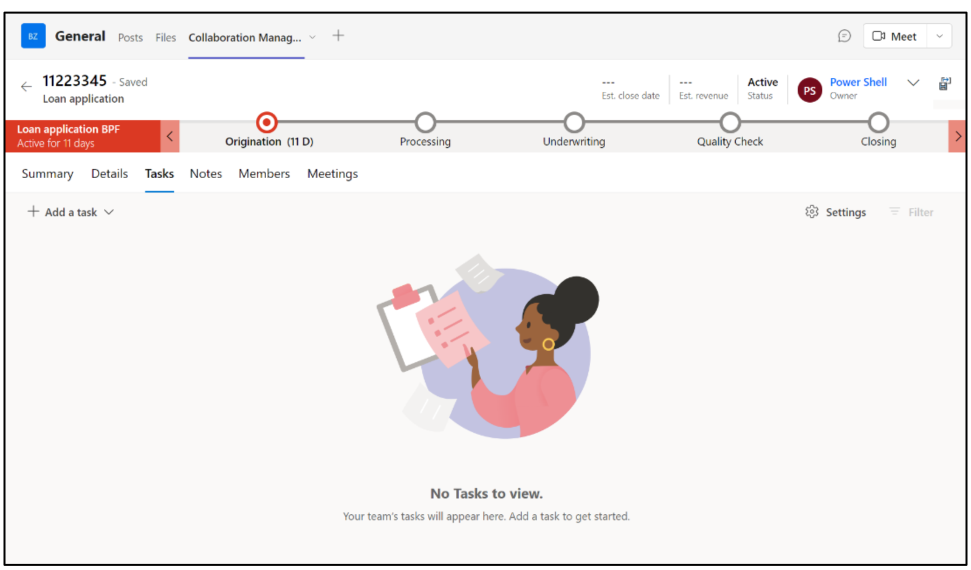


3. For more information about the loan, select the **Details** tab.

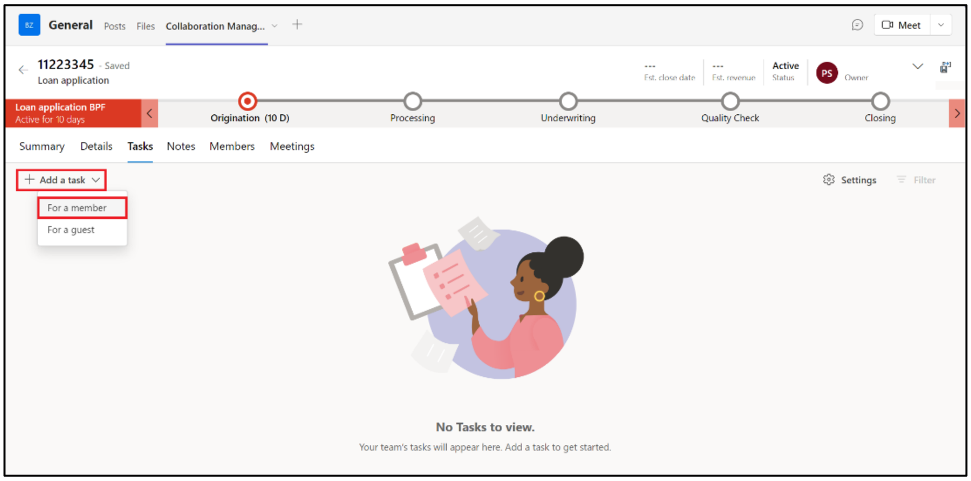
Note: As part of the fourth exercise, you'll learn how to bring in the rich controls from the Loan Tracker app into Collaboration Manager for Loans so that you can have a more holistic picture of the loan application.

Task 1: Creating tasks in Collaboration Manager for Loans

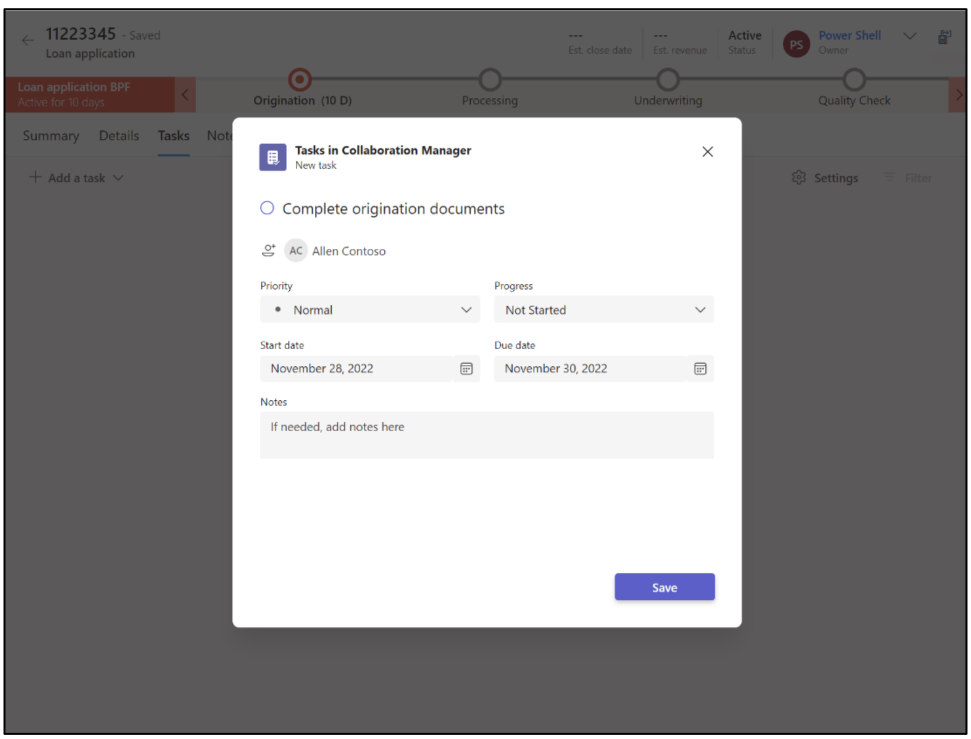
The first tab that you'll explore that provides collaboration is the **Tasks** tab. Selecting this tab will reveal an empty page where users can add the relevant tasks that they need to complete.



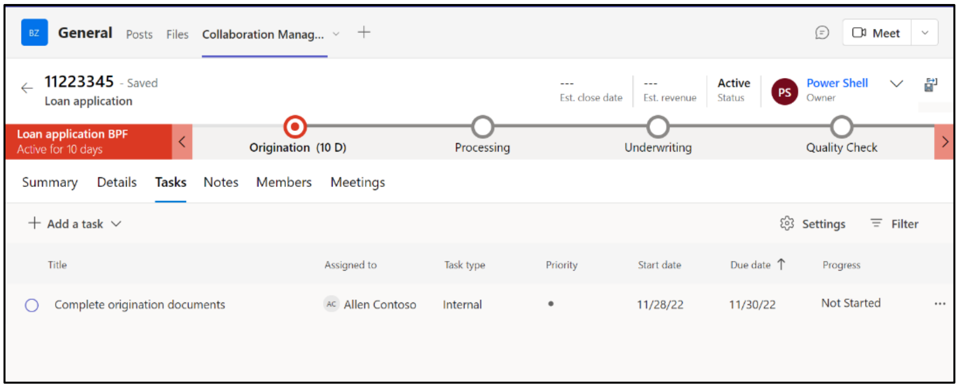
1. To create a new task for the team, select **Add a task** and select **For a member**.



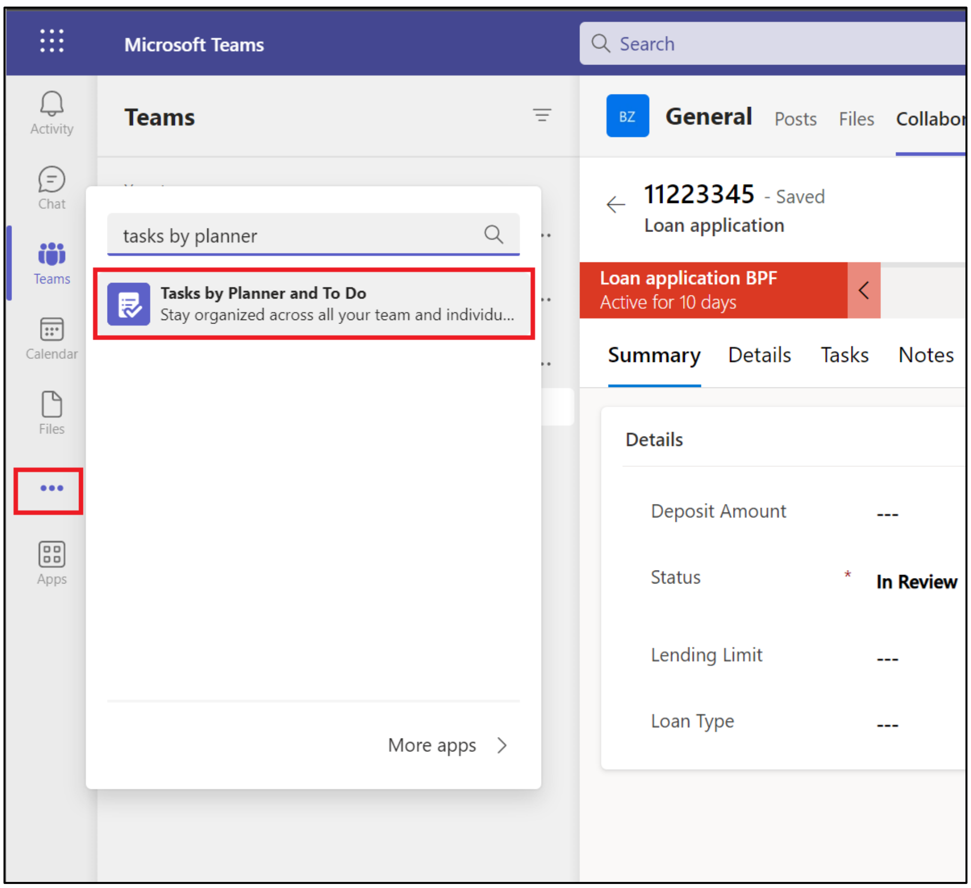
2. On the resulting dialog, you can provide specifics about the task and assign it to the relevant people on the team. When you're done, select **Save**.



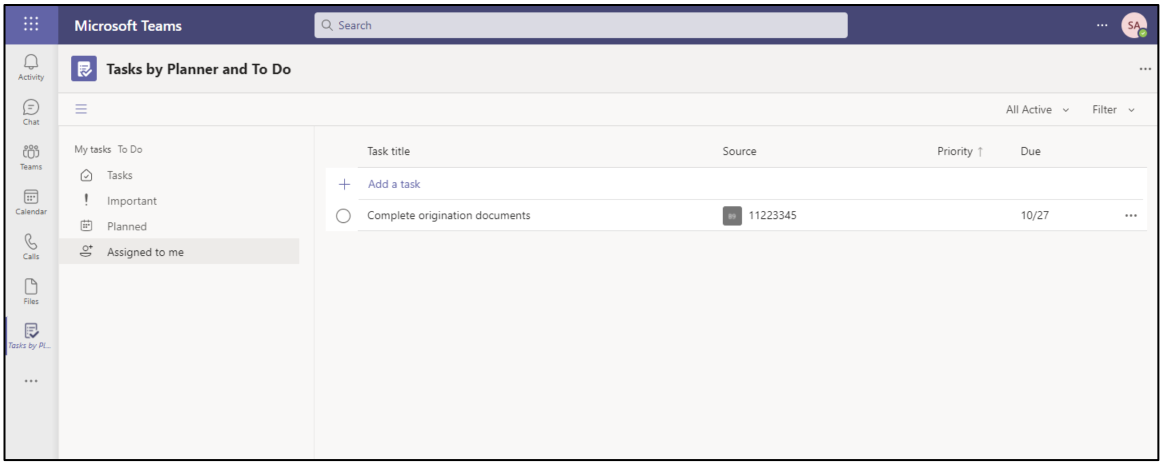
The newly created task should now appear in the tasks list.



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



4. When 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.



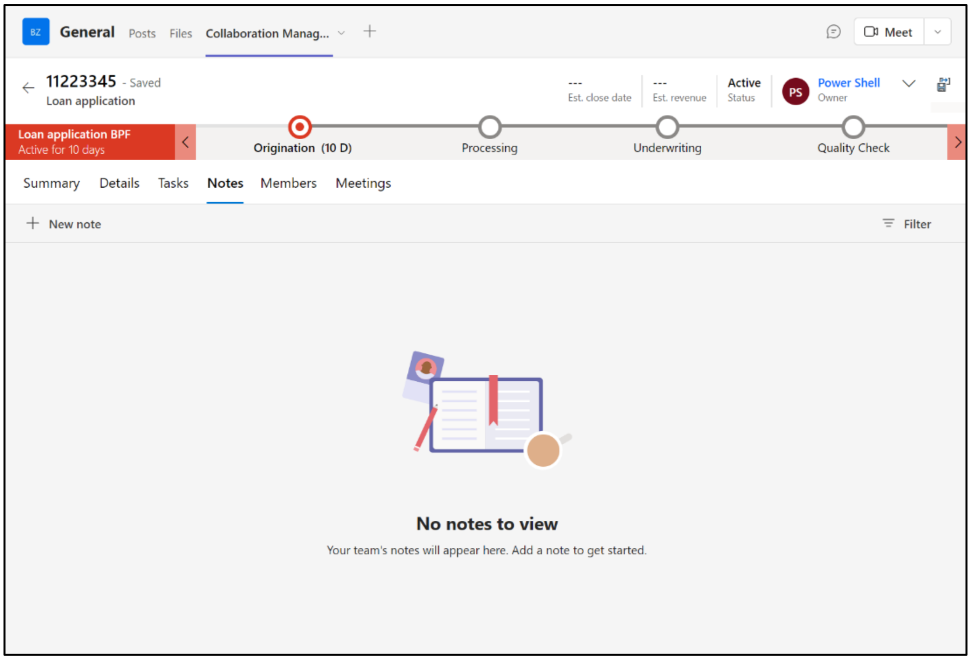
5. From within the **Tasks by Planner and To Do** app, you can view the details of a task, add attachments, and mark them as complete.

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

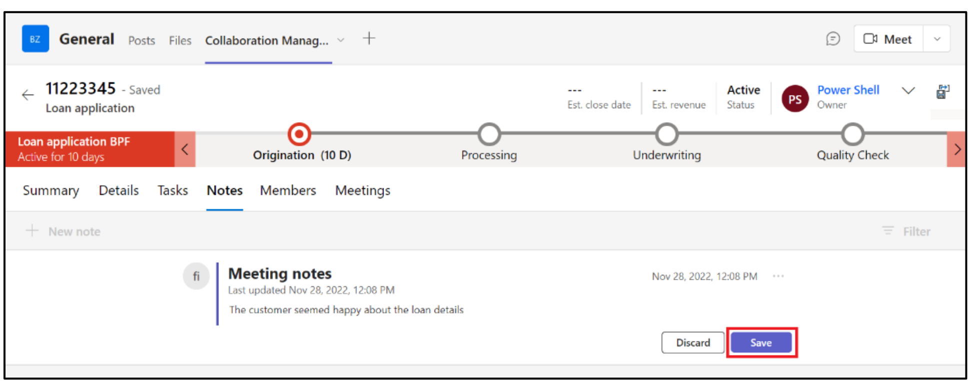
Task 2: Creating notes in Collaboration Manager for Loans

To create notes in Collaboration Manager for Loans, follow these steps:

1. 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.



2. To add a new note, select **New note**.
3. Provide details about the loan. The following screenshot shows an example of providing notes about the previous meeting with the customer.

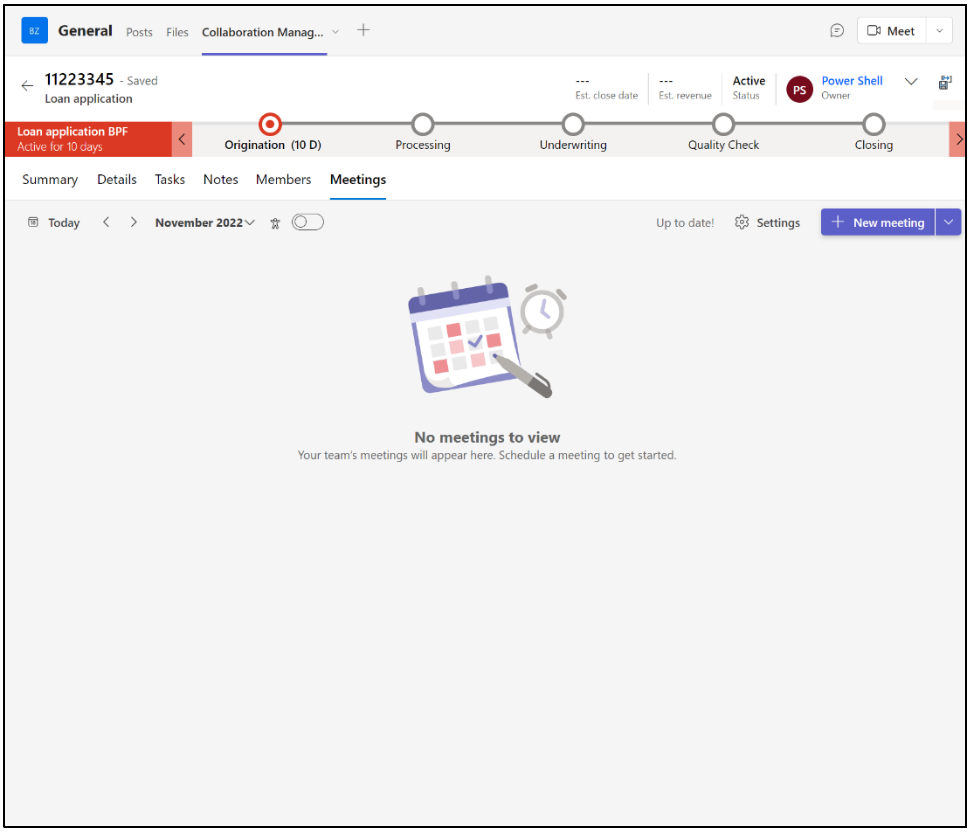


4. When you're finished entering the notes, select **Save**.

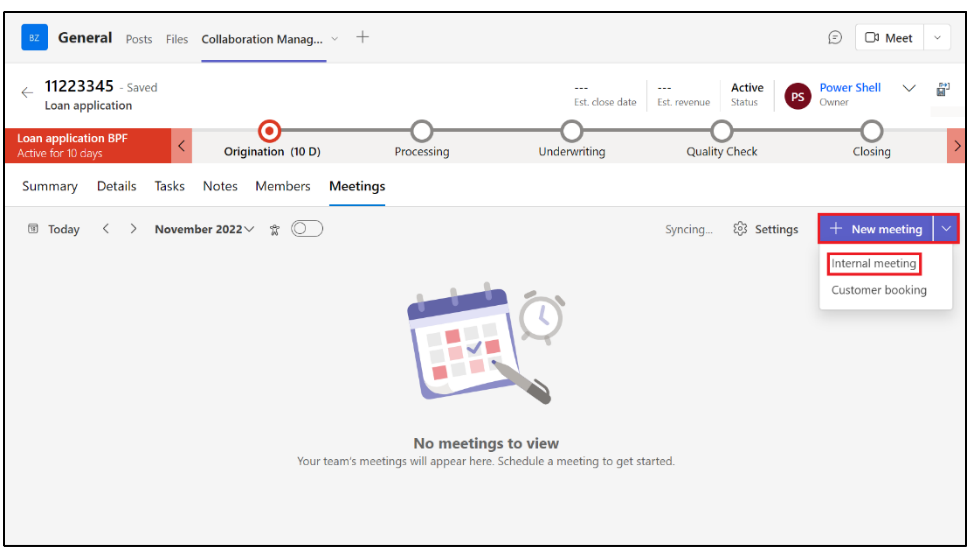
Task 3: Create meetings in Collaboration Manager for Loans

Follow these steps to create meetings in Collaboration Manager for Loans:

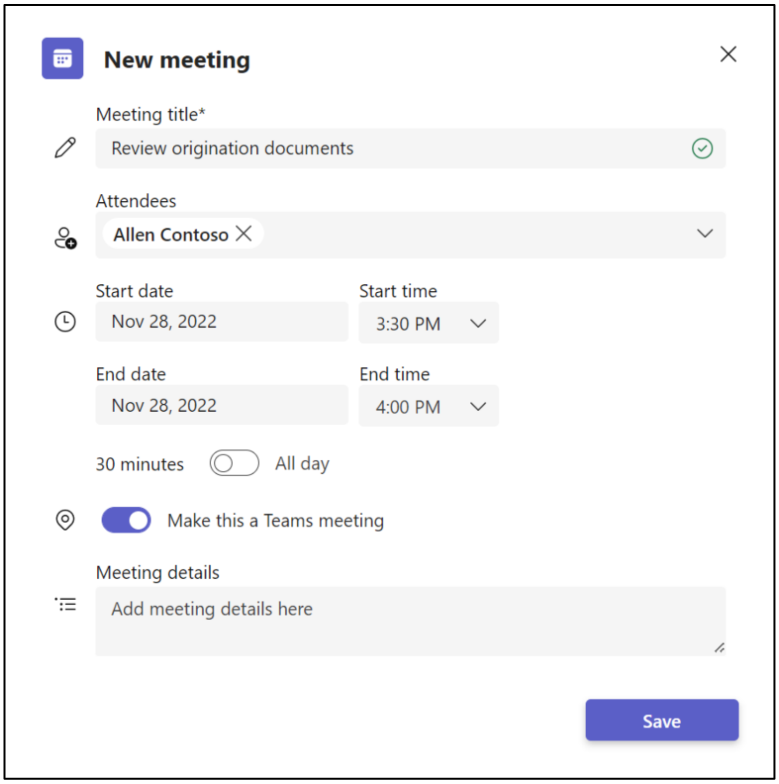
1. To schedule both internal and external meetings regarding the loan, start by selecting the **Meetings** tab for a loan record.



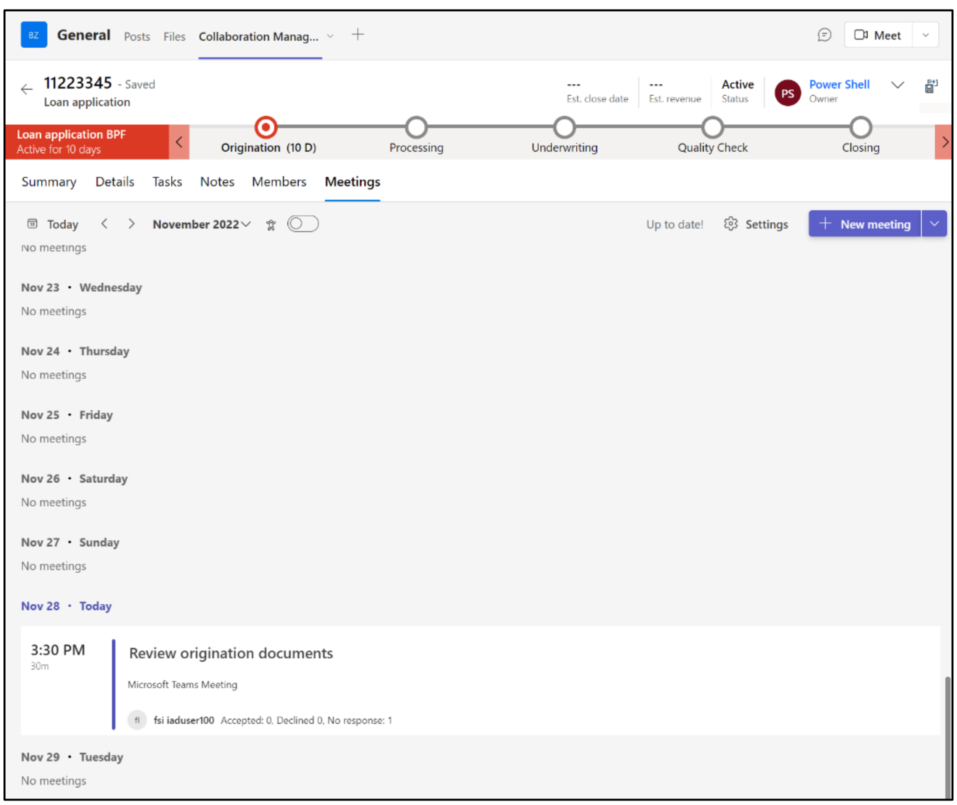
2. To schedule an internal meeting with the rest of the loan team, start by selecting the chevron next to **New meeting** and then select **Internal meeting**.



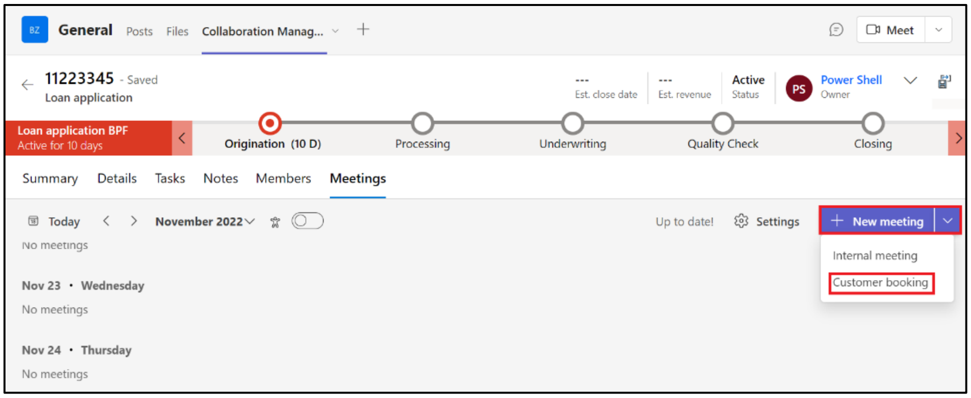
3. Within the **New meeting** dialog, you can provide all the relevant information about the sync.



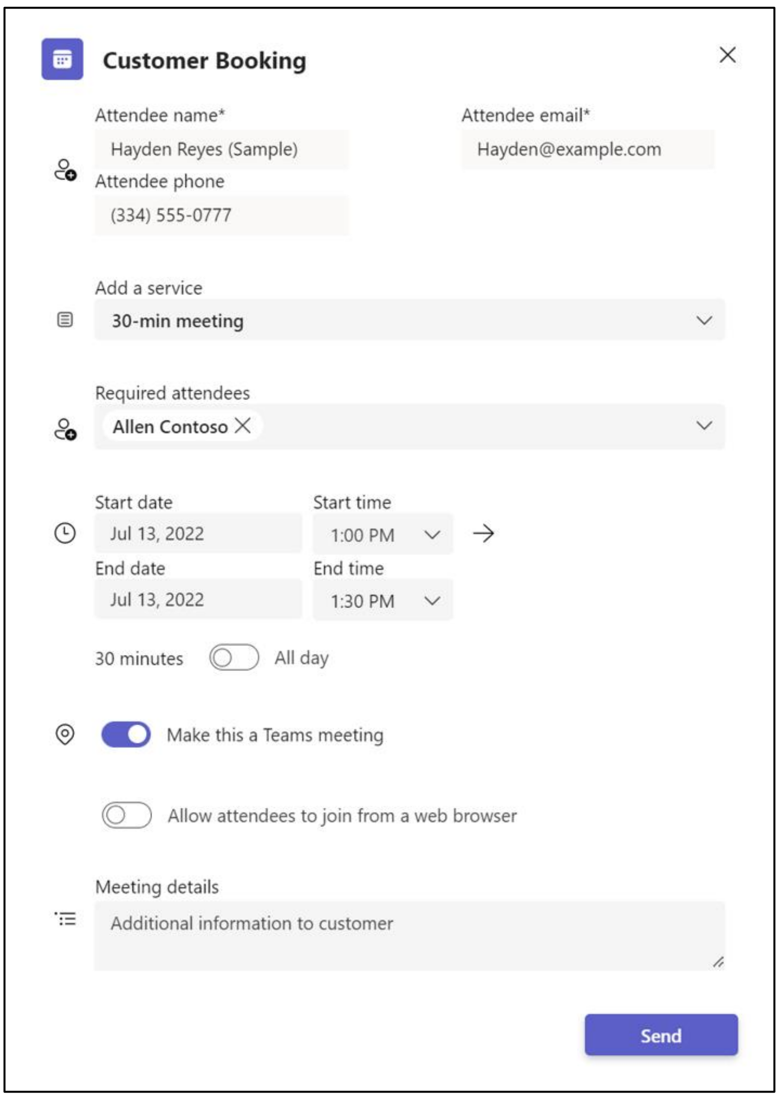
4. Scroll to the bottom of the dialog and select **Save** once you're finished. The meeting will now appear in the list of meetings.



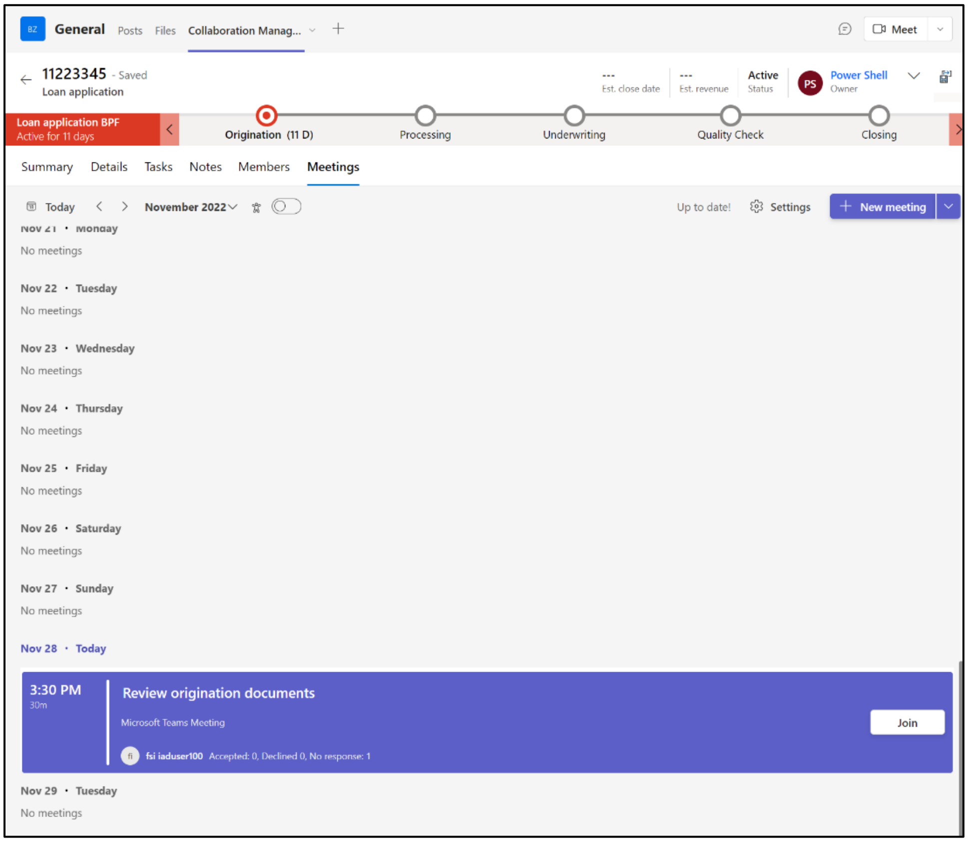
5. To schedule an external meeting with the customer, select the chevron next to the **New meeting** button and select **Customer booking.**



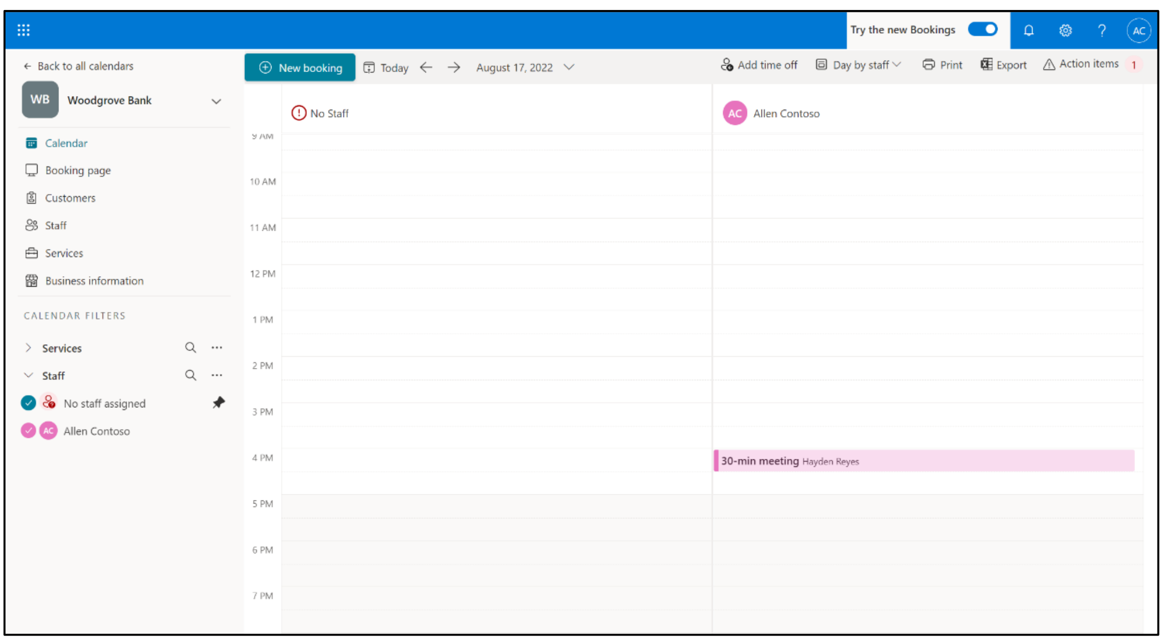
6. In the **Customer booking** dialog, the relevant customer is already prepopulated using the information in the Loan Application. You can provide additional information about the meeting before selecting **Save**. Note that you can add additional booking types by adding additional services within your Bookings business.



7. When you're finished, both meetings should appear in your meeting list. After the meeting has started, you can join it by selecting the **Join** button, which will open the meeting directly within Microsoft Teams.



8. 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.



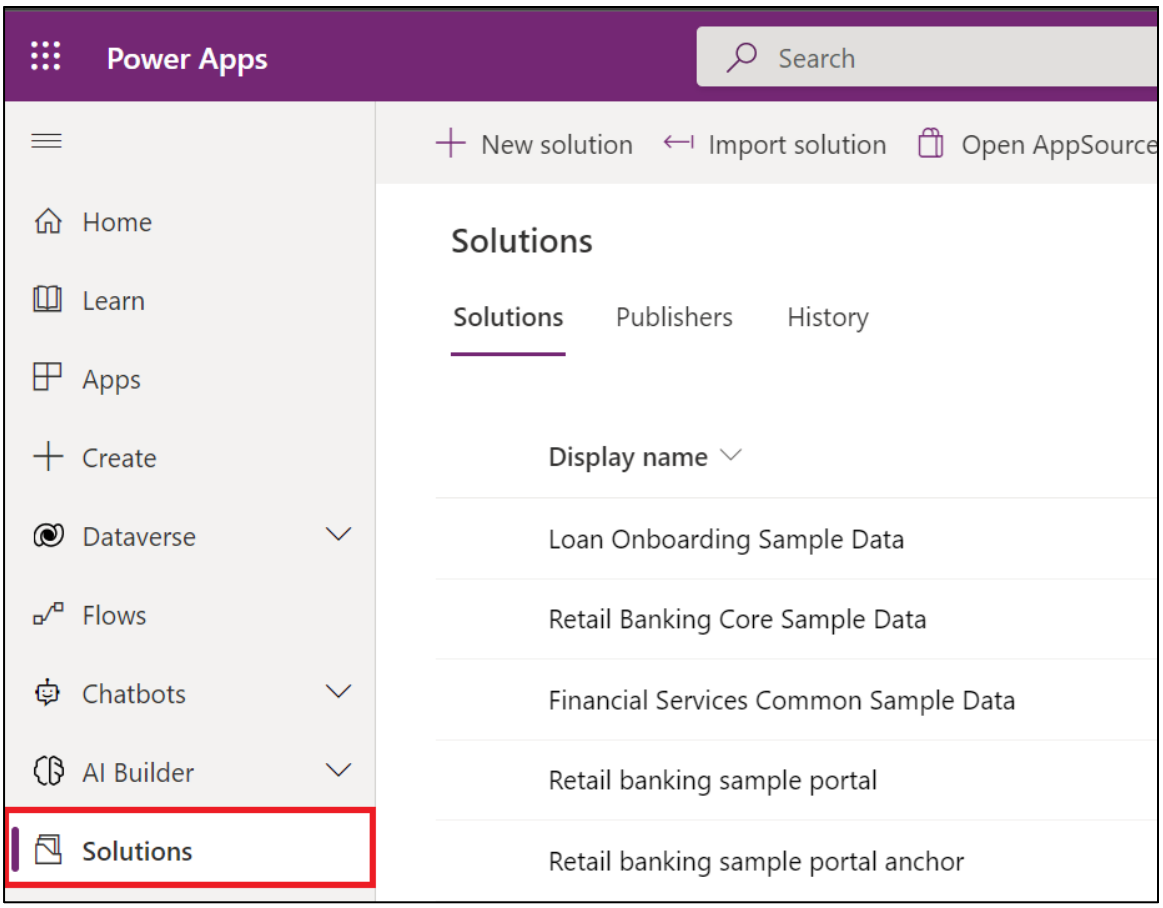
Exercise 4: Add controls from Loan Tracker

In this exercise, you'll embed the Loan Application form from the Loan Tracker app so that your users can have access to more information within Collaboration Manager for Loans. All apps in Microsoft Cloud for Financial Services use the same data model, which allows you to mix and match the experiences for the various apps.

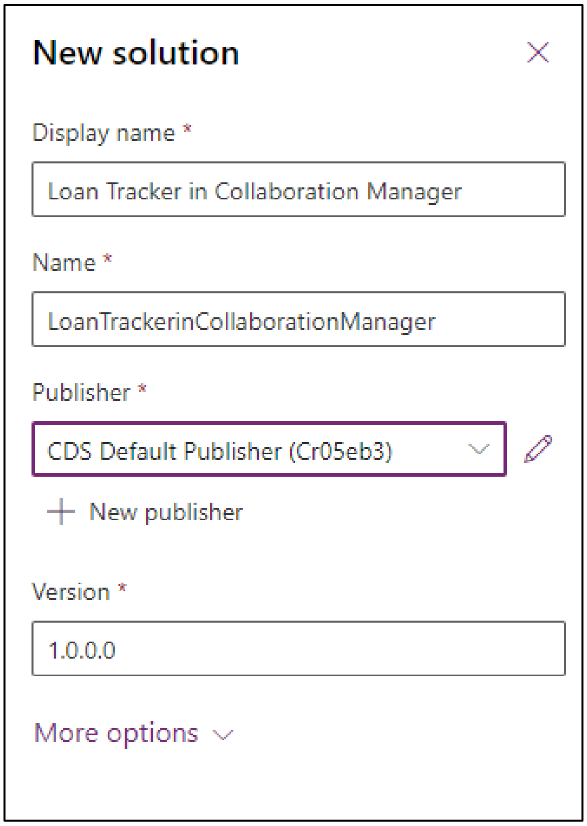
Task 1: Replace default form within Collaboration Manager

Before beginning to create your customizations, we first need to create a solution to house all the changes.

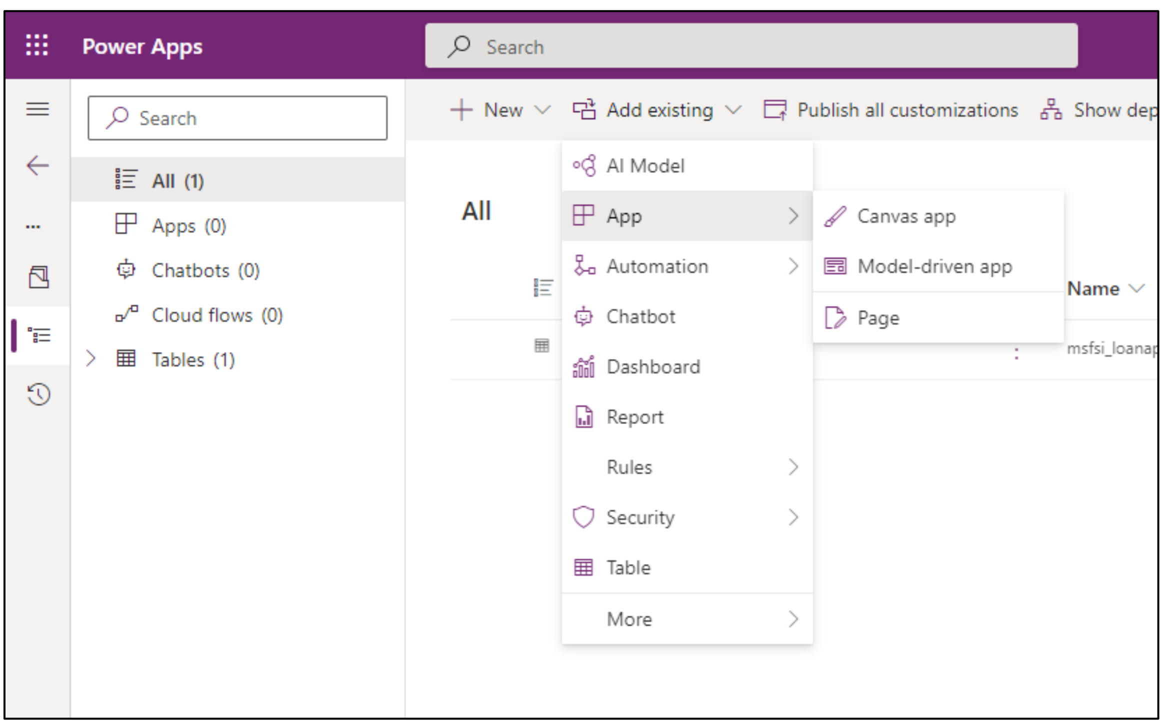
1. Go to https://make.powerapps.com and select **Solutions** in the left navigation.
2. Select **New solution** to create a new solution.



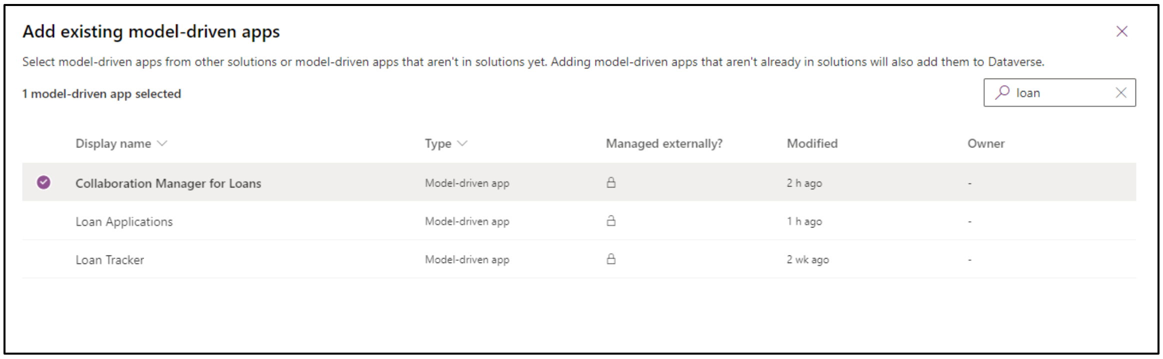
3. Provide information for the required fields and then select **Save**.



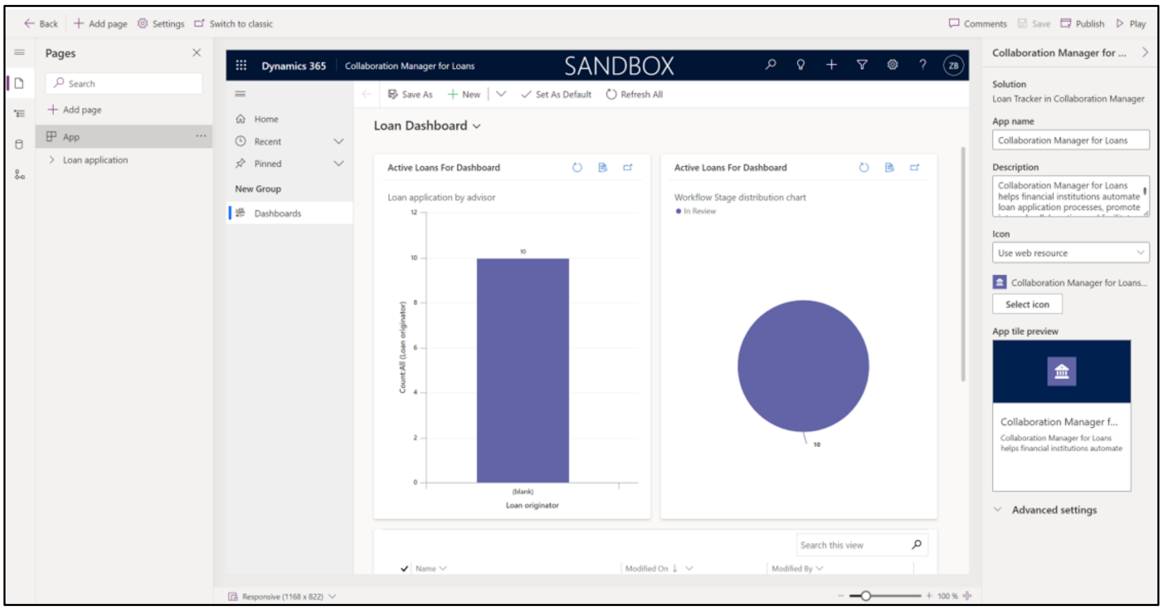
4. Because you want to show the Loan Tracker form instead of the default Collaboration Manager form, update the app module so that it shows a different loan application form. Select **Add existing > App > Model-driven app** so that you can begin making those changes.



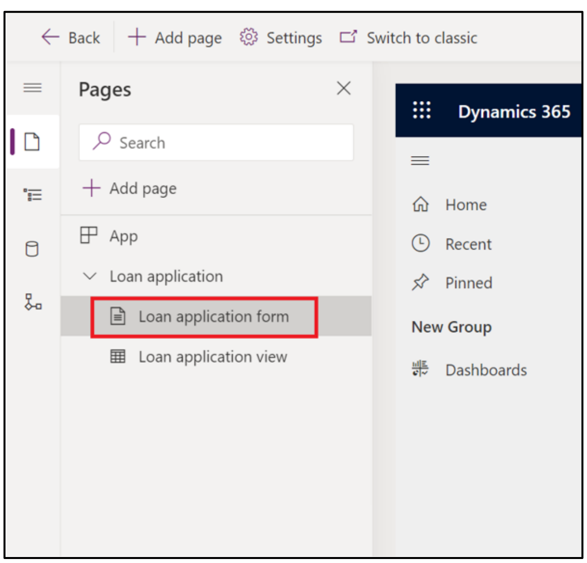
5. Select **Collaboration Manager for Loans** and then select **Add** to bring the app into your solution.



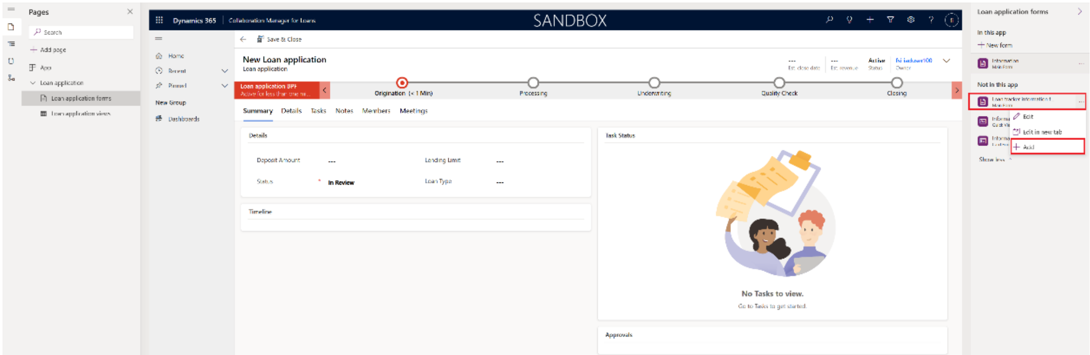
6. When the app shows in your solution, select it to open it.



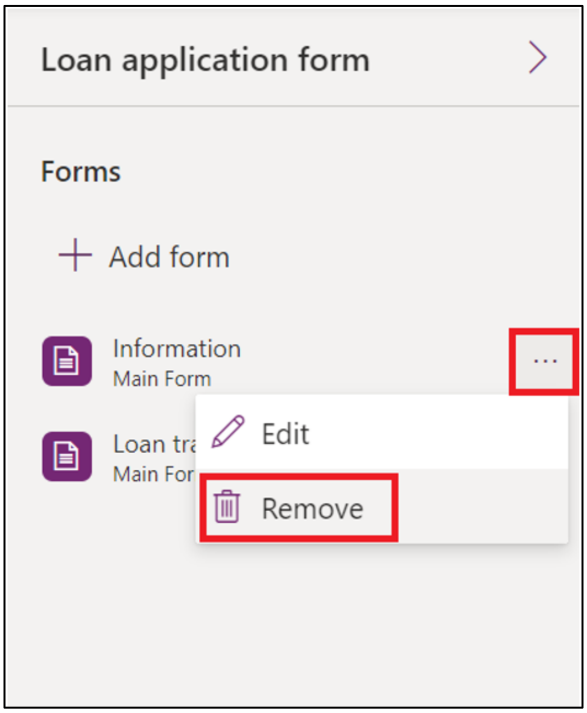
7. Select the **Loan application form** for the **Loan application** entity within the app designer.



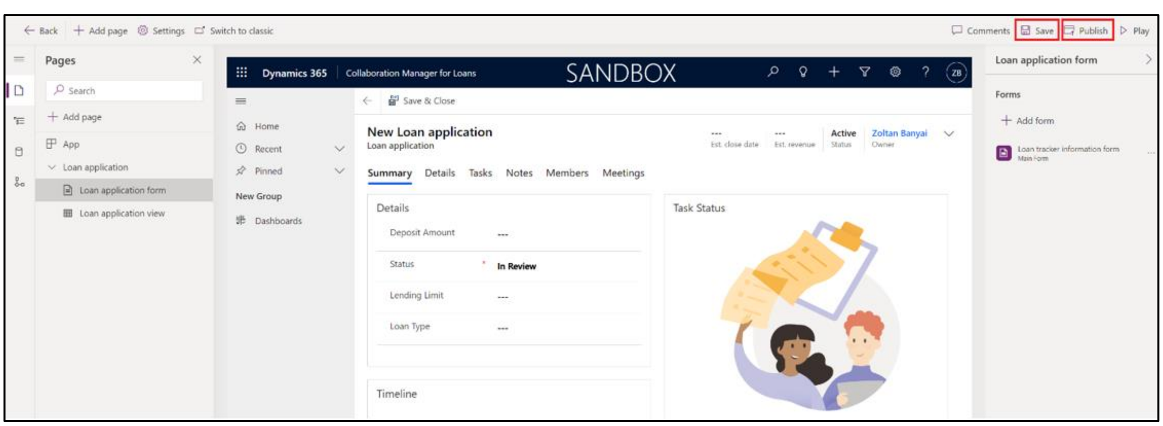
8. On the right side, select the **Loan tracker information form** and then select **Add**



9. Remove the **Information** form by clicking on the more options and select **Remove**.



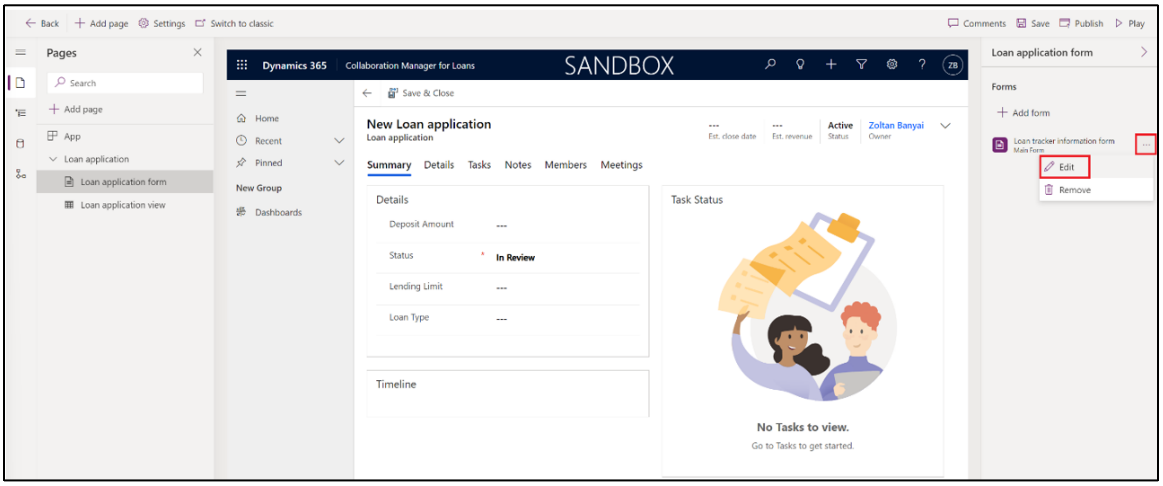
10. Select **Save** and after the changes are saved and then select **Publish**. If you played the app at this point within Microsoft Teams, the components from Loan Tracker will be present, but the collaborative features like tasks, meetings, and notes wouldn't be present.



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

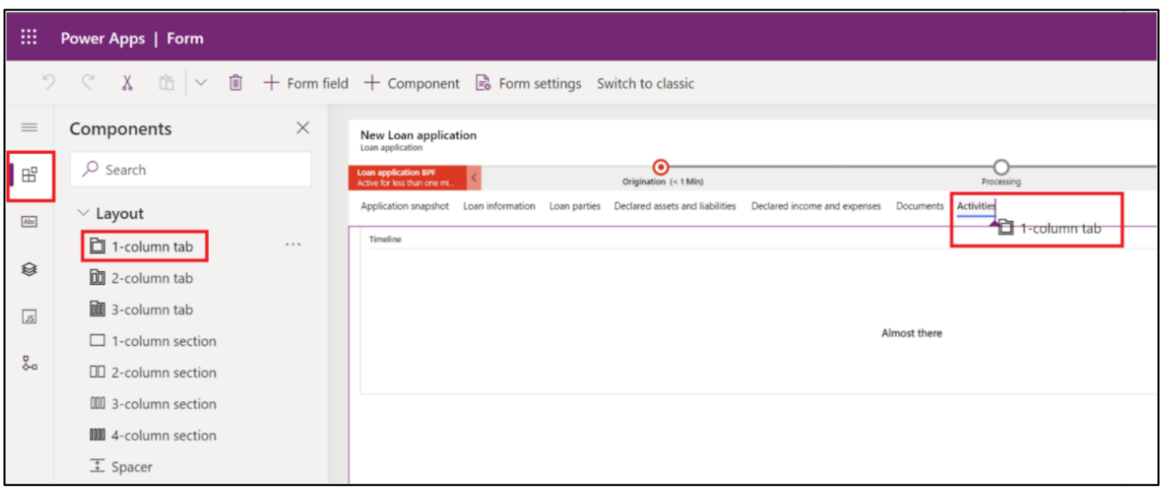
Now, you will edit the **Loan tracker information form** so that it includes the **Tasks**, **Meetings**, and **Notes** tabs.

1. Select the edit icon next to the **Loan tracker information form**.

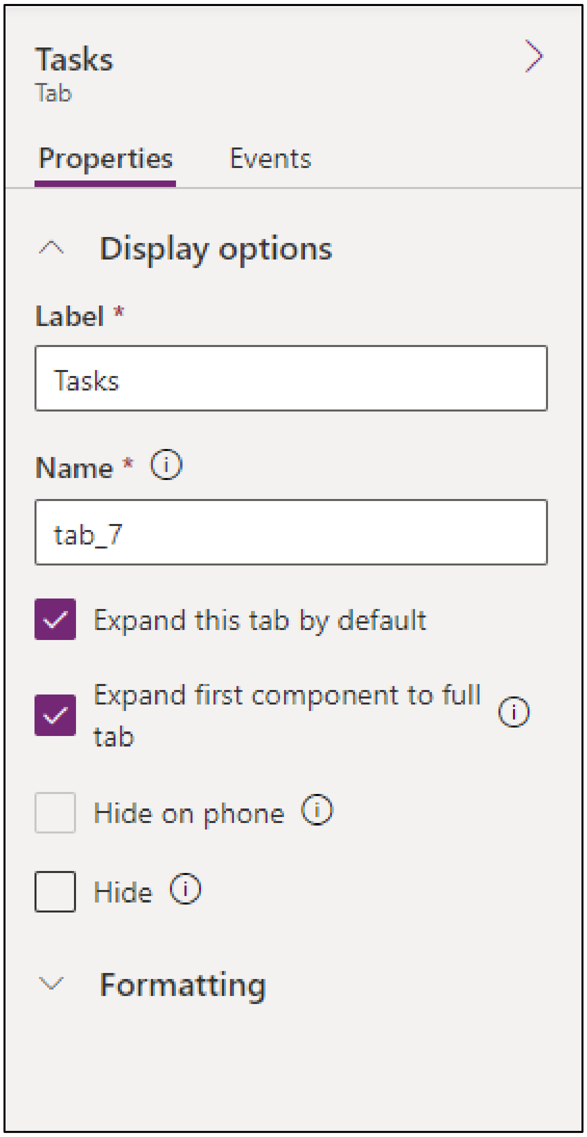


The **Loan tracker information form** will open in the form designer.

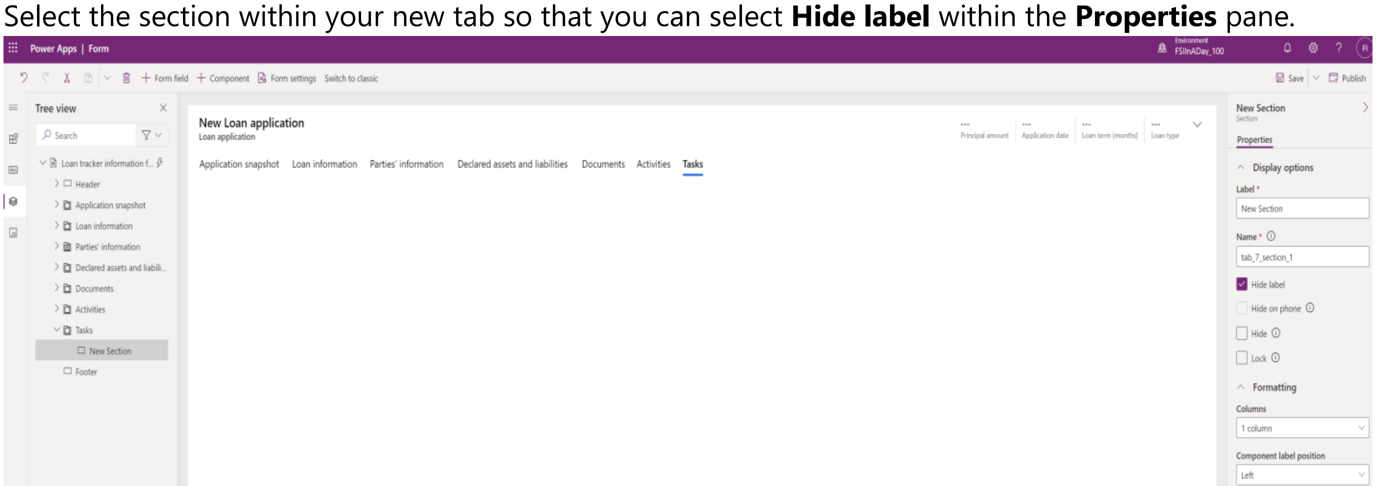
2. In the form designer, drag a **1-column tab** layout component from the **Components** drawer and then drop it to the left of the **Activities** tab.

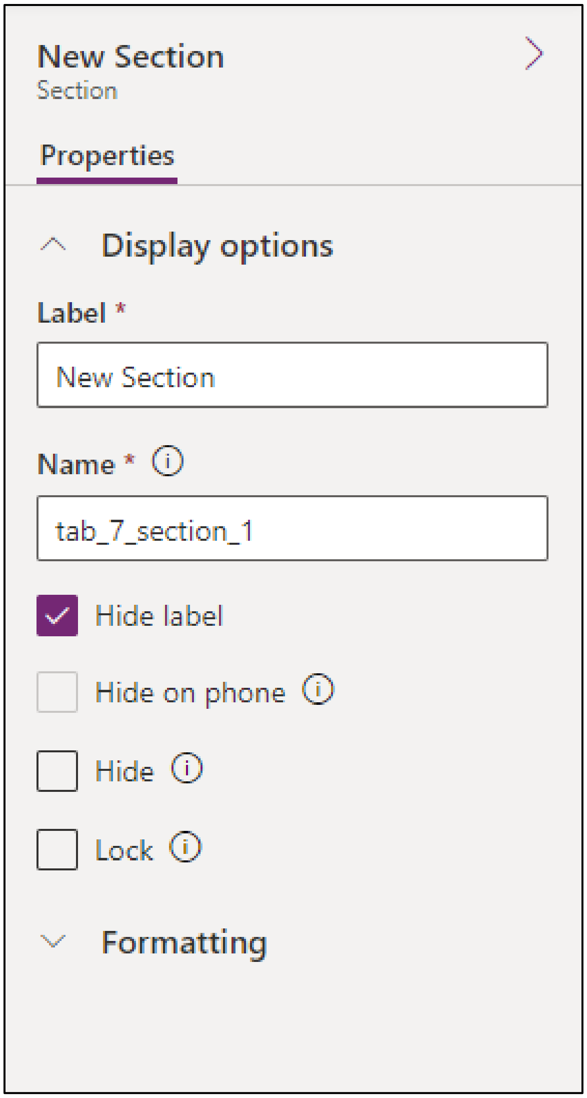


3. After dragging in the tab, rename the tab to **Tasks** in the **Properties** pane.
4. Select **Expand first component to full tab** in the **Properties** pane.

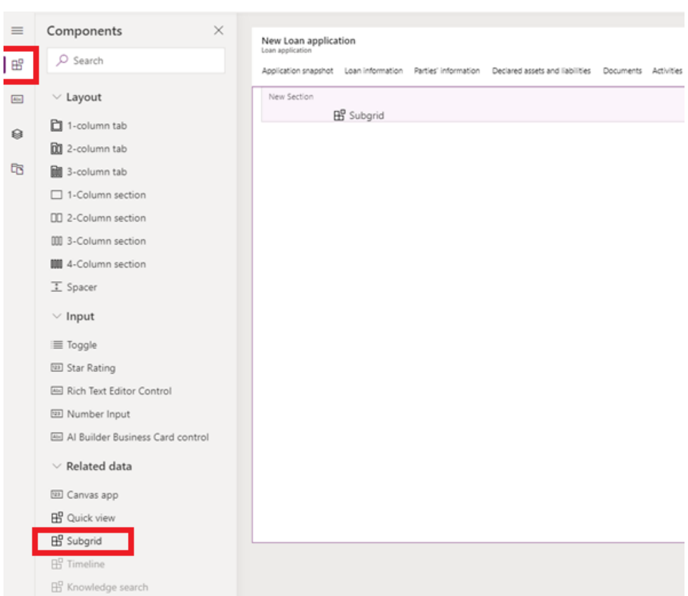


5. Select the section within your new tab so that you can select **Hide label** within the **Properties** pane.

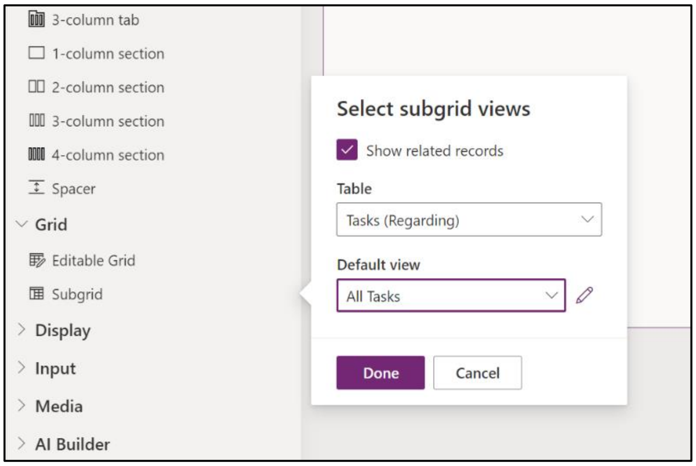




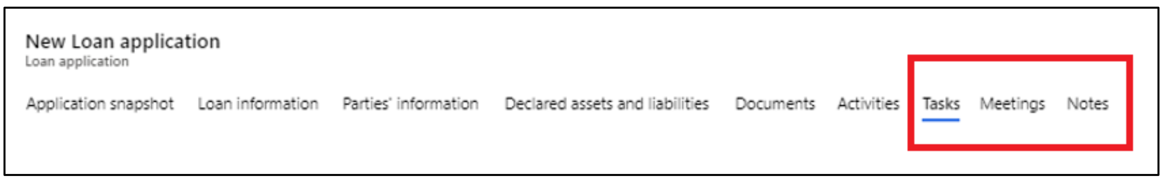
6. Drag a **Subgrid** control from the **Components** drawer and then drop it into your new section.



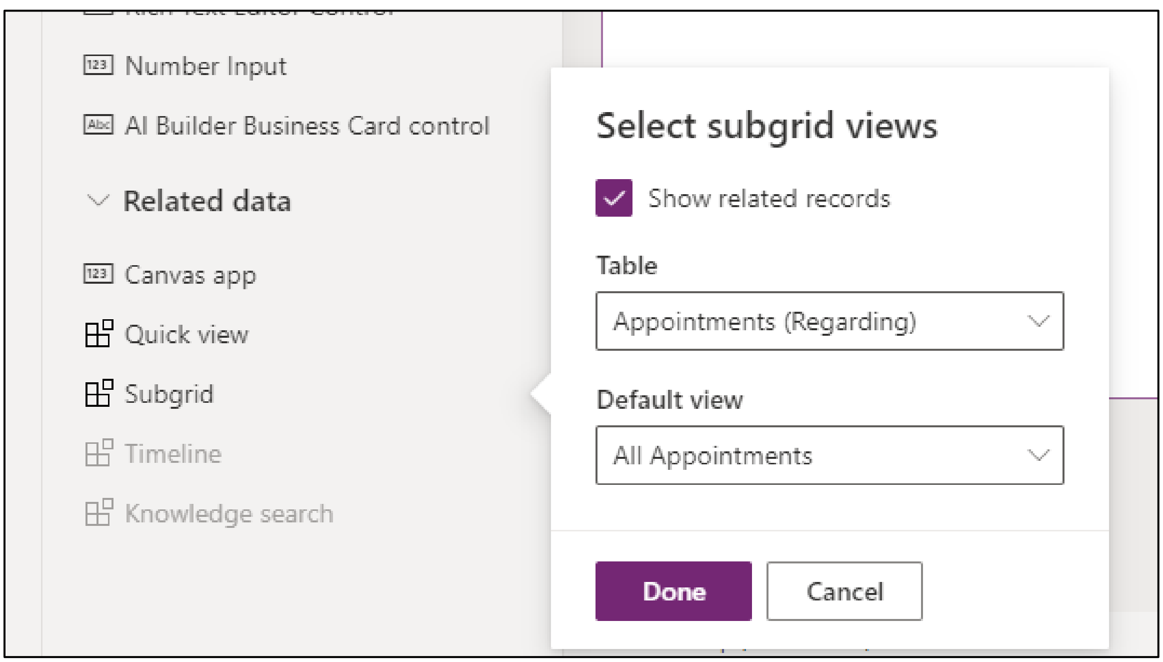
7. For **Tasks**, check Show related records and set the values to **All Tasks** from the **Tasks (Regarding)** table.



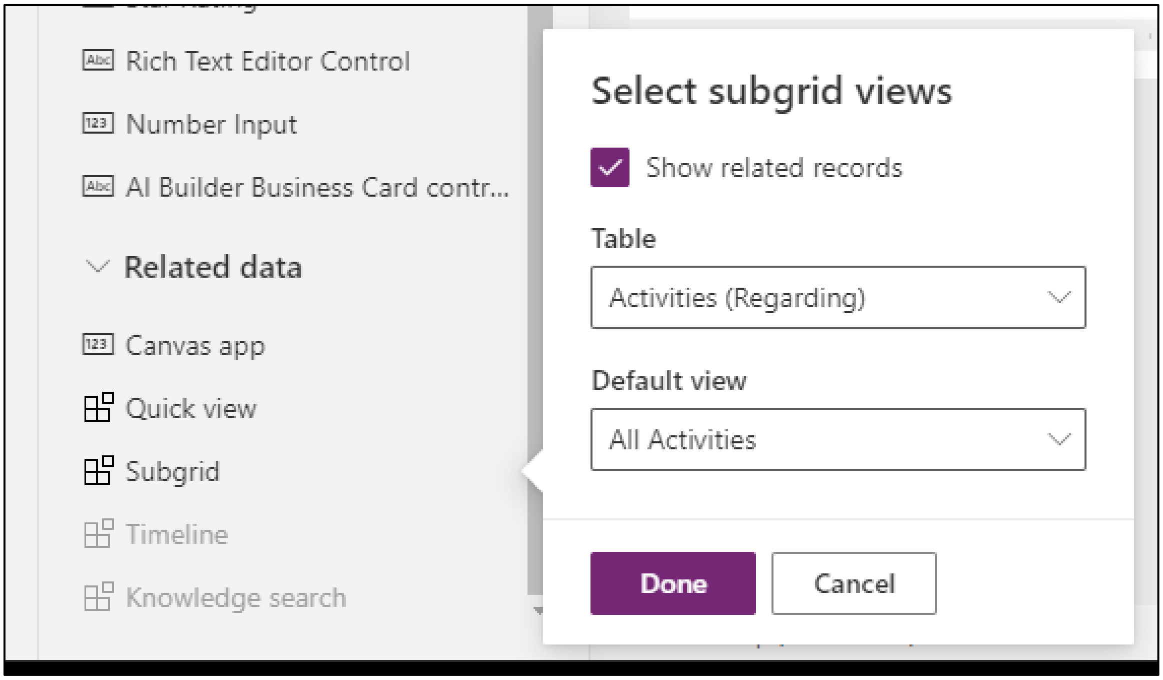
8. Repeat steps 1-7 for the **Meetings** and **Notes** tab.



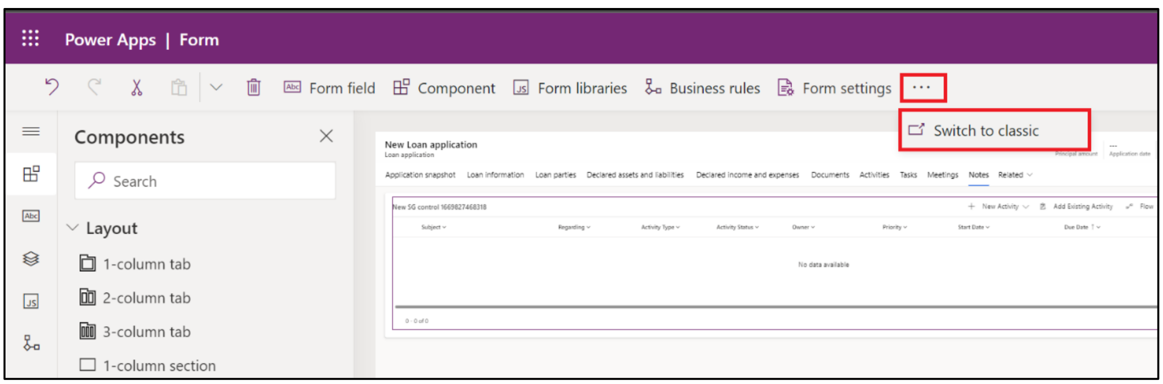
For the **Meetings** tab, set the subgrid to **All Appointments** within the **Appointments (Regarding)** table.



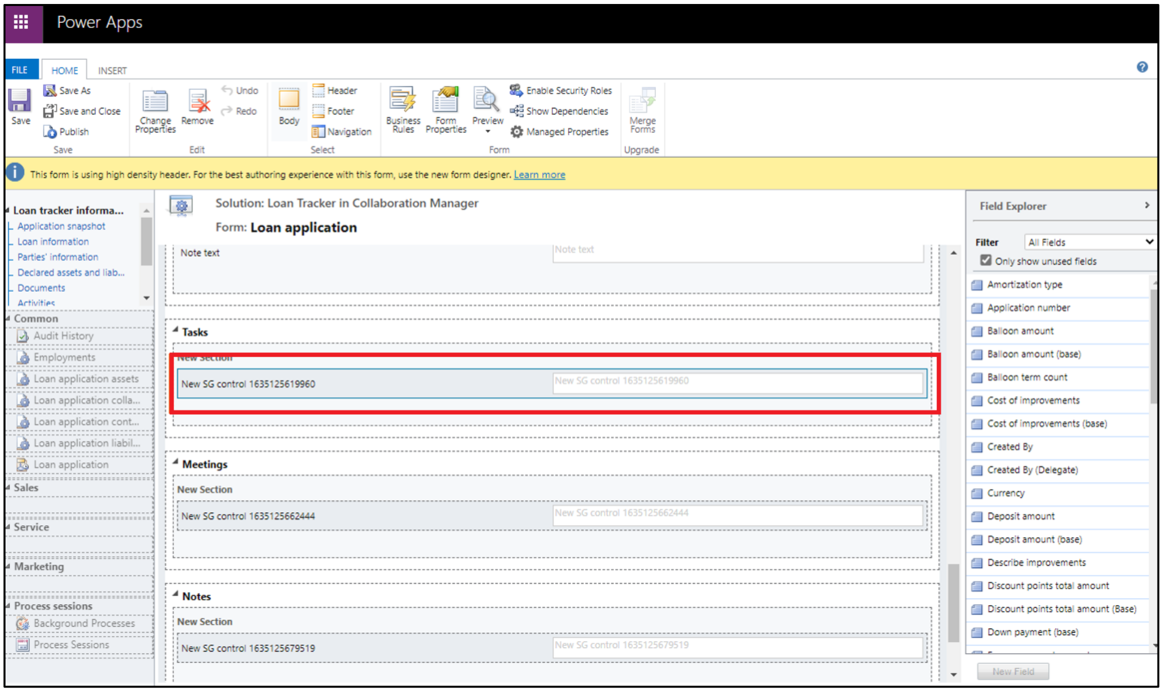
For the **Notes** tab, set the subgrid to **All Activities** within the **Activities (Regarding)** table.



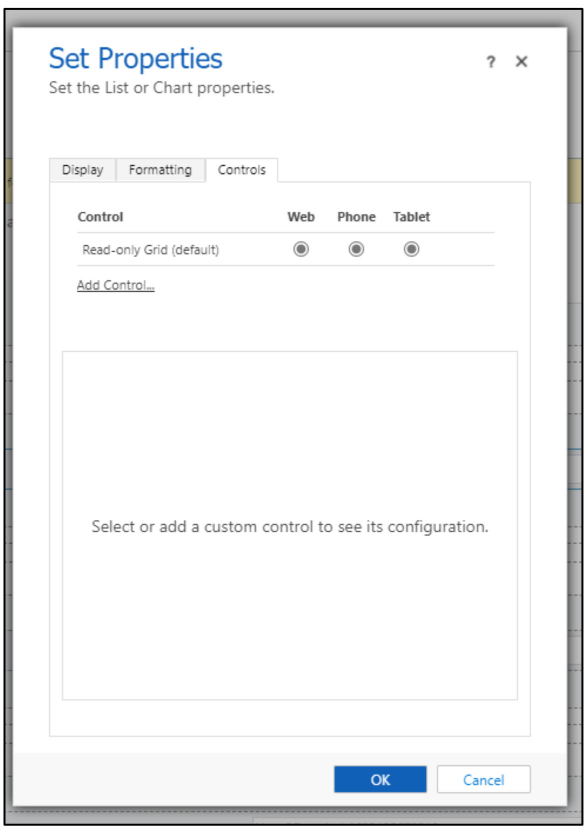
9. Set up the custom controls for your subgrids within the classic form designer. Select **Save** and then select **Switch to classic**.



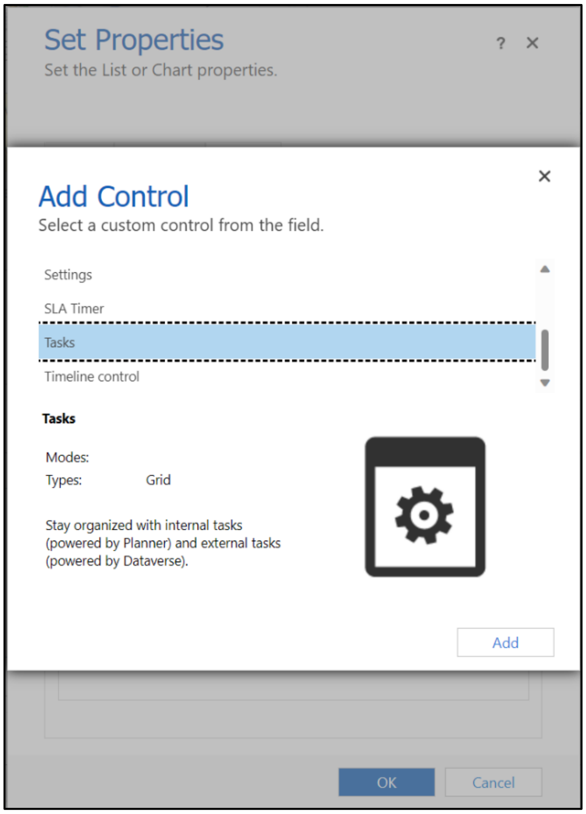
10. Scroll down in the classic form designer until you find the **Tasks** tab. Double-click on the subgrid to open up it's **Properties** dialog.



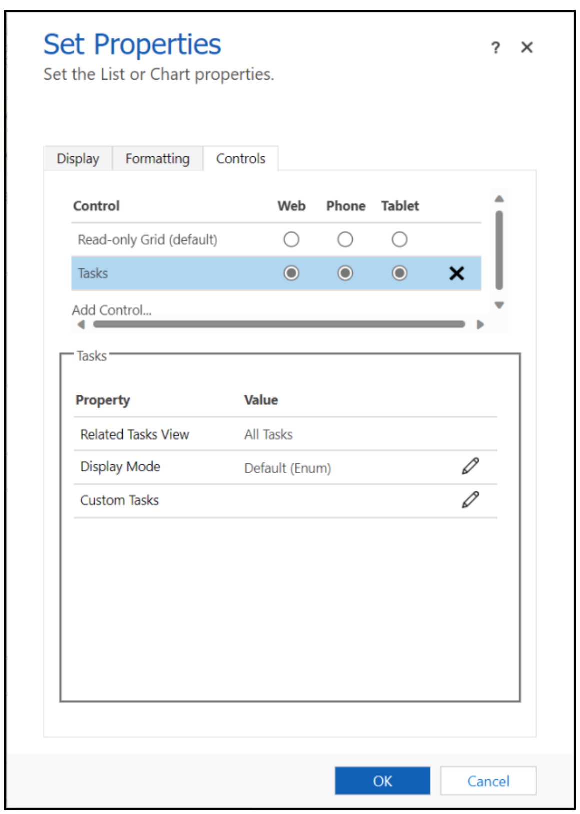
11. While in the **Properties** dialog, select the **Controls** tab to view all custom controls assigned to it.



12. Select **Add Control...**
13. For the **Tasks** tab, select **Tasks** and then **Add**.

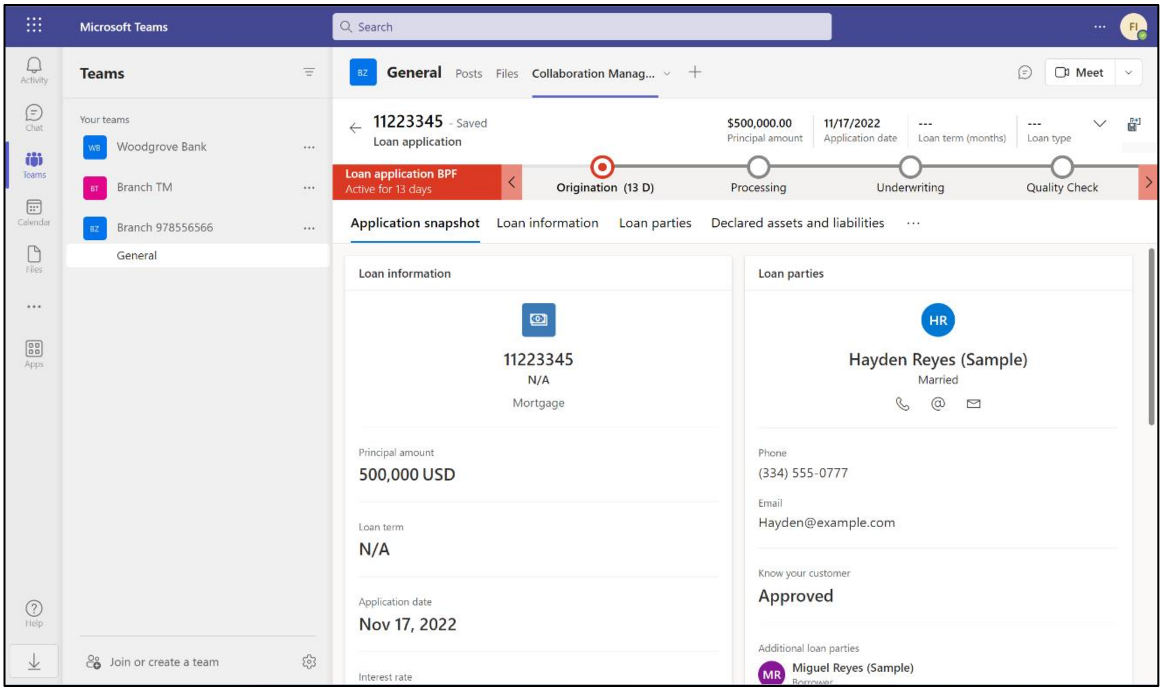


14. Select the **Web**, **Phone**, and **Tablet** radio buttons for the **Tasks** to ensure that it shows across all form factors.



15. Repeat steps 9-14 for the **Meetings** and **Notes** tabs. For **Meetings**, use the **Meetings** and for **Notes**, use the **Notes**.

16. Select **Save**.
17. Select **Publish**.
18. You can now open **Collaboration Manager for Loans** in the Teams. All tabs from Loan Tracker and the collaborative tabs from Collaboration Toolkit should now display.



Congratulations, you successfully added controls from Loan Tracker!

Summary

Nice work! You have completed the **Collaboration Manager for Loans** lab.

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