



Power Automate

Our Agenda

- ◆ HCL-PowerObjects
- ◆ Power Automate Overview
- ◆ RPA Overview
- ◆ Governance & Security
- ◆ Use Cases & Demo
- ◆ Development & Migration



●● About HCL-PowerObjects

PowerObjects is the Microsoft Business Applications COE at HCL, 100% focused on Microsoft Business Applications through our four pillars of Service, Support, A&S and R&D!

- Founded in 1993, acquired by HCL Technologies in 2015
- Largest dedicated, global practice of over 1300+ employees
- One of Top 5 Microsoft Global SIs for Microsoft
- Microsoft *Partner of the Year* over 30 times in last 10 years
- 1 Million+ Active Dynamics Users and over 1,200 companies using our IP
- An ERP practice that has more than doubled every year for the last three years

Service Support Education Add-Ons



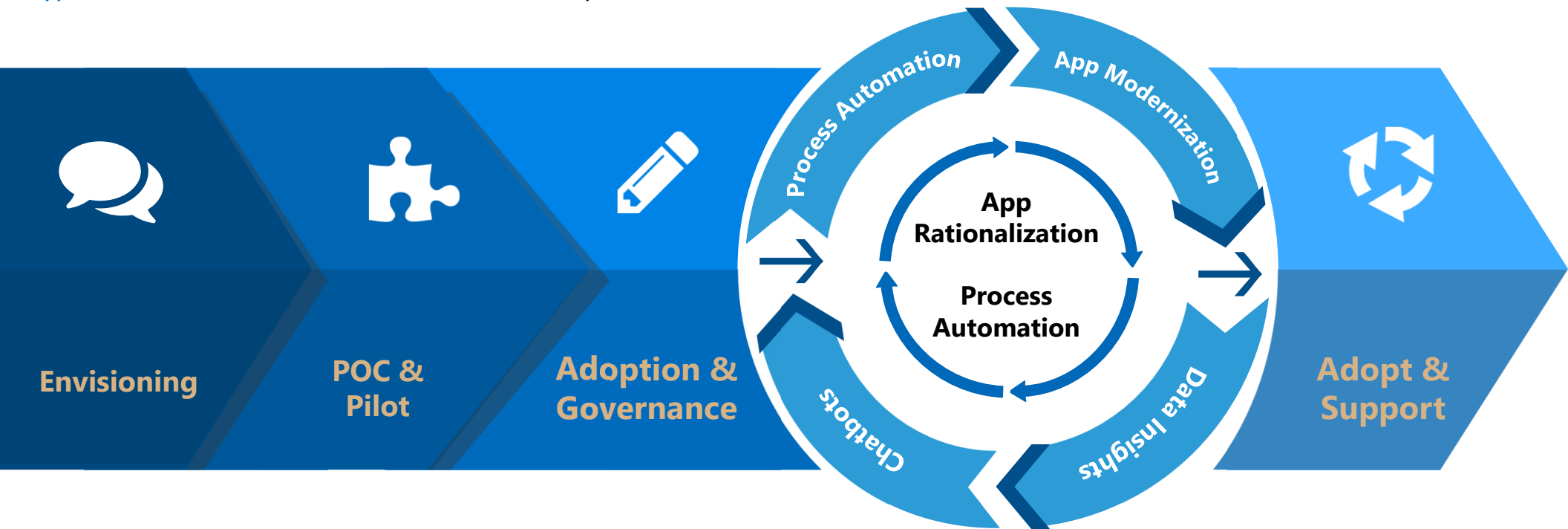
Multi-award winner

- ◆ 2020 (Business Applications) Technology Innovator of the Year
- ◆ 2020 Customer Service Global Partner of the Year
- ◆ 2019 Customer Service Global Partner of the Year
- ◆ 2019 Financial Services Global Partner of the Year
- ◆ 2019 Power Platform North America Partner of the Year



Invest in Power Platform

Typical and ideal scenario when it comes to implementation



●●POWER
●●OBJECTS

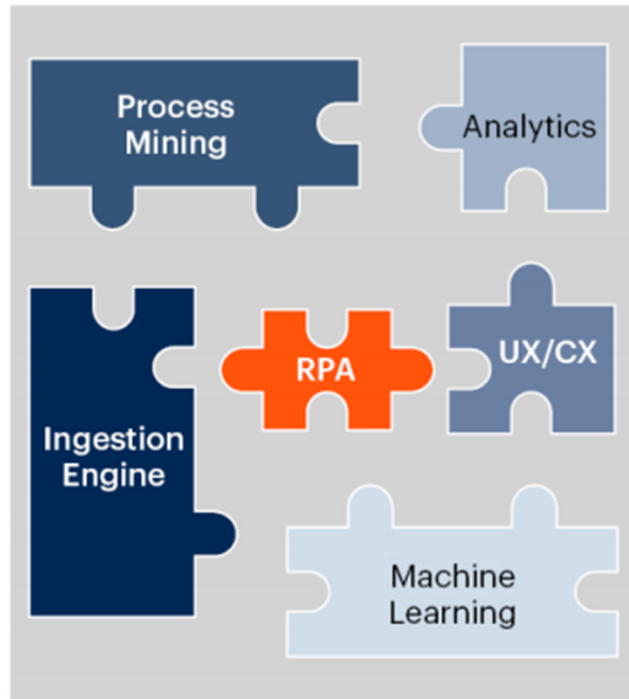
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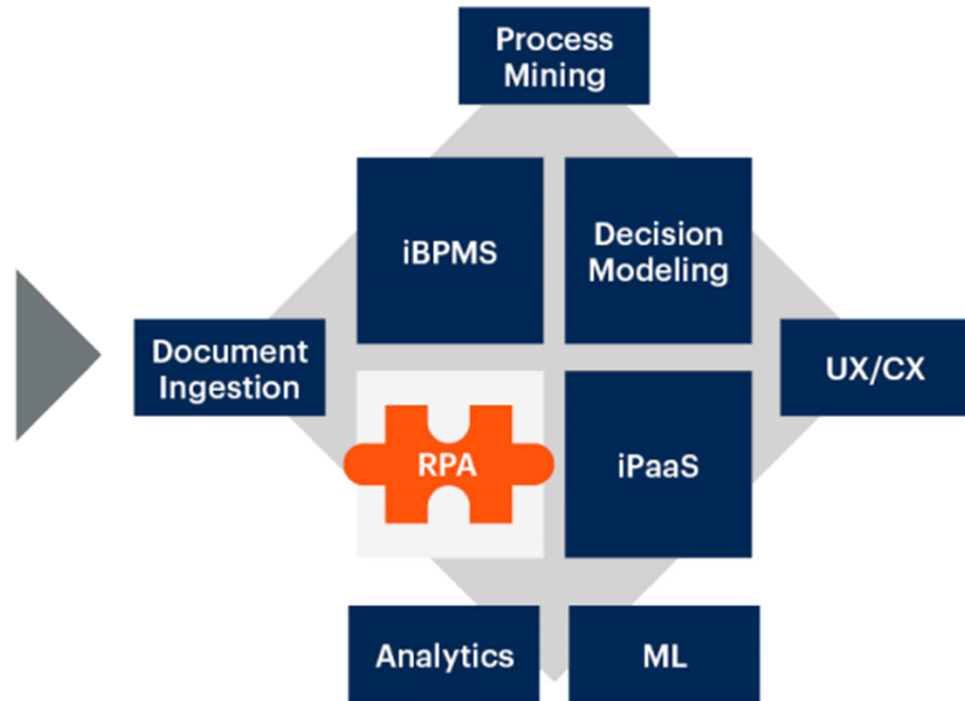
Power Automate

Evolution From Task-Based to Complemented RPA (CoRPA) to Digital Ops Toolbox

Complemented RPA (CoRPA)



Digital Ops Technology Toolbox

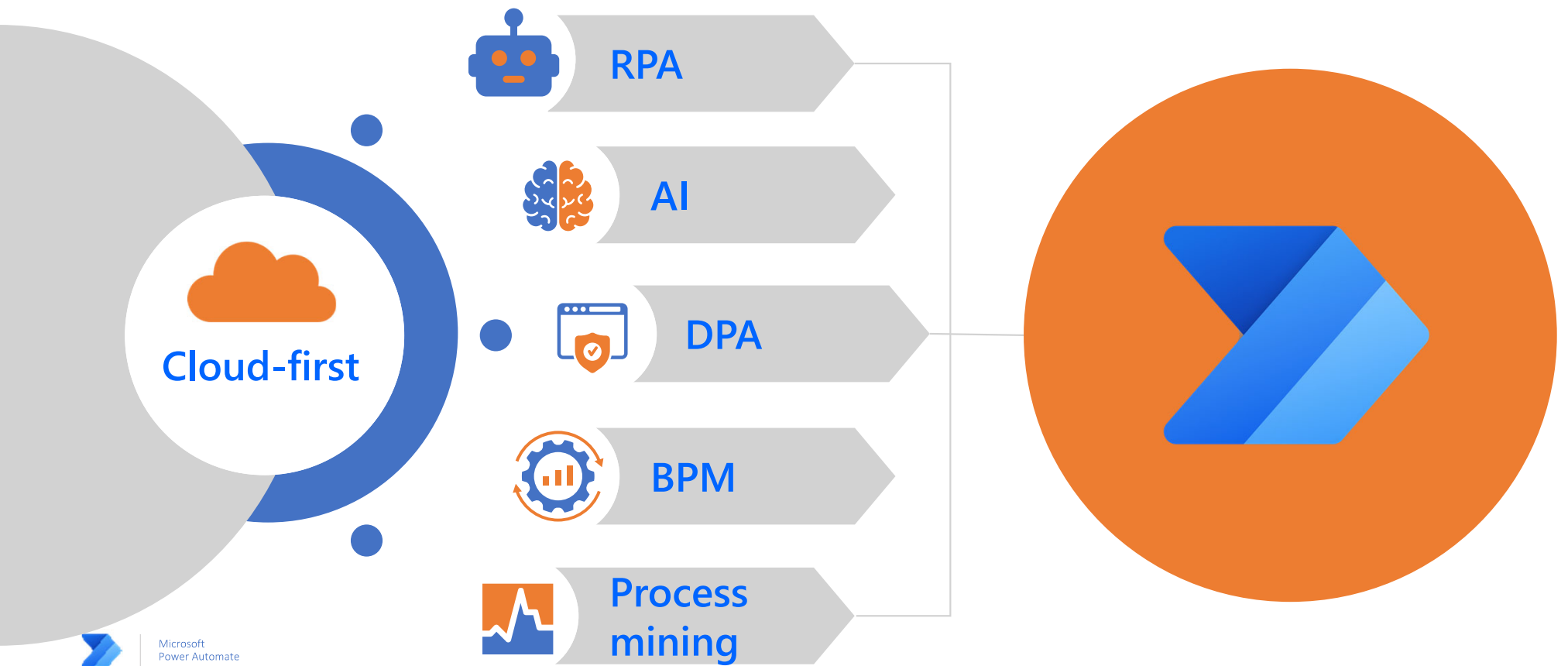


Source: Gartner

ID: 465015_C

Convergence into one intelligent automation platform

Automation is not an island





Power Automate – Cloud & Desktop



Power BI
Business analytics



Power Apps
Application development

- Canvas Apps
- Model-driven Apps
- Portals

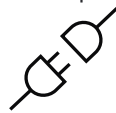


Power Automate
Process automation

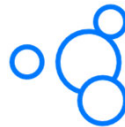
- Cloud Flows (DPA)
- Desktop Flows (RPA)
- Business Process Flows (BPM)
- Process Advisor (Process Mining)



Power Virtual Agents
Intelligent virtual agents



Data connectors



AI Builder




Dataverse

Center of Excellence (Governance, Compliance & Security)




A developer platform – for everyone


Microsoft 365


Teams

Every User

Power Platform


Power Apps


Power Automate


Power Virtual Agents


Power BI

Every Developer (Low Code)



Pro Developer (Code First)

Azure services


Analysis Services



API Management


Azure Functions


Kubernetes Service


Logic Apps


Cognitive Services


Bot Framework

Azure / Office Data Services


Microsoft Graph


Microsoft Dataverse


Azure Synapse Analytics


Cosmos DB


Visual Studio


VS Code

CI/CD ALM Pipeline

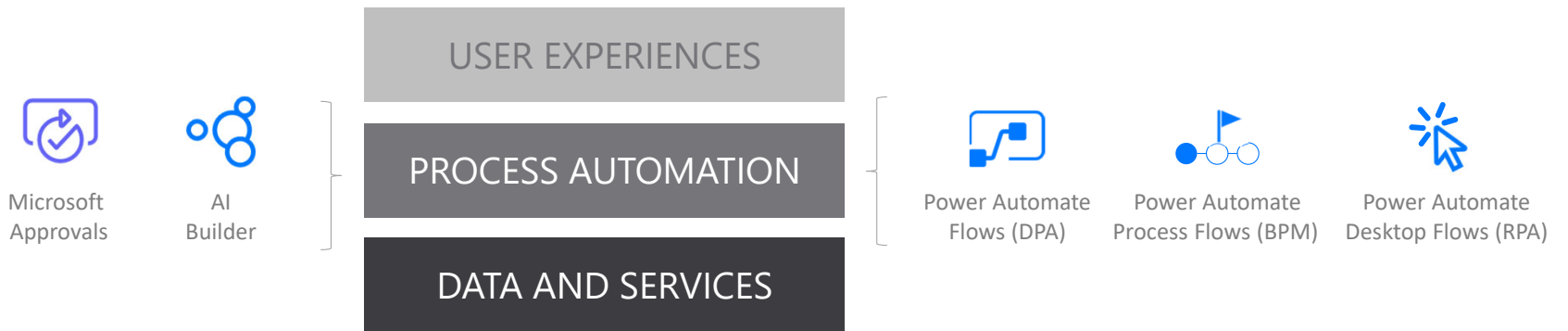
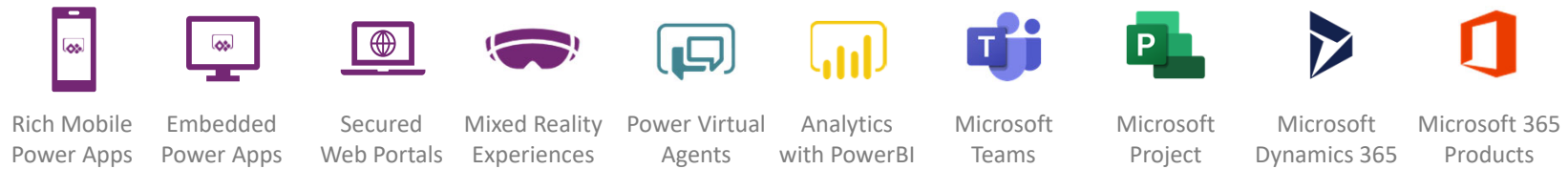


Azure DevOps



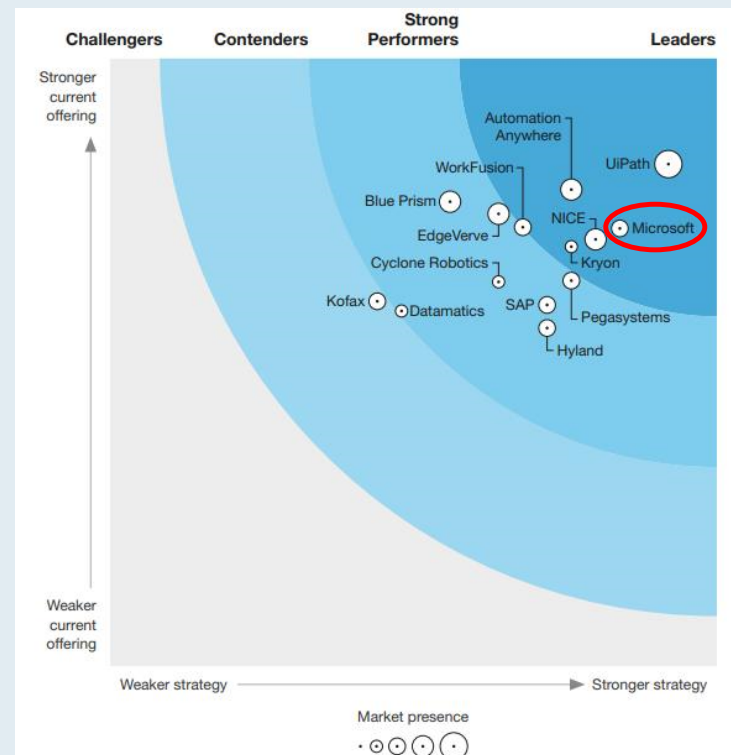
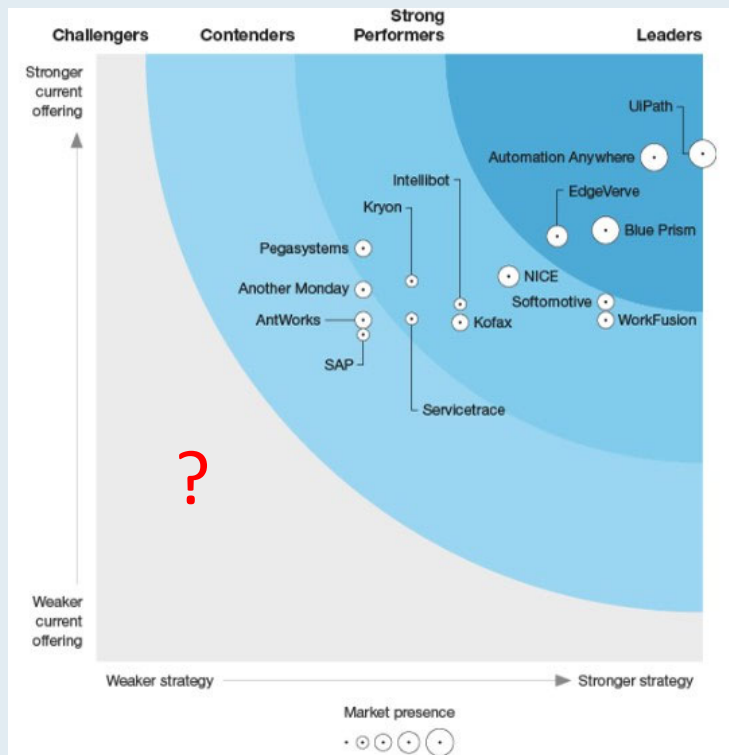
GitHub

Integration





Forrester Wave RPA – Q4 2019 vs. Q1 2021





Gartner Magic Quadrant – Q2 2019 vs. Q2 2021

Figure 1. Magic Quadrant for Robotic Process Automation Software



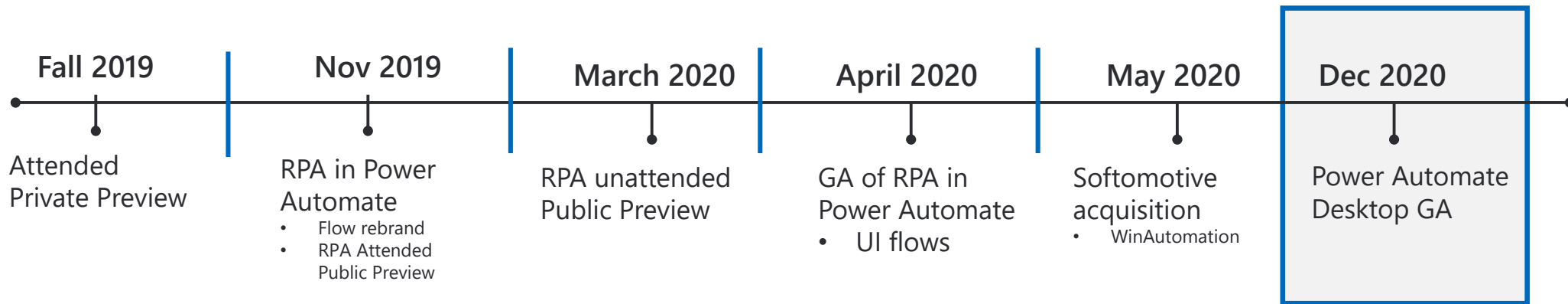
Source: Gartner (May 2019)

Figure 1: Magic Quadrant for Robotic Process Automation



Source: Gartner (July 2021)

Power Automate - RPA timeline



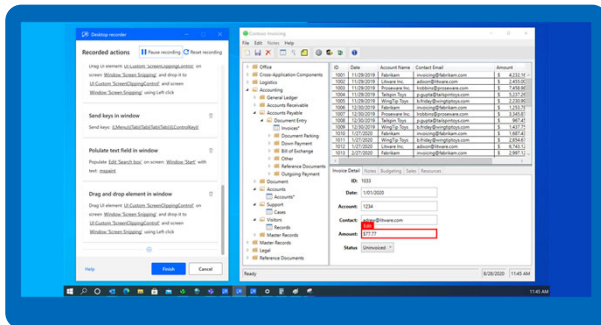
21
regions



43 languages

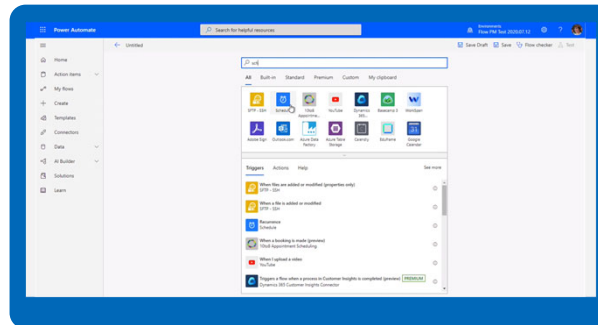


What you can do with Power Automate Desktop



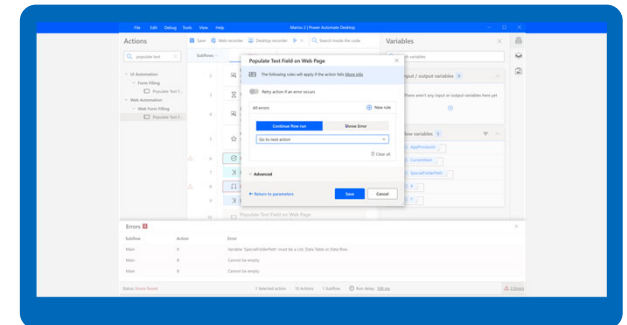
Automate locally

Focus on work that matters to you and your team. With flexibility to run your automations in either **attended** or **unattended** mode, automate local and legacy applications.



Build with ease

Drive **organic adoption** of RPA across your organization with one of the most **user-friendly platforms** for building desktop automations, with simple step recorders and an intuitive drag-and-drop designer.

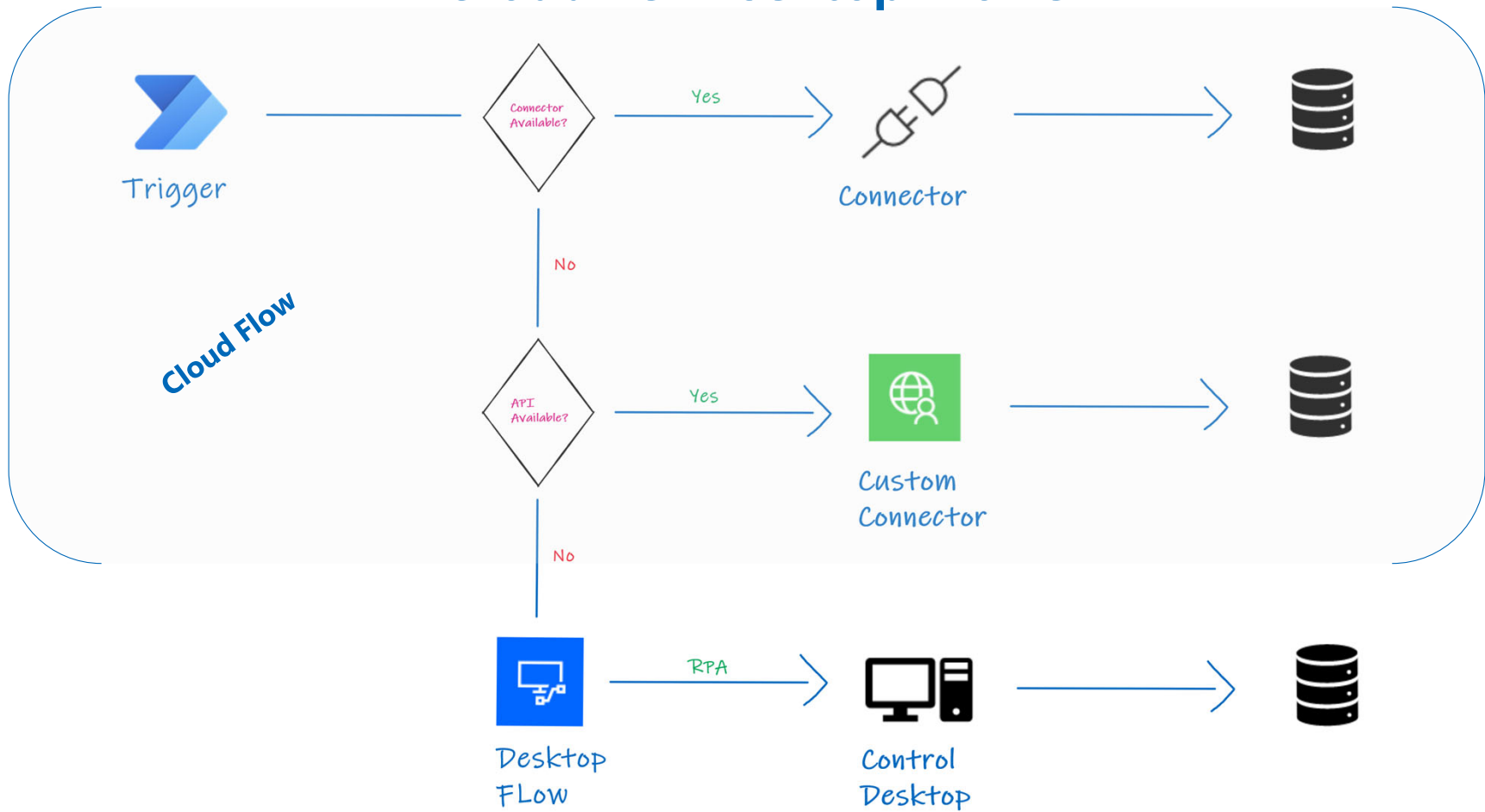


Process Discovery

Save time deciding which processes to automate by using the new process advisor tool to automatically incorporate processes into the designer.

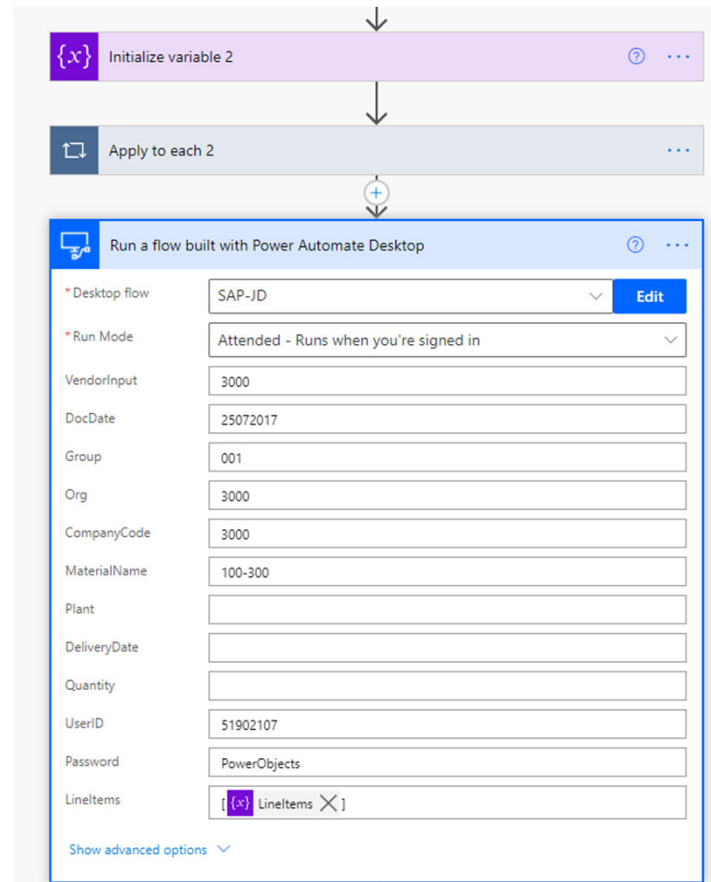


Cloud vs. Desktop Flows





Triggering Desktop Flow From Cloud Flow



●●POWER
●●OBJECTS

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RPA Overview



What is RPA?



Robotic process automation (RPA) is a productivity tool that allows a user to configure one or more scripts (referred to as “bots”) to activate specific keystrokes in an automated fashion.

The result is that the bots can be used to mimic or emulate selected tasks (transaction steps) within an overall business or IT process.

These may include manipulating data, passing data to and from different applications, triggering responses, or executing transactions. RPA uses a combination of user interface interaction and descriptor technologies.




Robotic Process Automation (RPA)

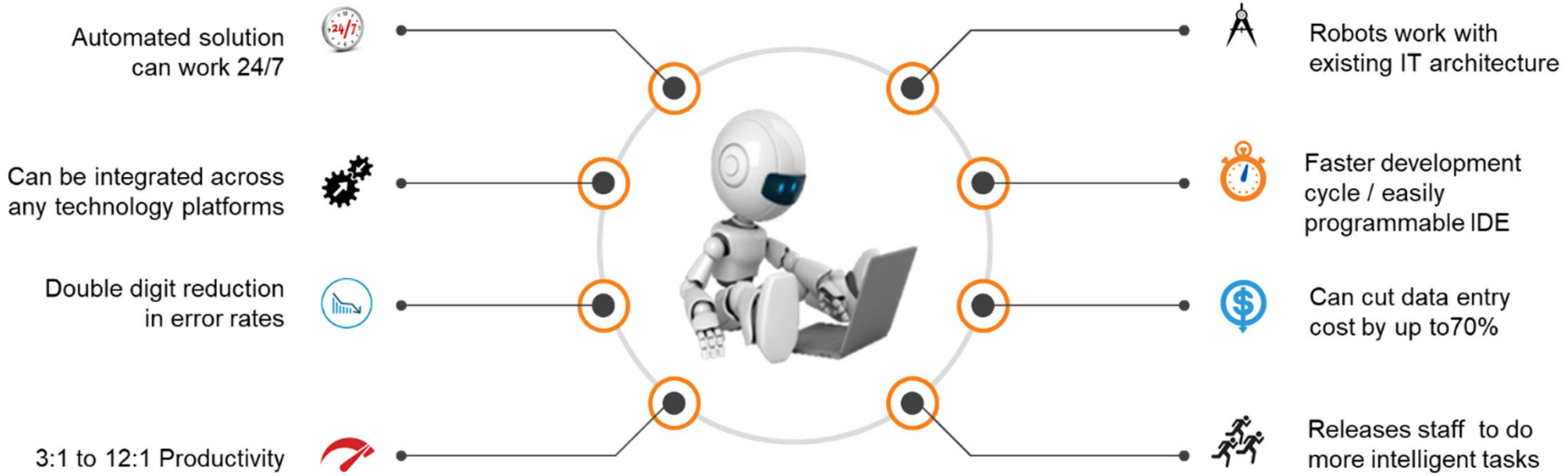
	 Attended Human initiated	 Unattended Fully automated
Overview	Drive efficiencies and automate manual, individual tasks across desktop and web	Accelerate the automation of high-volume and tedious tasks without lifting a finger
Scenario	On-demand task automation	Automate company processes at scale
Audience	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

Why RPA?

 Emulates human execution of repetitive processes with existence applications **1**

 Virtual workforce controlled by business operations teams **2**

 Sits alongside existing infrastructure, governed and controlled by IT **3**





Focus on High Value Activities

Eliminate

Simplify

Standardize

Automate

Where does this go?



Resource Reallocation, Risk Aversion, CSAT/ESAT, Decrease T2D, Gain Insights



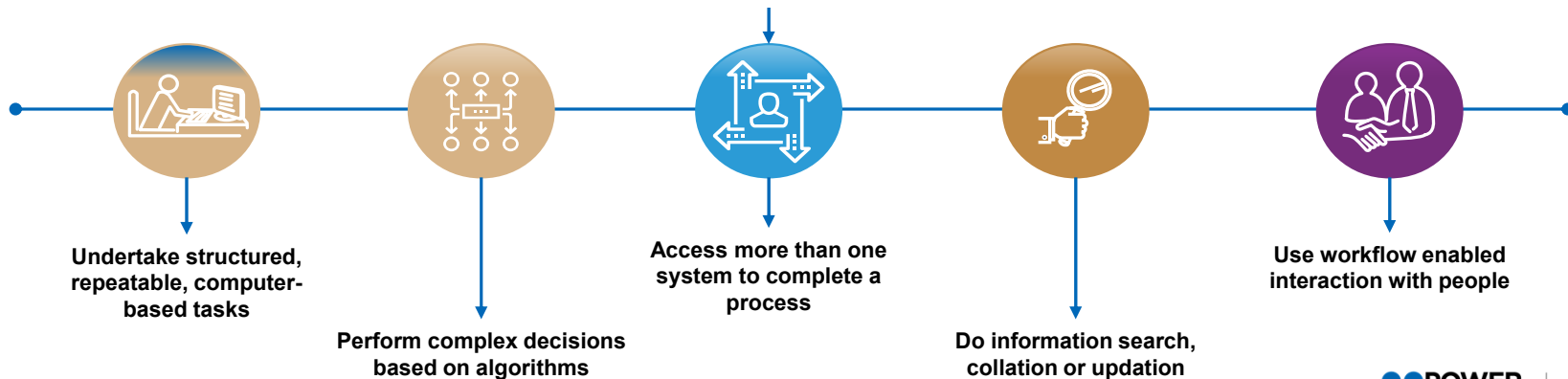
When to use RPA?

- Data entry and validation, data consolidation
 - File and data manipulation
 - Automated formatting
 - Multi-format message creation
 - UI manipulation
 - Web scraping



Robotics Automation can be effectively used by teams and individuals who:

- Text mining
- Uploading and exporting
- Downloading and importing
- Workflow acceleration
- Currency/exchange rate processing
- Reconciliations... and many more



Sample RPA Use Cases Across The Enterprise

Finance and Accounting	Sourcing and Procurement	Regulatory and Compliance	Financial Risk Management	Cyber Risk and Resilience
<p>Fixed Asset Accounting</p> <ul style="list-style-type: none"> Calculate asset depreciation <p>Procure to Pay (AP)</p> <ul style="list-style-type: none"> Manage incoming vendor invoices Process vendor payments Handle vendor inquiries/disputes <p>Order to Cash (AR)</p> <ul style="list-style-type: none"> Establish sales quotes. Validate sales orders Monitor customer credit Create and distribute customer invoice Process customer payments and apply cash <p>Record to Report (GL)</p> <ul style="list-style-type: none"> Record journal entries GL account reconciliation Intercompany transactions Maintain accounting master data <p>Travel and Expense</p> <ul style="list-style-type: none"> Audit expense reports 	<p>Contract Management</p> <ul style="list-style-type: none"> Systematically vetting of contract details and populating appropriate metadata is captured in straight through processing systems <p>Invoice Processing</p> <ul style="list-style-type: none"> Scanning invoices and automatically preparing payment file using logic and rules to validate invoices and route to appropriate teams to manage exceptions (no middleman) <p>Reconciliation</p> <ul style="list-style-type: none"> Automatic evaluation of open orders or non-receipts through business logic and rules route to appropriate team for resolution or close item <p>Spend Analytics</p> <ul style="list-style-type: none"> Robust spend analytics tools to allow for a single stop for supplier management, contract compliance and spend data 	<p>Licensing and Registrations</p> <ul style="list-style-type: none"> Data entry and validation for U4 Form and other jurisdictional forms Transfer amendments <p>Personal Account Dealing</p> <ul style="list-style-type: none"> Periodic disclosure attestations with changes. Review of account openings with paper statements. Paper trade entry Paper statement uploading to accounts Transfer disclosures <p>Outside Affiliations and Private Investments</p> <ul style="list-style-type: none"> Affiliations and investment reviewing with papers artefacts and responses from other functions within the organization Periodic disclosure attestations Transfer disclosures <p>Gifts and Entertainment</p> <ul style="list-style-type: none"> Reconciliation of the gifts and entertainment to expense system 	<p>Risk Change Explain</p> <ul style="list-style-type: none"> Identification and explanation of exposure movements Determination of data-related or business-related causes for exposure movement <p>Limits Management</p> <ul style="list-style-type: none"> Perform evaluation of credit limits Determine causes for limit breaches Recommend or perform remediation action based on circumstance <p>Risk Reporting</p> <ul style="list-style-type: none"> Aggregate and segment data for standard reports (e.g., Top 50 Counterparty Report) <p>Data Quality</p> <ul style="list-style-type: none"> Execute timeliness, accuracy, and comprehensiveness checks, and initiate remediation actions where required <p>Data Quality Control Testing</p> <ul style="list-style-type: none"> Ongoing evaluation of real-time, in-line controls, or post-process controls on data 	<p>Control Assessment</p> <ul style="list-style-type: none"> Analyze standardized control evidence to substantiate effectiveness <p>Activity Tracking</p> <ul style="list-style-type: none"> Examine system logs to identify suspicious or illegal activity <p>Client On boarding / Know Your Customers</p> <ul style="list-style-type: none"> Validate customer due diligence info and enter into account opening system <p>Reporting</p> <ul style="list-style-type: none"> Compile information into standard reporting formats, and act on results <p>Data Reconciliation</p> <ul style="list-style-type: none"> Reconcile processes, risks, and controls across operational risk management and business process management systems. <p>Anti-Money Laundering (AML)</p> <ul style="list-style-type: none"> Suspicious activity report prep based on AML monitoring outcomes <p>Comprehensive Capital Analysis Review</p> <ul style="list-style-type: none"> Run models, and prepare reporting based on model outputs

●●POWER
●●OBJECTS
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Governance & Security

Integrate automation, more securely



Security and compliance

Build in an environment founded on **security and compliance**.



Identity management

Access secure, cloud-based identity and management services via **Azure Active Directory (AD) native integration**.



Enterprise-grade governance

Apply enterprise-grade governance and **customizable data loss prevention (DLP) policies**.

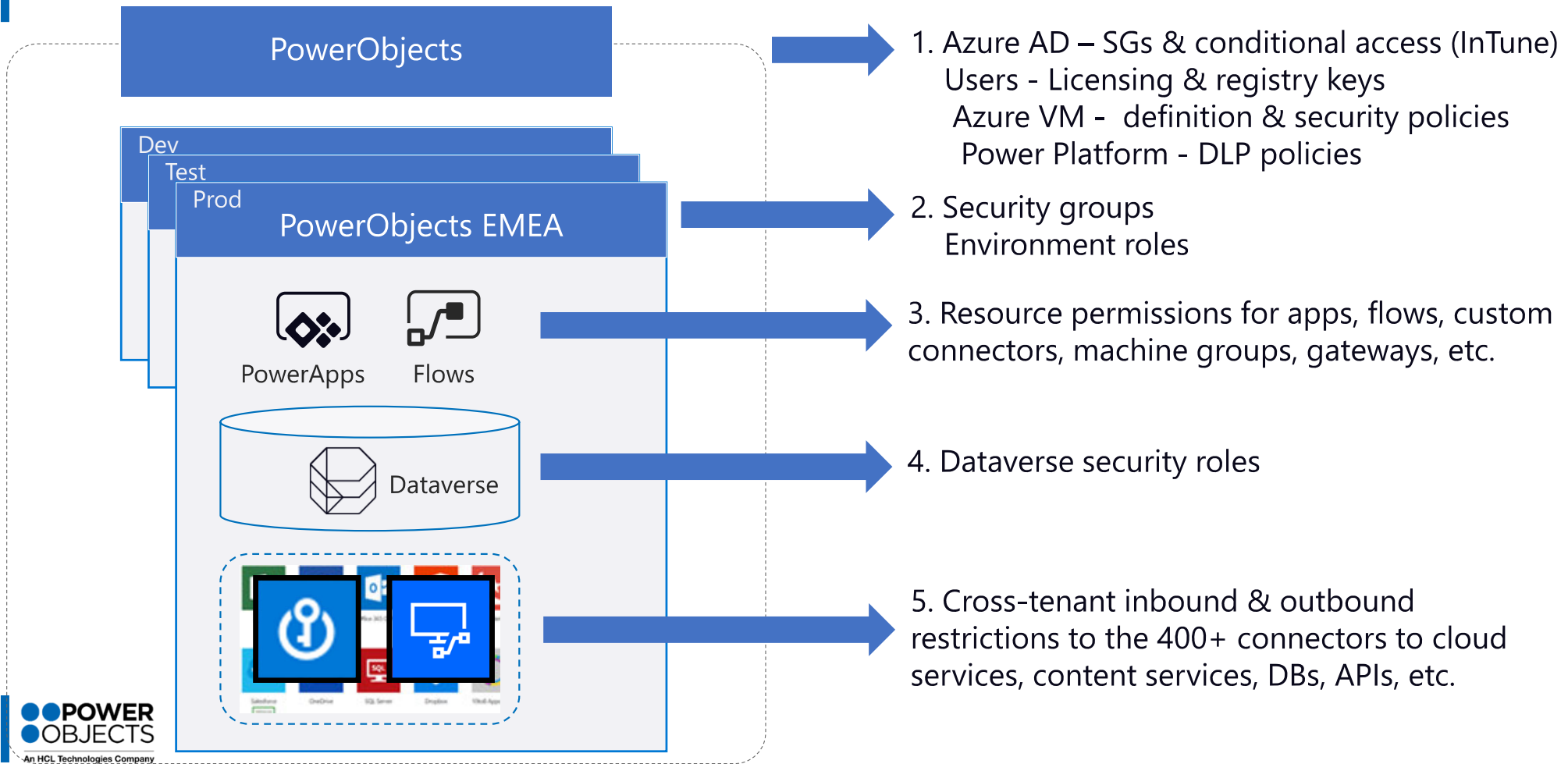


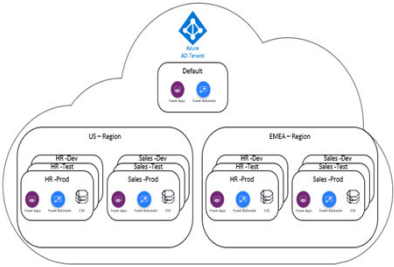
Cloud and on-premises

Integrate **cloud-based and on-premises data** with purpose-built security.



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Typical Environment Strategy

- User and team productivity
- Important Project
- Critical Project

Everyone has access, personal productivity and small team apps (ex. less than 25 users)



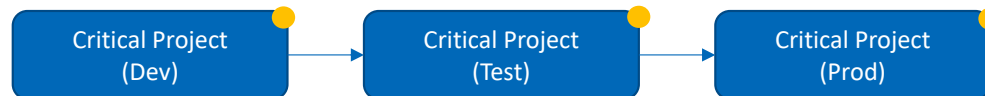
One user per environment. Completely locked down and cannot be used for anything other than development.



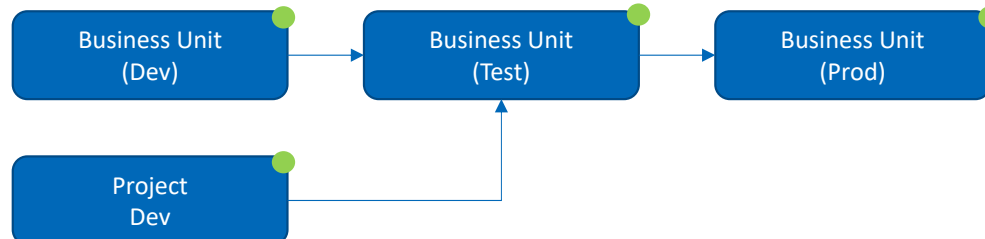
Collaboration between user and team productivity solutions. Approved Users and App Makers.



Dedicated environments for critical project workloads. End users can only access prod.



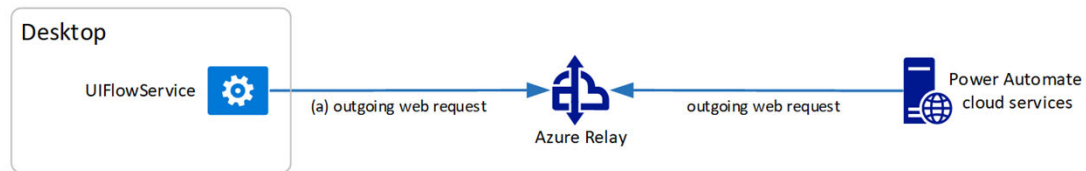
Important but medium complexity apps. Development environments per business unit and larger projects by BU. Shared test & prod environments.



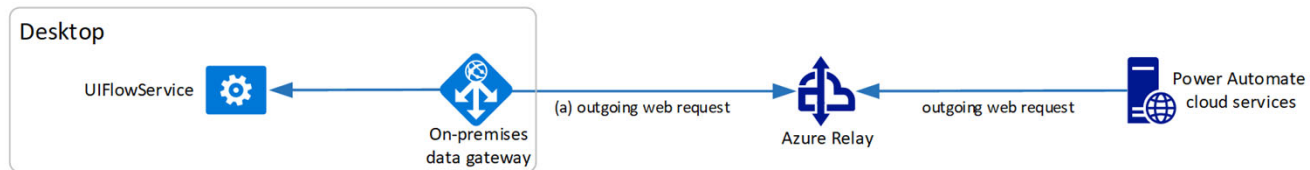


PAD Architecture

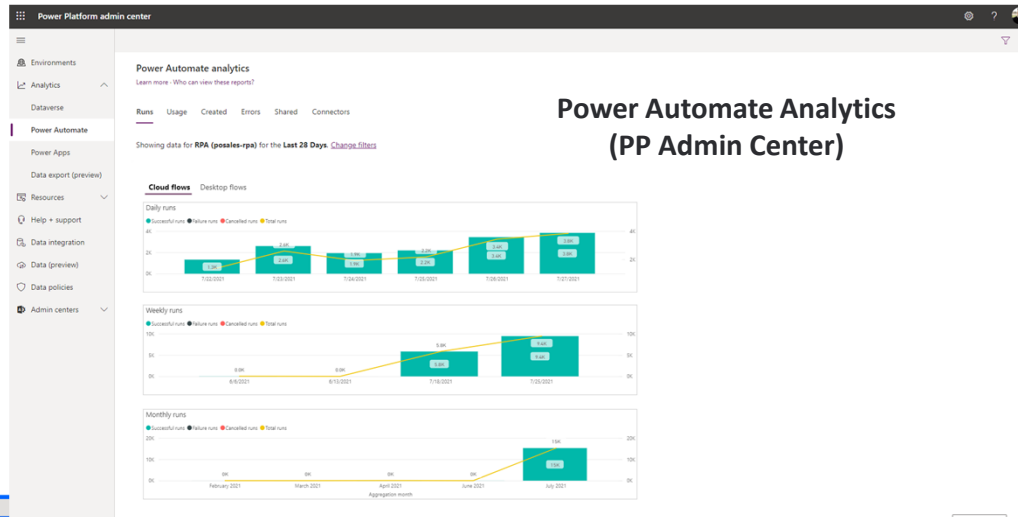
1. Attended/Unattended desktop 'direct' connectivity to the cloud service



2. Attended/Unattended desktop connectivity to the cloud service using the on-premises data gateway



Monitoring



+COE Starter Kit

+MS Security & Compliance Audit Logs

Power Automate

Search for helpful resources

Auto refresh Off

Desktop flow runs

Here's a quick overview of the desktop flows you have running. [Learn more](#)

Requested	Desktop flow	Status	Run start	Run mode	Machine	Group	Parent flow
Jul 22, 05:56 AM (6 d ago)	UnattendedRPA	Succeeded	Jul 22, 05:56 AM (6 d ago)	Attended	---	---	Private flow
Jul 22, 05:36 AM (6 d ago)	UnattendedRPA	Succeeded	Jul 22, 05:37 AM (6 d ago)	Unattended	---	---	Private flow
Jul 22, 05:34 AM (6 d ago)	UnattendedRPA	Failed	---	Unattended	---	---	Private flow
Jul 22, 05:32 AM (6 d ago)	UnattendedRPA	Failed	---	Unattended	---	---	Private flow
Jun 8, 01:16 PM (1 mo ago)	Standard Invoicing Demo	Failed	---	Attended	---	---	Document Automation Com...
Apr 1, 05:02 PM (3 mo ago)	Reset Standard Invoicing Demo	Succeeded	Apr 1, 05:02 PM (3 mo ago)	---	---	---	---
Apr 1, 04:52 PM (3 mo ago)	Standard Invoicing Demo	Succeeded	Apr 1, 04:52 PM (3 mo ago)	Attended	---	Standard Invoicing Demo ...	---
Apr 1, 04:43 PM (3 mo ago)	Reset Standard Invoicing Demo	Succeeded	Apr 1, 04:43 PM (3 mo ago)	---	---	---	---
Mar 16, 03:32 PM (4 mo ago)	Reset Standard Invoicing Demo	Succeeded	Mar 16, 03:32 PM (4 mo ago)	---	---	---	---
Mar 16, 03:32 PM (4 mo ago)	Reset Standard Invoicing Demo	Succeeded	Mar 12, 01:49 PM (4 mo ago)	---	---	---	---
Mar 12, 01:49 PM (4 mo ago)	Reset Standard Invoicing Demo	Failed	Mar 12, 01:49 PM (4 mo ago)	---	---	---	---
Mar 12, 12:27 PM (4 mo ago)	Standard Invoicing Demo	Succeeded	Mar 12, 12:28 PM (4 mo ago)	Attended	---	Standard Invoicing Demo ...	---
Mar 12, 11:04 AM (4 mo ago)	Reset Standard Invoicing Demo	Succeeded	Mar 12, 11:04 AM (4 mo ago)	---	---	---	---
Mar 11, 01:51 PM (4 mo ago)	Reset Standard Invoicing Demo	Succeeded	Mar 11, 01:51 PM (4 mo ago)	---	---	---	---
Mar 11, 01:51 PM (4 mo ago)	Reset Standard Invoicing Demo	Failed	Mar 11, 01:51 PM (4 mo ago)	---	---	---	---
Mar 11, 01:46 PM (4 mo ago)	Standard Invoicing Demo	Succeeded	Mar 11, 01:46 PM (4 mo ago)	Attended	---	---	Document Automation Com...
Mar 11, 01:37 PM (4 mo ago)	Reset Standard Invoicing Demo	Succeeded	Mar 11, 01:37 PM (4 mo ago)	---	---	---	---

Monitor Desktop Flow Runs

Auto refresh Off

Machines (preview) > My network machine

This is the description of the machine

Overview **Run queue**

Queue	Desktop flow	Requested	Priority	Status	Run start	Parent flow
1	Processing Invoice	1 h ago	High	Running	1 min ago	Database record management
2	Automate data sync	1 h ago	Moved to top	Quarant	---	Extend project access
3	Private flow	---	---	Quarant	---	Private flow
4	Record maintenance	1 h ago	High	Quarant	---	Demo with from app
5	Private flow	---	Normal	Quarant	---	Private flow

Monitor Machines



Additional Topics

•Machines

- Gateways vs Machine Groups
 - All machines in machine group must have same local account w/same password
 - Sharing = User (can run Desktop flows on group) or Co-Owner (run + share, edit details, add/delete machines)
 - Gateways will be used for connectors to access on premise, not required for PAD anymore (direct connection to machines)
 - [Machine specs](#)
 - Use windows server 2016 or 2019 to run bots as multiple users on single machine
 - [IP address configuration - Power Automate | Microsoft Docs](#)
 - [Silent Registration for Machines](#)
 - Mass deploy PAD on multiple machines via register machines to PA
- Permissions
 - Default - all environment makers can register their machines in an environment
 - Adjust permissions based on security roles by modifying Flow Machine and Flow Machine group table permissions for a given role

•Licensing

- All users can use PAD free on Windows 10 unless disabled (attended)
- Power Automate w/Attended RPA required for premium connections, trigger from cloud flow, published to cloud.
- [Prevention](#) (block access with registry keys)
 - Manually updating PAD
 - Logging into PAD w/MS Account
 - Configure PAD to interact with a corporate proxy server
 - Configure PAD to authenticate to a corporate proxy server using the current user's credentials

●●POWER
●●OBJECTS

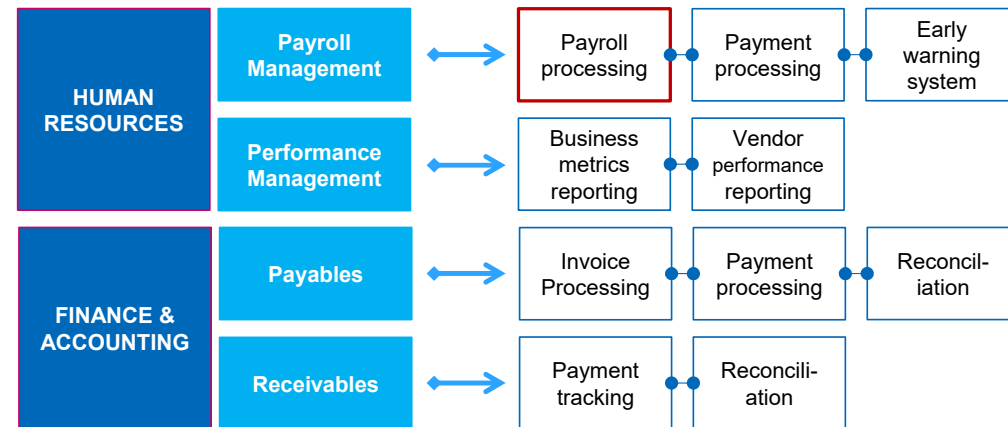
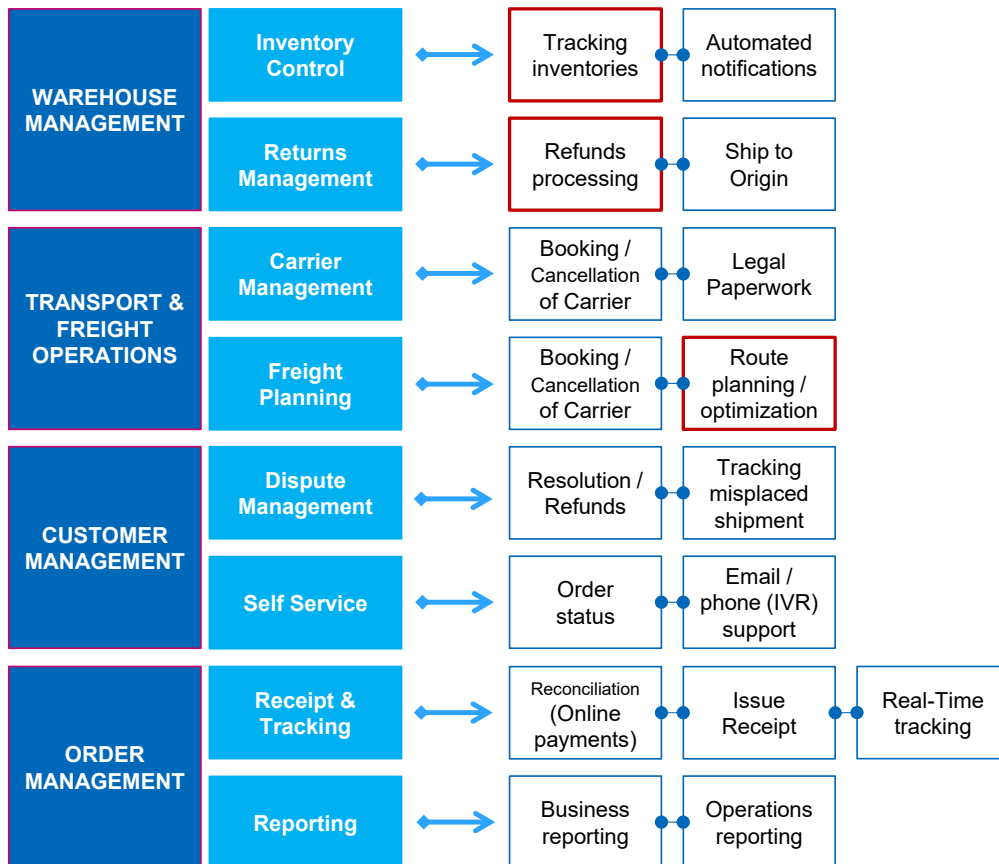
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Customer Use Cases & Stories



Process Automation





Process Opportunities in Finance Operations



Financial Ops & Accounting

- General Ledger Close
- Reconciliations
- Manual Journal Entries
- Intercompany Settlements
- Fixed Asset Management
- Regulatory & External Reporting



Financial Planning & Analysis (FP&A)

- Budgeting
- Forecasting
- Variance Analysis
- Management Reporting



Treasury Operations

- Consolidated Cash Position Reporting
- Cashflow Forecasting
- Foreign Exchange (FX) Exposure Data
- Bank Statement Consolidation



Tax Operations

- Tax Provisioning
- Tax Compliance
- Tax Accounting
- Data Management & Reconciliation



Accounts Payable

- Vendor Setup
- Purchase Order Creation
- Invoice Validation
- Invoice & Lease Payments
- Travel & Expense Reimbursements
- Payables Reporting



Accounts Receivable

- Customer Setup
- Sales Order Processing
- Invoice Creation
- Collections
- Payment Processing
- Receivables Reporting

RPA Case Study - SOP Based PO Creation

Purchase order creation

Problem Statement

Multiple sources of Orders



Variance in sources



Manual Collation of Orders



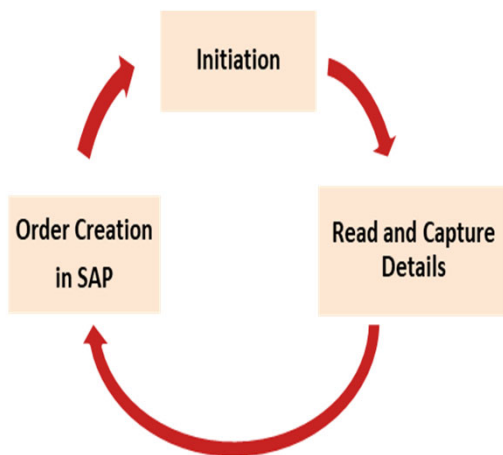
Manual Fixation



Lack of Central Repository



Process



Occurrence : ~ 8000 Orders/month
Teams Involved : Business Process Team
Manual Effort : 5 – 30 minutes/order

Manual efforts saved (hours/year)

5024

RPA Solution

Power Automate Desktop - BOT would be used to automate the manual work

- Connecting to mailboxes and Capturing details from emails
- Extracting PDFs from emails/ ITSM tools
- Extracting details from MS Excel files attached in emails
- Capturing details from Word Document attached in emails
- Reading/Extracting details from Web portals



Efficiency



Effectiveness



Experience

Indicative Benefits

Number of Orders received in PDF format = 38400/year

Manual effort for Order Creation = 10 minutes/Order

Manual effort saved (hours/month) for 40% records = 418

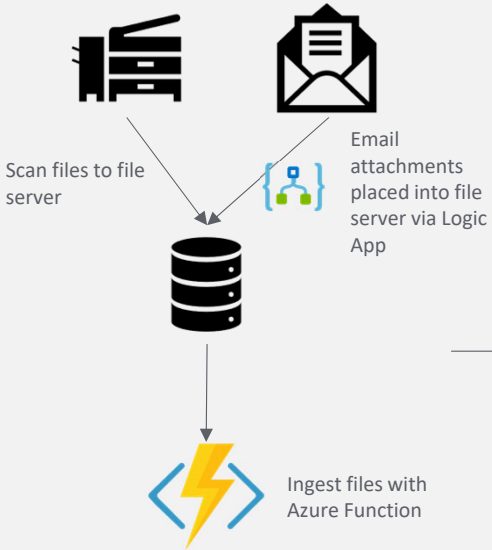
Productivity Improvement of 79%

All requests for Order Creation will be digitized in a structured format

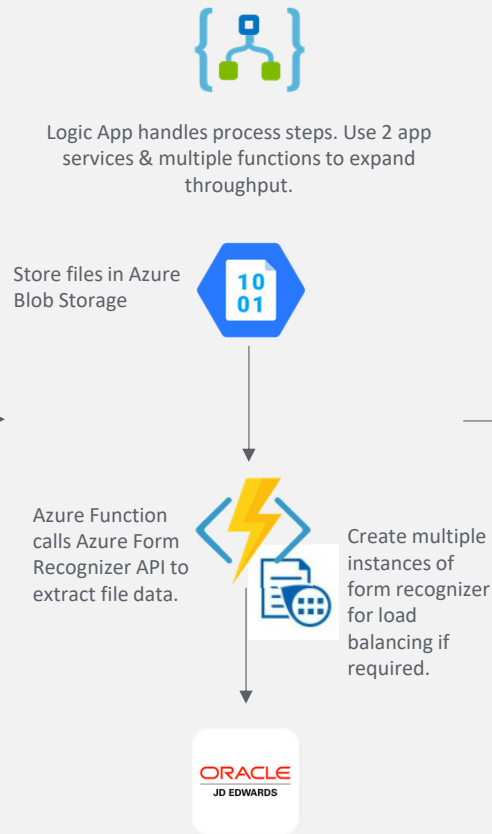
Improved processing times for Order Creation due to automation

Reduction of manual entry errors

Ingest



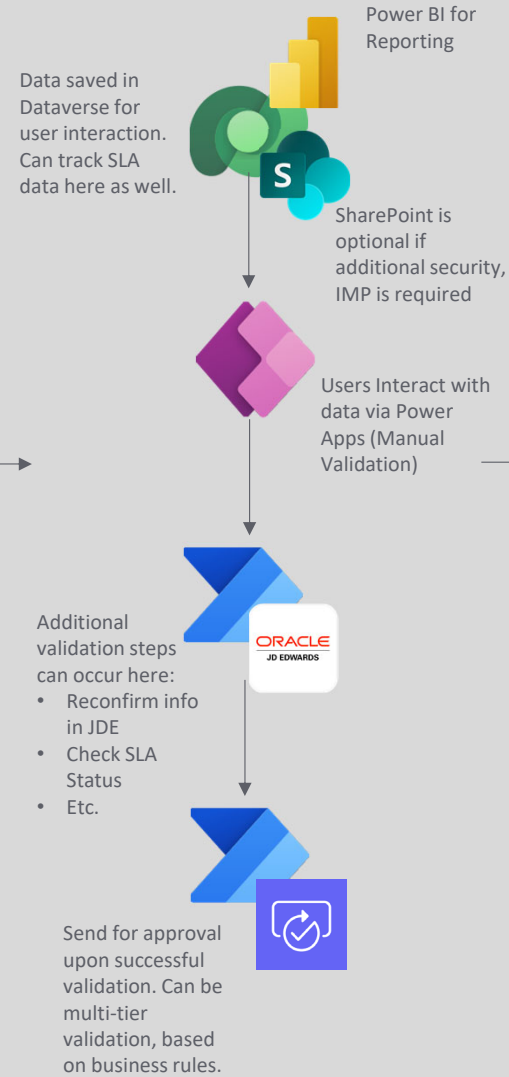
ETL



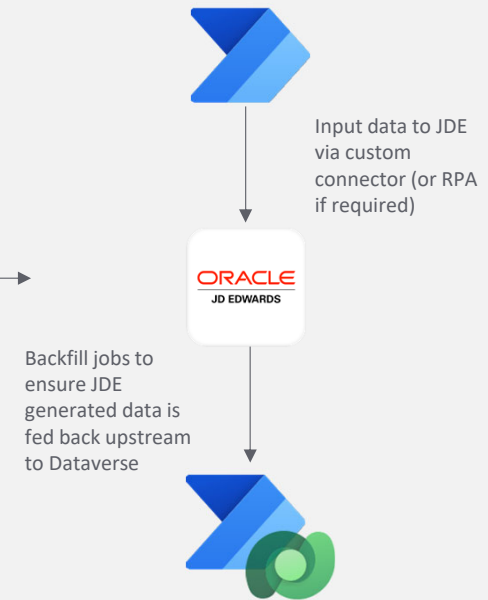
Logic App calls JDE (Custom Connector) for defined validation steps:

- Duplicate Check
- Validate Supplier, Purchase Info

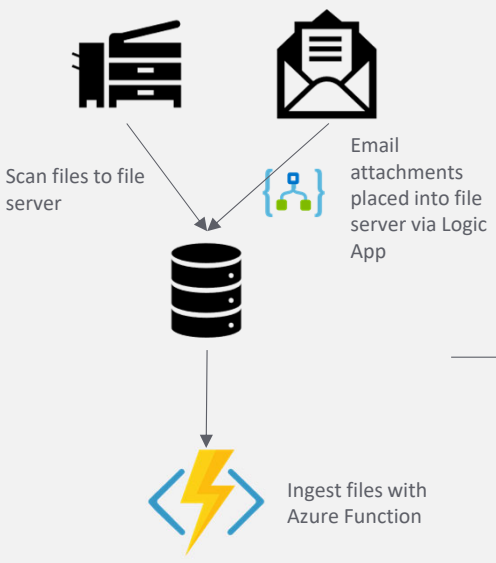
Process



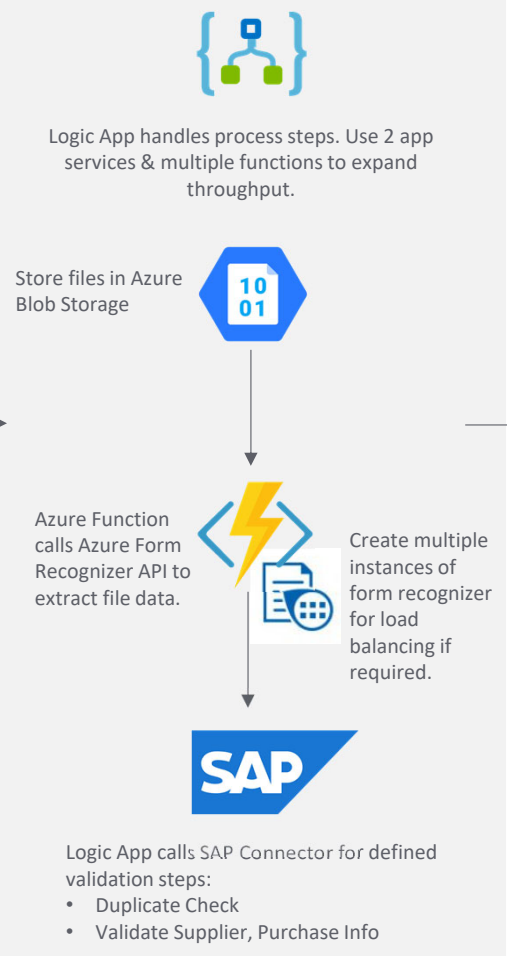
Input



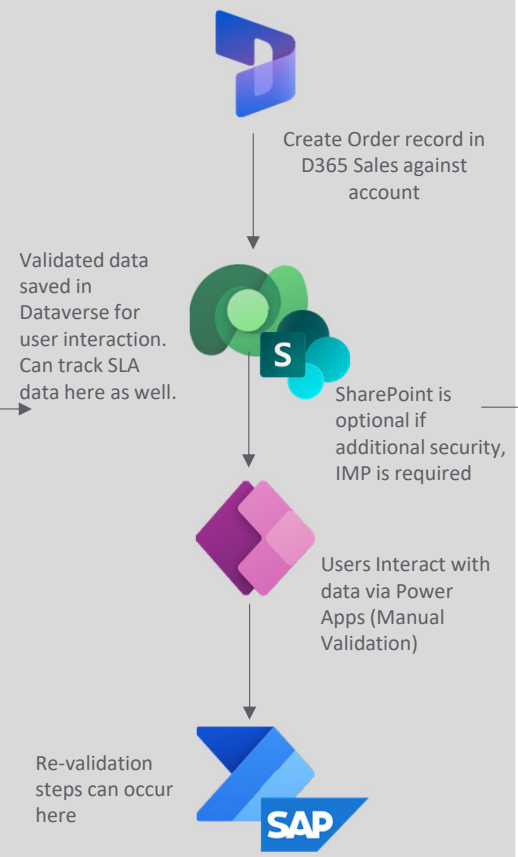
Ingest



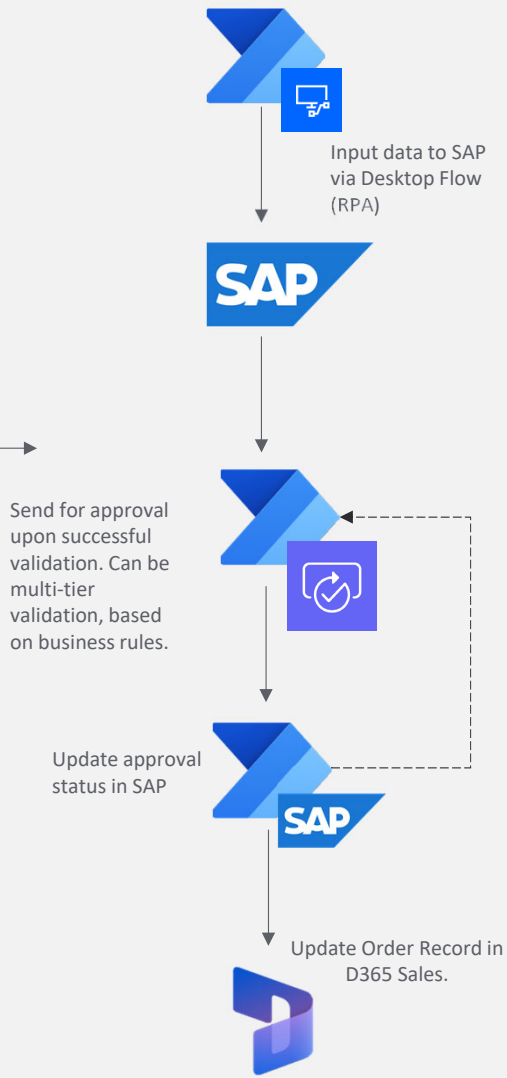
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Process



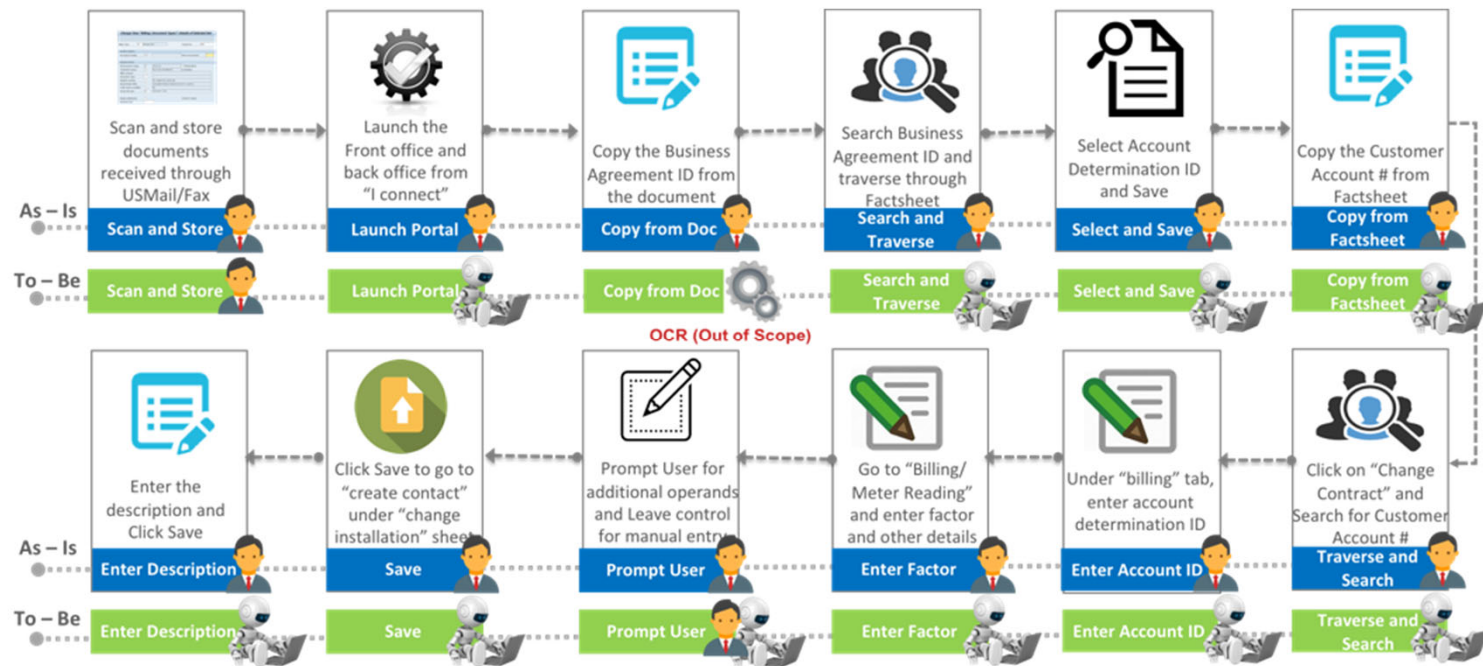
Input & Approve



Detailed Use Case – Sales Tax Exemption and Refund

Leveraging RPA and Process mining techniques to improve Sales Tax Processing scenario through Business aware Operations focus...

Techniques leveraged – End to End Process Mining, Event Correction, Activity mapping, and RPA



Benefits delivered



Reduction In Manual Process



Improved Accuracy



Decreased Processing Time





Other Recent Projects

- Cost Center Refresh – \$3B Global Manufacturing Company
- PO Processing – \$400M Global Manufacturing company
- PO Processing – Large Telecommunications Company
- 3 x IT Automation Use Cases – Industry Leading Oil & Gas Company

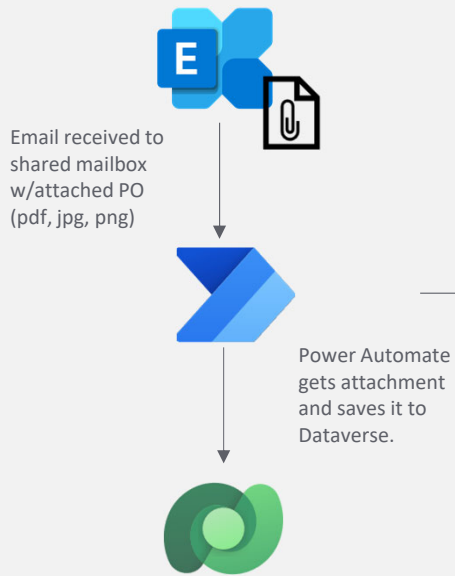
●●POWER
●●OBJECTS

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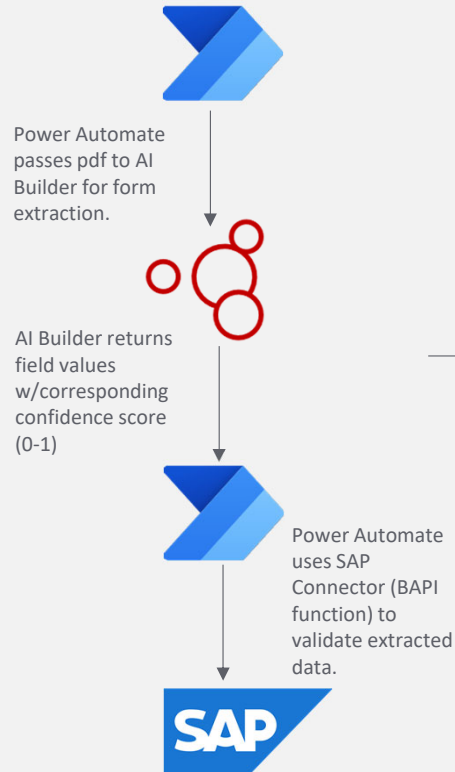
HCL

Demo

Ingest



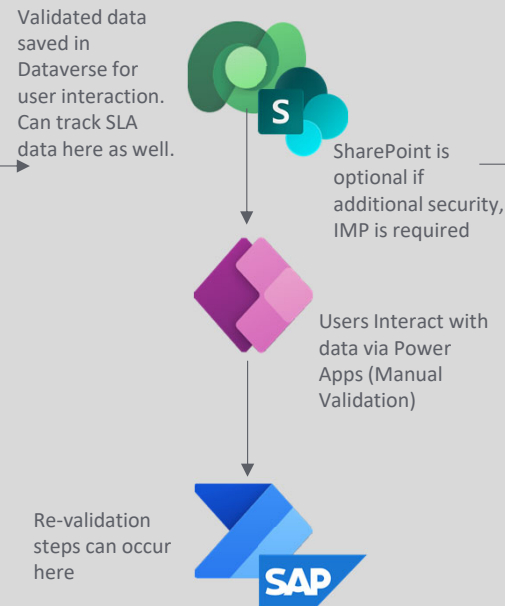
ETL



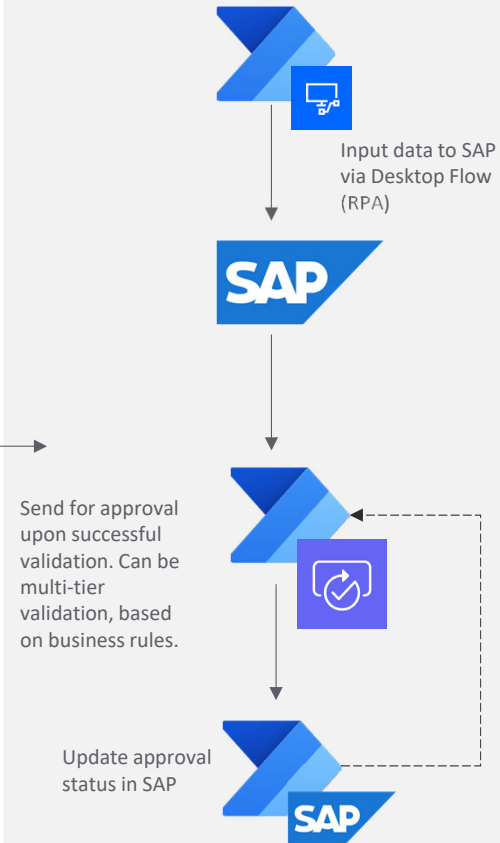
SAP Connector can be used for various types of validation, such as:

- Duplicate Check
- Validate Supplier, Purchase Info, Pricing, etc.

Process

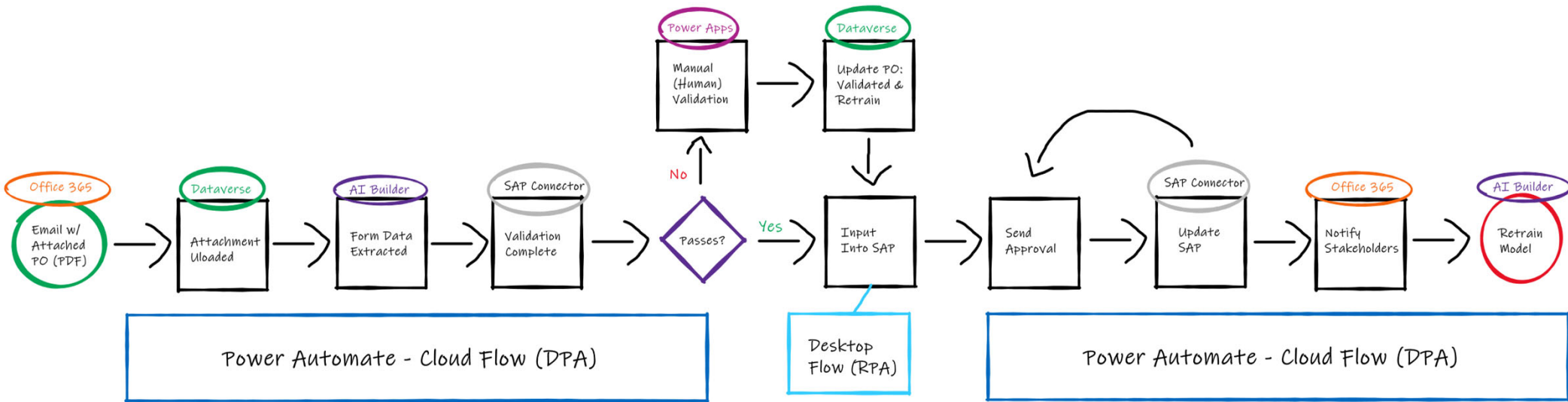


Input & Approve





Workflow



Mail - Training Demo - Outlook x Document Automation Appli... x

https://outlook.office.com/mail/inbox

Outlook Search Meet Now Attach Encrypt Discard

New message

Send Attach Encrypt Discard

To tra Bcc

Cc Training Demo trainingdemo1@GTMDemoPowerProperty.o... Search Directory

Add a subject

Send Discard

Select an item to read (No subject)

Favorites

- Inbox
- Sent Items
- Drafts 2
- Add favorite

Folders

- PO Power Prop... 1
- New group
- Discover groups
- Manage groups

Groups

Focused Other Filter

- Microsoft Flow Release PO - 4500019703 Tue 9:36 PM TD Requested by Training Demo <trainingdemo1...>
- Microsoft Flow Release PO - 4500019711 Tue 9:36 PM TD Requested by Training Demo <trainingdemo1...>
- Microsoft Flow Release PO - 4500019710 Tue 9:36 PM TD Requested by Training Demo <trainingdemo1...>
- Microsoft Flow Release PO - 4500019695 Tue 9:36 PM TD Requested by Training Demo <trainingdemo1...>
- Microsoft Flow Release PO - 4500019686 Tue 9:36 PM TD Requested by Training Demo <trainingdemo1...>
- Microsoft Flow Release PO - 4500019696 Tue 9:36 PM TD Requested by Training Demo <trainingdemo1...>

●●POWER
●●OBJECTS

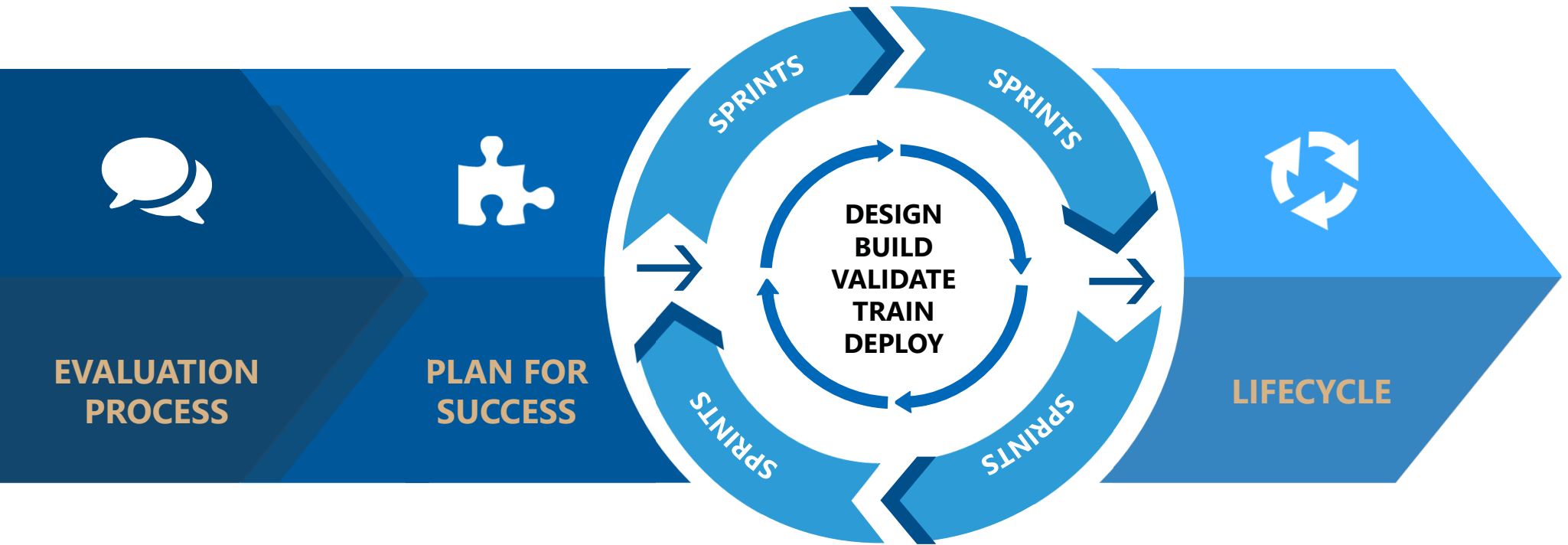
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Development & Migration Approach



Proven Process



**EVALUATION
PROCESS**

**PLAN FOR
SUCCESS**

SPRINTS

SPRINTS

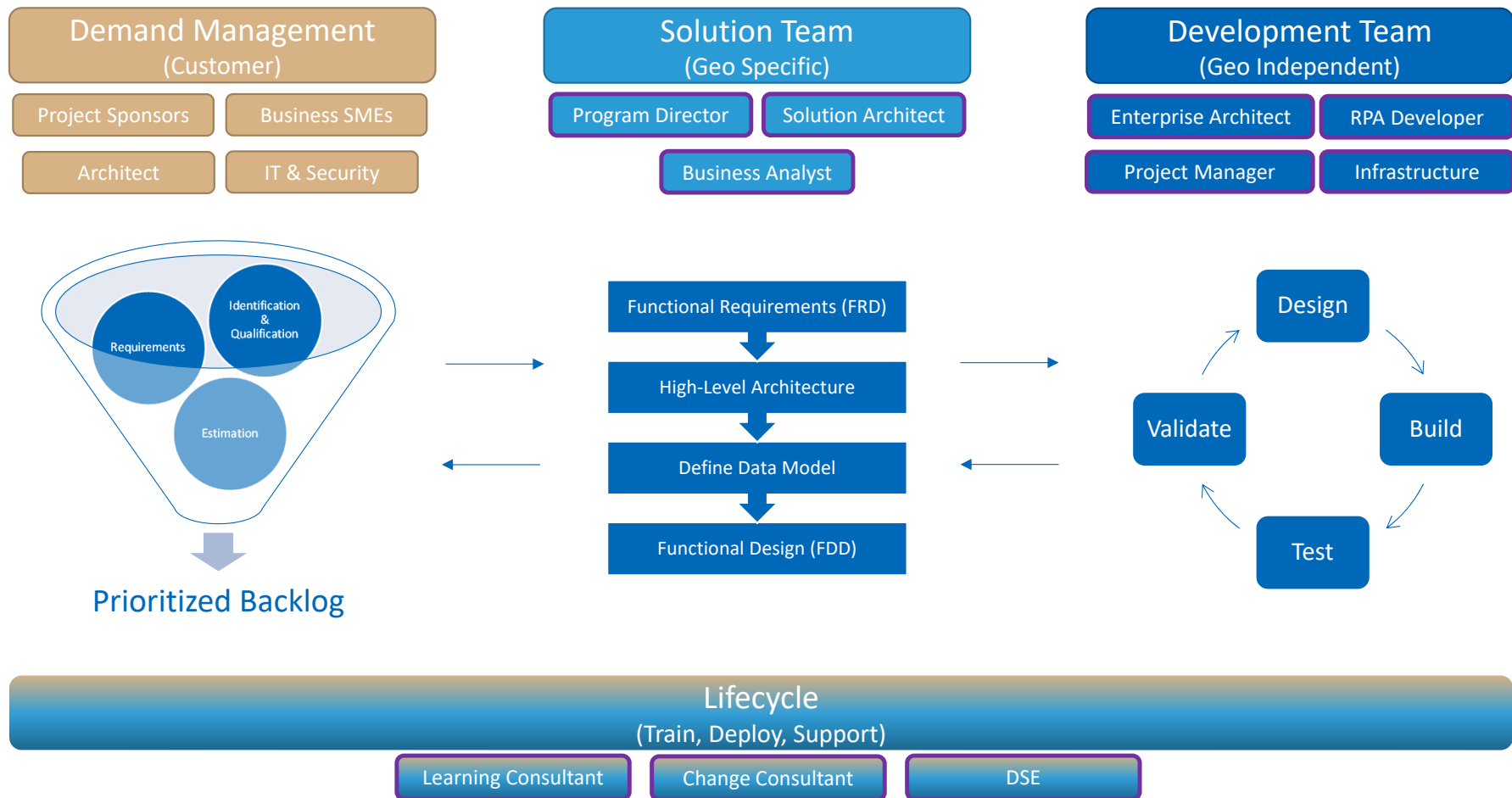
SPRINTS

SPRINTS

**DESIGN
BUILD
VALIDATE
TRAIN
DEPLOY**

LIFECYCLE

Delivery Approach



PowerObjects | Agile Bot Migration

Program Management Project Director & Project Manager

Engagement

- Structure a 180-day program
- Multiple Teams working concurrently on assigned Bots.
- Each Bot will follow its own Proven Process including UAT and rollout.
- This allows for rapid development in workstreams and to immediately get engaged, committing to a capacity-based SOW where we define & commit to roles over time.

Initial Workload:

Gather complete inventory of all candidate Bots. Obtain necessary information about each Bot (user count, data domains, process documentation, integration systems, and priority/importance).

Ongoing Workload:

Works with the Bot inventory to rationalize Bots & to assign workload to respective teams. Also supports both teams with design & build phases.

Application Rationalization Team

Quick/Small Team

Business Analyst
Solution Architect
Developer

Focus on quick & small bots

Business Analyst

Solution Architect

Developer

Infrastructure

Complex Team

Business Analyst
Solution Architect
Developer

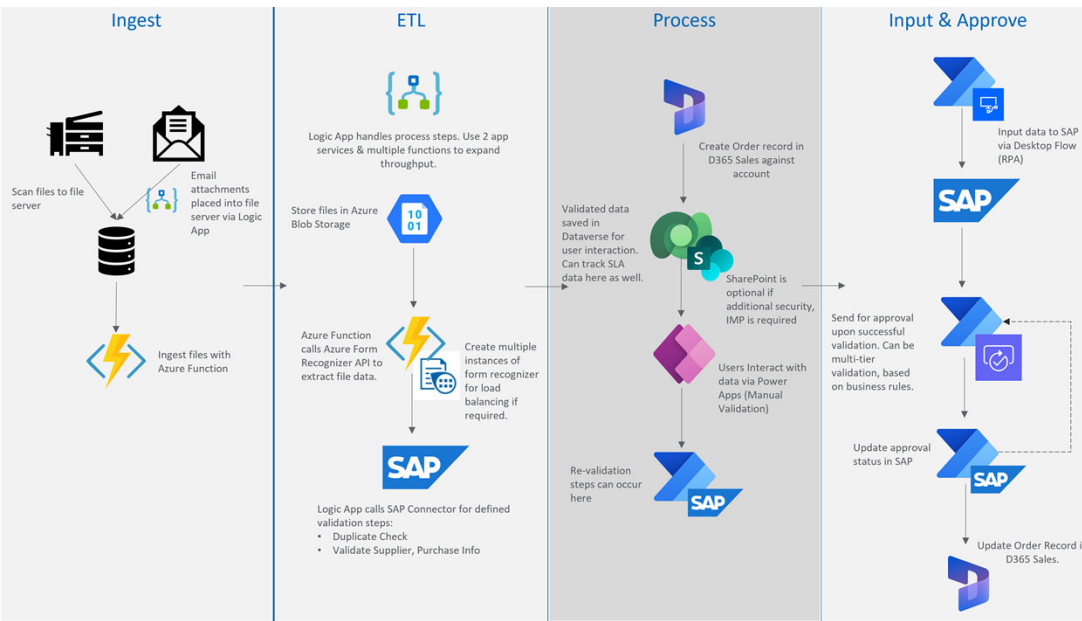
Focus on complex bots

●●POWER
●●OBJECTS

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SAP Accelerator

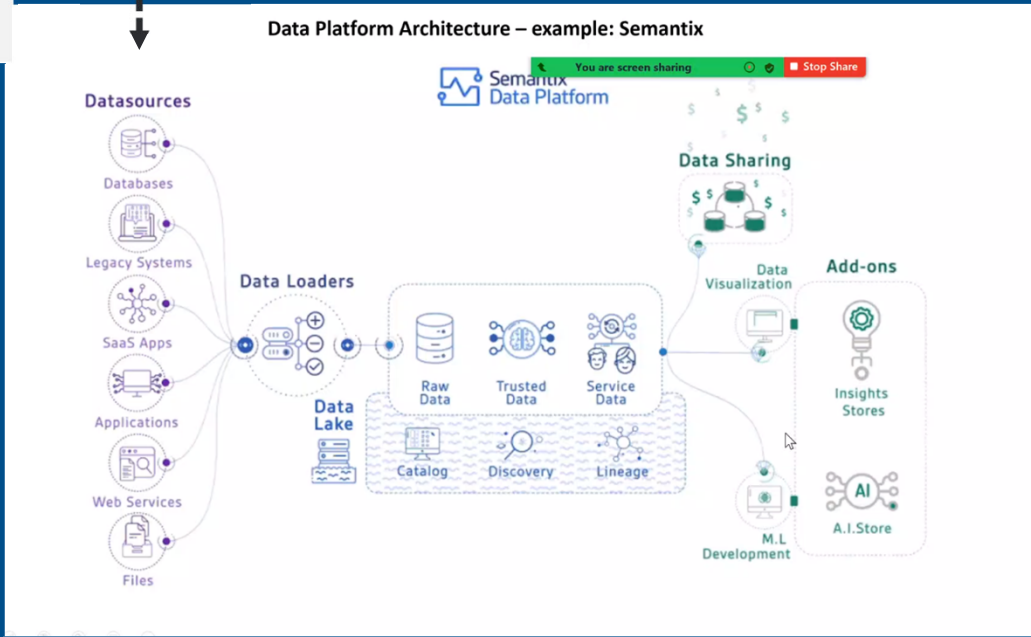


Now that data is in SAP, it can be pulled into data platform architecture as originally designed.

Dataverse = Processing Status
 D365 Sales = Order Status
 SAP = Purchase Order Status

Automated PO Processing

Data input into SAP w/little to no human interaction
 SAP approvals extended (made simpler) w/Power Automate





Start Re-envisioning Your Process Portfolio

Contact us to get started

 www.powerobjects.com

 powerobjects.com/events

 joshua.darragh@hcl.com





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MICROSOFT DYNAMICS 365

THANK YOU!

Aisle 1000

SAMSUNG

Sonus

Ques

icertis

APT

PDW PEOPLE WHO GET IT

CISCO

Zerto

Zerto

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bmc

SIMPLY THE COMPLEX

Acquia

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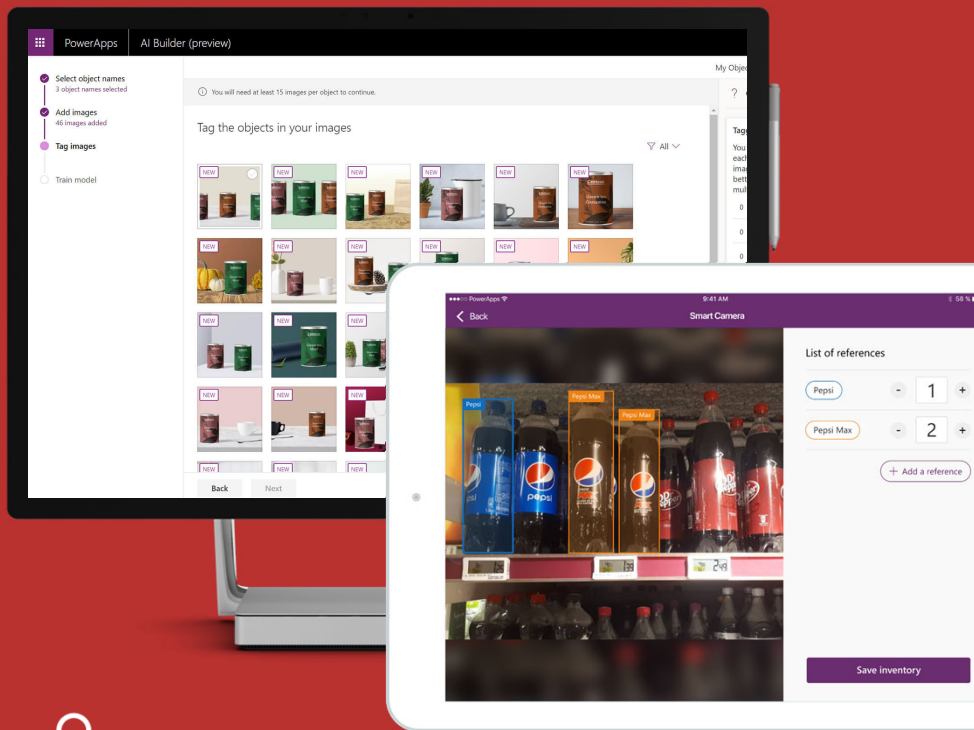
●●POWER
●●OBJECTS

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AI Builder

Infuse artificial intelligence in your business solution with AI Builder



- Every citizen developer is now an AI expert and can easily build, train, deploy and use **AI Builder**
- Create and organize contact and account data more efficiently with **business card scanner**
- Predict outcomes directly from historical business data patterns with **Prediction**
- Spend less time in the field trying to locate, identify and count items with **object recognition**
- Reduce PDF and paper forms data re-entry efforts and errors with OCR **forms processing and receipt scanning**
- Gather insights and trigger actions from natural language processing with **text classification**
- Augment feedback insights with **Sentiment Analysis**





Common Issues w/AI Form Recognition

1. Special Characters Accuracy
 - i.e. \$, * - [
 - Confusing “1” for “[“
 - Unable to recognize “.” or “,” i.e. “50.50” = “5050”
 - Spaces in Dates i.e. “7 / 15 / 2021”
2. Low accuracy for handwritten documents
3. Low accuracy for scanned documents with less than perfect quality
4. Accuracy of tables
5. Language support & accuracy
6. Number of documents required for training to reach usability
7. Number of documents processed at once
8. Lifecycle of retraining & publishing model
9. Infrastructure maintenance & updates
10. Reporting



Common Issues w/AI Form Recognition

Special Characters Accuracy

- i.e. \$, * - [
- Confusing “1” for “[“
- Unable to recognize “.” or “,” i.e. “50.50” = “5050”
- Spaces in Dates i.e. “7 / 15 / 2021”

Best Run USA

Bill To		Purchase Order	
Best Run USA	Best Run USA	Order #	Revision
7890 Broad Street	PO Box 310700	5324909-98	0
New York, NY 10001	New York, NY 10001		Page
United States	United States		1 of 1
Supplier		Buyer	
C.E.B. New York	Best Run USA		ABC Buyer
123 Fake St	7890 Broad Street		Buyer Email
New York, NY 10001	New York, NY 10001		abc@best.com
Supplier No.		Payment Terms	
3000	Upon Receipt		Confidence score
			99%
Confirm To / Telephone		Ship Via	
ABC Buyer / 123-456-7891			Ground

LINE DETAILS						
Line	Part Number	Delivery Date	Qty	UOM	Unit Price	Extended Price
310	100-400	30-JUL-2017	1000	EA	\$155.00	\$155,000.00
						Total USD \$155,000.00

The Terms and Conditions for Purchase Orders located at "www.contoso.com/purchaseordertermsandconditions" are incorporated by reference into this Purchase Order, and are integral and material terms of this Purchase Order and the agreement between the parties. Unless the parties have executed a separate master supply & purchasing agreement and/or service agreement, the Terms and Conditions noted above shall govern. A copy of the Terms and Conditions for Purchase Orders will be provided to Supplier upon request.

EEO Clause in Section 202: "The Equal Employment Opportunity clause in Section 202 Paragraphs 1 through 7 of Executive Order 11246, as amended, relative

Best Run USA

Bill To		Purchase Order	
Best Run USA	Best Run USA*	Order #	Revision
7890 Broad Street	PO Box 310700	5324909-98	0
New York, NY 10001	New York, NY 10001		Page
United States	United States		1 of 1
Supplier		Buyer	
C.E.B. New York	Best Run USA #001		ABC Buyer
123 Fake St	7890 Broad Street		Buyer Email
New York, NY 10001	New York, NY 10001 US		abc@best.com
Supplier No.		Payment Terms	
3000	Upon Receipt		Confidence score
			99%
Confirm To / Telephone		Ship Via	
ABC Buyer / 123-456-7891			Ground

LINE DETAILS						
Line	Part Number	Delivery Date	Qty	UOM	Unit Price	Extended Price
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Best Run USA

Bill To		Purchase Order	
Best Run USA	Best Run USA*	Order #	Revision
7890 Broad Street	PO Box 310700	5324909-98	0
New York, NY 10001	New York, NY 10001		Page
United States	United States		1 of 1
Supplier		Buyer	
C.E.B. New York	Best Run USA #001		ABC Buyer
123 Fake St	7890 Broad Street		Buyer Email
New York, NY 10001	New York, NY 10001 US		abc@best.com
Supplier No.		Payment Terms	
3000	Upon Receipt		Confidence score
			99%
Confirm To / Telephone		Ship Via	
ABC Buyer / 123-456-7891			Ground

LINE DETAILS				Total Amount	Extended Price
Line	Part Number	Delivery Date	Qty		
310	100-400	30-JUL-2017	1000	\$155,000.98	\$155,000.98
				Confidence score	99%
				Total USD \$155,000.98	

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Common Issues w/AI Form Recognition

Low accuracy for handwritten documents & scanned documents with less than perfect quality

Contoso, Ltd.
4567 Main St Buffalo
NY 90852
<http://www.contoso.com>
555-0123

INVOICE

PO# 1791003
1791003

Confidence score 99%

Nov 03, 2021
Nov 18, 2021

Balance Due: \$49.91


Bill to:
Wingtip Toys
567 Forest St
MD 98054
555-5652

Item	Qty	Amount
Complete golf set. Left-handed Rate: \$390.00	01	\$390.00
Portable clip-on umbrella Rate: \$27.44	01	\$27.44
Microfiber Golf Towels 3 Pack Rate: \$16.41	01	\$16.41
Golf Tees 25 Pack Rate: \$4.97	02	\$9.94



Common Issues w/AI Form Recognition

Accuracy of tables

 **Best Run USA**

Best Run USA
7890 Broad Street

Bill To
Best Run USA
PO Box 310700

Purchase Order		
Order #	Revision	Page

Detected table ×

Material	PO Quantity	Deliv. Date
100-300	10	30-JUL-2017
100-400	100	30-JUL-2017

LINE DETAILS


Line	Part Number	Delivery Date	Qty	UOM	Unit Price	Tax	Extended Price	
1	100-300	30-JUL-2017	10	EA	155.00	N	1,550.00	
2	100-400	30-JUL-2017	100	EA	4.00	N	400.00	
\$Total							USD	1,950.00

The Terms and Conditions for Purchase Orders located at "www.contoso.com/purchaseordertermsandconditions" are incorporated by reference into this Purchase Order, and are integral and material terms of this Purchase Order and the agreement between the parties. Unless the parties have executed a separate master supply & purchasing agreement and/or service agreement, the Terms and Conditions noted above shall govern. A copy of the Terms and Conditions for Purchase Orders will be provided to the Supplier upon request.



Common Issues w/AI Form Recognition

Language support & accuracy

 Best Run USA

Best Run USA
7890 Broad Street
New York, NY 10001
United States

Bill To
最佳运行 *
PO Box 310700
New York, NY 10001
United States

Supplier
纽约
123 Fake St
New York, NY 10001

Ship To
最佳运行 #001
7890 Broad Street
New York, NY 10001

Supplier No.
3000

Payment Terms
Upon Receipt

Confirm To / Telephone
ABC Buyer / 123-456-7891

Purchase Order		
Order #	Revision	Page
5324909-98	0	1 of 1

Date of Order	Buyer
	ABC Buyer

Buyer Email	Ship Via
abc@buyer.com	Ground

Purch. Group
最佳运行 #001

Confidence score
99%

LINE DETAILS							
Line	Part Number	Delivery Date	Qty	UOM	Unit Price	Tax	Extended Price
310	100-600	7/30/2017	1000	EA	\$155.51	N	\$155,000.98
Total							\$155,000.98

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Common Issues w/AI Form Recognition

Number of documents required for training to reach usability

Power Automate Search for helpful resources

Environments PO Power Property (def... ? ? 10

SAP Demo | Save and close

- Choose information to extract
8 fields, 1 table
- Add collections of documents
2 collections
- Tag documents
7 documents tagged
- Model summary

Add collections of documents

Add sample documents for your model to study. Put similar documents into the same collection.

Create a collection for each layout ⓘ

New collection

Add documents ⓘ

Contoso
6 documents

Best Run USA
7 documents

Quick tips

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

Improve the performance of your model
You must add at least five examples of your document type for each collection. Adding more than 25 examples could yield better results.

What does analyze do?
Your uploaded documents will be analyzed to identify their overall structure, detect form fields, and extract field values. This may take a few minutes.

Get help or send feedback
Get the answers you need, or tell us about your experiences.
[Get help](#)

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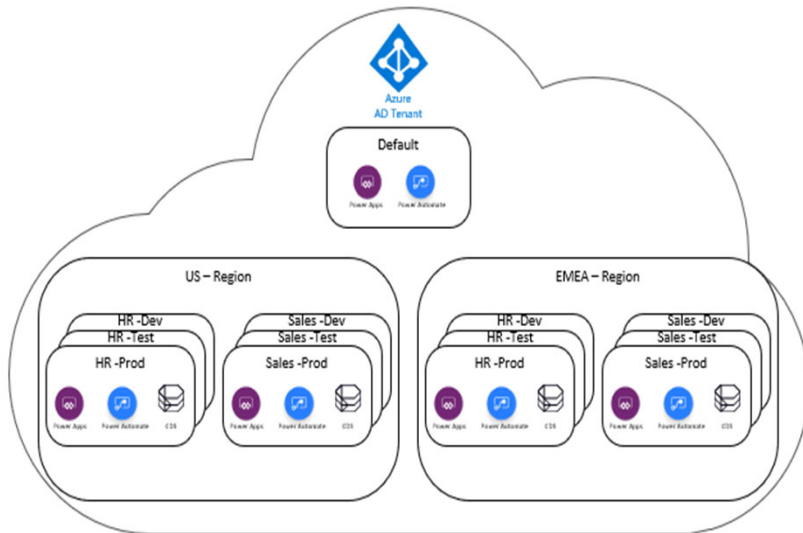
HCL

Back **Analyze** Add at least five sample documents for each collection



Common Issues w/AI Form Recognition

Lifecycle of retraining & publishing model



The screenshot shows the user interface for managing AI Form Recognition models. At the top, there are action buttons: **Edit model**, **Share**, **Settings**, and **Delete**. A yellow notification bar states: "You have an open draft for this model. Continue editing your draft or discard it to start a new one." Below this, the breadcrumb path is **Models > SAP Demo**, with sub-breadcrumbs **Form Processing**, **Published**, and **Training Demo**. Two tabs are visible: **Published version** (selected) and **Last trained version**. The main content area is titled **Training document** and includes a **See details** link. It displays a preview of a document with a **Blue Box USA** header. At the bottom of the document preview, there are buttons for **Use model** and **Quick test**, along with a vertical ellipsis menu. On the right side, a **Selected fields** list includes: **Payment Terms**, **Shipping Type**, **Currency**, **Vendor**, **Doc. Date**, **Purch. Org.**, **Purch. Group**, **Total Amount**, and **Line Items**.