

# Importante!

- ❖ Material elaborado pelo time de especialistas em Power Platform da Microsoft Brasil para ser utilizado em **demonstrações online para seus clientes**.
- ❖ O uso deste material é permitido **apenas para clientes** Microsoft que participaram da sua apresentação em ambiente online e para **fins de referência e/ou autoestudo**.
- ❖ Este conteúdo é de **propriedade intelectual da Microsoft**. Todos os direitos reservados.
- ❖ Este material utilizou como referência as funcionalidades da **Power Platform** disponíveis conforme a **documentação oficial** e previstas para lançamento em seu **guias de lançamento** na data de sua elaboração (ver slide de abertura). Como o conteúdo destas fontes é dinâmico, sempre consulta-las em caso de dúvidas.

Em caso de dúvidas ou questões acesse nosso site (Power Platform Connect)  
<https://microsoft.github.io/powerplatformconnect/>

# Hyper automation with Power Platform

Version 3.0 from Jul 31, 2024

# Agenda

-  **Introduction**
-  **Why low-code?**
-  **Best practices for automation**
-  **Power Platform patterns of value**
  - Innovate
  - Orchestrate
  - Improve
-  **Next steps**
-  **Closing**



# Why low code?

# Business challenges



Organizations need **digital transformation** to thrive, but legacy automation solutions can be costly, inefficient, and difficult to manage





Accelerate developers and  
empower new makers

# AI & Low-code empower everyone



Developers



IT Admins

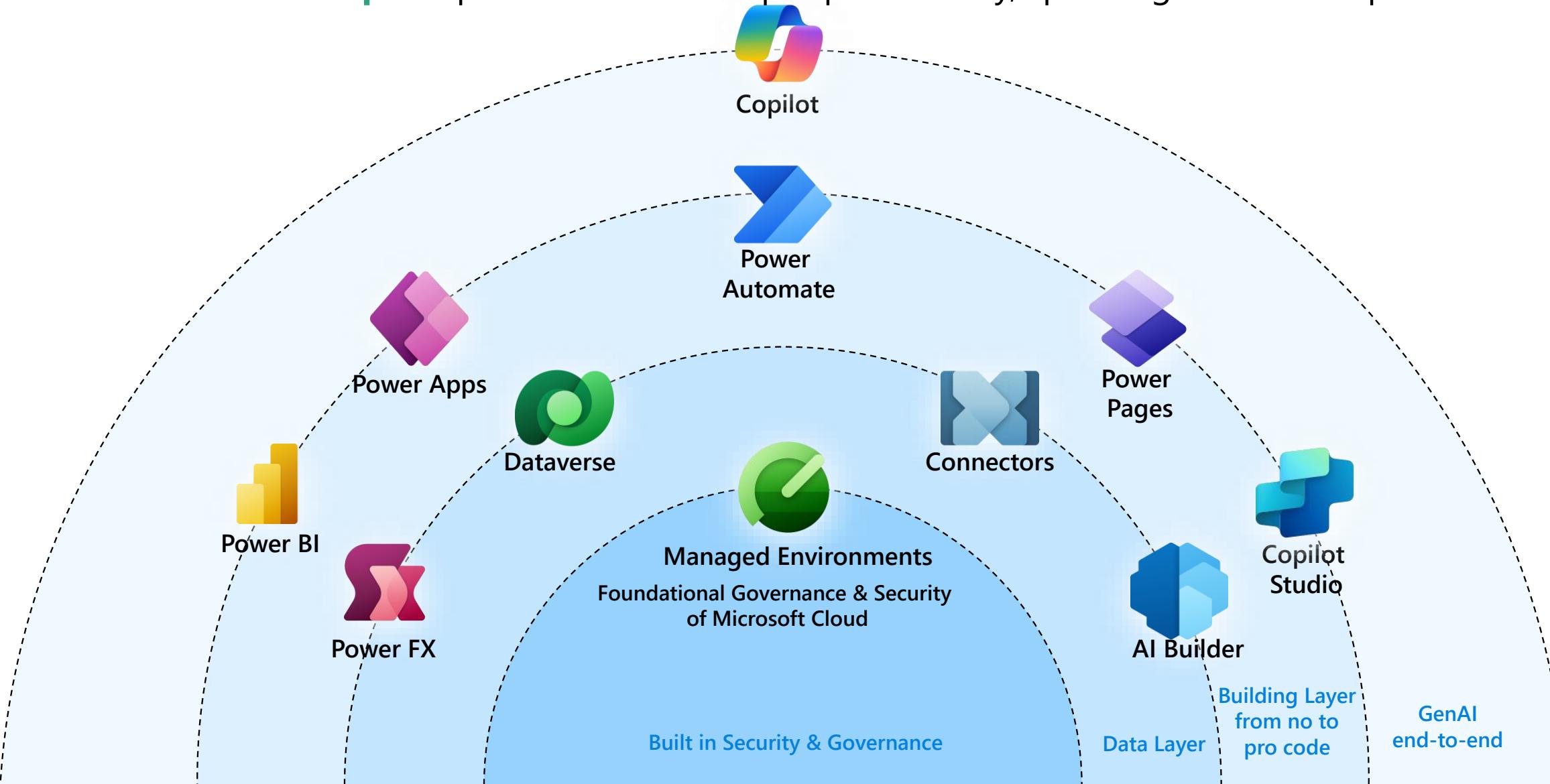


Business and  
Front-Line Workers



# Microsoft Power Platform

The world's **most complete** platform for developer productivity, spanning no-code to pro code

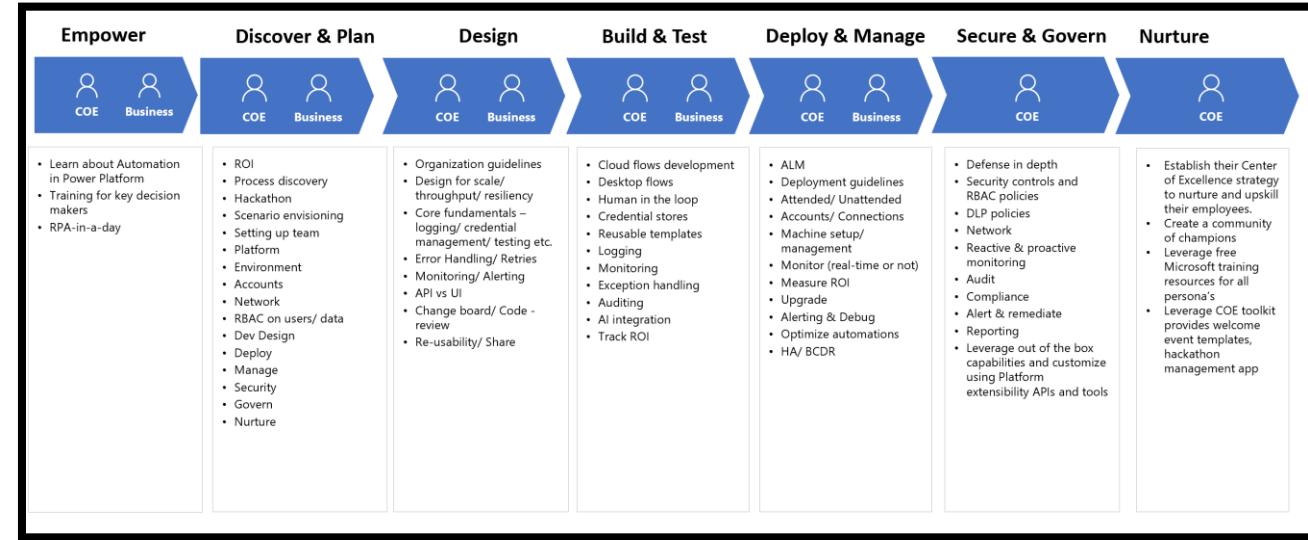


# Automation adoption best practices

# Automation center of excellency (CoE)

Automate at scale with efficiency, reliability and governance

- An **Automation Center of Excellence (CoE)** can ensure that the organization can realize automation and productivity objectives. By democratizing who can and build out automations, they can allow the organization to scale their automation practice.
- Microsoft published **complete guide** to help you streamline the exploration, implementation, security, governance, and scaling of process automation across your organization.
- This guide is based on **HEAT (Holistic Enterprise Automation Techniques)**, which is a collection of learnings from deploying hyper automation solutions at many enterprises.



[Learn more!](#)

# Power Platform well architected

## Automate at scale with efficiency, reliability and governance

Use the framework as a starting point to create your organizational architectural standards for automation workloads built with Microsoft Power Platform.

- **Successful design:** comprehensive and thorough coverage of concepts
- **Confidence in outcomes:** based on real customer experiences and subject matter expertise of Microsoft solution architects
- **Recognize tradeoffs and risks:** helps you realize that following the recommendations might involve making compromises against the other pillars.
- **Improve over time:** intended for iterative use and as a tool for continuous improvement. Assess the maturity of your workload against the guidance and use it as a changing score that evolves with your workload, ensuring that the design stays efficient and effective in meeting your business goals.

The screenshot displays the Microsoft Assessments Power Platform Well-Architected assessment interface. It includes:

- MICROSOFT ASSESSMENTS** and **Power Platform Well-Architected** sections.
- A descriptive text about examining reliability, security, operational excellence, performance efficiency, and experience of your workload's design.
- A **Start Assessment** button.
- Length of assessment:** 60 minutes.
- Format:** Multiple choice and multiple response questions.
- Results:** Receive curated and personalized guidance that fits your specific scenarios.
- A tablet showing the **Guidance Answer Summary** and **Recommendations for your workload**.
- A smartphone showing **Your overall results** (Moderate) and **Categories that influenced your results**.
- A **TAKE ACTION** section with the text **Improve your score** and **After completion of assessment, needs. Over time, you can improve**.
- A **See results example** button.

**Learn more!**

# Plan your automation project

## Easy guidance for makers, IT pros and developers

Do you have a process or task that you want to automate, but aren't quite sure how? This documentation can help you **plan** and **design** an automation project, whether you're a business user, an IT pro, or a professional app developer who has never worked on an automation project before.

Learn how navigate through the

Plan: Identify the who, what, when, and why.

Design: Design your new automated process "on paper," and consider various methods of automation.

Make: Create the Power Automate flows.

Test: Try out the automation you created.

The screenshot shows a web browser displaying the Microsoft Learn website for Power Automate. The page title is "Attended and unattended scenarios". The URL in the address bar is "Learn / Power Platform / Power Automate / Attended and unattended scenarios". The page content includes a sub-headline "With any of the automation methods you use, the automation is going to be either attended or unattended", followed by two sections: "Unattended" and "Attended". Below each section is a brief description and an illustration. A sidebar on the left lists various documentation topics under "Power Automate guidance documentation".

Learn / Power Platform / Power Automate /

## Attended and unattended scenarios

Article • 02/15/2022 • 2 contributors

With any of the automation methods you use, the automation is going to be either attended or unattended.

**Unattended**

**Attended**

Power Automate guidance documentation

- Plan a Power Automate project
  - Introduction
  - Various types of process automation
  - Planning phase
  - Designing phase
    - Process design
    - Architectural design
      - Determining which automation method to use
      - Attended and unattended scenarios
      - Separate flows into smaller automated processes
      - Authentication and security
      - Defining inputs and outputs
      - Transforming and formatting data
      - Formalizing messages and alerts
      - Reducing risk and planning for error handling
      - Adding analytical data to Microsoft Dataverse
      - Decision-making flowchart for your design
    - Making phase
      - Testing phase
      - Deploying and refining phase

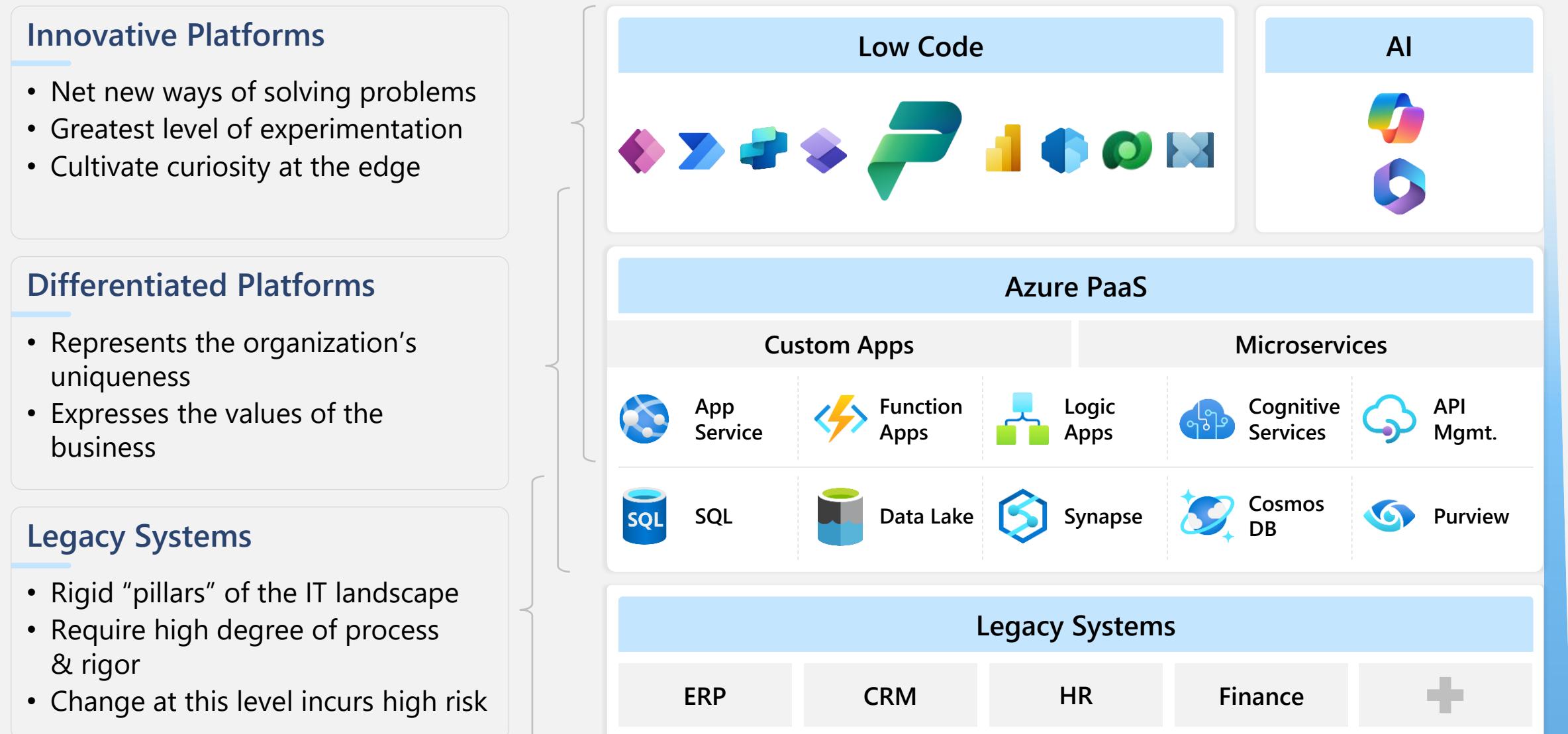
**Learn more!**

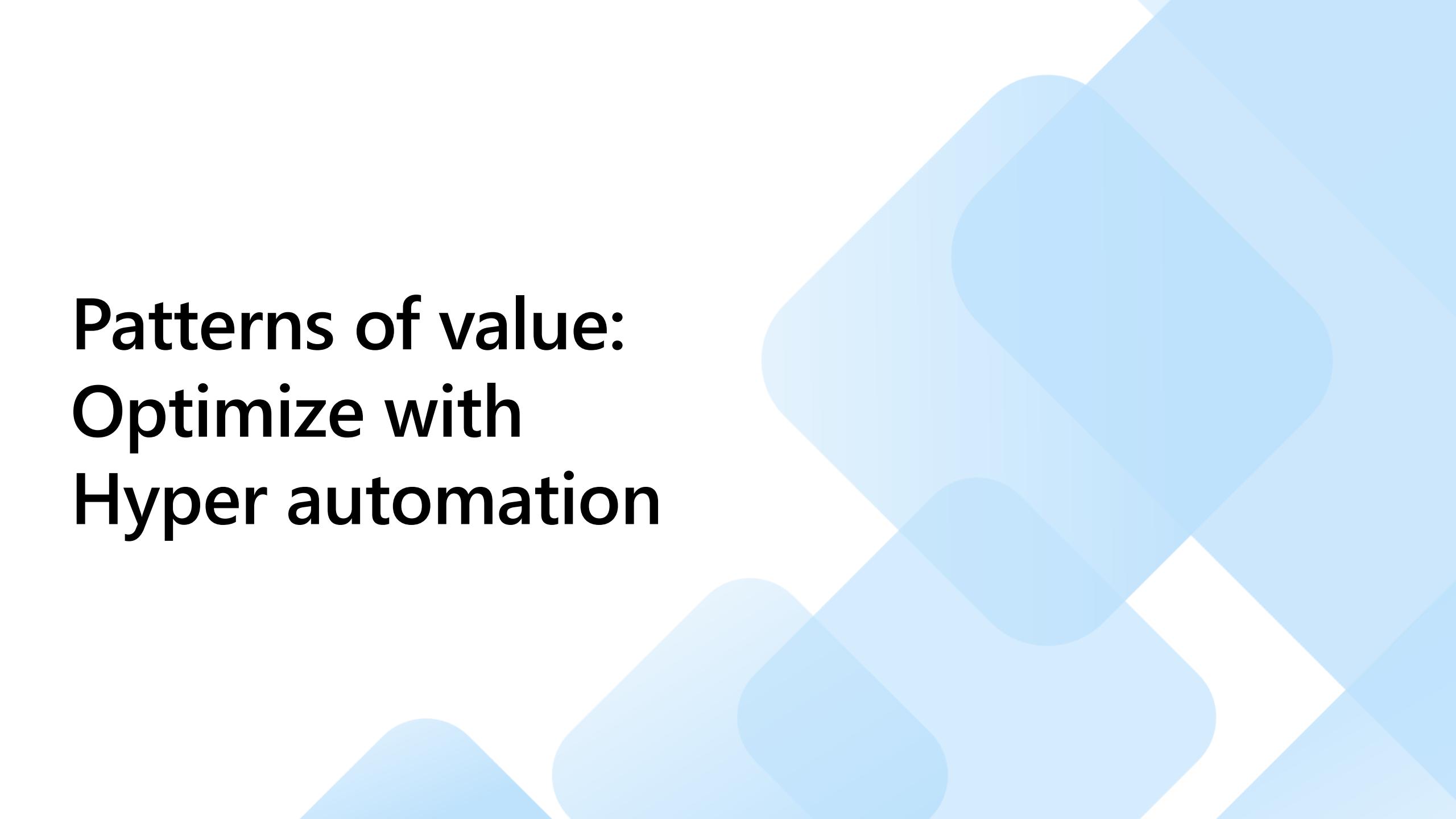


Runs on Azure  
Extends Azure



# Composable Technology Architecture





# **Patterns of value: Optimize with Hyper automation**

# Unlock Value Across Your Organization, With An End-to-End AI and Low Code Platform

Application Modernization



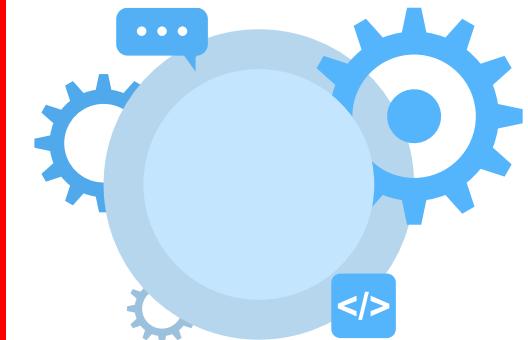
Extend LOB Systems



Optimize with Hyperautomation



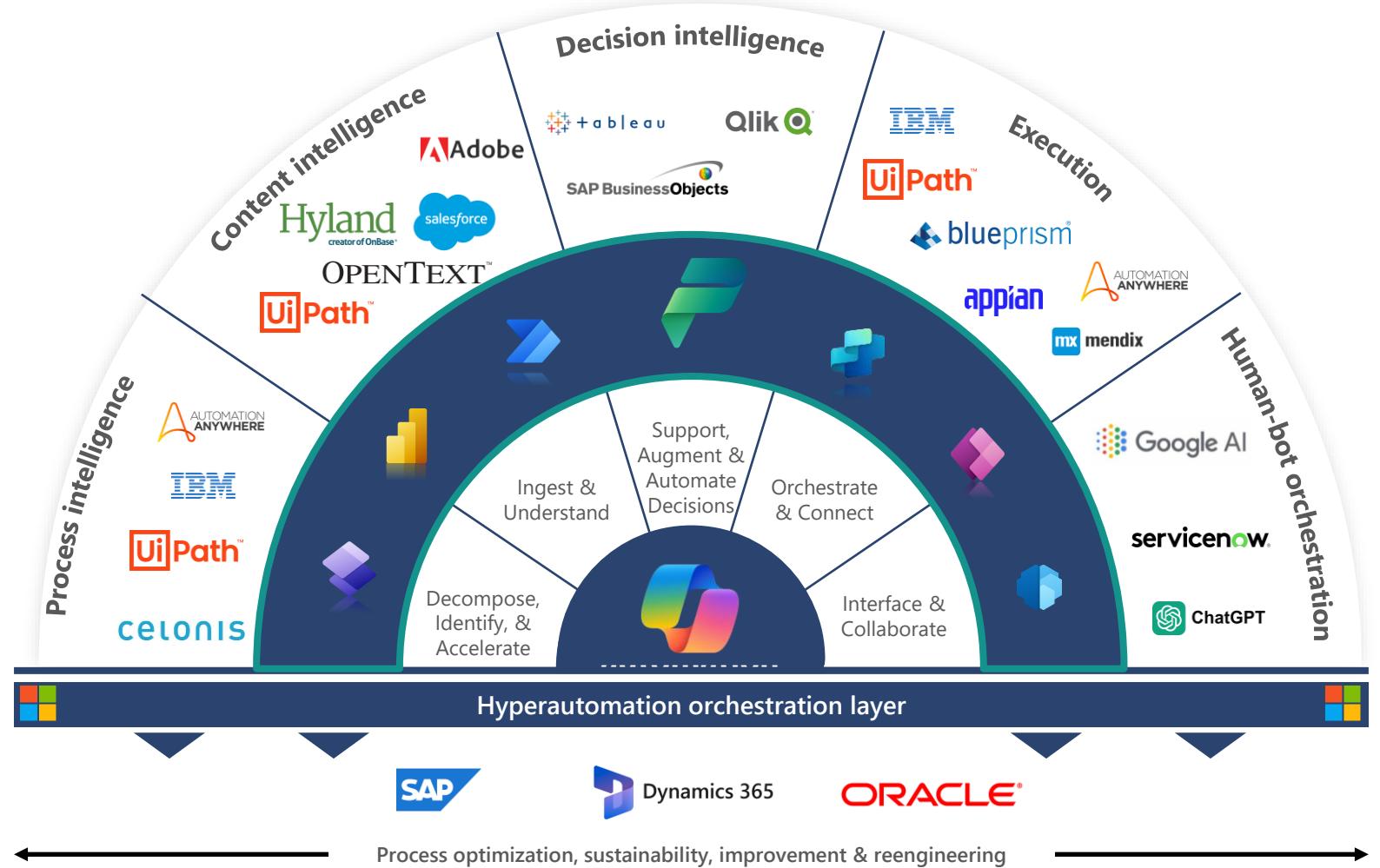
Build your own copilots



SOLUTION

# Hyperautomation with Microsoft

Convergence into a comprehensive, end-to-end process automation and optimization platform



# The benefits of automation at scale



Increase **organizational agility** through end-to-end process automation and orchestration – streamlining scalability



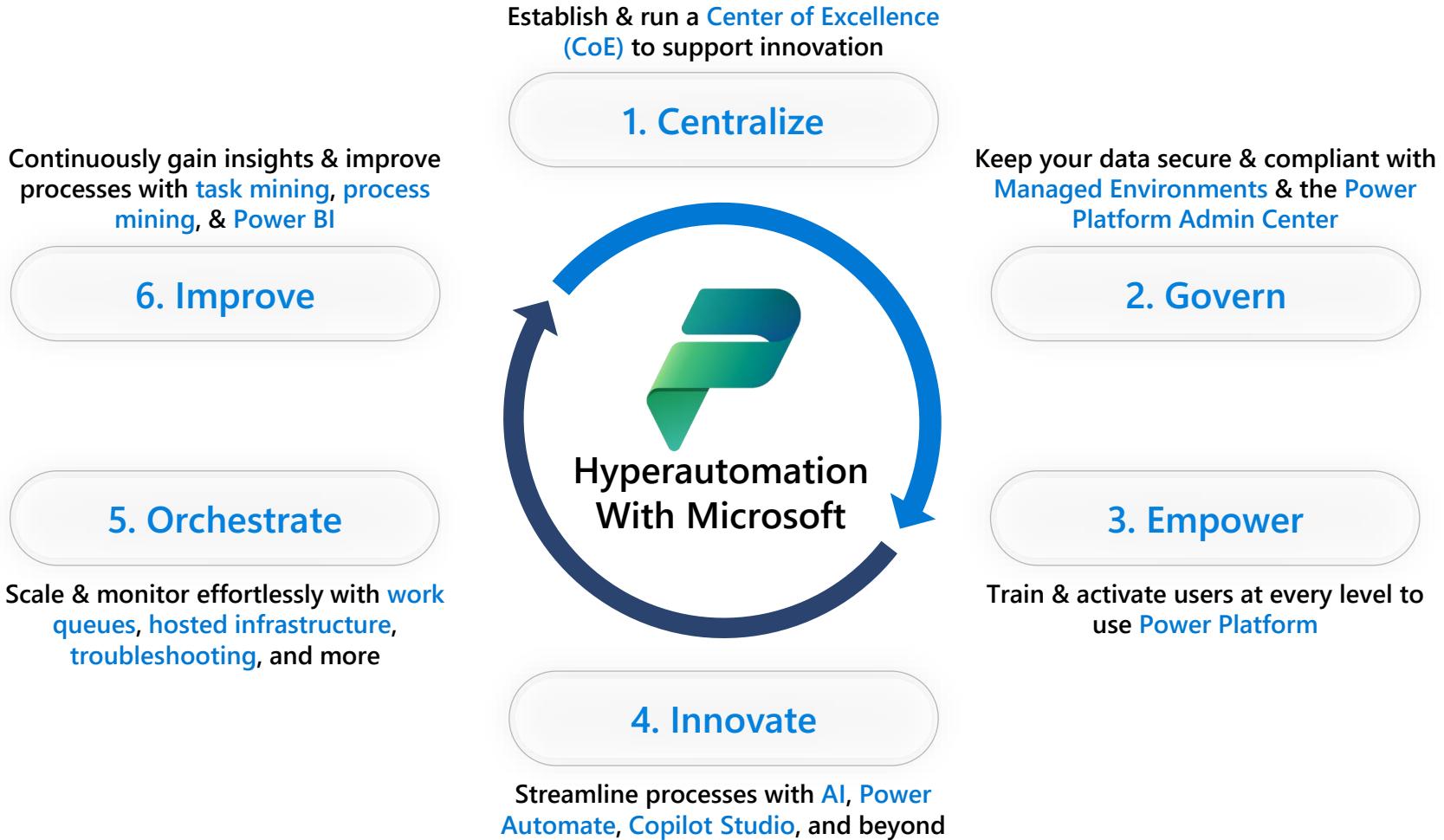
Foster **employee innovation** at every level with AI-powered tools and governance – keeping data secure



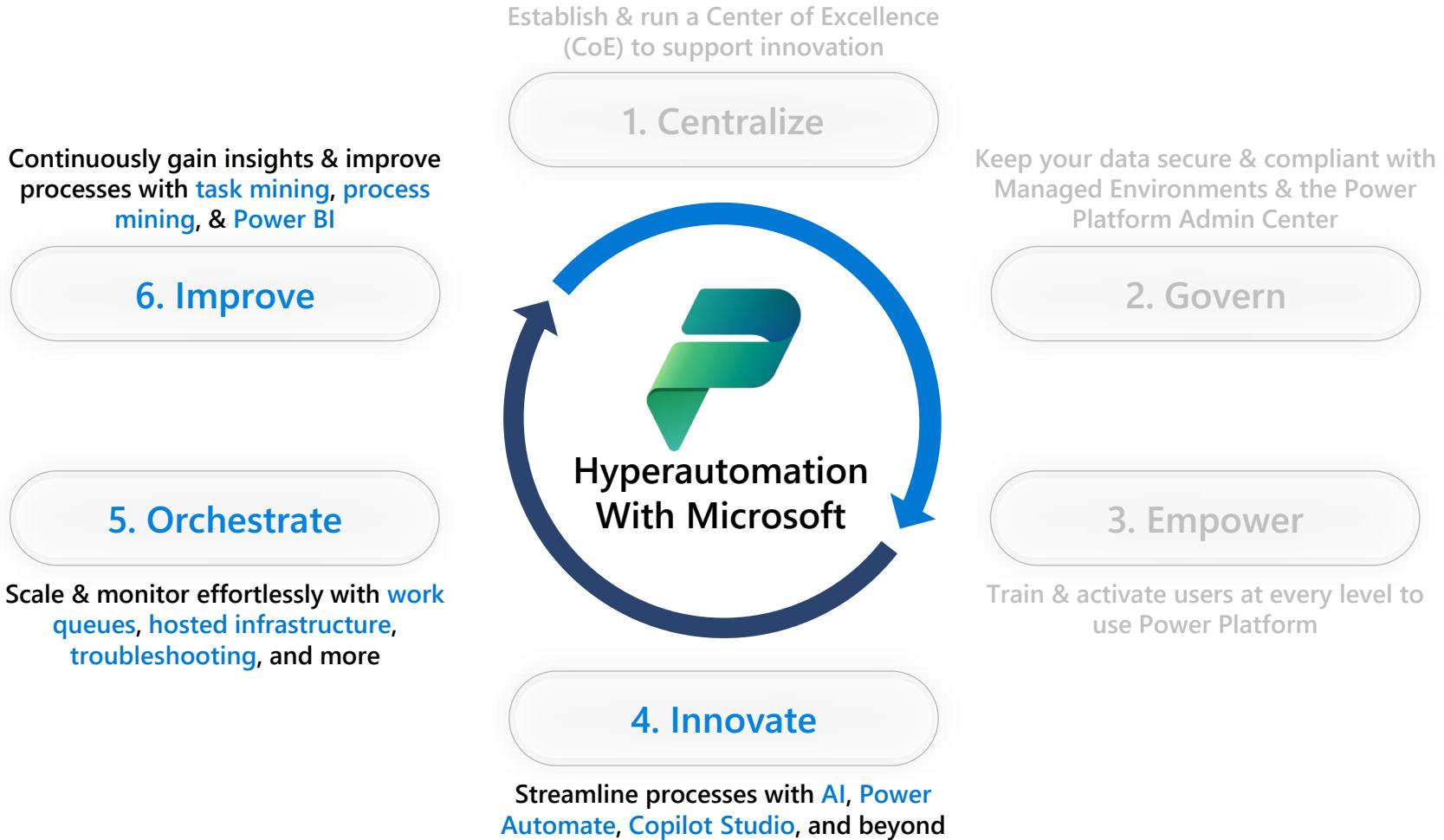
Continuously improve **processes** with 360 visibility, insights, and admin controls – saving time and costs

90% of AI users say it helps them save time at work.

# Continuously optimize with hyperautomation

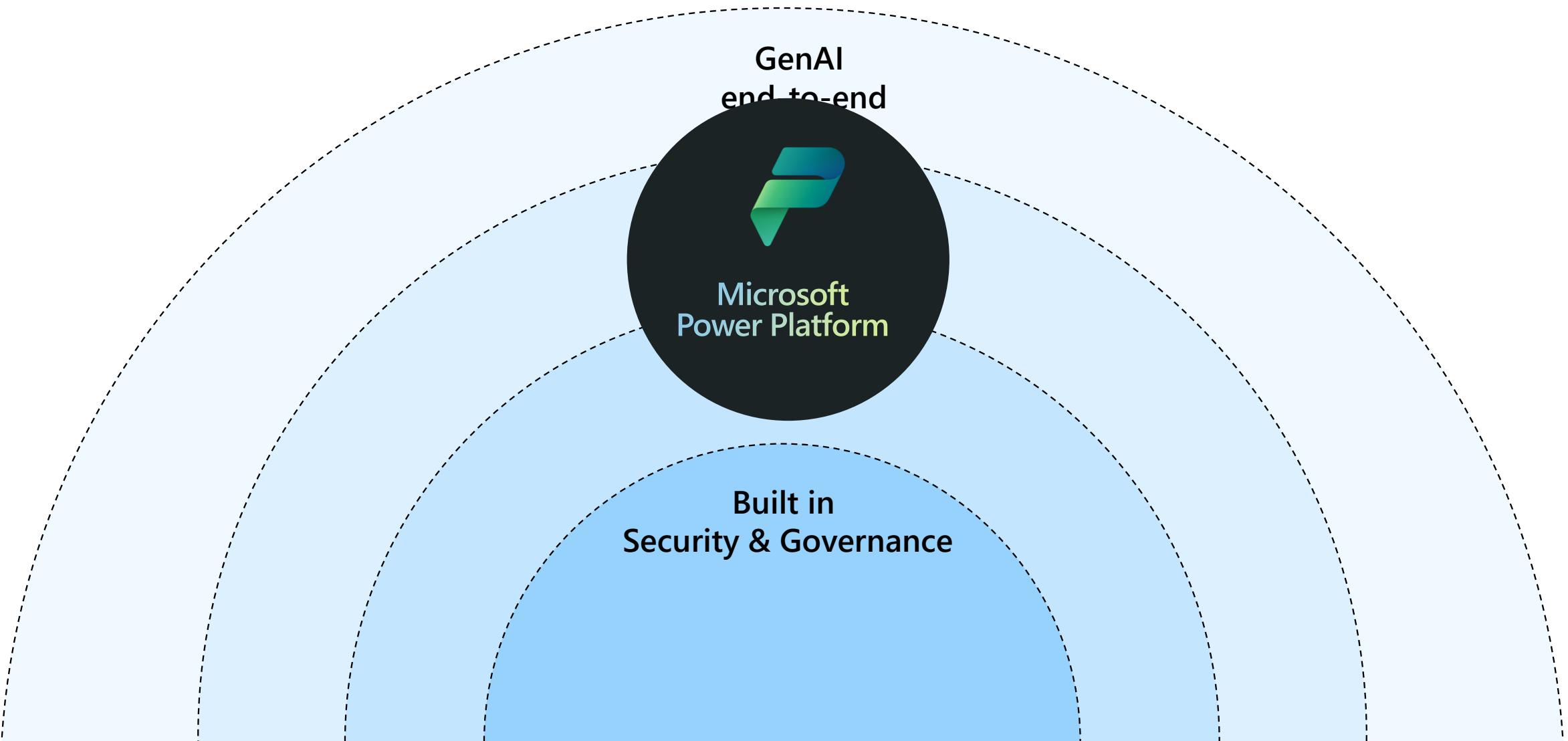


# What we will see today

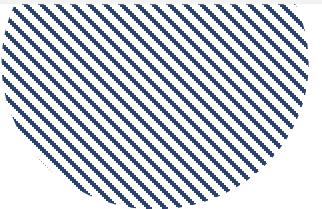


# Microsoft Power Platform

The world's **most complete** platform for hyper automation



# Personal and enterprise automation



# A complete suite of building tools

Apps, automation, pages, dashboards and copilots. All in one, easy to build, easy to connect.

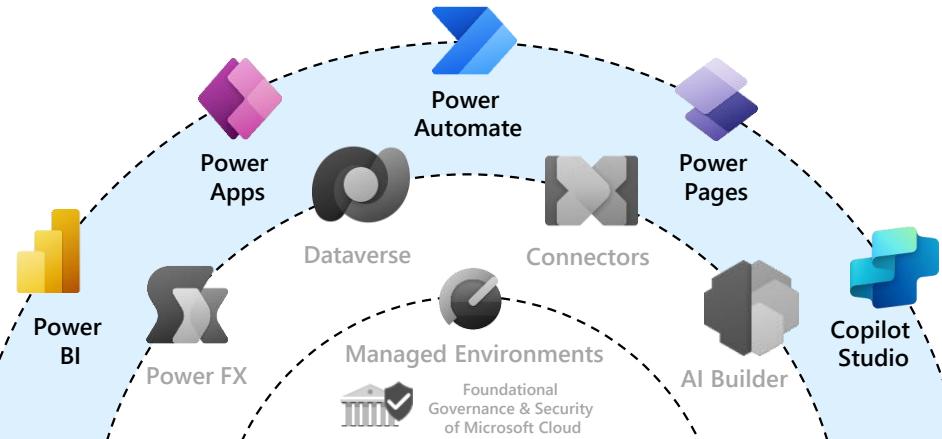
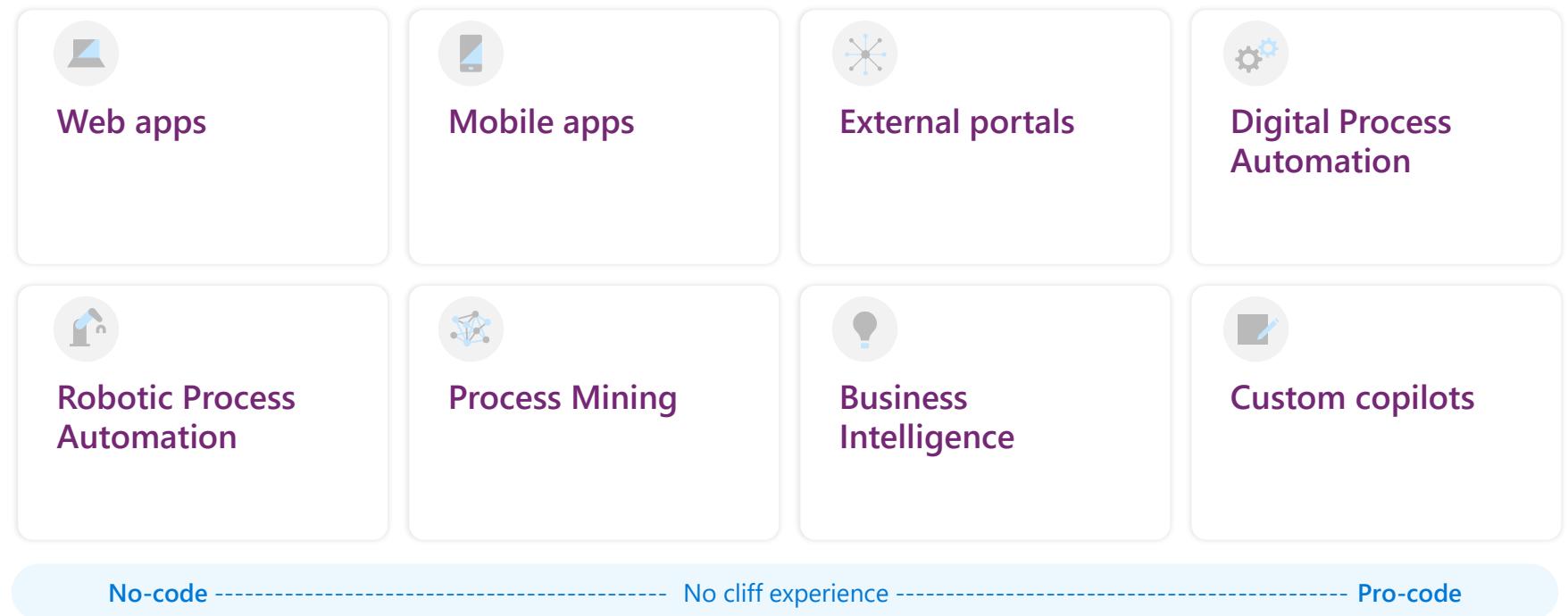
Two modes:



Personal and team productivity mode



Enterprise application mode



# Personal and team productivity model

Empower individuals and teams to solve problems within well defined limits.



Personal and team  
productivity mode



Enterprise  
application mode

## Dataverse Support



Dataverse  
Admin Mode



Dataverse  
for Teams

## Build from Office UI



SharePoint UI  
Custom Forms



OneDrive UI  
Item Flows



SharePoint UI  
Item Flows



Teams  
Application

## Data Sources for apps



SharePoint  
Content



Office  
Forms



Excel  
Spreadsheets



Microsoft  
Planner



OneDrive  
Content



Teams  
Content

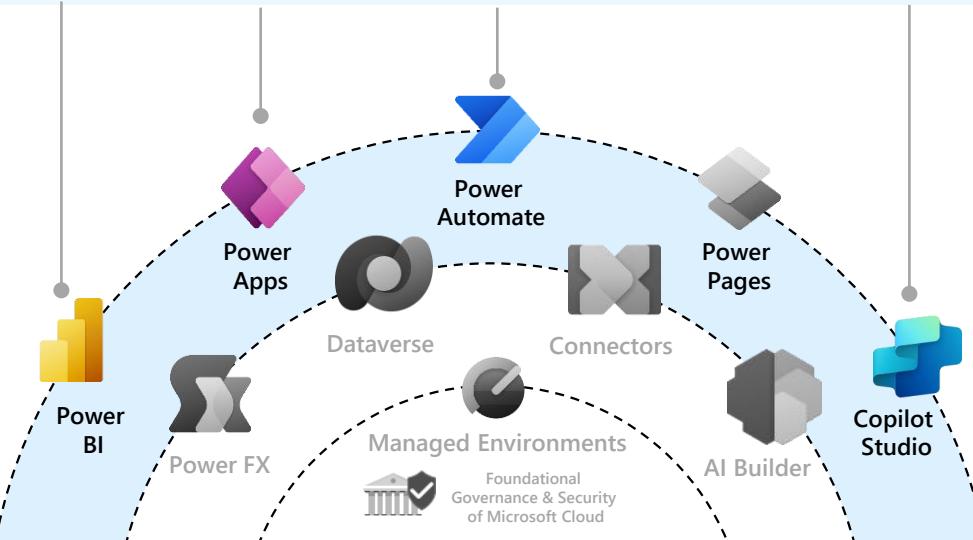


ToDo  
Tasks

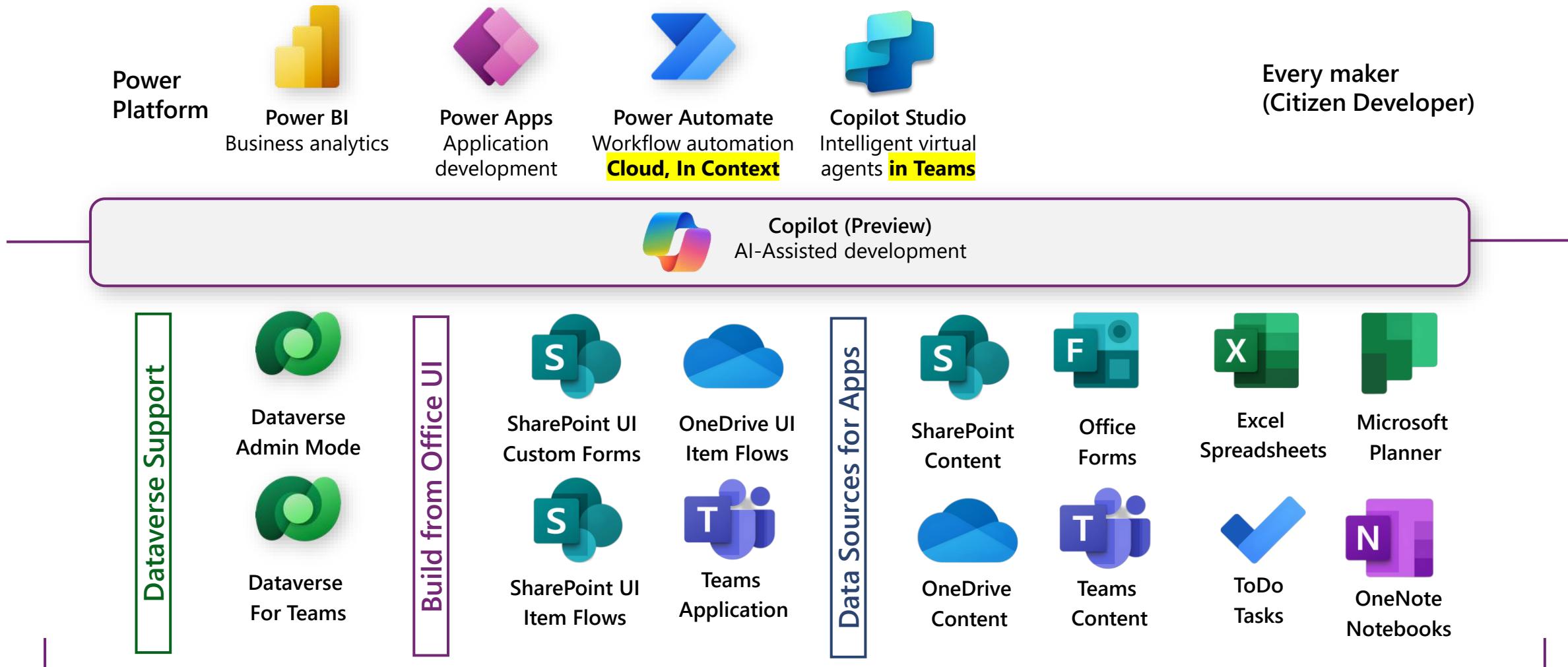


OneNote  
Notebooks

## Citizen Developers using Power Platform



# Productivity Application Model / Deep Dive



Office 365 Makers developing extensions to encourage sharing and collaboration

# Enterprise application model

Give pro developers and advanced low-code makers tools for accelerated enterprise app development.



Personal and team productivity mode



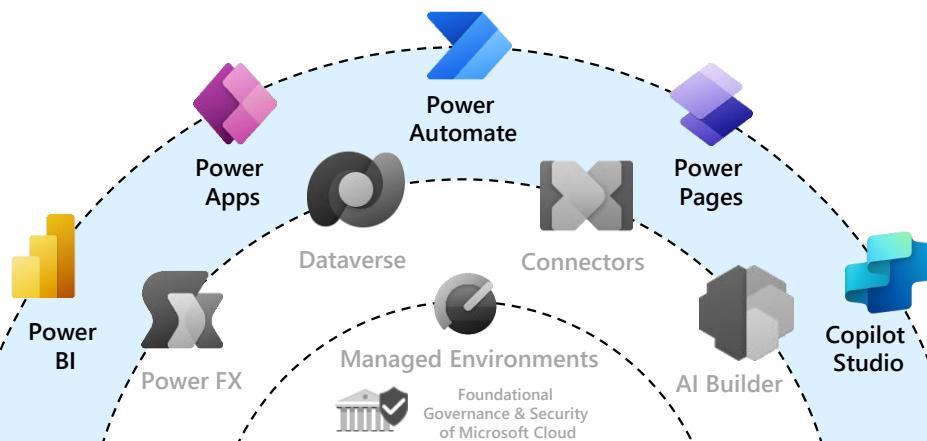
Enterprise application mode

## Enterprise Application Model with Power Platform

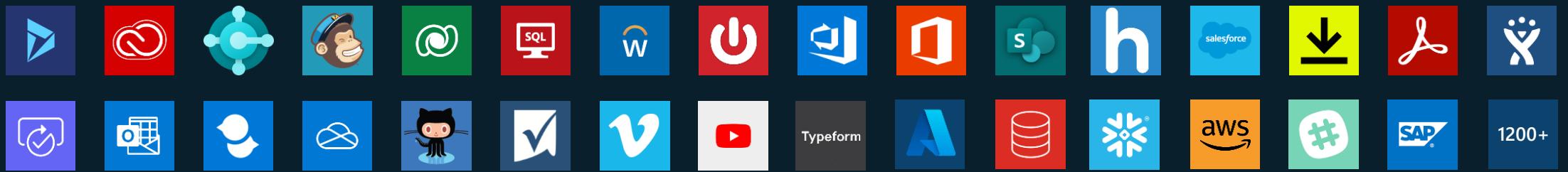
### Comparing Power Platform SaaS and Custom Application Stacks

Application stack	Hosted Web Applications	Hosted Web Applications	Hosted Web Applications	Power Platform
User Interface	JavaScript UI Framework (Angular)	JavaScript UI Framework (React)	JavaScript UI Framework (jQuery)	PowerApps, Copilot Studio, Power Pages
Workflow Process	Client Language (JavaScript)	Client Language (C#, WebAssembly)	Client Language (Flutter)	Dataverse, Business Workflows, Power Automate
Business Process rules	Client Language (JavaScript)	Client Language (C#, WebAssembly)	Client Language (Flutter)	Dataverse Business Rules
Business Process	Stored Procedures Logic Apps	Python	Stored Procedures Logic Apps	Dataverse Custom Actions
Data Integrity	Stored Procedures	PL/SQL	Stored Procedures	Dataverse Service
Data	SQL Server	Oracle	SQL Server	Dataverse Tables

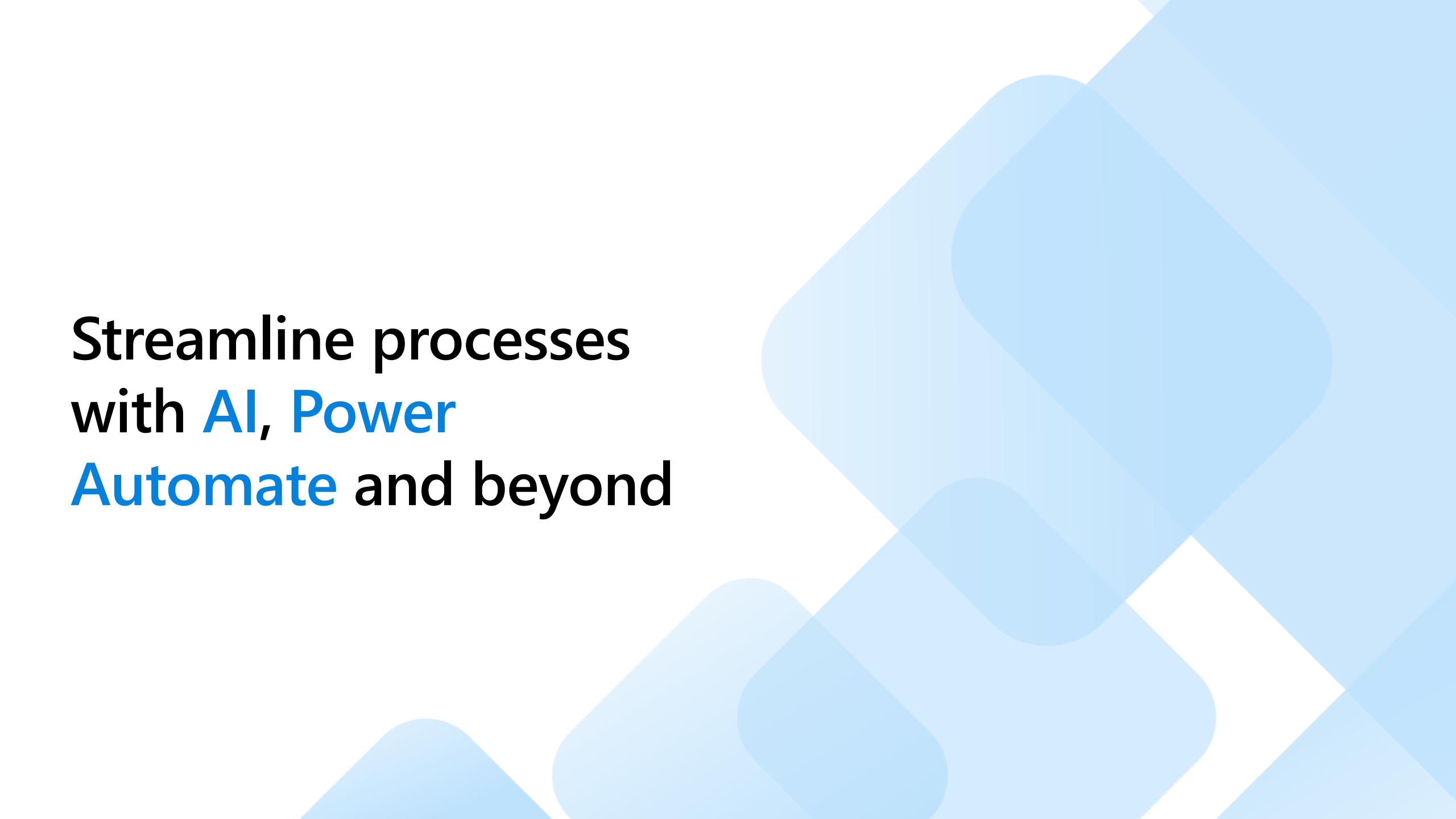
Lifecycle Management – Security – Auditing - Governance



# 1,000+ Copilot connectors



Build one today <https://aka.ms/copilotconnectors>



Streamline processes  
with **AI, Power**  
**Automate** and beyond

# Retain the value of your existing investments

Bring all your systems and data into scope for automation



## Cloud flows

Digital Process Automation (DPA)

With APIs

Modern automation for apps, services, and data with APIs in the cloud

Prebuilt

Connect to 1,400+ prebuilt API connectors

Custom

Develop your own API connectors for personalized solutions



## Desktop flows

Robotic Process Automation (RPA)

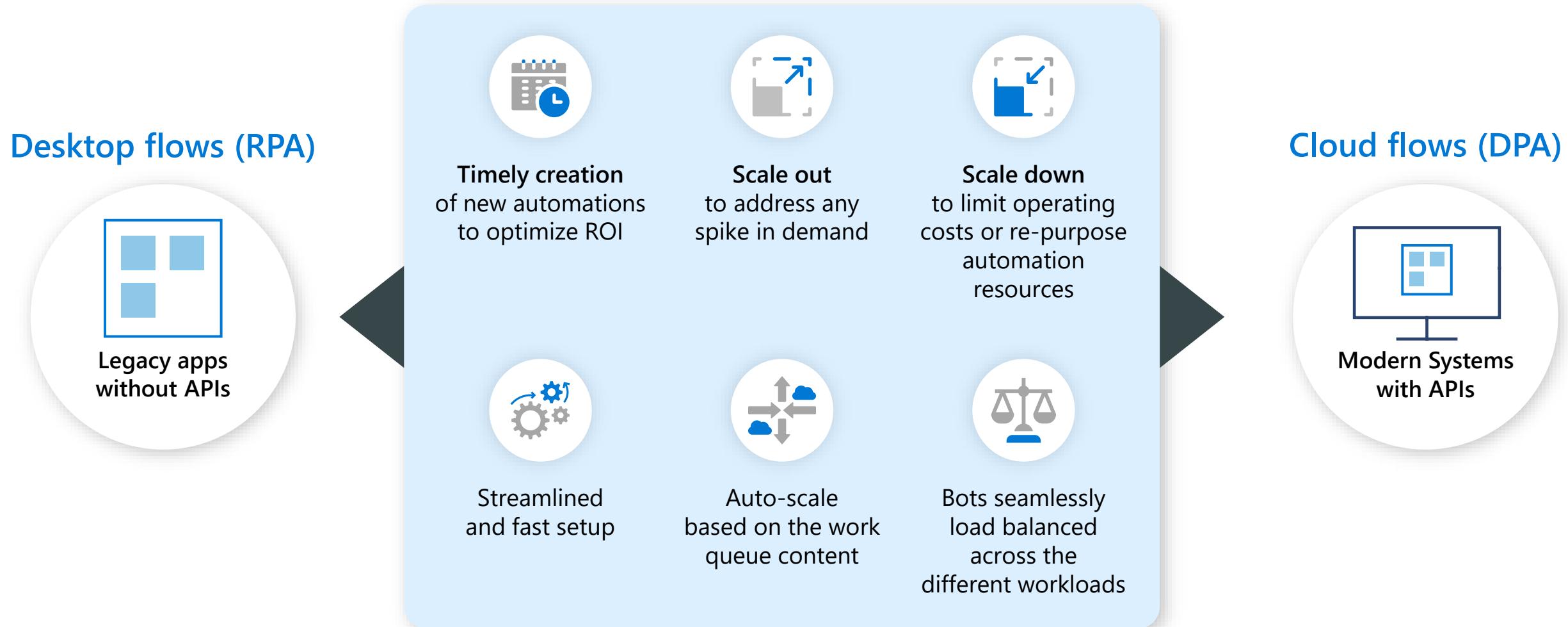
Without APIs

On-prem or legacy system automation on a desktop or virtual machine by mimicking user actions on a screen

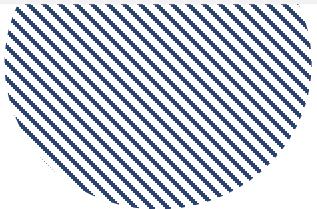
Choose from hundreds of drag-and-drop user interface (UI) actions

Develop your own UI actions with the actions SDK

# Automate across legacy and modern applications

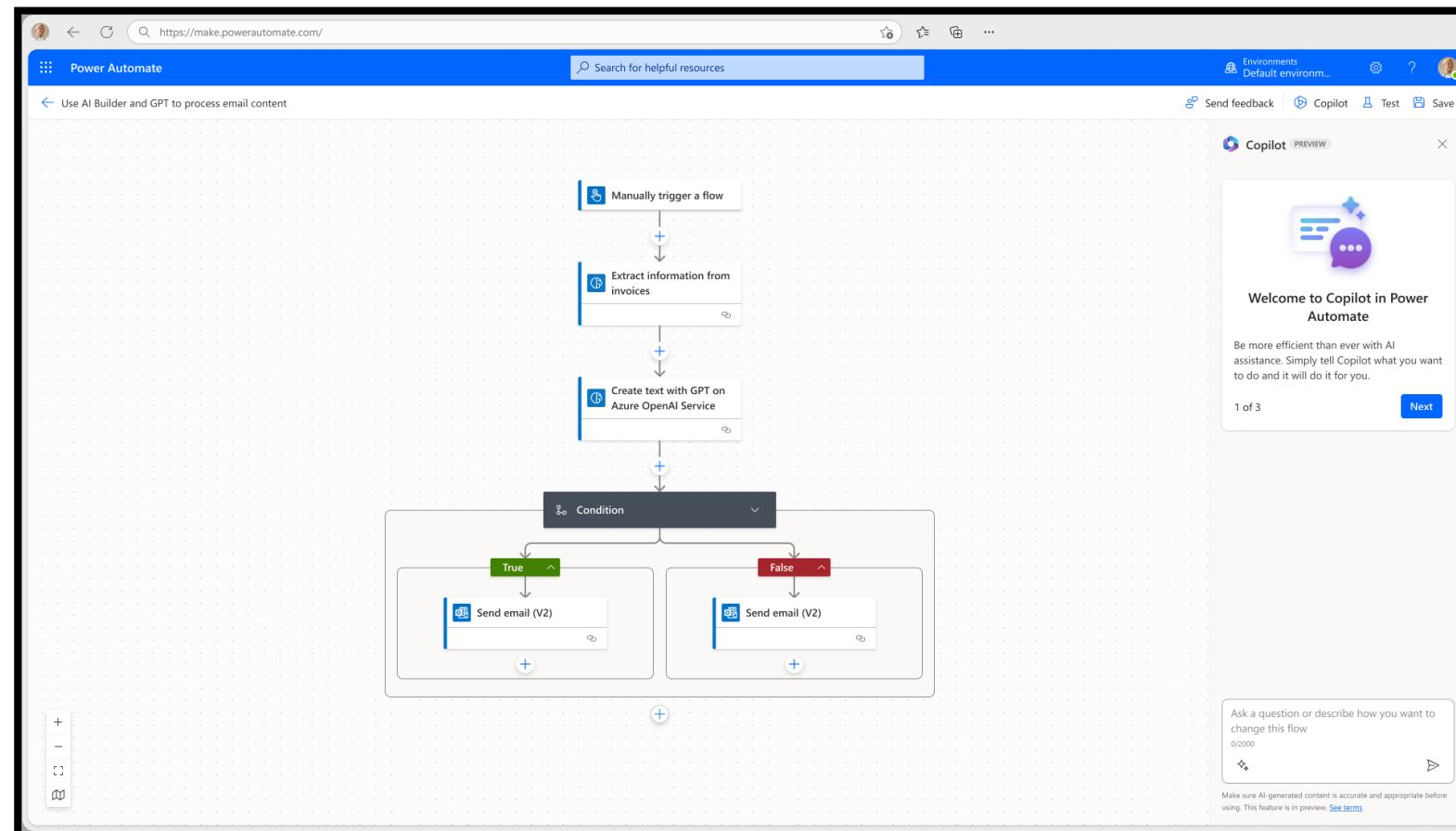


# Cloud flows



# What is a cloud flow?

- An automation that is triggered by an event such as arrival of an email from a specific person, or a mention of your company in social media.
- Used to create automations between **cloud-based apps, services, and data** using **API connectors** and hundreds of prebuilt **templates**.



# Cloud flows templates

Get started quickly with prebuilt, searchable cloud flow templates

The screenshot shows the Microsoft Power Automate website interface. At the top, there's a navigation bar with the Microsoft logo, 'Power Automate', and various menu items like 'Product', 'Capabilities', 'Pricing', 'Partners', 'Learn', 'Support', 'Community', 'Sign in', 'Try free', and a 'Buy now' button. Below the navigation is a search bar labeled 'Search templates ...' and a dropdown menu set to 'Sorted by published time'. The main content area features a grid of 12 template cards, each with a title, description, creator, and metrics. The templates are categorized under 'Featured'.

Template Title	Description	Creator	Published	Views
Notify the team when a new lead is created in Salesforce	Automated by Microsoft Power Automate Community	By Microsoft Power Automate Community	Instant	277
Notify a channel you'll be out of office	Automated by Microsoft	By Microsoft	Instant	6192
Create a new Trello card from a message	Automated by Microsoft	By Microsoft	Instant	5359
Get a push notification when you receive an email from your boss	Automated by Microsoft	By Microsoft	Automated	547944
Get a push notification with updates from the Power Automate blog	Automated by Microsoft	By Microsoft	Automated	174357
Forward emails to a channel	Automated by Microsoft	By Microsoft	Automated	63448
Analyze emails sentiment with AI Builder and send results to Teams	Automated by Microsoft	By Microsoft	Automated	18601
Create a to-do whenever you are @mentioned in an email	Automated by Microsoft	By Microsoft	Automated	69994
Save a message to OneNote	Automated by Microsoft	By Microsoft	Instant	1
Create a Planner task when a channel post starts with TODO	Automated by Microsoft	By Microsoft	Instant	1
Follow up on a message	Automated by Microsoft	By Microsoft	Instant	1
Notify a team when Planner tasks change status	Automated by Microsoft	By Microsoft	Instant	1

# Approvals with Power Automate

Create, manage and share approval processes across the organization

## Connectors

Within Power Automate you can create a new approval flow via a trigger from a system driven event from one of the **1000+ connectors or add your own LOB connector**

## Storage

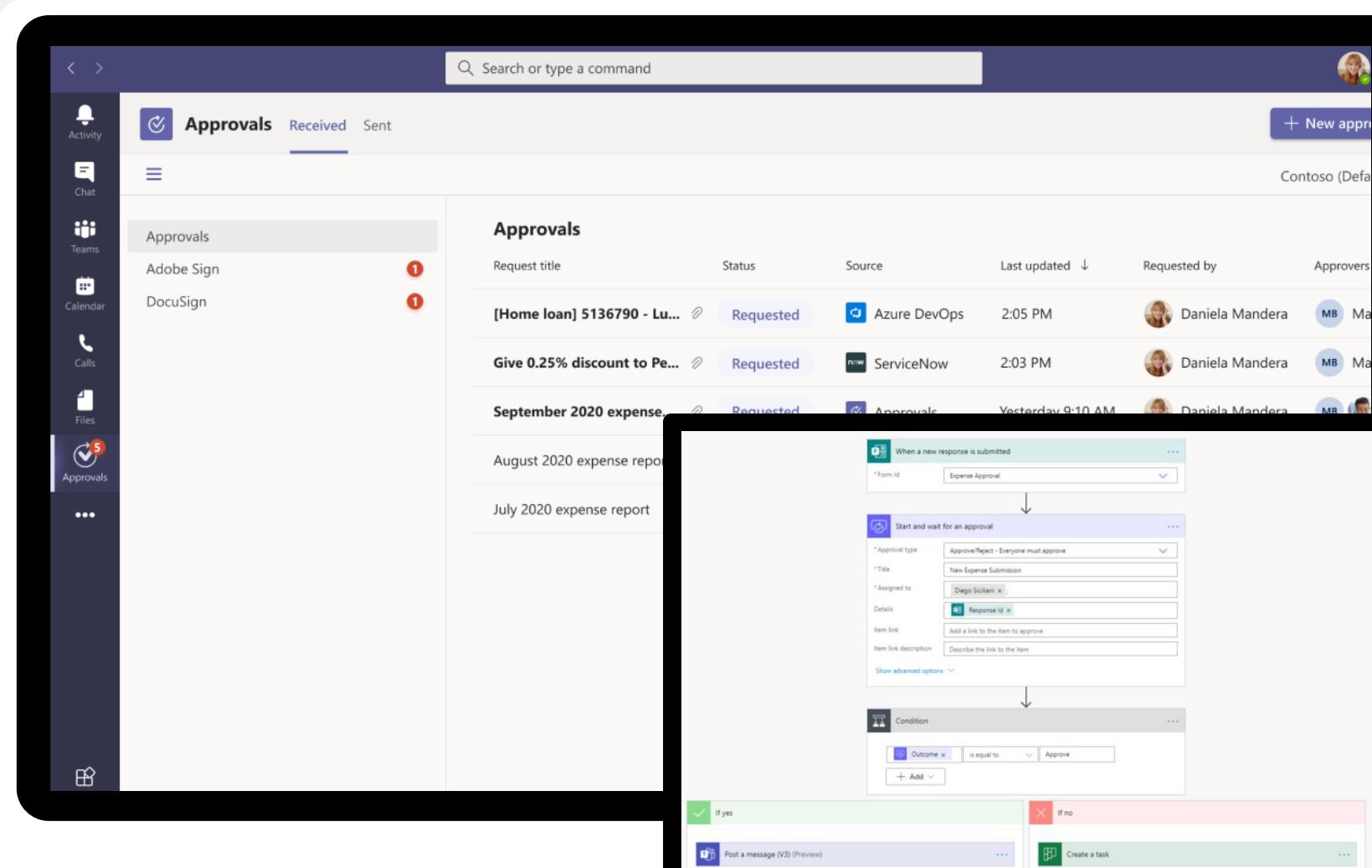
All Approvals are **stored in Dataverse** where the **admins have full access**, and can configure policies and manage Approval's storage, rollover, and policy in Dataverse

## Retention

Approvals **last forever** or whatever policy the Admin has set

## Security

Only the **requestor, approver, and the Global Tenant Admin** can access the data



# Embed Power Automate

Automation in your product offering



Power Automate embedded into Adobe Sign for advanced document signature and processing workflow

All Adobe users are now able to use Power Automate flows seamlessly to streamline their process, without leaving Adobe UI.

A screenshot of the Adobe Sign application interface. At the top, there's a navigation bar with 'Home', 'Send', 'Manage', and 'Workflows'. On the right, it shows 'John Appleseed' and activity counts: '0 IN PROGRESS', '0 WAITING FOR YOU', and 'NOTIFICATIONS'. The main area is titled 'Welcome to Adobe Sign, John'. It features a large button labeled 'Get a document signed' with sub-options 'Request signature' (blue button) and 'Start from library' (white button). Below this, there's a section titled 'Do more with Adobe Sign' with six smaller cards: 'Fill and sign a document', 'Publish a web form', 'Send in bulk with Mega Sign', 'Create a reusable template', 'Manage and track all agreements', and 'Create a workflow'. Each card has a small icon representing its function.

# Cloud flows: Custom API

Create and use  
custom connectors for  
more scenarios

Connector Name: Star Wars API V1

1. General > 2. Security > 3. Definition > 4. Code (Preview) > 5. Test

Swagger Editor  Update connector

**Actions (2)**

Actions determine the operations that users can perform. Actions can be used to read, create, update or delete resources in the underlying connector.

- 1 PeopleList ...
- 2 PeopleGetById ...

**New action**

**Triggers (1)**

Triggers read data in from your connector. A trigger focuses on a particular event that happens, say a new Contact or Order being created and provides the relevant data so that users can take action on that event.

**New trigger**

**References (0)**

References are reusable parameters used by both actions and triggers.

**Policies (0)**

Policies are used to change the behavior of actions and triggers.

**General**

Summary [Learn more](#)  
People List

Description [Learn more](#)  
Get a list of people.

Operation ID \*  
This is the unique string used to identify the operation.  
PeopleList

Visibility [Learn more](#)  
 none  advanced  internal  important

**Request**

It defines the pre-requirements needed in order to make a request. Describes a single operation parameter. A unique parameter is defined by a combination of a name and location.

Verb \*  
The verb describes the operations available on a single path.  
GET

URL \*  
This is the request URL.  
https://@env/endpoint/variables/StarWarsAPIV1/connectorName/execute

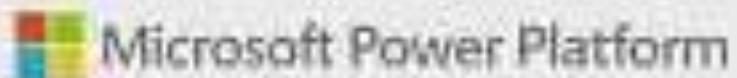
+ Import from sample

# Demo

Cloud flow best practices

# Best practices in Power Automate

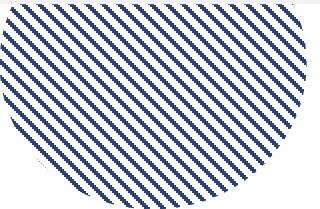
## Part 1



# Best practices in Power Automate

## Part 2

# Desktop flows



# What are desktop flows?



Desktop flows enable you to automate repetitive tasks using software robots that act like humans.

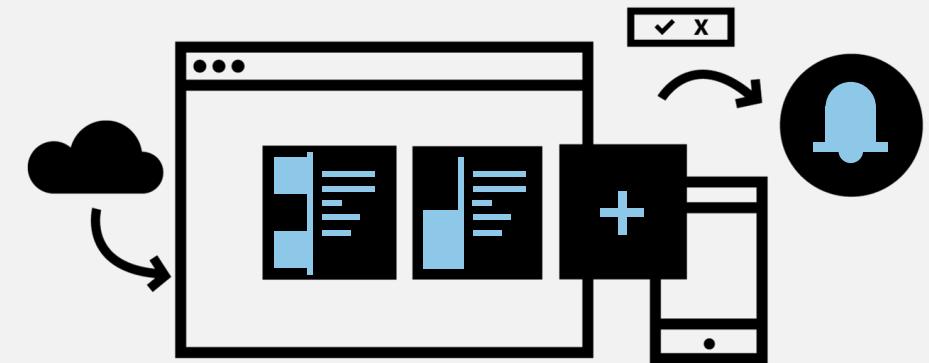


It opens the world of automation to include software that's old or new, on-premises or in the cloud.



Employees focus on high-value activities, improving compliance and job satisfaction while removing human error.

**Focus on what's most important.**  
Automate the rest.

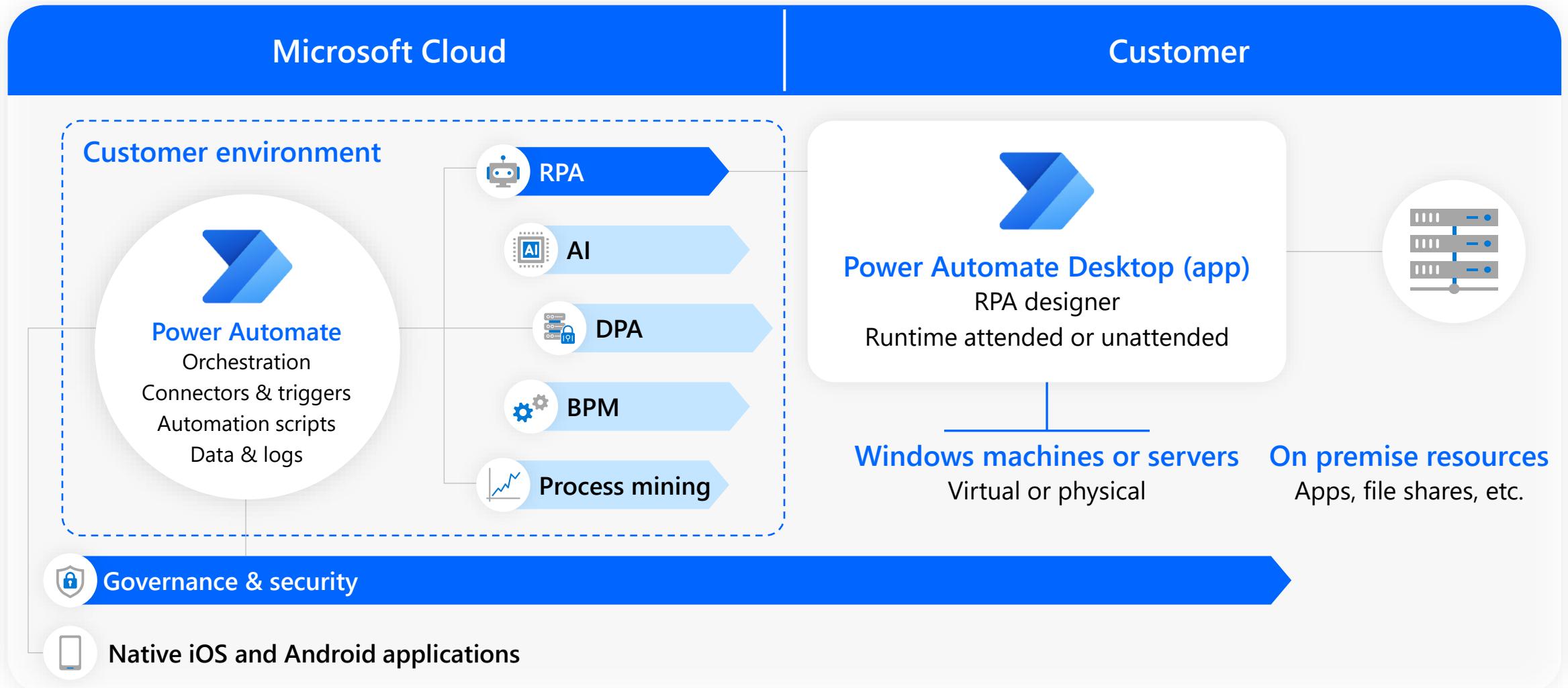


# Robotic Process Automation (RPA)

Automate your desktop by creating software robots that act like humans interacting with the user interface (UI)

	Attended	Unattended
Overview	Drive efficiencies and automate manual tasks across desktop and web	Accelerate the automation of high-volume and tedious tasks without lifting a finger
Scenario	On-demand task automation	Automate company processes at scale
Audience	Citizen developer in business unit	Automation specialist in a Center of Excellence dedicated to RPA
Requirement	User signed in on their device/human initiated	Jobs on dedicated machines/ robots do the work
Availability	Power Automate for Windows 10/11 Power Automate per user with attended RPA	Unattended RPA add-on

# Desktop flows: Logical Architecture



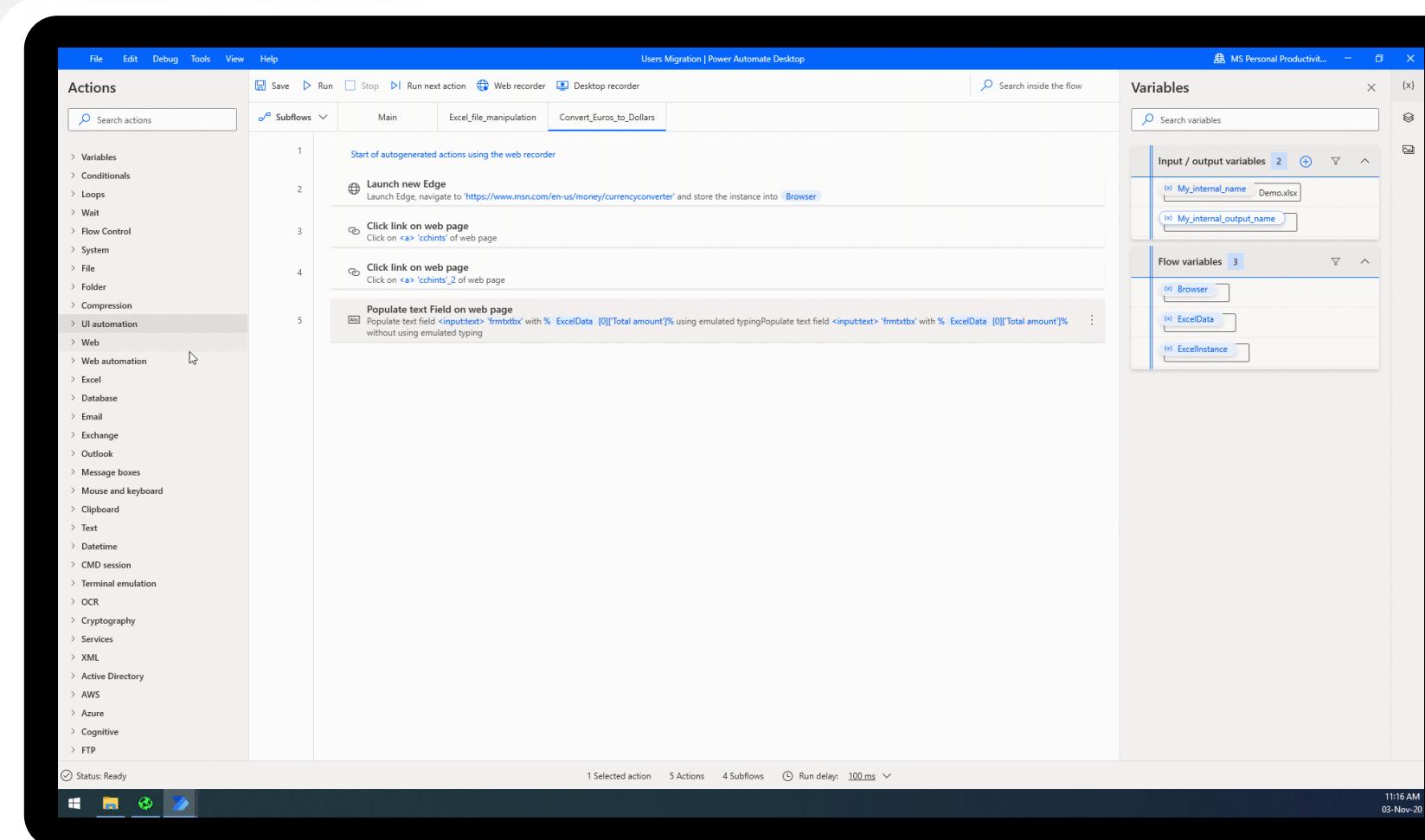
# Create quickly and easily with desktop flow designer

Accelerate development, adoption, and deployment with streamlined authoring built for professional developers and citizen developers alike.

Intuitive **drag-and-drop interface** with **400+ prebuilt actions** to create each step in your desktop flow

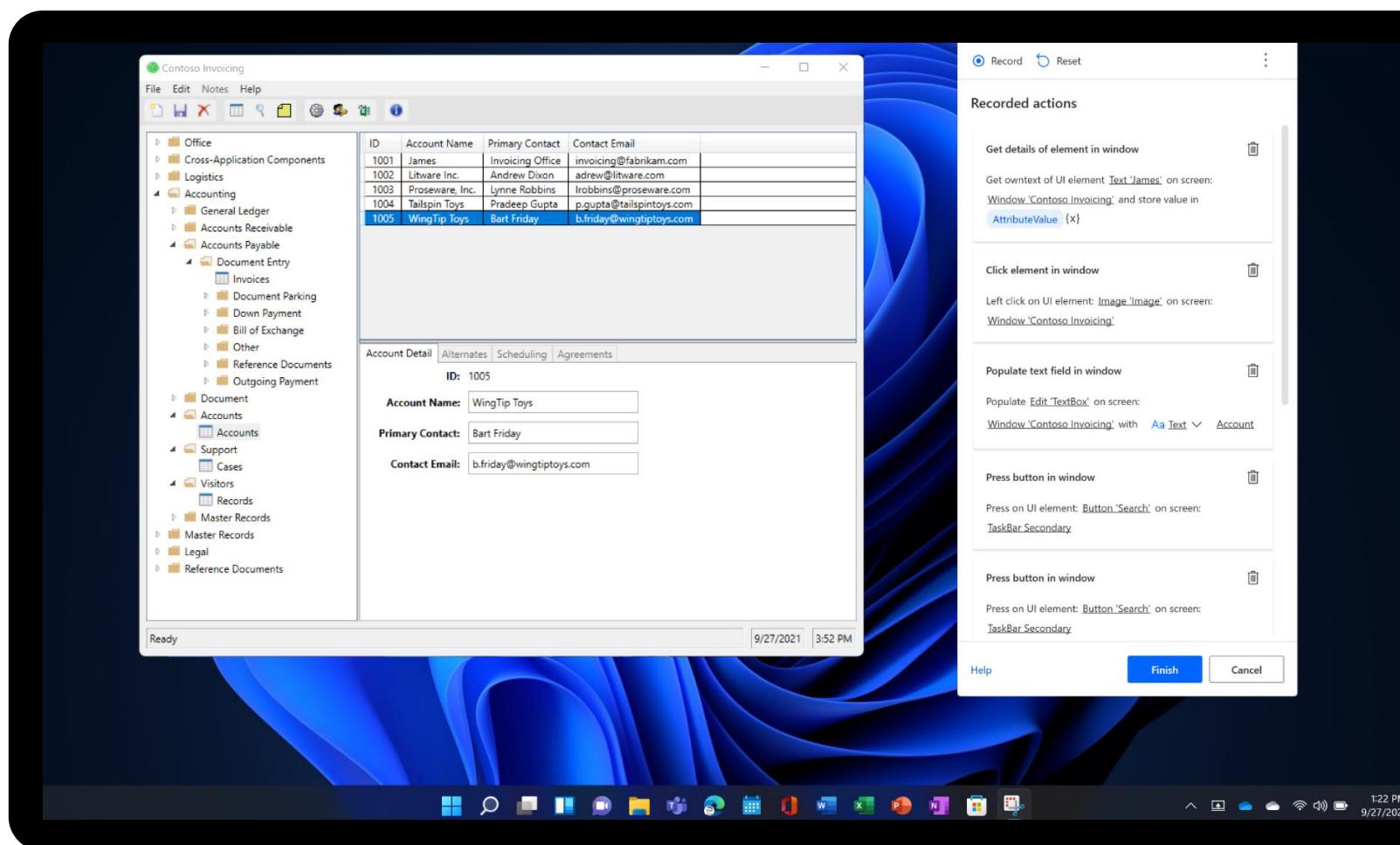
Use the **recorder** to capture your own actions, such as mouse clicks and keyboard inputs

Start quickly with prebuilt examples that are ready to run, or **share flows with others** for collaboration



# Recorder

Use the recorder to capture your own actions



# Deploy confidently with troubleshooting and monitoring

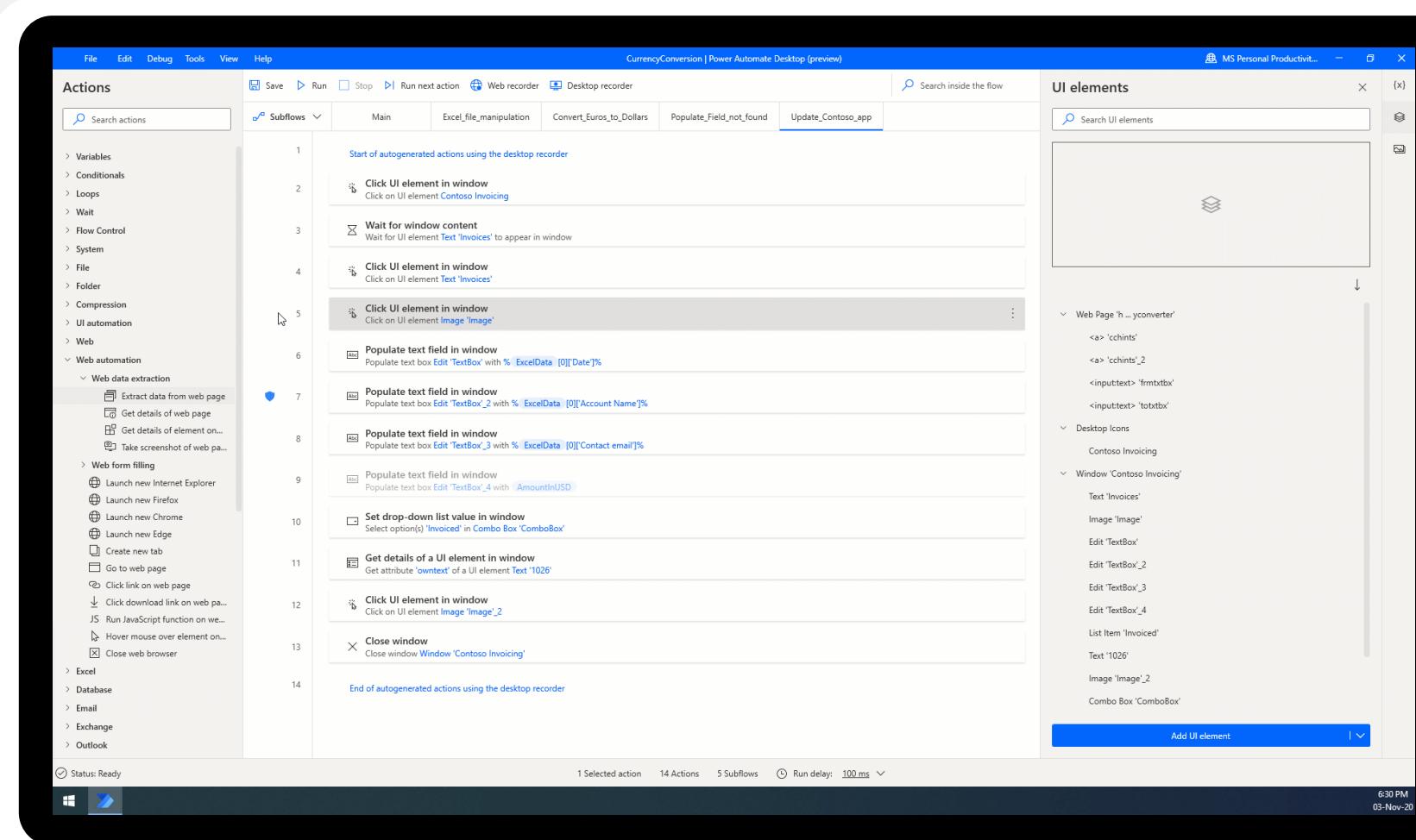
Keep your flows running smoothly with simple tools to test, debug, monitor, and manage your automations in one place.

Ensure flows continue to run with rich **error handling** settings

Use **debugging and testing tools** to troubleshoot as you build

Stay informed with flow **tracking, management, reporting**

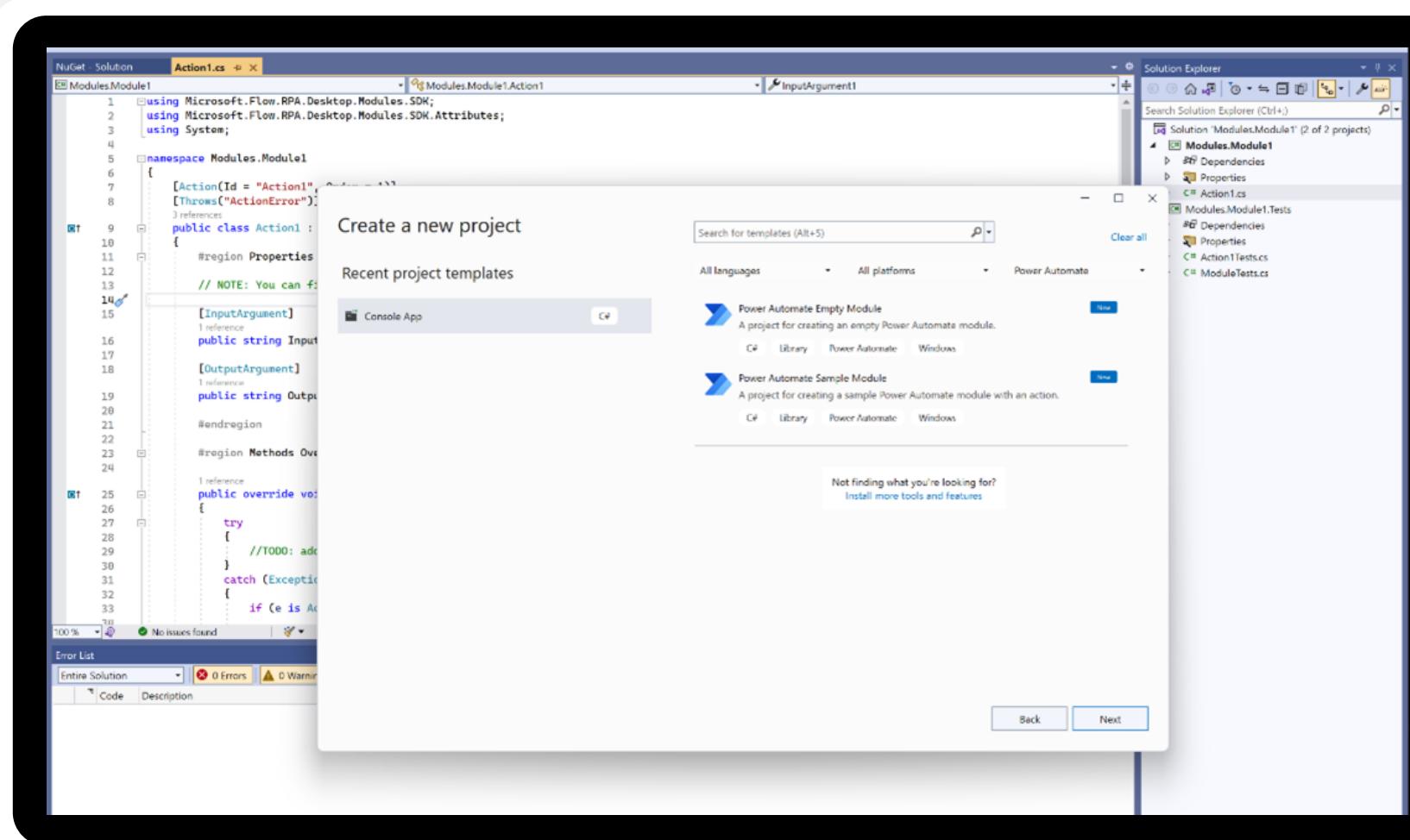
Prioritize based on rules, or promote critical workloads to the front of the line





# Actions SDK

Create custom actions  
for homegrown or  
legacy apps



# Demo

Building a desktop flow

Ep. 6/9



# Automate It

Special Series

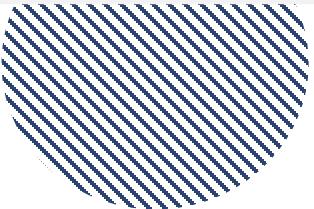
No-Code RPA with SAP GUI in  
Power Automate Desktop

# Demo

AI Recorder (coming soon)

How to build automations  
with the  
**AI Recorder**

# AI Builder





# One hub for all AI capabilities

The screenshot shows the AI Builder landing page. At the top, there's a section titled "Add Intelligence to your business" with a video thumbnail. Below it, a heading "Try out AI capabilities for each data type" leads to a grid of 16 icons representing different AI functions:

- Extract information from invoices
- Extract all the text in photos and PDF documents (OCR)
- Extract relevant words and phrases from text
- Extract document header
- Extract information from identity documents
- Extract business card details
- Extract custom information from documents
- Detect positive, negative, or neutral sentiment in text data
- Classify customer feedback into predefined categories
- Entity extraction
- Extract key elements from text, and then turn them into predefined categories
- Top phrase extraction
- Extract most relevant words and phrases from text
- Language detection
- Detect the predominant language of a text document
- Text translation
- Detect and translate more than 50 supported languages

## AI models

**Democratized access to complex AI models** including document processing object detection, sentiment analysis, and many more.

The screenshot shows the "Power Apps | AI Builder" interface with a "Custom prompt" dialog open. The dialog contains a "Prompt" section with the following text:  
Summary:  In less than two paragraphs without adding more information, Write the summary in an eighth-grade level.  
When the test seems too short to make at least one paragraph of summary, answer that you can't summarize a test that is too short.  
Below this is a "Test your prompt" input field and a "Save custom prompt" button.

## GPT Prompts

**Build GPT Prompts** that trigger instructions to the GPT model hosted in Azure Open AI Service

The screenshot shows the "Copilot Studio" interface with a "Add Power Platform component as an AI plugin" dialog open. The dialog lists three scenarios:

- Generate content or extract insights: Use AI Builder dynamic prompts to generate content and answer questions from your Dataverse data. (Microsoft Copilot Studio)
- Custom automation: Use AI Builder logic flows to enable your users performing complex automation logic. (Microsoft Copilot Studio)
- Update or get answers about external data: Use connections or custom connectors to enable your users performing changes and getting specific answers on external data. (Microsoft Copilot Studio)

## AI Plugins

**Extend Copilot** by creating AI Plugins that can connect to external systems, format Copilot responses, and perform workflow operations



## Prompt Library and GPT Templates

Pre-configured prompts to help you get started with common scenarios:

A screenshot of the AI prompts library. At the top left is a search bar with placeholder text "Search AI prompts". Below it is a section titled "AI prompts" with a "View all" button. The main area shows six cards, each with an icon and a title. The first card is "Find them" (blue icon), the second is "Create text with GPT using a prompt" (purple icon), the third is "Respond to a complaint" (grey icon), the fourth is "Classify text" (light blue icon), the fifth is "Extract information from text" (light blue icon), and the sixth is "Summarize text" (light blue icon). Each card has a brief description below the title and a "PREBUILT PROMPT" or "CUSTOM PROMPT" button at the bottom right.

Pre-configured templates to integrate prompts in an end-to-end workflow:

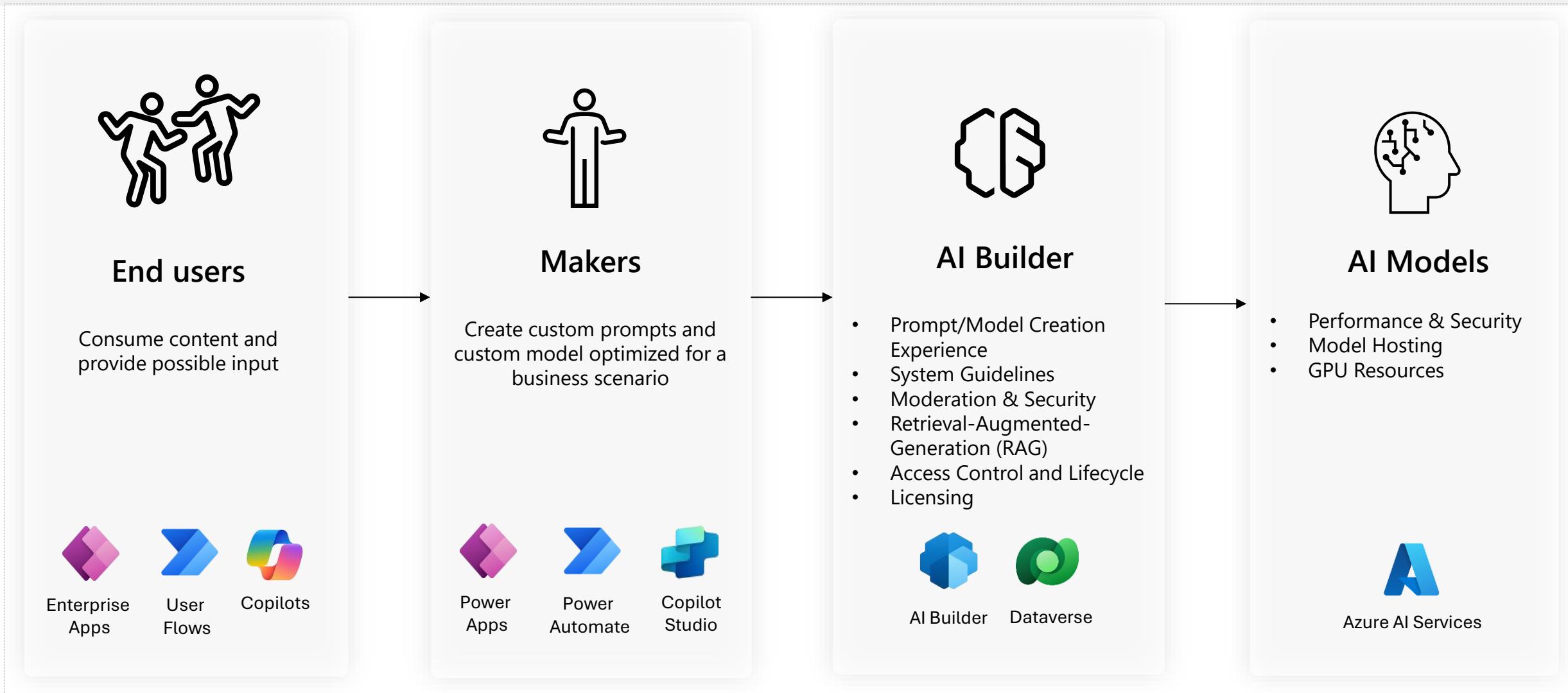
A screenshot of the Power Automate template library. The top navigation bar includes "Power Automate", a search bar with "GPT" typed in, and "Environments PACustomer Demo". On the left, there's a sidebar with "Templates" selected, showing options like "Learn", "My flows", "Approvals", "Solutions", "Process mining", "Desktop flow activity", and "More". The main area shows a grid of four template cards under the "All templates" tab. Each card has an icon, a title, the creator, and a "View" button. The titles are "Summarize emails using GPT", "Extract information from documents using GPT", "Reply to a customer email using GPT", and "Classify and route emails using GPT", all by Microsoft. The "View" buttons show counts of 354, 208, 182, and 31 respectively.

# AI Builder



## High Level Workflow

Microsoft Cloud



# Demo

Intelligent document processing with AI Builder

- Home
- Approvals
- My flows
- Create
- Templates
- Connectors
- Data
- Monitor
- AI Builder

Explore

- Models
- Document automation
- Process advisor

Solutions

Learn

Ask a chatbot

## Add Intelligence to your business

Automate processes, find insights, and make applications more productive. Choose from prebuilt and customizable AI models, or leverage the models your company has already built.

 Watch a 90 second video



### Try out AI capabilities for each data type

 All

 Documents

 Text

 Structured data

 Images

 Invoice processing Extract information from invoices	 Text recognition Extract all the text in photos and PDF documents (OCR)	 Receipt processing Extract information from receipts	 Identity document reader Extract information from identity documents	 Business card reader Extract information from business cards	 Custom model Document processing Extract custom information from documents
 Sentiment analysis Detect positive, negative, or neutral sentiment in text data	 Category classification Classify customer feedback into predefined categories	 Entity extraction Extract key elements from text, and classifies them into predefined categories	 Key phrase extraction Extract most relevant words and phrases from text	 Language detection Detect the predominant language of a text document	 Text translation Detect and translate more than 90 supported languages
 Category classification Classify texts into custom categories	 Entity extraction Extract custom entities from your text	 Prediction Predict future outcomes from historical data	 Object detection Detect custom objects in images	 Image classification Classify your images based on their content (powered by Lobe)	 Image description Generate description of an image

Show detected words↑ ↓ 1 of 4 |    

## RENTAL LEASE AGREEMENT



This Rental Lease Agreement made this on 2<sup>nd</sup> of May, 2022 by and between Andre Lawson the "Landlord" and Preston Morales the "Tenant". The Landlord and Tenant are collectively referred to in this Agreement as the "Parties".

For the covenants contained herein, and other good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the Parties agree as follows:

**1. LEASE TERM.** The term of this Agreement shall be a period of six (6) months, with a start date on 05-09-2022 and ending date on the day 11-07-2022 hereinafter known as the "Lease Term."

**2. PROPERTY.** The leased premises shall be comprised of that certain personal residence (including both the house and the land) located at 4567 Main St Buffalo, NY 98052 ("Premises"). Landlord leases the Premises to Tenant and Tenant leases the Premises from Landlord on the terms and conditions set forth herein.

**3. MONTHLY RENT.** The rent to be paid by Tenant to Landlord throughout the term of this Agreement is \$ 1,570 per month and shall be due on the 1st day of each month.

**4. INSPECTION OF PREMISES.** Landlord and Landlord's agents shall have the right at all reasonable times during the term of this Agreement and any renewal thereof to enter the Premises for the purpose of inspecting the Premises and all buildings and improvements thereon. And for the purposes of making any repairs, additions or alterations as may be deemed appropriate by Landlord for the preservation of the Premises or the building. The right of entry shall likewise exist for the purpose of removing placards, signs, fixtures, alterations or additions, that do not conform to this Agreement or to any restrictions, rules or regulations affecting the Premises.

**5. SECURITY DEPOSIT.** Upon the due execution of this Agreement, Tenant shall

Rental agreements model |  Quick tips |  Save and close

### Collection 1



&lt; Document 3 of 5 &gt;

 Add field  Landlord Tenant Monthly rent amount Address Tables  Inventory

 [Edit model](#)  [Share](#)  [Settings](#)  [Delete](#) [Share feedback](#)

- [Home](#)
- [Action items](#)
- [My flows](#)
- [Create](#)
- [Templates](#)
- [Connectors](#)
- [Data](#)
- [Monitor](#)
- [AI Builder](#)
- [Explore](#)
- [Models](#)
- [Document automation](#)
- [Process advisor](#)
- [Solutions](#)
- [Learn](#)

## Models > My invoices AI model

Document Processing • Published • David Beaulieu

### Accuracy score

[More details](#)

This model correctly predicted 99% of actual results and may be ready to be used. To improve the accuracy score, [review full evaluation](#).

[Use model](#)[Quick test](#)

### Information to extract

[More details](#)

abc	Invoice Id	99
abc	Bill to address	99
abc	Due date	99
abc	Subtotal	99
abc	Tax amount	99
abc	Shipping amount	99
abc	Total amount	99
g	Line items	97

### How your model is used



Power Automate  
[See documentation](#)



Power Apps  
[See documentation](#)

# Demo

**Retrieval-Augmented Generation (RAG) with AI Builder**

## Unlock the power of generative AI with GPT

Use a GPT model running on Azure OpenAI Service to supercharge your flows and apps. Automate answering questions, summarizing documents, and more.

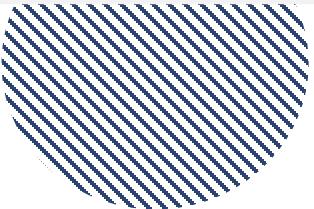
[Try the preview](#)

AI Models > Explore

[All](#)[Documents](#)[Text](#)[Structured data](#)[Images](#)

 Extract information from invoices	 Extract all the text in photos and PDF documents (OCR)	 Extract information from receipts	 Extract information from identity documents	 Extract information from business cards	 Extract custom information from documents
 Create text, summarize documents, and more with GPT	 Detect positive, negative, or neutral sentiment in text data	 Classify customer feedback into predefined categories	 Extract key elements from text, and classifies them into predefined categories	 Extract most relevant words and phrases from text	 Detect the predominant language of a text document
 Detect and translate more than 90 supported languages	 Classify texts into custom categories	 Extract custom entities from your text	 Predict future outcomes from historical data	 Detect custom objects in images	 Generate description of an image

# AI flows



# AI flows

A new approach to automation that is dynamic and **outcome-driven**

User and AI collaboratively design **automation plan**, including parameters and guidelines.

**LLM reasoning, orchestration and execution of automation.**

**Monitor** flow success with run history, analytics, and individual flow run details.

Limited Private Preview

intelligent | flexible | dynamic

The screenshot shows the Microsoft Power Automate 'Design' interface for a 'Copilot workflow - Device returns approval'. The interface is divided into several sections:

- Input:** Device name, Customer notes.
- Variables:** Customer returns team, Returns channel.
- Output:** Approval request ID, Approval recommendation, Recommendation reasoning, Teams message ID, Approval decision.
- Automation plan:** A large central panel containing LLM-generated text:
  - Start an approval for a device return request and assign it to the Customer returns team.
  - Recommend whether to approve the request by consulting Troubleshooting guide for device insights based on the Customer notes and Device name.
  - If approved add a task to the Customer Returns plan with the device and approval request details. Summarize the request details, approval and the Planner task ID created and post a message to the Customer returns team in the Returns channel.
- Connectors:** Approvals, Teams.
- Guidelines:** Provide guidance that can influence Copilot Workflows as it executes your automation.
- Knowledge:** Troubleshooting guide.
- Triggers:** None.

# AI flows

## Automation for the age of AI

Limited Private Preview

### Cloud flows

**Rules-based**  
cloud automation

FOR

Modern systems with APIs

### AI flows

**Outcome based**  
generative AI powered  
automation

FOR

Simplifying complex processes,  
esp. with conditions, exceptions  
and loops

Inform flow based on  
unstructured data

### Desktop flows

**Rules based**  
UI automation

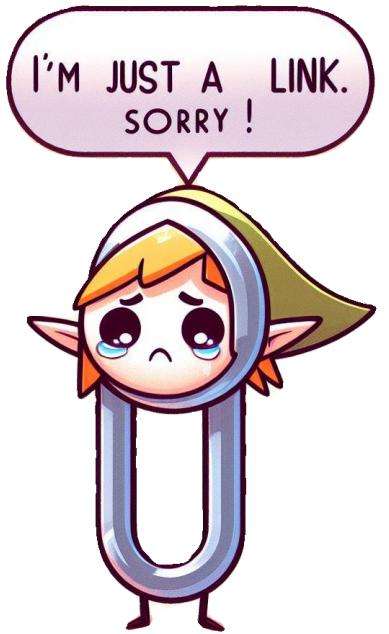
FOR

Legacy systems without APIs

UI automation

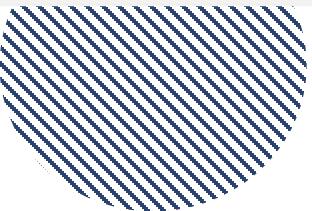
# Demo

## AI Flows



Start me at 29:54  
Stop me at 36:29

# Copilot as an agent (preview)



Early Access Preview

# Build copilots with agent capabilities

Complete tasks independently with a copilot tailored to a specific tasks or functions

Operate **independently** of the user  
to fully automate tasks

Respond to events in addition to copilot  
or human requests

Act on behalf of a **company**,  
department, or team – not just a user

The screenshot shows the Copilot Studio interface. On the left, a sidebar has 'Copilot Studio' at the top, followed by 'Home', 'Create', 'Copilots', 'Library', and three dots. Below this is a large blue box containing the text 'Your copilot is ready! Here's what's next:' and a list of five items with icons: 'Add instructions to refine and improve how it responds', 'Add actions so your copilot can perform specific tasks', 'Test your copilot to ensure its comprehension', 'Publish your copilot so others can use it', and a small icon with a plus sign. To the right of this is the 'Overview' section with a 'Goal' card ('Assist users through new hire support, troubleshooting, and hardware procurement') and 'Channels' ('Outlook', 'Teams', 'Microsoft Copilot'). Below these are 'Triggers' ('New Hire Detection', 'Employee hardware refresh') and 'Actions' ('Send email request', 'Create record', 'Send for approval'). On the right side, there's a 'Test your copilot' window with a sub-section 'Let's test your copilot!' containing text about testing requirements and buttons for 'Run a simulated test' and 'Run a real world test'. Below this are two message cards: one from AI saying 'Ok, great. I will contact the user <entity>, include the <delivery date> and a request for temporary laptop in the interim. I saved this as a Learned Response, and added an Arrange a temporary laptop action.' and another from AI saying 'Your test purchase order has been created.' with a link to 'Test purchase order - Surface Laptop 5'.

# Copilots with agent capabilities - The new 'app' in a gen AI world

## Problem

Unique business processes, industries, circumstances, and customers



Complex processes, form-heavy apps, labor intensive systems, and high setup and maintenance costs

Copilots can handle this variability and complexity at infinite scale

## Solution



Automates long-running processes



Reasons over actions and user inputs



Leverages memory and knowledge



Monitor, learns and improve



Follows human guardrails and asks for help

## How

### Two key breakthroughs

1. Guard-rail agentic architectures to control and manage LLM-based orchestration.
2. Action models and fine tuning of these action models for specific tasks.

# When to use which

## AI flows

### What is it?

- A new approach to automate a workflow that enables users and AI to collaboratively design an automation plan for that workflow.
- Upon execution, the optimal steps are dynamically selected based on the automation plan and defined guardrails and resources by the user.
- It is alternative approach to specifying every rule and step of the workflow at design time, increasing the convenience of building and maintaining workflow automation.

### When to use it?

- Automate one individual complex end to end processes
- Especially ones that include ad hoc, unstructured data and exception management
- EG IDP for financial reporting process

### Top capabilities that enable this

- Develop Automation Plan for a given workflow
- Dynamic selection of steps when automation plan is executed
- Manage and monitor single workflow with org guardrails
- Trigger AI Flow from Cloud Flow or from within Autonomous Copilot

## Copilot with agent capabilities

### What is it?

- An autonomous Copilot can engage, reason and automate across a myriad of workflows, data sources, and events to achieve role level outcomes.
- Autonomous Copilot can act in the background to respond to business events without the need for human interaction.
- Orchestrates across many actions including AI Flows, Cloud Flows, Desktop Flows (RPA) and copilot connectors
- Has long-running memory and reasoning capabilities.

### When to use it?

- Need your copilot to take on a role / function that can acts independently at times
- Be triggered by events other then conversation.
- Eg customer success, employee onboarding

### Top capabilities that enable this

- Plan across multiple workflows
- Orchestrate multiple workflows
- Teaching to improve accuracy.
- Manage and monitor across workflows with org guardrails
- Memory for deep context and personalization

## Conversational copilot

### What is it?

- Natural conversational AI across many channels and modalities.
- Answer questions and access knowledge (both proprietary and public)
- Leverage the power of AI but with the specific control in certain topics
- Take well-defined actions

### When to use it?

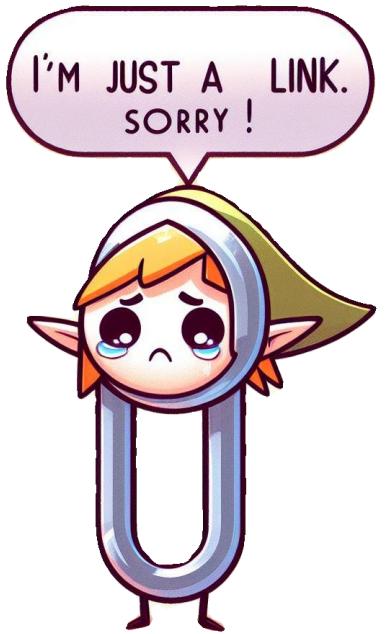
- Build custom copilots for employees, customers and partners that provide end user value with enhanced conv AI experiences.
- Actions triggered by the end user.
- Expense managed / FAQ, IT helpdesk.

### Top capabilities that enable this

- Multi-modal Conversational AI
- Multi-channels
- Generative answers across topics, organizational knowledge and external websites.
- Generative Actions & Extensions

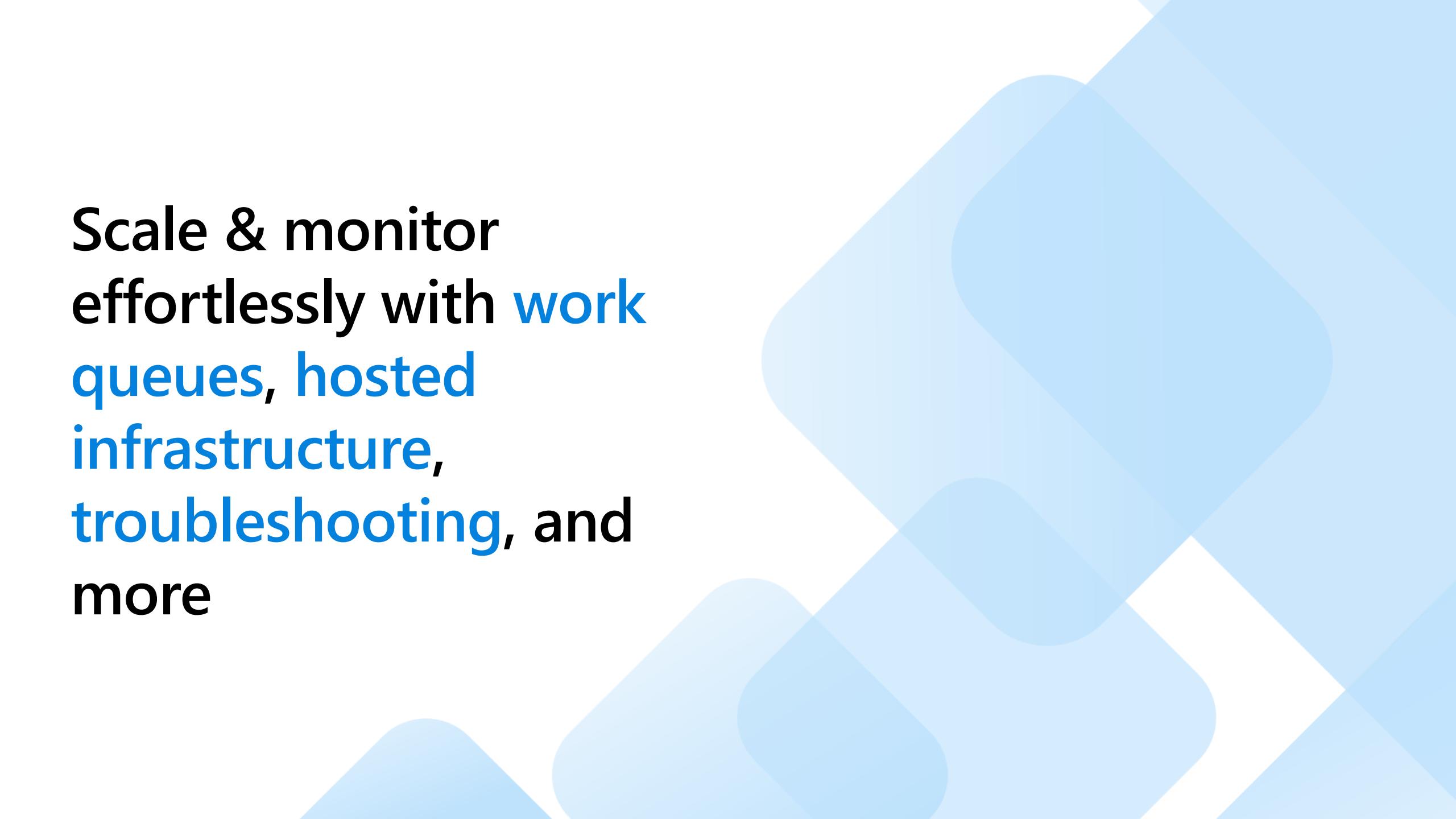
# Demo

Copilot Studio agent capabilities

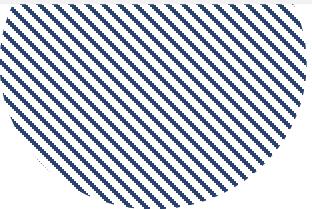


Start me at 11:38  
Stop me at 19:56

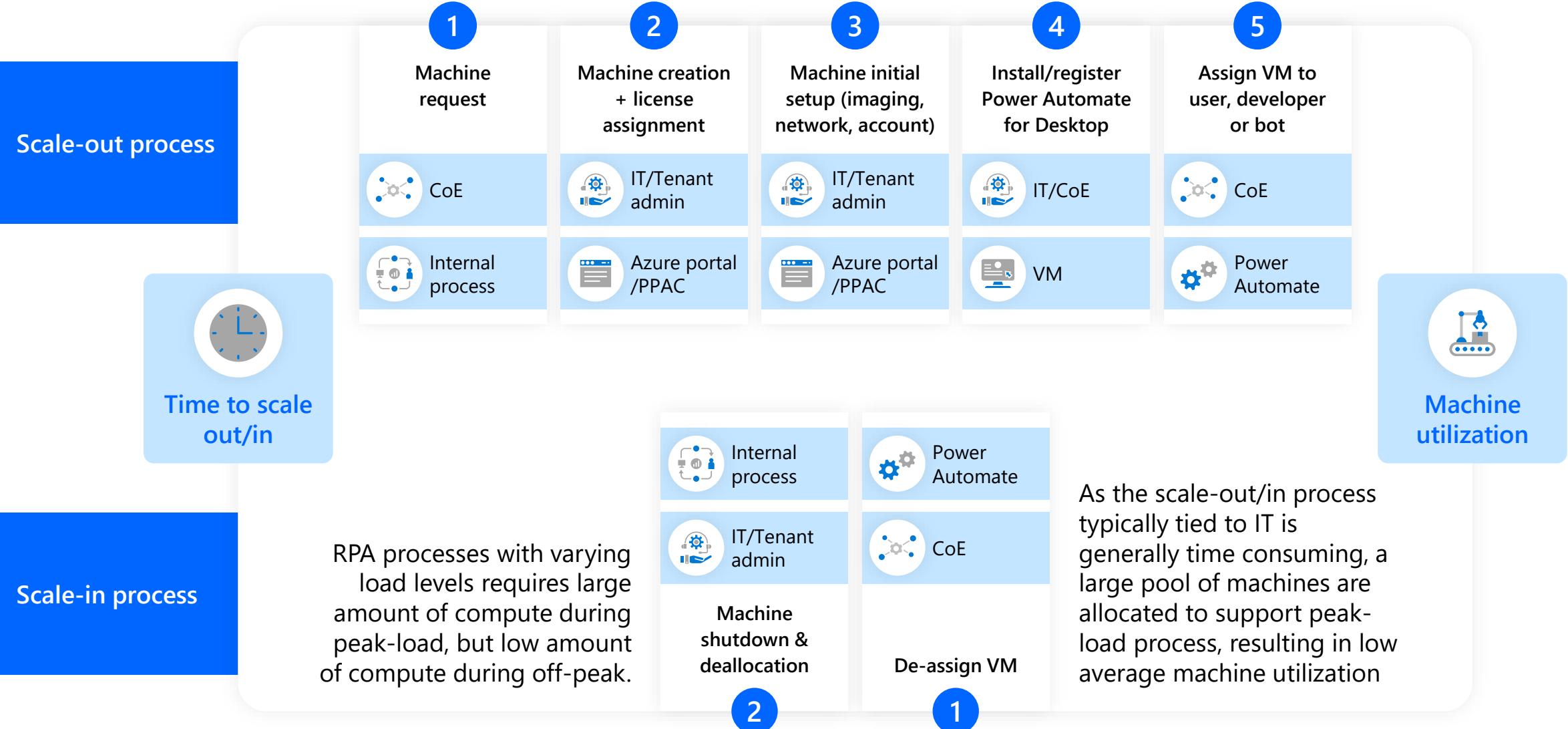
Scale & monitor  
effortlessly with **work  
queues, hosted  
infrastructure,  
troubleshooting, and  
more**



# Hosted RPA

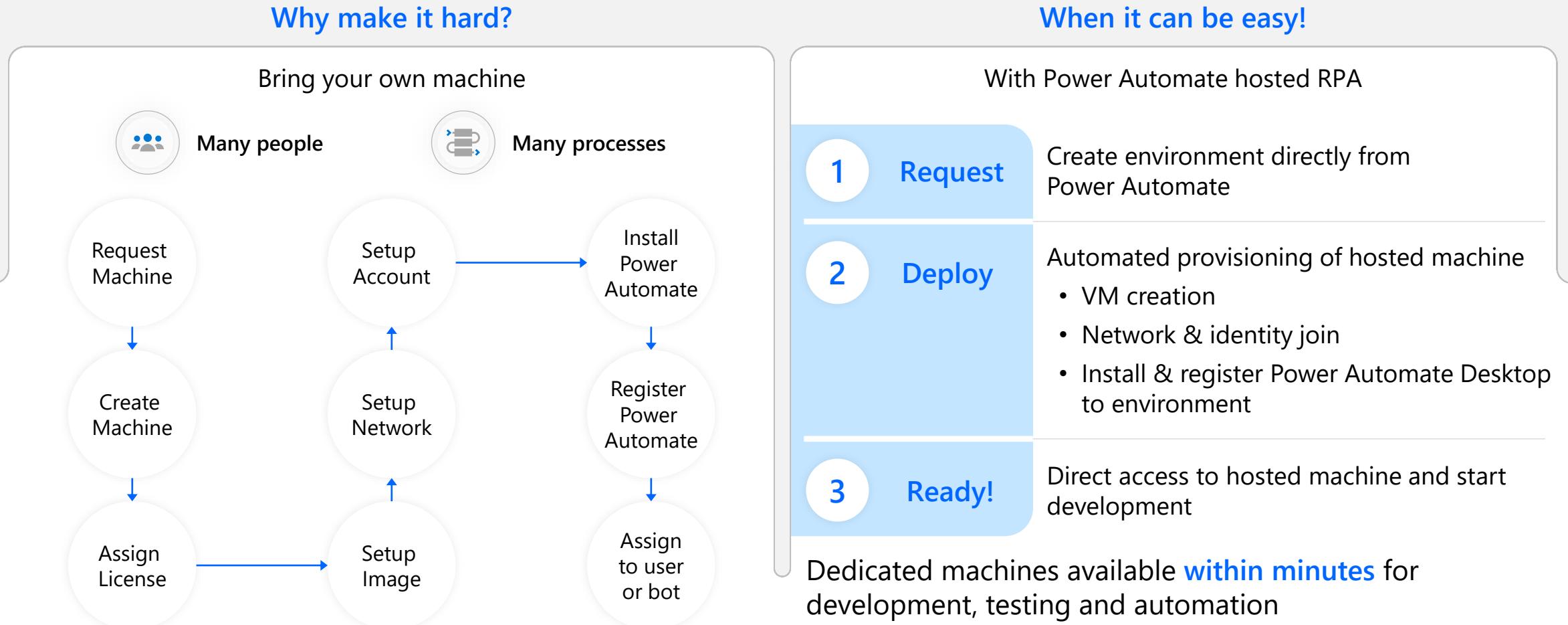


# Typical unattended RPA workload management

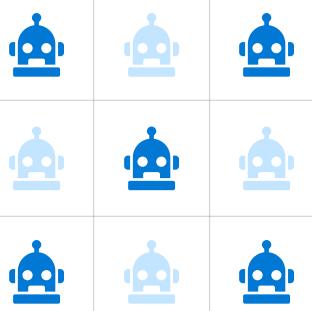


# Hosted RPA

## Simplify and accelerate RPA machine deployment



# Scale your workloads with hosted RPA



## Single hosted machines

**For** pro and citizen developers

Build or test automation

**For** business users

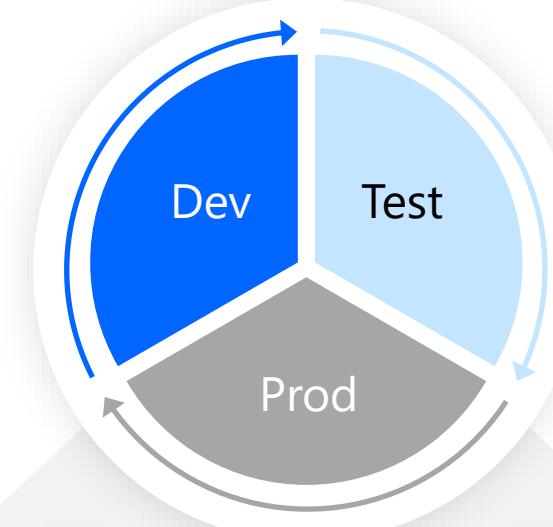
Run automation on dedicated machines



## Hosted machine groups

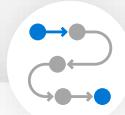
**For** unattended automation in production

Optimize your resources for higher efficiency and lower cost



### Automatic scaling

**Manage peaks** with machines that spin up and down to optimize efficiency



### Dynamic load balancing

**Optimize resources** between processes, teams, and organizations

# Hosted machine group: Unattended load-management

Increased load trends

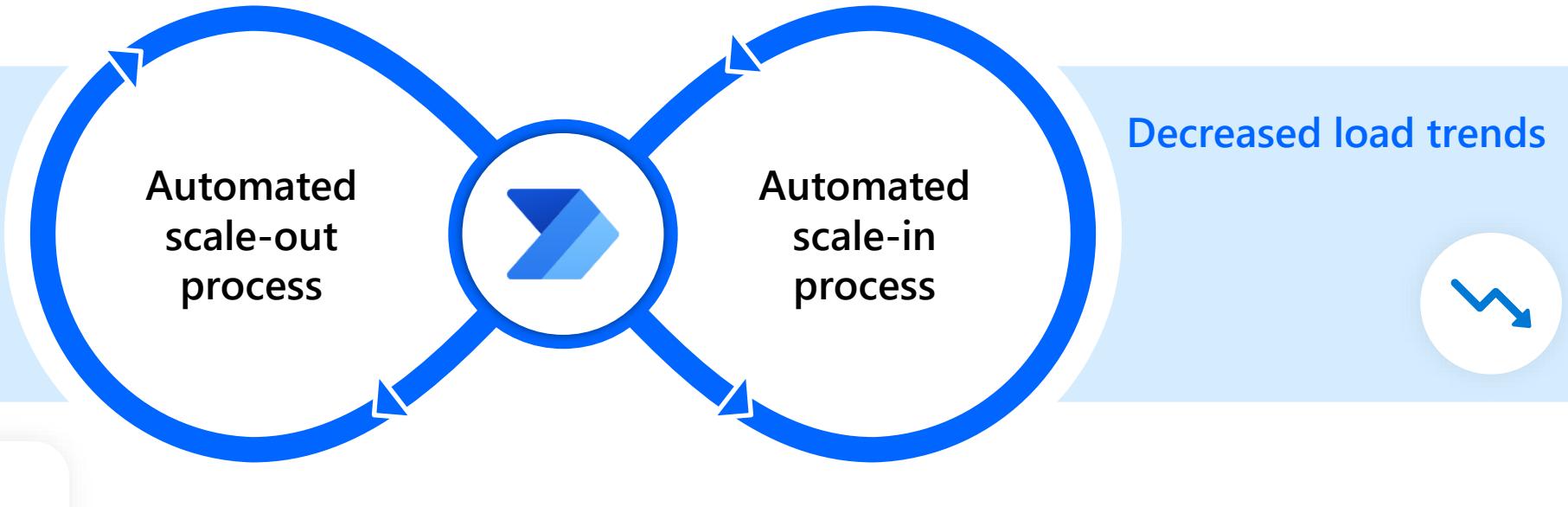


~10 mins to 1 hour

Average time to  
scale-out/in



Machine utilization



## Observations

- With hosted machine group, multiple RPA processes with varying load levels in an environment are automatically scaled-out/in based on real-time load.
- The number of allocated capacity in an environment are automatically assigned across different RPA processes, ensuring available machines are efficiently utilized

# Seamless orchestration

Monitor, manage, and optimize your RPA infrastructure

## Monitor

queue and flow status

## Prioritize

critical workloads

## Add, remove, or reassign

resources as needed

## Create

custom VMs for specialized applications  
& configurations

The screenshot shows the Microsoft Power Automate interface. On the left, a sidebar navigation includes Home, Action items, My flows, Create, Templates, Connectors, Data, Monitor, Runs, Machines, AI builder, Solutions, and Learn. The main content area displays the 'Machine groups > Invoice Management' page. It shows an overview of the machine group, including its type (Hosted machine group), flow activity (3 running, 1 queued), VM image (Marketing VM image), account type (Local account), state (Provisioned), and owner (Mona Kane). Below this, a table lists recent runs, showing details like requested time, desktop flow name, status (e.g., Running, Failed, Successful), and parent flow. The right side of the screen shows connections (RPATest-Contoso\Monica, RPATest\Alan) and shared access. A search bar at the top right says 'Search for the helpful resources'.

Requested	Desktop flow	Status	Parent flow
Jan 04, 03:29 PM (6 min ago)	Contoso invoice Management flow	Running	Automatic invoice management
Jan 04, 03:33 PM (2 min ago)	Contoso invoice Management flow	Running	Automatic invoice management
Dec 19, 03:29 PM (2 weeks ago)	Contoso invoice Management flow	Failed	Automatic invoice management
Dec 19, 01:12 PM (2 weeks ago)	Contoso invoice Management flow	Successful	Automatic invoice management
Dec 19, 11:32 AM (2 weeks ago)	Contoso invoice Management flow	Successful	Automatic invoice management
Dec 19, 09:10 AM (2 weeks ago)	Contoso invoice Management flow	Successful	Automatic invoice management
Dec 18, 08:29 PM (2 weeks ago)	Contoso invoice Management flow	Failed	Automatic invoice management
Dec 18, 06:09 PM (2 weeks ago)	Contoso invoice Management flow	Successful	Automatic invoice management
Dec 18, 04:11 PM (2 weeks ago)	Contoso invoice Management flow	Failed	Automatic invoice management
Dec 18, 03:12 PM (2 weeks ago)	Contoso invoice Management flow	Successful	Automatic invoice management

# Demo

Hosted machine groups

# Hosted RPA bots

New machine group

Hosted RPA bot (recommended)

Machine group name \*

Sales order bots

Description

Bots for automated processing of sales orders

Max number of bots:

8

Image source \*

Default Windows Desktop Image



# Additional recommended content

## Managing Power Automate Desktop (videos)

A special series around managing Power Automate Desktop on Windows at scale throughout your organization



[Learn more!](#)

## Managing Power Automate Desktop (guide)

Download the complete guide



[Download now!](#)



# Optimize your RPA infrastructure

Monitor queue and flow status

The screenshot shows the Power Automate Desktop flow activity dashboard. At the top, there's a search bar and navigation links for environments (Contoso Dev) and help. The main area is titled "Desktop flow activity" and includes sections for "Last runs", "Errors", "Machines", and "Current runs". A date range from "From 10/1/2023, 1:00:00 AM to 11/9/2023, 1:00:00 AM" is selected, along with filters for "All errors", "All desktop flows", "All cloud flows", "All machines", "All machine groups", "All run modes", "3 run statuses selected", "All users", and "Clear filters".

Key visual elements include:

- Desktop flows completion status:** A donut chart showing 107 total runs, with a small orange slice for "Cancelled" and a large green slice for "Succeeded".
- Desktop flows runs and error rate:** A bar chart showing the number of runs per day. The x-axis spans from Oct 1 to Oct 17. The y-axis ranges from 0 to 68. A red line represents the "Desktop flow error rate" and a blue line represents "Desktop flow runs".
- Average runs duration:** A stacked bar chart showing duration in minutes for runs on Oct 1, 3, 4, 5, and 17. The pink segment represents "Queuing and machine assignment" and the blue segment represents "Execution".
- Run status - Trends:** A line chart showing the trend of successful and canceled runs over time from October 1 to October 17. The green line represents "Successful" runs and the orange line represents "Cancelled" runs.
- Top desktop flows runs status:** A table showing the status of top desktop flows. It includes columns for Desktop Flow name, Attended, Unattended, Local, Successful, Skipped, Failed, Canceled, and Total count.

Desktop Flow	Attended	Unattended	Local	Successful	Skipped	Failed	Canceled	Total
Calculate Sales commission - PA...	—	34	—	32	—	—	2	34
Calculate Sales commission - PA...	24	2	—	26	—	—	—	26
[PAD] Calculate Sales Commission	19	—	1	19	—	—	1	20
Calculate Sales commission - PAD	17	—	2	19	—	—	—	19

Prioritize critical workloads

Add, remove, or reassign resources as needed

Create custom VMs for specialized applications & configurations

## MANAGE AND MONITOR

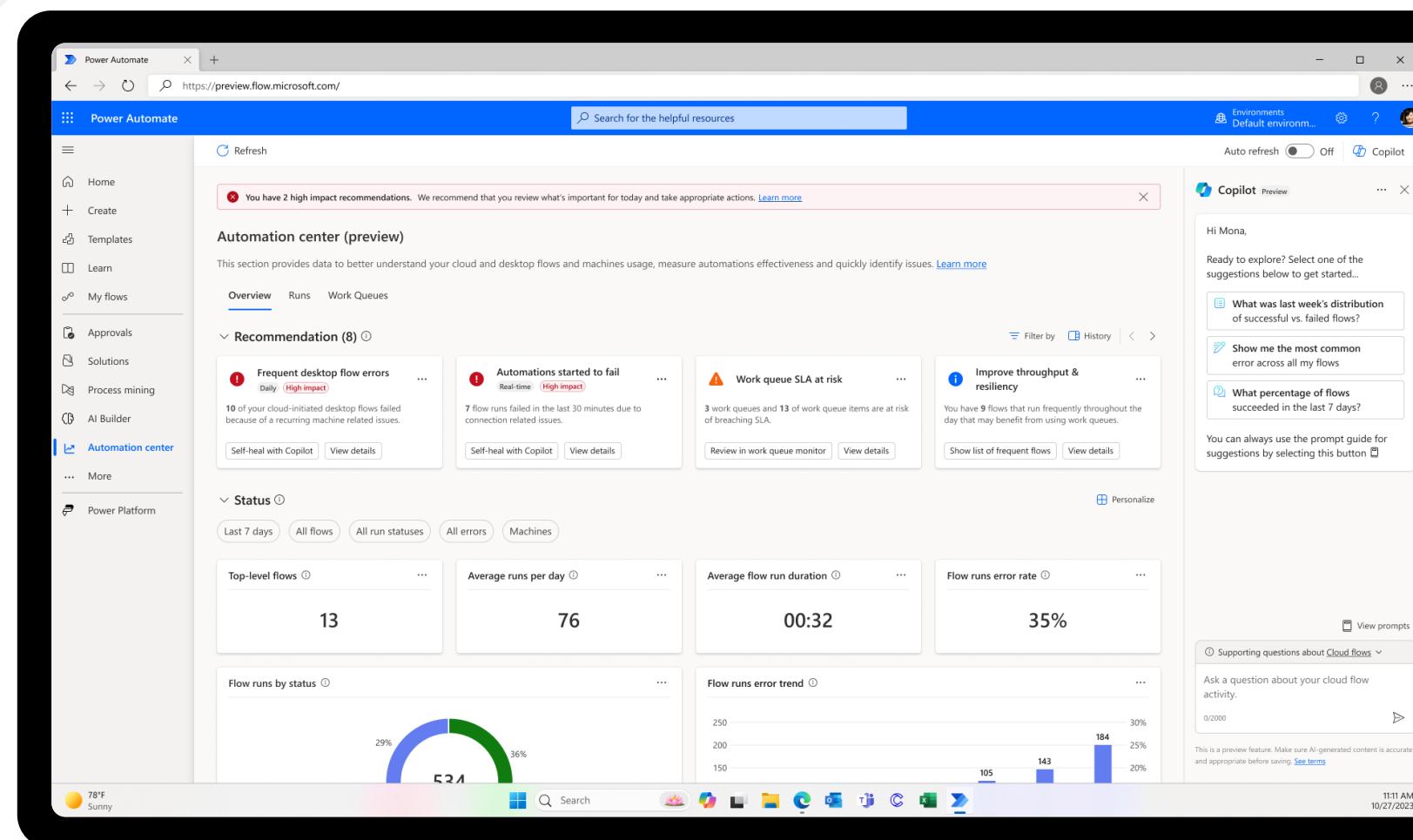
# Get 360 visibility with automation center

Gain an [end-to-end view](#) of your automation status with flow analytics and insights

Dedicated [work queue monitoring](#) to closely track SLA attainment, average processing time, and throughput

Recommendation area provides users with [actionable insights and best practice](#) recommendations

Use [Copilot to query](#) cloud and desktop flow telemetry, work queue throughput, and documentation





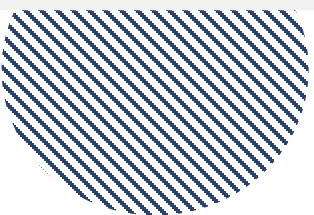
# Work queues

Use work queues to help prioritize work items effectively across their organization, providing full digital workforce management.

The screenshot shows the Power Automate web interface with the URL <https://preview.flow.microsoft.com/>. The left sidebar includes options like Home, Action items, My flows, Create, Templates, Connectors, Data, Monitor, Cloud flow activity, Desktop flow activity, Desktop flow runs, Work queues (which is selected), Machines, AI Builder, Process advisor (preview), Solutions, and Learn. A chatbot icon with the text 'Ask a chatbot' is at the bottom of the sidebar. The main content area is titled 'Work queues' and contains a sub-header: 'Use work queues to store, prioritize, distribute and process work items. [Learn more](#)'. Below this are three tabs: 'Process queues' (selected), 'Machine queues', and 'Machine group queues'. A table lists various work queues with columns for Name, Description, Status, Enqueued, Processed, Processing, On hold, Exception, and Owner. The table includes entries such as 'Release Purchase Requisition GRP2', 'Vendor Invoice Processing', 'Worker Order Consolidation', 'IBM Maximo Machine Group', 'Leave Requests', 'Fiscal month AP Closing', 'Custom work queues', 'Supplier Product Code Changes', 'Standalone MM VM1 - Ma1', 'Vendor Invoice Processing', 'Fiscal month AP Closing', 'Expense Claim Payment', 'Supplier Product Code Changes', and 'Custom work queues 2'. Each entry shows its status (Active, Stopped, Pause) and the number of items in each category. The 'Owner' column lists names and profile pictures for each queue.

Name	Description	Status	Enqueued	Processed	Processing	On hold	Exception	Owner
Release Purchase Requisition GRP2	Release Purchase Requisition after approval	Active	3	2	1	4	1	Darlene Robertson
Vendor Invoice Processing	Process permit to work, welding cert, CSE...	Active	0	—	—	—	—	Cody Fisher
Worker Order Consolidation	Process permit to work, welding cert, CSE...	Stopped	1	0	0	0	3	Cameron Williamson
IBM Maximo Machine Group	Validated and process extracted claim data	Active	2	0	0	1	1	Jerome Bell
Leave Requests	—	Pause	1	0	0	5	8	Kristin Watson
Fiscal month AP Closing	Create ending and opening balance for process	Active	1	4	3	1	0	Darrell Steward
Custom work queues	—	Stopped	1333	765	13	12	0	Jane Cooper
Supplier Product Code Changes	—	Active	5	23	1	0	0	Jacob Jones
Standalone MM VM1 - Ma1	Release Purchase Requisition after approval	Active	3	2	1	4	1	Arlene McCoy
Vendor Invoice Processing	Process vendor invoices after form extraction	Active	0	—	—	—	—	Bessie Cooper
Fiscal month AP Closing	Create ending and opening balance for process	Active	1	4	3	1	0	Annette Black
Expense Claim Payment	—	Pause	1333	765	13	12	0	Esther Howard
Supplier Product Code Changes	—	Active	5	23	1	0	0	Courtney Henry
Custom work queues 2	—	Active	1333	765	13	12	0	Jacob Jones

# Governance



# Governance is key to an Enterprise Scale Platform

Better Together

## Managed Environments for Power Platform

More Visibility

Enhanced **out-of-the-box governance capabilities** that will simplify, automate, and **streamline IT administration** of Microsoft Power Platform **at scale**.

More Control

### Power Platform Admin Center

A unified portal for administrators **to manage environments and settings for Microsoft Power Platform.**

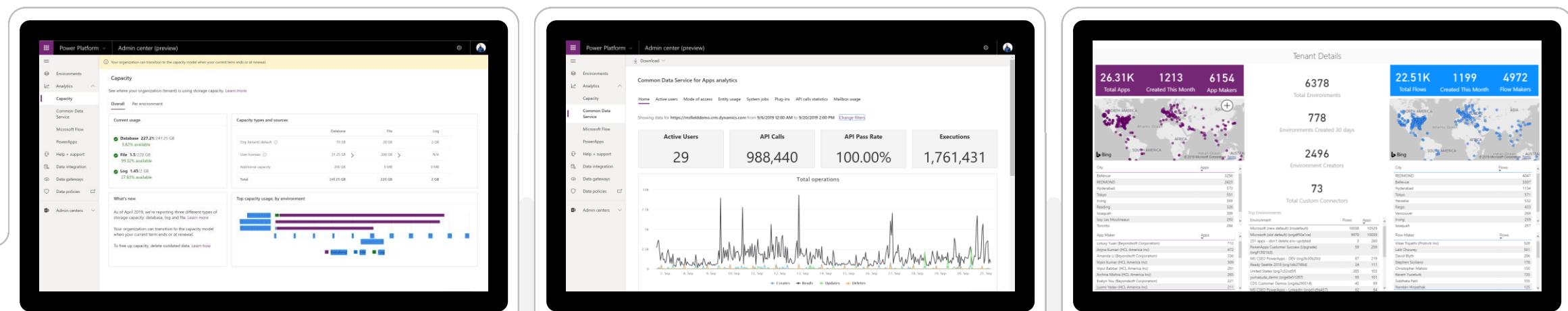
Less Effort

### Center of Excellence Kit

A collection of components and tools designed to help you **get started** with developing a strategy for **adopting and supporting Microsoft Power Platform**

# Reporting and analytics

## Insights in a unified dashboard



The image displays three mobile device screens, each showing a different dashboard from the Power Platform Admin center (preview). The first screen shows the 'Capacity' dashboard with sections for 'Current usage' and 'Capacity types and sources'. The second screen shows the 'Common Data Service for Apps' dashboard with metrics like 'Active Users', 'API Calls', 'API Pass Rate', and 'Executions', along with a line chart of total operations over time. The third screen shows the 'Tenant Details' dashboard with sections for 'Total Apps', 'Environments', 'Environment Creators', and 'Custom Connectors', each displaying counts and geographical maps.

Admin insights provide deep visibility into usage and performance of applications

Users  
Locations  
Capacity

Analytics track health and implementation metrics and help keep users on track

Service performance  
Error reporting  
App usage

Personalize insights and drive action with custom Power BI reports and Power Automate

All up view of what's being created  
Discover your champions  
Trigger automated actions

# Powerful Governance Tools

## Power Platform Admin Center

The most comprehensive governance and security features **out-of-the-box**

### Tenant isolation

This screenshot shows the 'Tenant isolation (preview)' section of the Power Platform Admin Center. It includes a toggle switch labeled 'On' for enabling tenant isolation, and sections for 'Allowed direction' (Inbound and Outbound) and 'Tenant ID' (listing 'fb1caad404b40ac-a8d7-9f97c077ff'). A note states: 'Tenant isolation can be used to block external tenants from establishing connections into your tenant (inbound isolation) as well as block external tenants from establishing connections out of your tenant (outbound isolation). You can add/edit up to 50 rules in the grid below when Tenant isolation is On as well as Off. However, these rules will only be enforced when Tenant isolation is On.'

### Data Policies

This screenshot shows the 'Data policies' section of the Power Platform Admin Center. It displays a list of connectors assigned to the 'Non-business (50) | Default' group. The connectors listed are: 'CDK Drive Customer', 'Custom Vision', 'Demo Second Conn...', and 'Dynamics 365 Customer'. Each connector has columns for Name, Blockable, Class, Publisher, and About.

### Control actions

This screenshot shows the 'Connector actions' page for 'SQL Server' in the Power Platform Admin Center. It lists five actions: 'Delete row (V2)', 'Execute a SQL query (V2)', 'Execute stored procedure (V2)', and 'Get row (V2)'. Each action has a 'Allowed' toggle switch set to 'Yes'. A note at the bottom says: 'Create a list of actions to limit access to endpoints in order of priority. Enter endpoints in Server name, database name format, or use pattern matching with \*\*. Learn more.'

### Configure endpoints

This screenshot shows the 'Configure endpoints' page for 'SQL Server' in the Power Platform Admin Center. It displays a table with three rows. The first row has an 'Action' column with a 'Deny' dropdown and an 'Endpoint' column with '11.22.33.444'. The second row has an 'Action' column with a 'Deny' dropdown and an 'Endpoint' column with 'Enter endpoint pattern'. The third row has an 'Action' column with an 'Allow' dropdown. Buttons for '+ Add endpoint' and 'Delete' are visible at the top of the table.

## Center of Excellence starter kit

The starter toolkit you need to **drive innovation** and **improvement faster**

### Multiply the effectiveness of IT admins

This screenshot shows the 'Power BI - CoE BI COE Dashboard' in the Power BI service. The dashboard is titled 'BIQD\_CoEDashboard\_JuneDashboard\_Updated...' and shows various Power BI reports and metrics. The left sidebar lists items like 'Microsoft Teams Env...', 'Cloud flows', 'Makers', 'Desktop flows', 'Virtual Agents', 'Power Apps Portals', 'Custom Connectors', 'App Connections', and 'App Risk Assessment'. The right side of the screen displays a list of reports and metrics, with a note at the top right: 'PPU Trial 31 days left'.

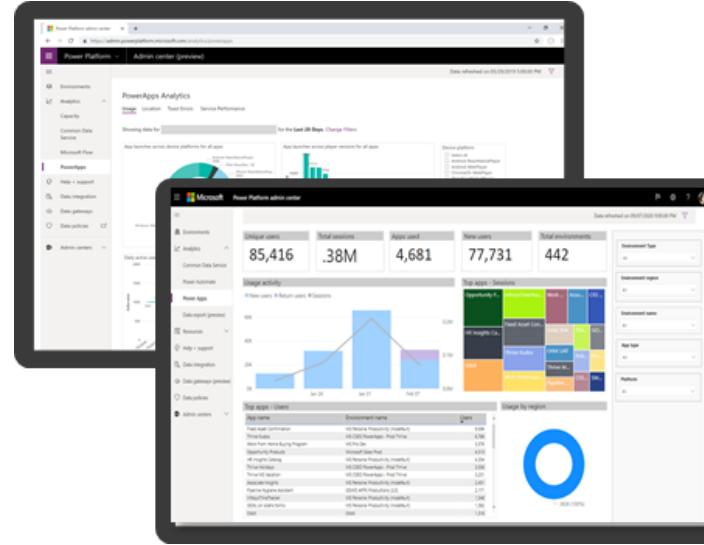
# Center of Excellence starter kit (CoE)



## The CoE starter toolkit



## Out-of-the-box analytics



## Self-service analytics



A downloadable Power BI package that is optimized to get you started

Out-of-the-box tenant level analytics for tracking inventory, usage, and health monitoring

Export data to Azure for custom analytics and performance monitoring



# Accelerate scaling of an Automation CoE

### Automation Kit

Collect, Triage, Approve and Monitor Expected vs Actual Return on Investment

Automation Kit

Collect, Triage, Approve and Monitor Expected vs Actual Return on Investment

Automation Center

HR Onboarding - Level: Automation Project

General - Related

Name: AP-00000005

Status: Submitted

Corporate Goal: Cost Savings through Automation

Department: Human Resources

Approved On: 12/10/2023

Approved By: Mike Sibley

Approved On: 12/10/2023

Approved By: Mike Sibley

Status: Active

RCA Basic

AVC Number of Automation Steps: 29

Number of FTEs Associated: 1,000

Development Costs: 100K

Maintenance Costs: 10K

Complexity Score: 50

Estimated Savings Potential: \$1.5M

Total Projects: 28

Approved: 21

Pending: 0

Submitted: 4

In Production: 19

Approved Projects Savings Potential: \$1M

Average Savings: \$65K

Highest Savings: \$17K

Vending machine replacement

Manage Financial Resources

Complexity Score vs. Estimated Savings

Estimated Savings

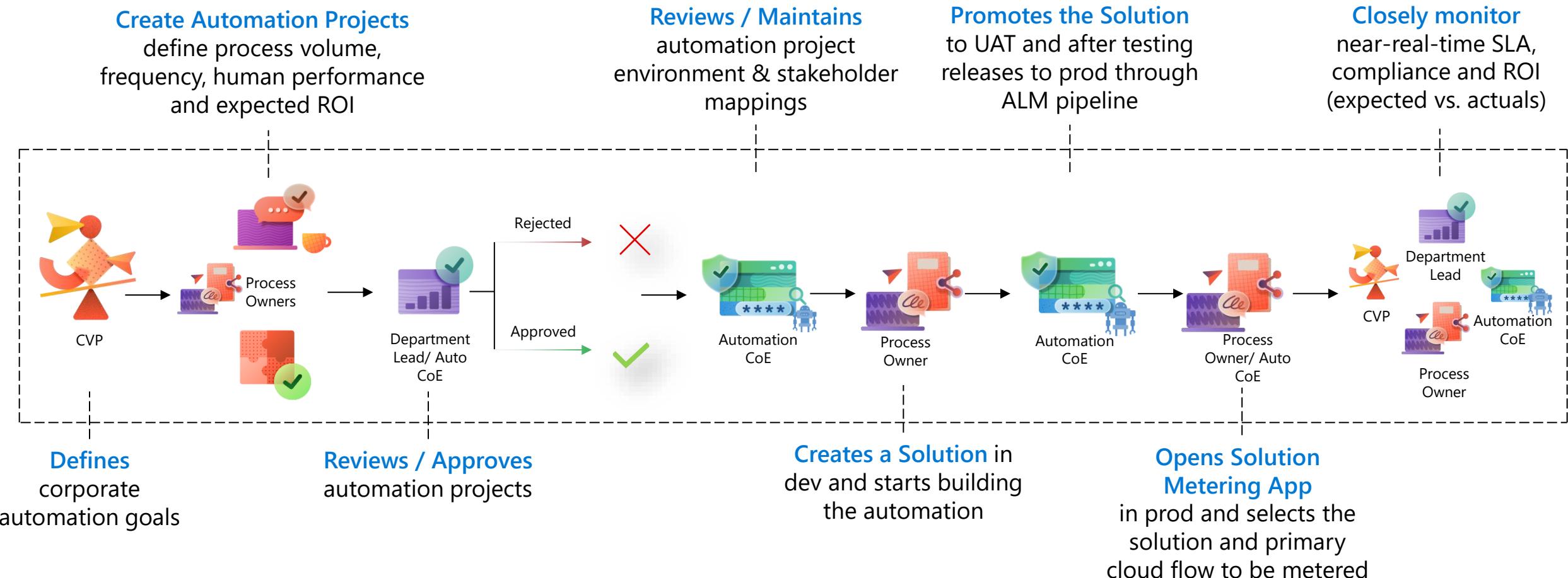
Complexity Score

Name	Dept.	Status	Estimated Savings	Complexity Score
Account unlock	Information Technology	Approved	\$45.0K	27
Cartridge replacement in vending machines	Purchasing	Approved	\$14,000	25
Check materials and services	Purchasing	Approved	\$34,000	27
Create applicant record	Finance	Approved	\$1K	7
Customer order processing	Purchasing	Approved	\$25,700	50
Deliver Digital Products	Purchasing	Approved	\$34,000	12
Employee self-service	Human Resources	Approved	\$4,000	7
Employee onboarding	Human Resources	Submitted	\$375,900	50
Manage Financial Resources	Finance	Approved	\$14,000	1
Manage Human Capital	Human Resources	Approved	\$17,300	27
Offering tasks	Human Resources	Approved	\$2,000	37
Onboard IT User Support	Information Technology	Approved	\$1,700	12
Order materials and services	Purchasing	Approved	\$16,100	50
Total			\$1,818,800	



# What you can achieve with Automation Kit

Journey from Project Definition to SLA & ROI based near-real-time reporting



Continuously gain  
insights & improve  
processes with **task**  
**mining, process**  
**mining, & Power BI**

TAKE THE GUESSWORK OUT OF AUTOMATION

# Process and task mining

Use out-of-the-box templates for rapid deployment from data ingestion to pre-defined custom reports.

Gain deep insights with powerful features including rework detector, root cause analysis, process compare and custom metrics.

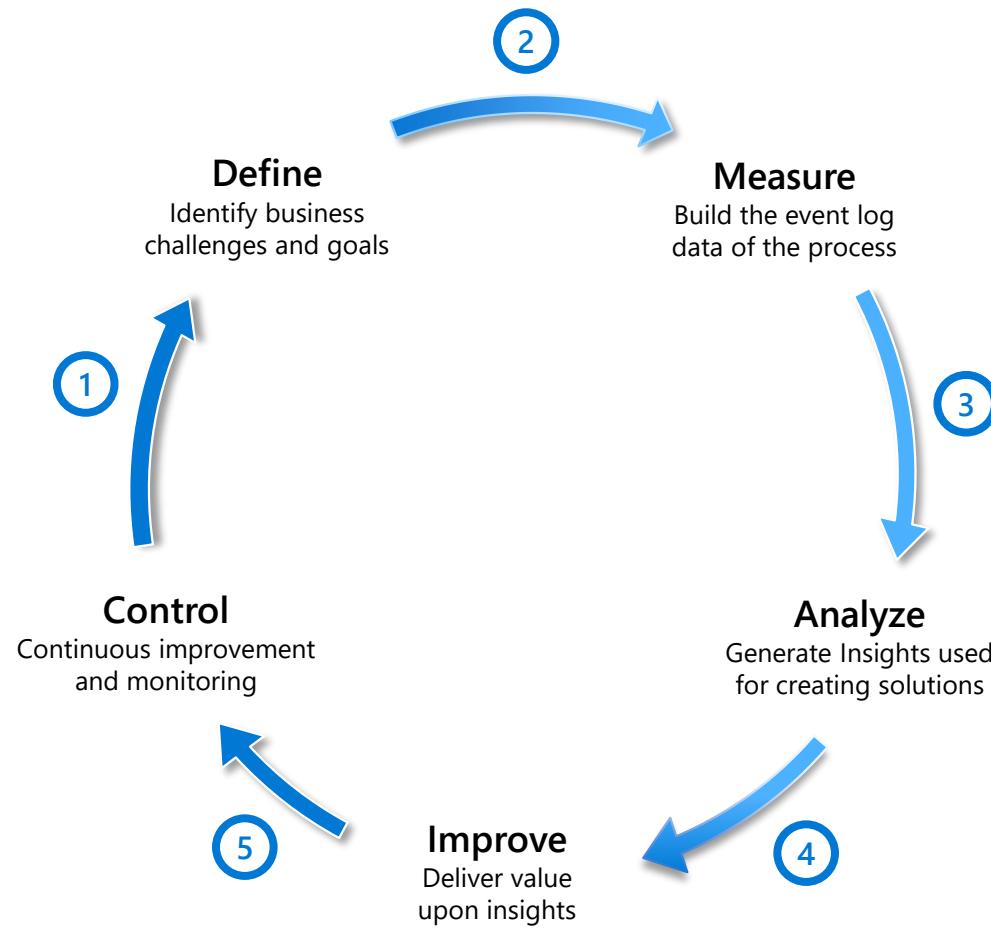
Create views, publish them to [create custom Power BI reports](#) and share across the organization

Seamlessly integrate with Power Automate flows to turn insights into action

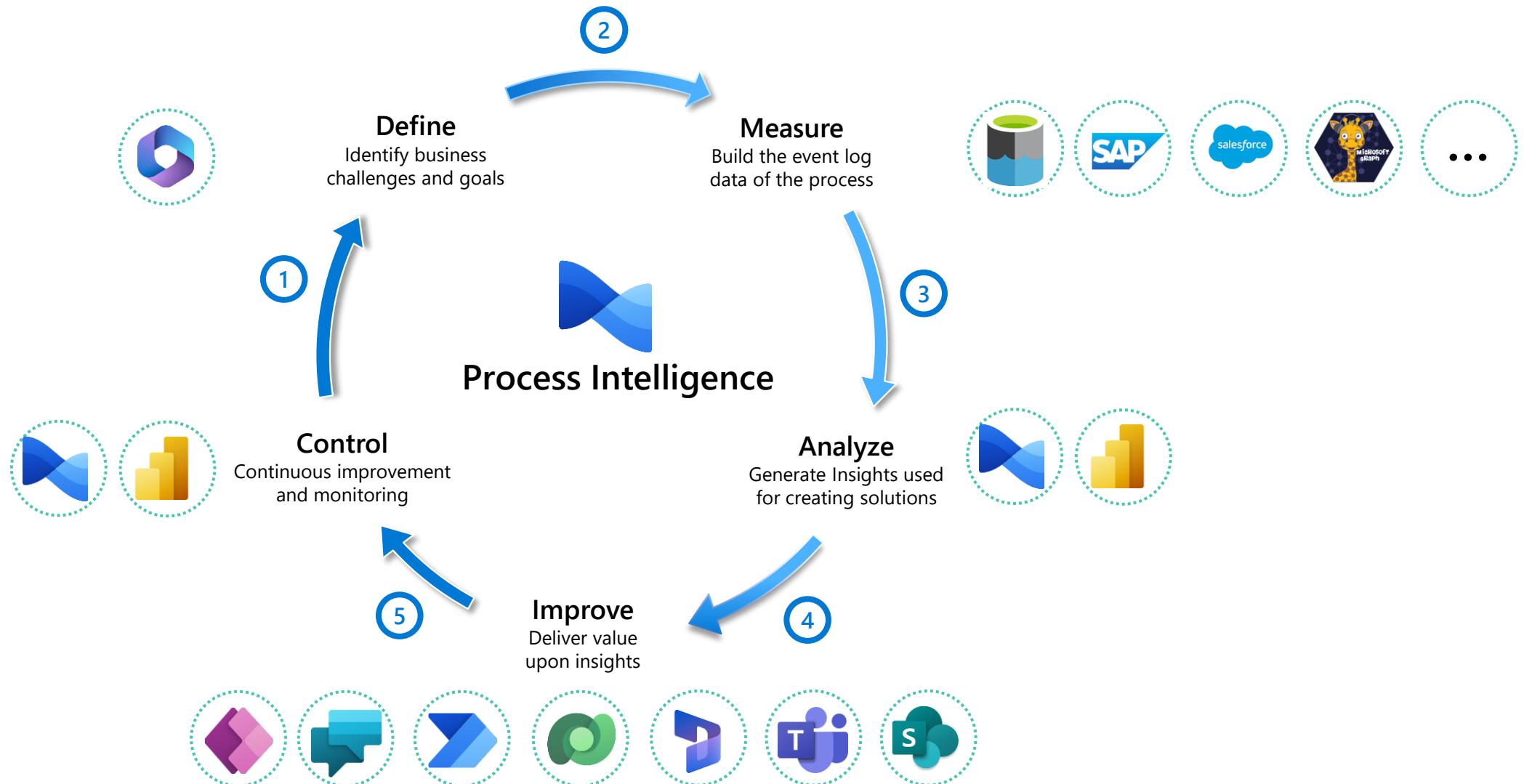
Discover possibilities for [automation of individual workflow](#) with task mining

The screenshot shows the Microsoft Power Automate interface. At the top, there's a navigation bar with 'Power Automate' on the left, a search bar, and links for 'Environments', 'Public Preview Demo', and 'All processes'. On the far right, there are settings and help icons. The main content area has a sidebar on the left with links like 'Home', 'Approvals', 'My flows', 'Create', 'Templates', 'Connectors', 'Data', 'Monitor', 'AI Builder', 'Process advisor', 'Solutions', and 'Learn'. Below the sidebar, a section titled 'Start with a popular template' shows 'Top picks' for 'Finance & Operations' including 'Show me process advisor - Finance', 'Accounts payable', 'Procure to pay (P2P)', and 'Desktop flows'. Another section titled 'Learning more about processes' includes links for 'Download Power Automate Desktop', 'Download sample data to try out Process advisor', 'Process advisor MS Learn module: self-paced', 'How to upload the data for process mining', 'How to analyze imported log files in process...', 'How to record your process', 'How to prepare a recording', 'How to analyze a process', and 'Automation recommendation'. A 'Ask a chatbot' button is at the bottom left of the sidebar.

# A typical business process optimization journey



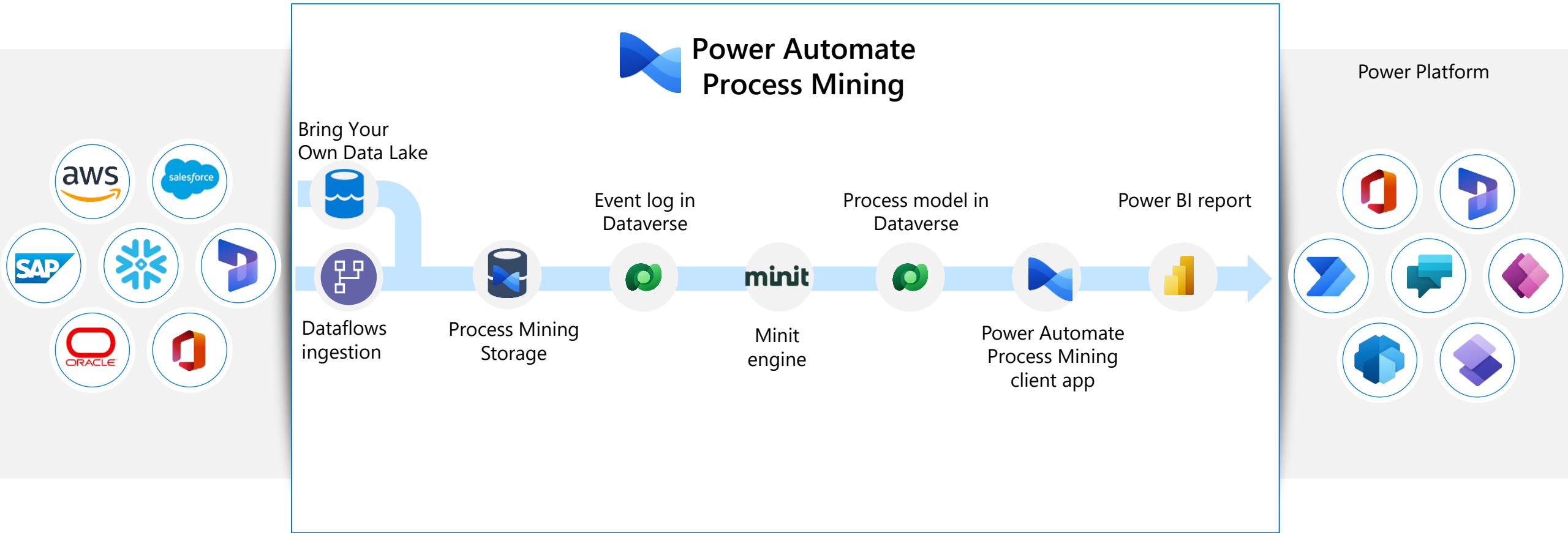
# Microsoft's End-to-end Process Intelligence



# Process Mining Architecture

# Details

## A complete overhaul of Process Mining solution with Minit components





# Use-cases

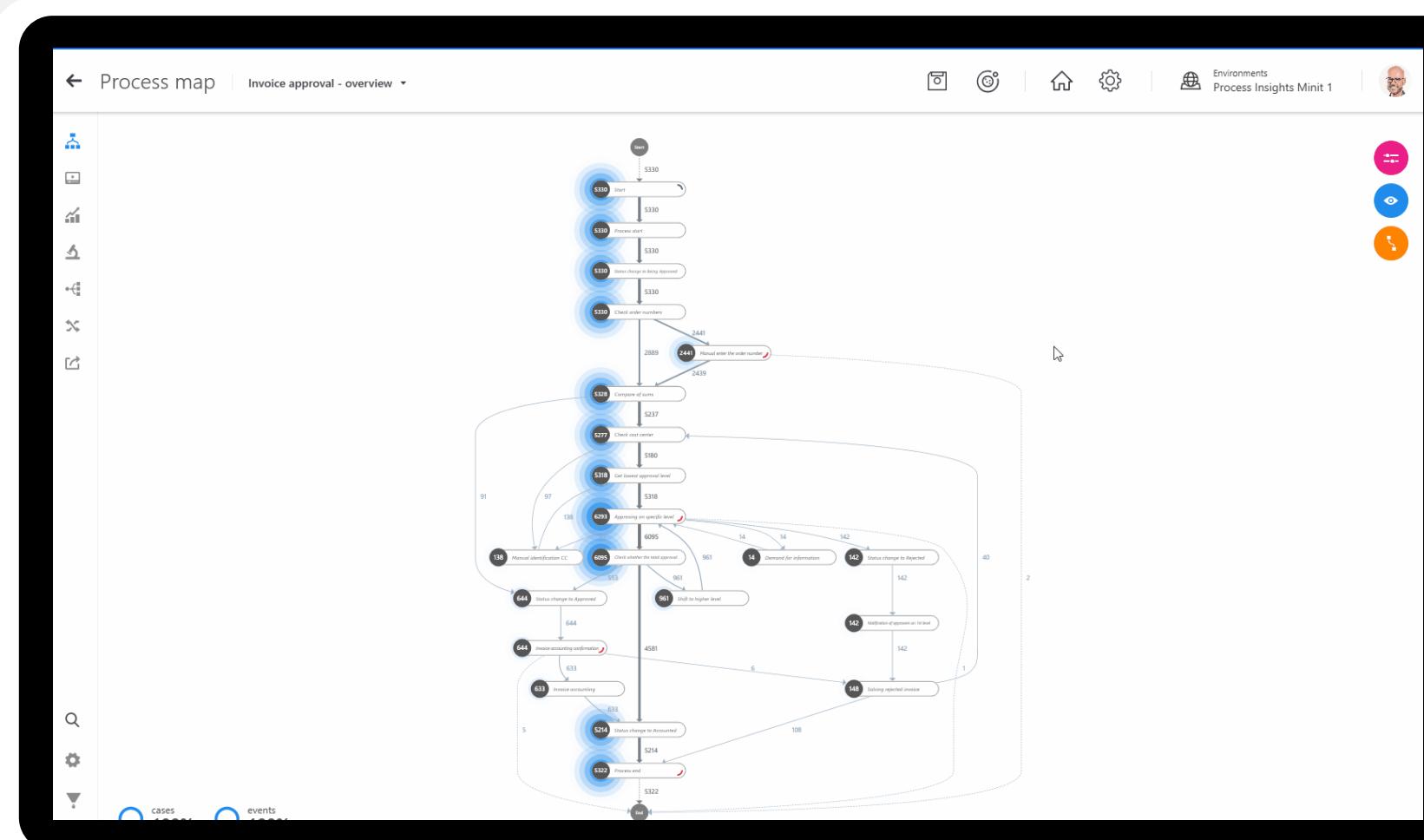
Accelerate your digital transformation efforts with a blueprint for building Cloud flows, RPA, AI and more.

Visualize and analyze your Order to Cash Process (O2C) to see how effectively you convert your products or services into cash.

Avoid automating inefficient processes and continuously monitor to identify process inefficiencies.

Achieve full visibility of your Order to Activation (O2A) process and identify process inefficiencies.

Decrease regulatory compliance risks, improve response time to regulatory questions, spot and fix potential problems.



# Power Automate Process Mining

## Key capabilities

### Easy-to-use web and desktop experiences

From ingestion to process map and insights in the web, using Power Automate Desktop for task mining to interactive drill-down and set up of custom metrics in the Minit desktop app

### Deep Analytics

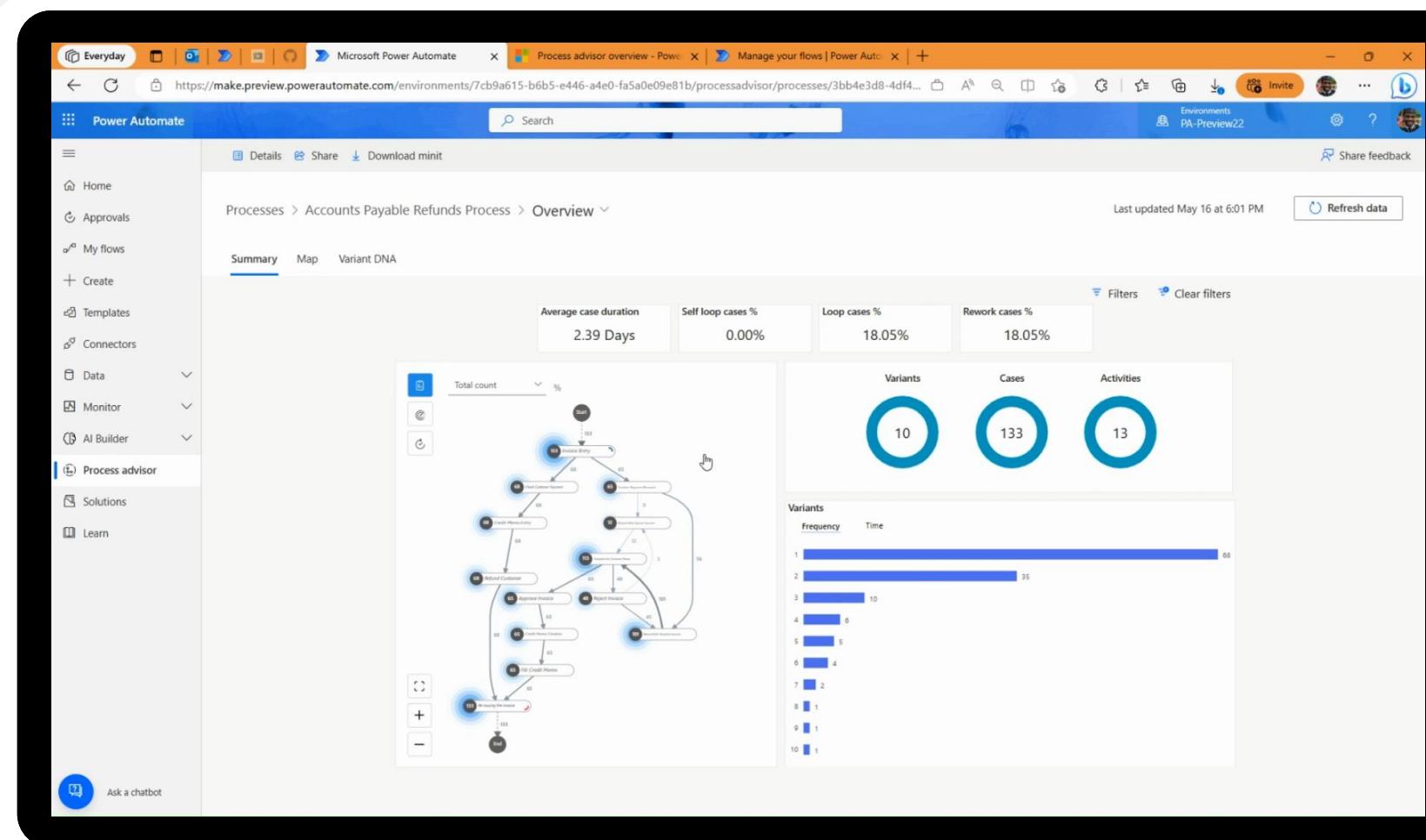
Discover inefficiencies and eliminate them by comparing processes, detecting rework, using AI powered root cause analysis and more

### Customizability & Extensibility

From customizing metrics to producing meaningful results and customized reports with Power BI and integration with Power Platform, Dynamics, Azure and M365

### Get started with OOB Templates

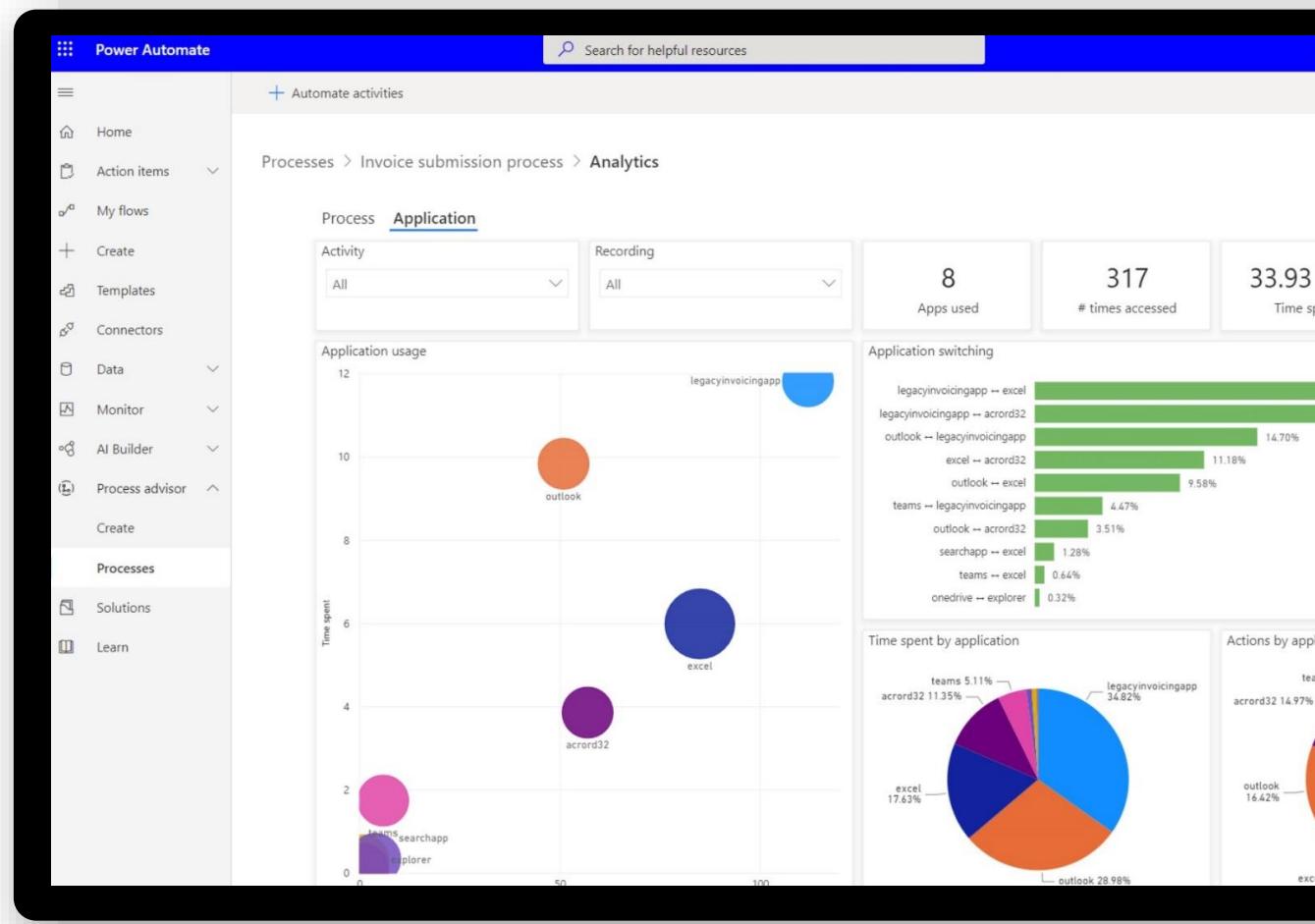
Use out-of-box templates such as Finance and Supply Chain, for rapid deployment from data ingestion to pre-defined custom reports



Take the guesswork out of automation

# Task Mining

- 1 Capture **detailed steps** for **tasks** performed on users' desktops
- 2 Gain **insights** into task execution, **identify** common mistakes, and **pinpoint** what can be **automated**
- 3 **Optimize** business processes identifying **inefficiencies** and **bottlenecks** and **reducing costs**
- 4 **Foster** a culture of **continuous improvement** where employees are encouraged to optimize their work processes.



Take the guesswork out of automation

# Process analytics (preview)

1 Gain **valuable insights** and **optimize** your **cloud flows**

2 Visualize your flow's **performance** and monitor for **performance drifts**

3 Identify **bottlenecks** and **opportunities** for **improvement**

The screenshot shows the Power Automate interface with the following details:

**Details:**

- Flow: Process sales orders
- Status: Off
- Owner: Joe Fernandez
- Created: Apr 21, 06:10 AM
- Modified: May 6, 03:15 AM
- Type: Automated
- Plan: This flow runs on owner's plan

**28-day run history:**

Start	Duration	Status
Apr 21, 06:16 AM (3 wk ago)	00:00:24	Succeeded
Apr 21, 06:16 AM (3 wk ago)	00:00:26	Succeeded
Apr 21, 06:16 AM (3 wk ago)	00:00:25	Succeeded
Apr 21, 06:16 AM (3 wk ago)	00:00:25	Succeeded
Apr 21, 06:16 AM (3 wk ago)	00:25:13	Succeeded
Apr 21, 06:16 AM (3 wk ago)	00:01:25	Succeeded
Apr 21, 06:16 AM (3 wk ago)	00:01:14	Succeeded

**Connections:**

- Approvals
- Microsoft Dataverse
- Excel Online (Business)
- Connections

**Owners:**

- JK
- MF

**Process insights (preview):**

- Average duration of y
- 00:08:02



# Demo

Optimize processes with Process Mining

# Event log – overview

A **case** is a collection of related events (e.g., claim created, policy check, payment) and their corresponding attributes (e.g., timestamp, resource, cost per event, etc.)

An **attribute** is a descriptor or additional level of detail for a specific event or case (e.g., timestamp, resource, claim status, etc.)

An **event log** is a collection of all the details for a specific case

CaseID	Activity	Start	Resource	User	PerEvent	ClaimantType	total_claim_amount	total_paid	peril_description	insurance	handler_team	claim_status	claim_channel	ProductivityEqualizer
1	100 Claim Created	2022-01-03T08:00:00.000	BAAA		10	ClaimantType02	750	750	Flight Cancelled	Travel	Team B	Closed	Web	0.5
2	100 Policy Check	2022-01-03T08:18:35.463	BSDR		10	ClaimantType02	750	750	Flight Cancelled	Travel	Team B	Closed	Web	0.5
3	100 Premium Paid	2022-01-03T09:03:50.538	BAAA		10	ClaimantType02	750	750	Flight Cancelled	Travel	Team B	Closed	Web	0.5
4	100 Coverage Check	2022-01-04T08:04:24.069	BSDR		12	ClaimantType02	750	750	Flight Cancelled	Travel	Team B	Closed	Web	0.5
5	100 FNOL Duplicate Check	2022-01-04T09:32:50.056	BAAA		10	ClaimantType02	750	750	Flight Cancelled	Travel	Team B	Closed	Web	0.5
6	100 D Check	2022-01-04T11:16:29.295	BSDR		4	ClaimantType02	750	750	Flight Cancelled	Travel	Team B	Closed	Web	0.5
7	100 Screening Positive	2022-01-04T11:16:29.295	BSDR		10	ClaimantType02	750	750	Flight Cancelled	Travel	Team B	Closed	Web	0.5
8	100 FNOL Fraud Check	2022-01-04T11:16:30.295	BAAA		20	ClaimantType02	750	750	Flight Cancelled	Travel	Team B	Closed	Web	0.5
9	100 Assign Handler	2022-01-04T13:27:34.584	BPRT		12	ClaimantType02	750	750	Flight Cancelled	Travel	Team B	Closed	Web	0.5
10	100 Assign Handler	2022-01-04T18:44:17.169	BPRT		12	ClaimantType02	750	750	Flight Cancelled	Travel	Team B	Closed	Web	0.5
11	100 Assign Handler	2022-01-05T08:00:05.000	BPRT		12	ClaimantType02	750	750	Flight Cancelled	Travel	Team B	Closed	Web	0.5
12	100 Collect Support Info	2022-01-05T08:05:08.849	BSDR		10	ClaimantType02	750	750	Flight Cancelled	Travel	Team B	Closed	Web	0.5
13	100 Investigation	2022-01-05T08:10:56.577	BAAA		31	ClaimantType02	750	750	Flight Cancelled	Travel	Team B	Closed	Web	0.5
14	100 Incident Details Requested	2022-01-05T08:10:57.577	BAAA		10	ClaimantType02	750	750	Flight Cancelled	Travel	Team B	Closed	Web	0.5
15	100 Incident Details Uploaded	2022-01-05T08:48:13.518	BAAA		5	ClaimantType02	750	750	Flight Cancelled	Travel	Team B	Closed	Web	0.5
16	100 Claim Validity Check	2022-01-05T12:07:33.128	BBAB		6	ClaimantType02	750	750	Flight Cancelled	Travel	Team B	Closed	Web	0.5
17	100 Claim Fraud Check	2022-01-05T15:05:17.580	BBAB		9.5	ClaimantType02	750	750	Flight Cancelled	Travel	Team B	Closed	Web	0.5
18	100 Liability Check	2022-01-05T15:05:18.580	BBAB		15	ClaimantType02	750	750	Flight Cancelled	Travel	Team B	Closed	Web	0.5
19	100 Settlement	2022-01-05T15:05:18.680	BRobot 2		1	ClaimantType02	750	750	Flight Cancelled	Travel	Team B	Closed	Web	0.5
20	100 Payment	2022-01-05T15:08:46.368	BRobot 2		1	ClaimantType02	750	750	Flight Cancelled	Travel	Team B	Closed	Web	0.5
21	166 Claim Created	2022-01-03T08:00:00.000	BAAA		10	ClaimantType01	101	101	Lost Luggage	Travel	Team B	Closed	Web	0.5
22	166 Policy Check	2022-01-04T11:16:24.162	BSDP		10	ClaimantType01	101	101	Lost Luggage	Travel	Team B	Closed	Web	0.5
23	166 Premium Paid				10	ClaimantType01	101	101	Lost Luggage	Travel	Team B	Closed	Web	0.5
24	166 Coverage Check				10	ClaimantType01	101	101	Lost Luggage	Travel	Team B	Closed	Web	0.5
25	166 FNOL Duplicate Check				12	ClaimantType01	101	101	Lost Luggage	Travel	Team B	Closed	Web	0.5
26	166 ID Check				10	ClaimantType01	101	101	Lost Luggage	Travel	Team B	Closed	Web	0.5
27	166 FNOL Fraud Check				4	ClaimantType01	101	101	Lost Luggage	Travel	Team B	Closed	Web	0.5
28	166 Assign Handler	2022-01-04T11:10:12.045	BPRT		20	ClaimantType01	101	101	Lost Luggage	Travel	Team B	Closed	Web	0.5
29	166 Collect Support Info	2022-01-04T15:05:57.502	BSDR		12	ClaimantType01	101	101	Lost Luggage	Travel	Team B	Closed	Web	0.5
30	166 Investigation	2022-01-04T17:33:51.785	BAAA		10	ClaimantType01	101	101	Lost Luggage	Travel	Team B	Closed	Web	0.5
31	166 Incident Details Requested	2022-01-04T18:10:15.227	BAAA		31	ClaimantType01	101	101	Lost Luggage	Travel	Team B	Closed	Web	0.5
32	166 Incident Details Uploaded	2022-01-04T18:10:16.227	BAAA		10	ClaimantType01	101	101	Lost Luggage	Travel	Team B	Closed	Web	0.5
33	166 Incident Details Requested	2022-01-04T18:10:16.227	BAAA		5	ClaimantType01	101	101	Lost Luggage	Travel	Team B	Closed	Web	0.5



Power Demos  
Optimize with Hyperautomation  
Snackabe video

# Next steps

# Continue sua jornada de **conhecimento**

## Demonstrações técnicas de Power Platform

Eventos no **Microsoft Teams** conduzidos pelos especialistas em Power Platform da Microsoft Brasil. Para participar procure seu **gestor(a) de conta** (AE) ou **especialista** (SSP).



### Desenvolvimento de aplicativos

#### Tópicos

- Canvas Apps
- Microsoft Dataverse
- Model Driven Apps
- Power Pages

#### Duração

03 horas

[Saiba mais](#)

### Governança e ALM

#### Tópicos

- Governança
- Segurança
- Monitoramento
- Centro de Excelência (CoE)
- ALM/DevOps

#### Duração

03 horas

[Saiba mais](#)

### Hiper automação

#### Tópicos

- Process e Task Mining
- Cloud flows (DPA)
- Desktop flows (RPA)
- Gerenciamento e monitoramento
- Hosted machines (VMs SaaS)
- Automações e integrações

#### Duração

03 horas

[Saiba mais](#)

### Criando copilots com Copilot Studio

#### Tópicos

- Ecosistema Microsoft de copilots
- Visão geral do Copilot Studio
- Recursos baseados em IA generativa
- Automações e integrações

#### Duração

03 horas

[Saiba mais](#)

# Continue sua jornada de **conhecimento**

## Power Platform Connect

Site mantido pelos especialistas em **Power Platform** da **Microsoft Brasil**. Nele você encontrará:



### Biblioteca de conteúdo

Coleção de links oficiais das soluções que compõem a Power Platform



### Eventos online

Eventos online promovidos pela Microsoft ou seus parceiros.

<https://microsoft.github.io/powerplatformconnect>

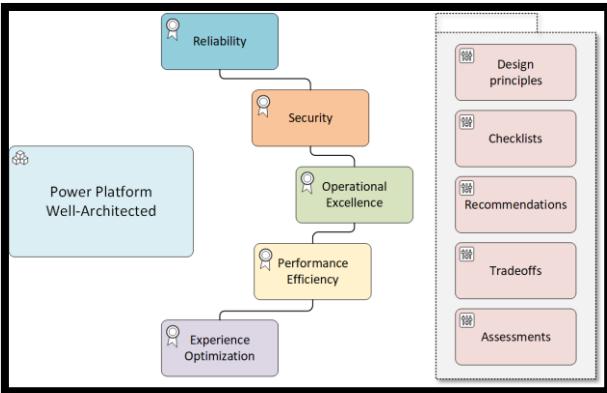
## Microsoft Power Platform Adoption

Saiba como o low code pode **acelerar** sua transformação digital e como adotar de forma **segura** e **eficiente** a Power Platform em toda a sua organização.

A screenshot of the Microsoft Power Platform Adoption website. It features a header with the Microsoft logo and navigation links. Below the header, there's a main section titled "Microsoft Power Platform Adoption" with a sub-section "Adoption workbook". To the right, there are three cards: "Adoption best practices", "Adoption maturity model", and "Steps on your adoption journey". Each card includes a brief description and a call-to-action button.

<https://adoption.microsoft.com/en-us/powerplatform/>

# Continue sua jornada de **conhecimento**



## Power Platform Well-Architected

Ajuda você a projetar aplicativos modernos para atender aos requisitos atuais e se adaptar às necessidades e desafios futuros

[Conheça](#)

This screenshot shows the "Dashboard overview for home page" in the Admin documentation. It features a sidebar with navigation links like "Administrator Power Platform", "Overview", "Work with various admin portals", "Support", "Licensing", "Environments", "Security and governance", "Analytics", "Storage", "Resources", "Activity logging", "Data integration", "Data sources and gateway clusters", "Manage data", "Work with templates", "Integrate (synchronize) your email system", "Extend with integration and solutions", "Unified admin experience for finance and operations apps (preview)", and "Performance tuning and optimization". The main area displays a "Welcome, System" dashboard with sections for "Recent activity", "257 unread messages", and "Some advisories reported". Below the dashboard, there's a section titled "The following are the cards you can add to the dashboard." with a "Download PDF" button.

## Guia de administração da Power Platform

Acesso unificado a toda a documentação sobre administração, governança e segurança

This screenshot shows the "Power Platform White Papers" page. It includes a sidebar with links to "Power Platform guidance", "Power Platform adoption best practices", "Power Platform Center of Excellence (CoE) Kit", "Power Platform ALM Accelerator", "Power Platform Creator Kit", "Automation adoption best practices", "Enterprise security", "Activating Managed Environments", "Application modernization with Power Platform", "Migrating apps and flows from the default environment", and "Resources". The main content area features a diagram titled "Environment Routing" showing "New Makers" connecting to a "Default Environment" and then branching out to four separate "Env" icons. Below the diagram, there's a section titled "Low-code resources created by the makers represent the initial stage in a resource's application lifecycle management (ALM) journey. As part of this initial stage, it's important to capture each version of the resource so that it can be released to it, if necessary. When the resource is ready to be used, the maker can use the continuous integration attached to the developer environment to promote it to a production environment, where users can run the resource isolated from any continued maker activity."

This screenshot shows the "Power Platform White Papers" page, identical to the one above but with a different background color. It includes a sidebar with links to "Power Platform guidance", "Power Platform adoption best practices", "Power Platform Center of Excellence (CoE) Kit", "Power Platform ALM Accelerator", "Power Platform Creator Kit", "Automation adoption best practices", "Enterprise security", "Activating Managed Environments", "Application modernization with Power Platform", "Migrating apps and flows from the default environment", and "Resources". The main content area features a diagram titled "Environment Routing" showing "New Makers" connecting to a "Default Environment" and then branching out to four separate "Env" icons. Below the diagram, there's a section titled "Low-code resources created by the makers represent the initial stage in a resource's application lifecycle management (ALM) journey. As part of this initial stage, it's important to capture each version of the resource so that it can be released to it, if necessary. When the resource is ready to be used, the maker can use the continuous integration attached to the developer environment to promote it to a production environment, where users can run the resource isolated from any continued maker activity."

## Power Platform White Papers

Informações, soluções e recomendações detalhadas para ajudá-lo a abordar tópicos complexos da Power Platform

[Conheça](#)

# Thank you!

**Ricardo de Souza**

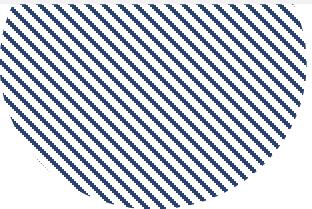
Technology Specialist - Power Platform

 rdesouza@microsoft.com

 <https://www.linkedin.com/in/ricardodesouza/>

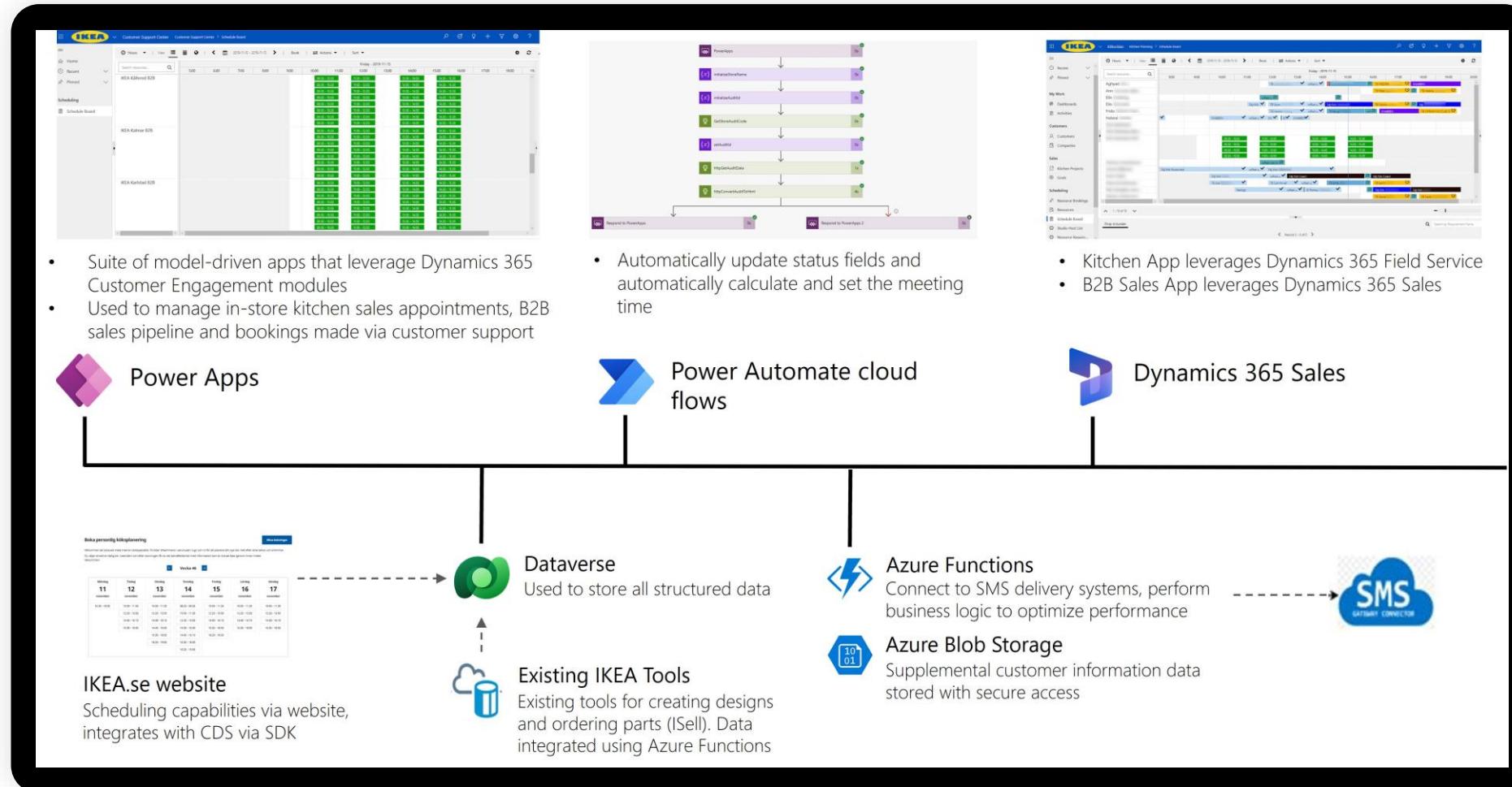
# Appendix

# Reference architectures



# Solution Architecture Using Dataverse

How [IKEA Sweden](#) partnered with [Capgemini](#), a Microsoft Gold Partner, to build a Dynamics 365 and Power Platform solution for its sales staff to improve the kitchen buying experience for individual customers (B2C) and businesses (B2B).





# Streamline customer onboarding processes with Power Apps

EY is a global professional services organization committed to “building a better working world.” A client with an outdated CRM came to EY to explore streamlining its onboarding processes for new customers. Using Microsoft Power Platform, EY helped the client streamline its onboarding process by reducing manual effort and providing better workflow capabilities to share information across the company.



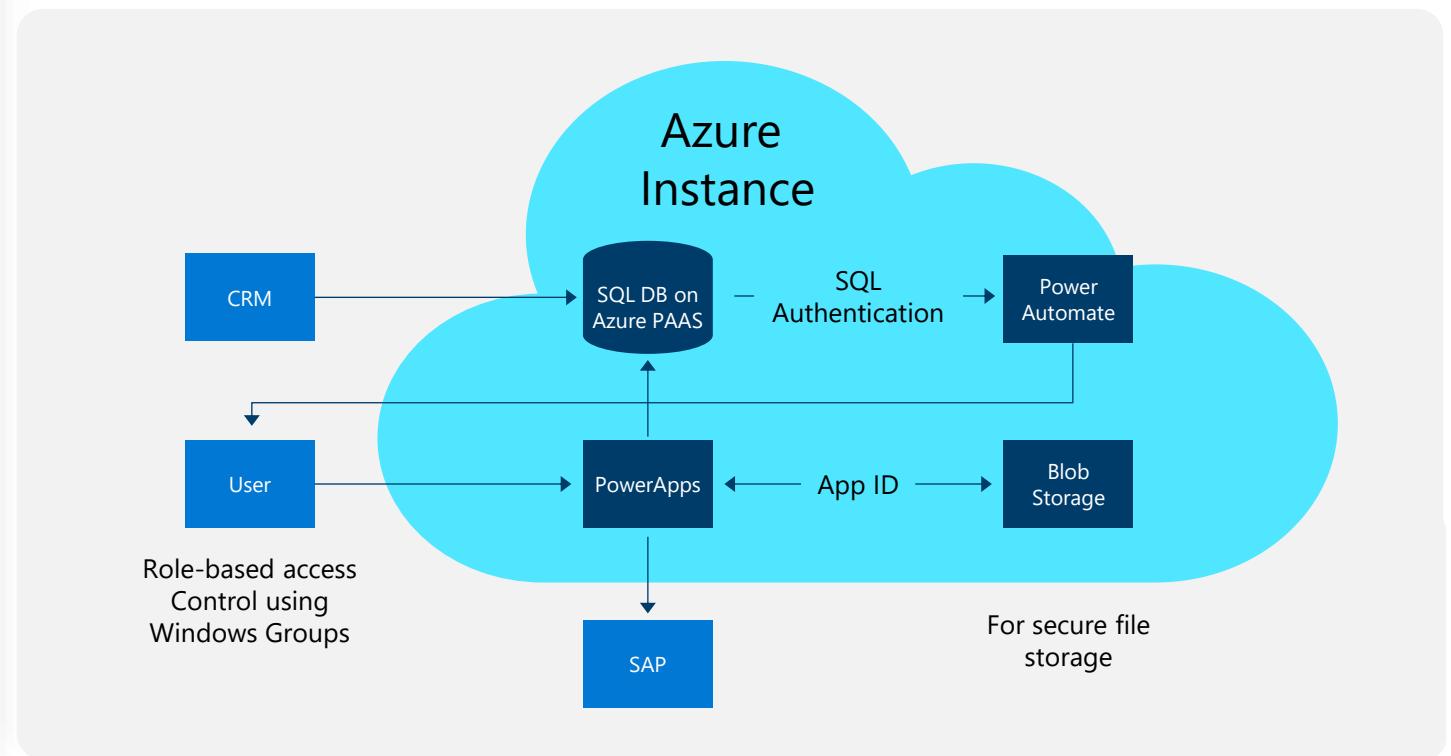
## Challenge

The onboarding process is email-based, manual and decentralized causing negative impact on customer relationships



## Solution

Build an app powered by Azure to securely and accurately collect, review and propagate customer data for creation of records minimizing manual data entry



# Streamline departmental processes, like Blackmores



## Challenge

To check order status, Blackmores Planners had to manually consolidate information from multiple sources locked in various data silos.



## Solution

Supplier data is consolidated in Azure SQL Database. Azure Functions uses Azure API management to create monthly tasks for Planners to review and update data in Power Apps.



## Impact



Over 50% reduction in time to prepare supplier report.



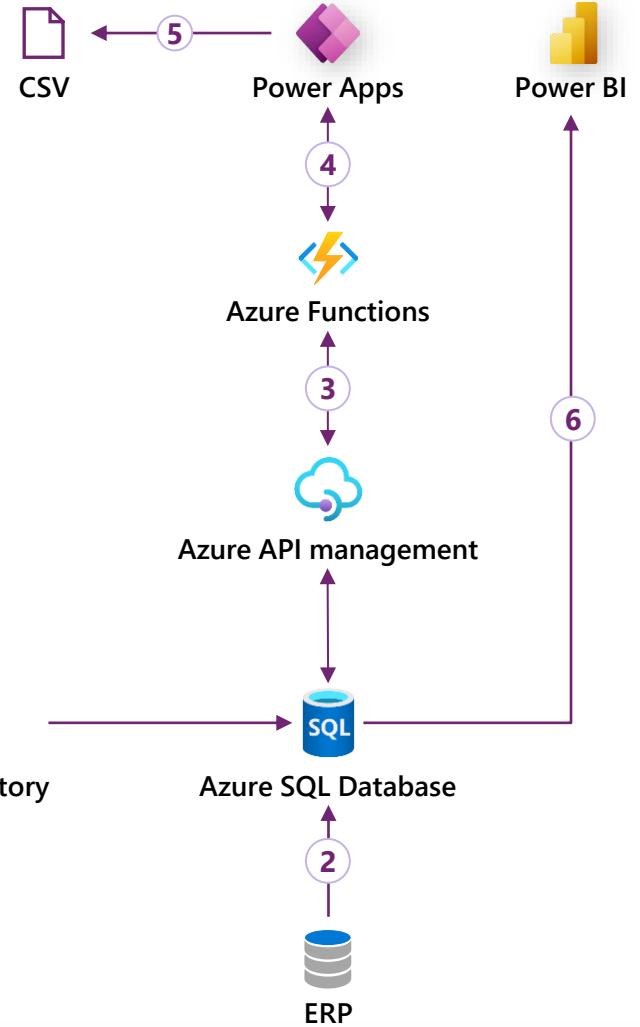
Unified data reduces errors from manual assembly.



Process is monitored to ensure timely and regular reporting.

## LOB/DEPARTMENTAL SOLUTIONS

- 1 Supplier data stored in Dataverse is moved to SQL via Data Factory.
- 2 Purchase order (PO) data stored in ERP system is sent to Azure SQL database.
- 3 Azure Functions uses API to surface PO data monthly and creates a task for user to review.
- 4 Power Apps retrieves data from Azure SQL Database through API.
- 5 User reviews and updates POs in Power Apps and sends this data to suppliers through CSV export.
- 6 Power BI reports trends in supplier status.



*The big benefit of Power Apps is that you can spend less time on the “boring” stuff like modelling data or building forms and focus on the areas where there is the most complexity and – as a result – business value.”*

– Tijn Tacke  
Dynamics 365 Platform Lead



## Customer example: Automating order processing at Coca-Cola UNITED

*"We explored open-source options, but these platforms keep changing. We like the low-code simplicity of the Power Platform and how it integrates with Azure. Today, it's the preferred platform for all our ERP analysts."*

- Bob Means: Director of Business Solutions

Coca-Cola Bottling Company United

### Situation

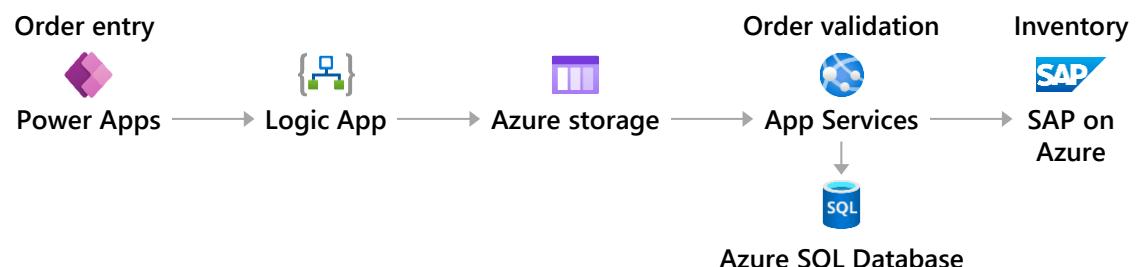
- Coca-Cola UNITED wanted a faster way to process on-demand shipment requests (or "forced shipments") from customers.
- Previously, account reps had to submit orders and check inventories manually, often leading to errors and shipping delays.

### Solution

- A new solution built using PP and Azure automates the forced shipment process.
- A field rep enters order details through a mobile app. Azure App Services then validates the order against inventory data in SAP, writes all details to a SQL database and sends to SAP for processing.

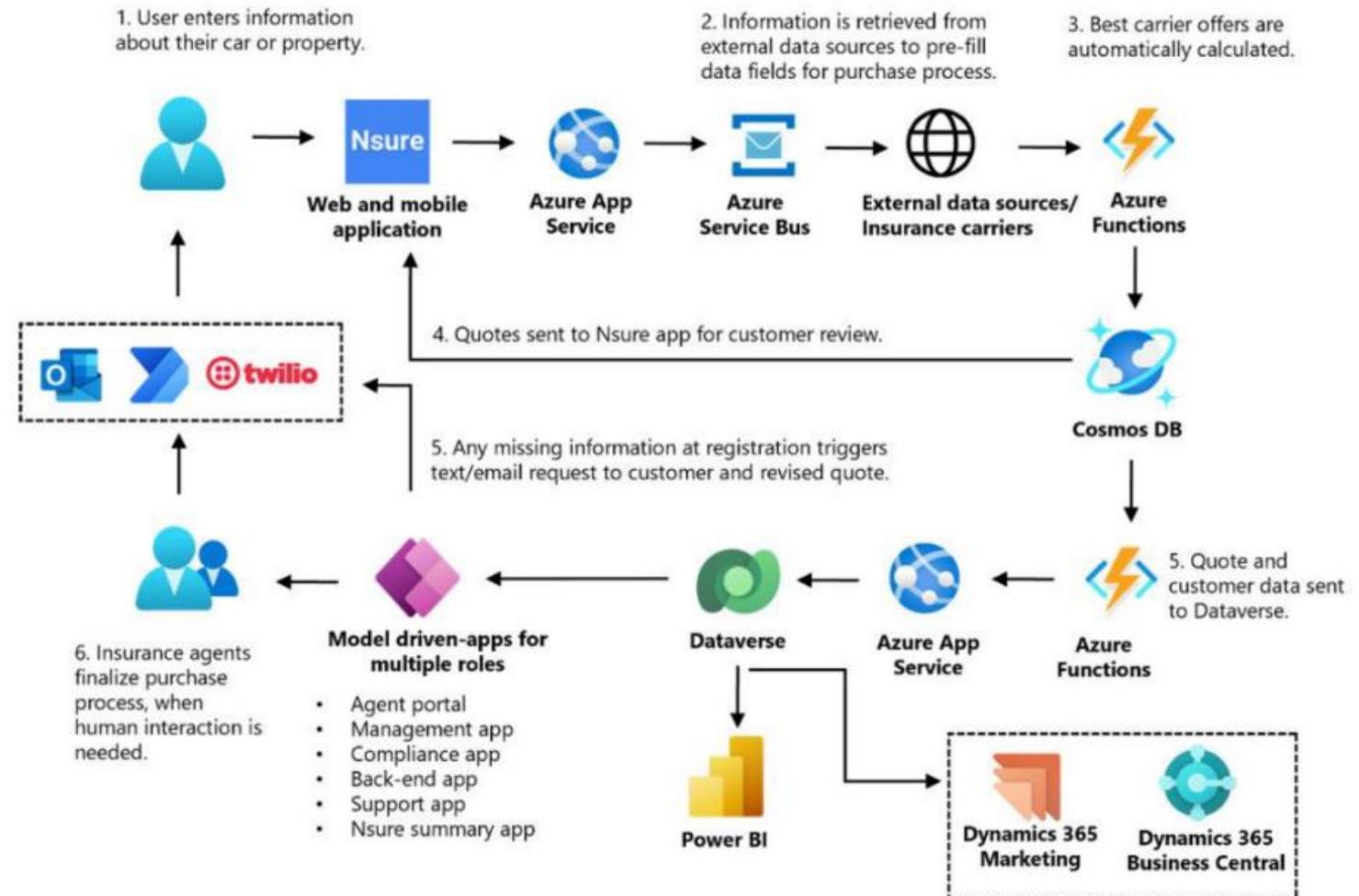
### Impact

- Order processing has **gone from hours to seconds** with the automated solution.
- The company is now **processing ten times more** forced shipment orders – with better tracking, fewer errors, faster delivery times, and improved customer satisfaction.



**NSure.com**, a proprietary online insurance shopping platform, offers a real-world example. The company's initial launch relied on traditionally developed Angular, Xamarin, and Azure services.

By adding Power Platform and Dynamics 365, NSure.com created a next-generation solution using both lowcode and traditional coding techniques, as the following diagram illustrates.





# Makers & Experience Devs Collaborate to Build a Track Abnormality Detection Solution

Tokyo Metro Co., Ltd. operates nine of the 13 subway lines that stretch beneath Tokyo. Maintenance of all lines is an important task that the company was looking for ways to improve. They utilized Microsoft Azure AI and Power Apps to create a solution in-house through Fusion Teams that uses photos of the track and data to scan and report abnormalities and greatly reduce the need for manual inspections.



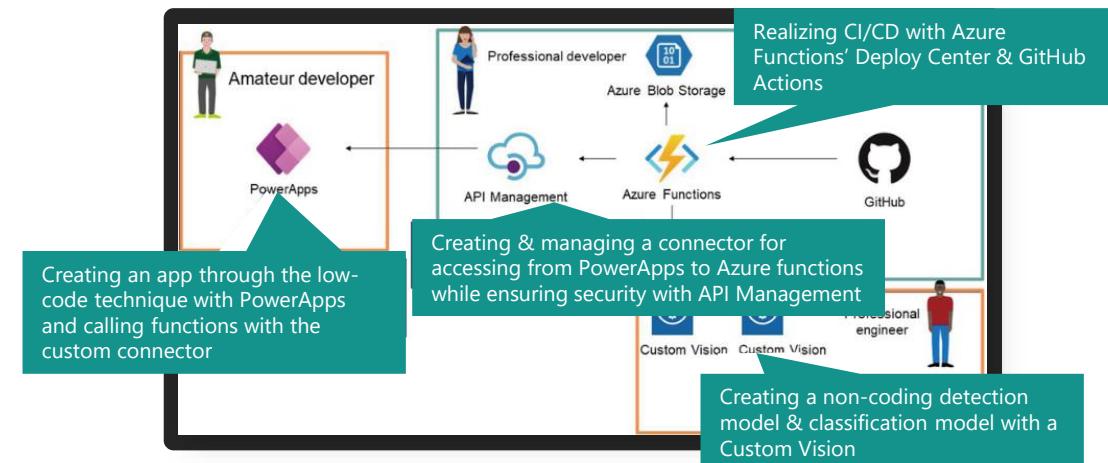
## Challenge

Visual inspections is a laborious and time-consuming task that leaves room for error



## Solution

Develop an AI-based solution using internal resources to examine the tracks using cameras and report back to an app monitored by the authorized staff to perform maintenance as needed



>90%

accuracy using [Custom Vision](#)

3 step

process to identify, detect then classify targets





# Optimizing HR for a global technology-enabled services leader

## About Epiq

8,000+ people and operations worldwide

“

With AI Builder in Power Automate, we added a model that cleans up formatting of new employee submission forms. This allows us **to process more efficiently** at scale – and **it works flawlessly**.

– Colt Coan: Senior Manager of Rapid Development, Epiq

### Challenge

Automate onboarding process and decrease costs

Improve collaboration between hiring managers and IT teams

### Solution

End-to-end process automation, AI-driven forms processing, and bots for managing requests

System integration with Workday and ServiceNow

**\$500,000** annual labor cost savings

**2,000** hours saved monthly

Onboarding time from weeks to days

Center of Excellence with **over 600** other apps

### Impact



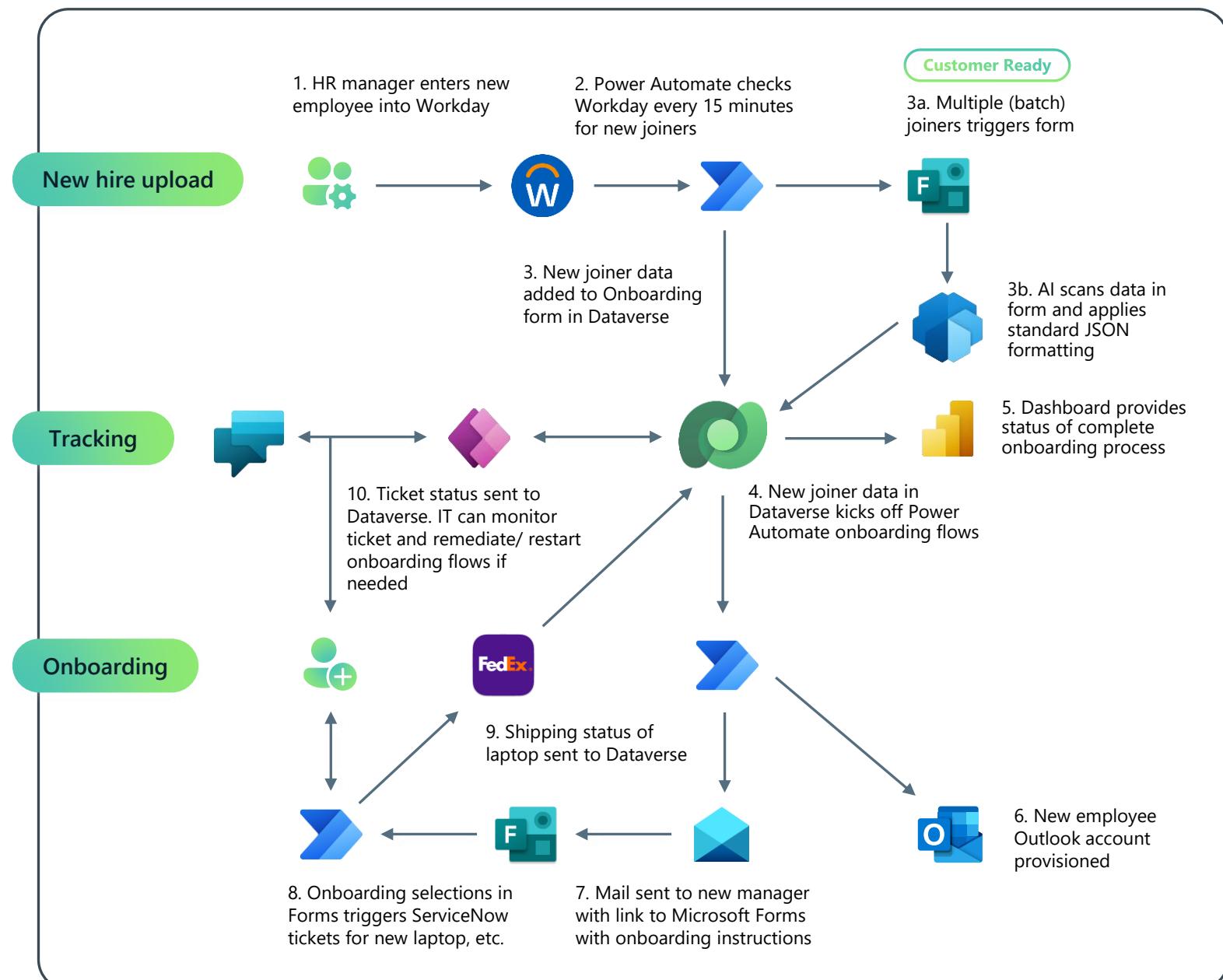
# A better employee onboarding system

Built with Microsoft Power Platform



By automating our onboarding and offboarding process with Power Platform, we're saving about **2,000 hours** of work each month and **over US\$500,000** annually in associated costs.

– Colt Coan, Senior Manager of Rapid Development, Epiq





## Center of Excellence

Driving faster, more rigorous development



**390+**

Makers



**600+**

Low-code / no-code solutions

“

Since working with Power Platform, **there has never been this much collaboration between the business and IT teams**. Everyone is planning and building compelling business solutions together.

– Colt Coan, Senior Manager of Rapid Development, Epiq