Housekeeping Items

- Please mute yourselves

- If there aren't a lot of people, we'll take questions openly throughout the presentation

- Otherwise, feel free to ask question in the Chat panel or click the 'Raise hand' icon

- You can also join our Microsoft Teams Conference Channel and continue the conversation there (Ask Us How?)
    - Instructions: https://itrak365.com/conference-schedule/

- If you have question after the conference, see above or you can just email them to us via support@neosystems.com

- We can provide copies of the video and any presentation materials, just ask

- Check out our YouTube and LinkedIn pages as well

- Make sure to look at the Schedule for other sessions

An Introduction to a Powerful New Toolkit

"Paper is hard to avoid. It's still a ubiquitous part of many operations. It's lightweight, durable, simple to use, and an established tool in many operations.

But it's also poorly scalable, requires manual intervention, difficult to collaborate on, does not provide a lot of insight without digitization, and hinders or at least slows down decision making at many companies.

We're aiming to make the conversion of paper information into real, usable, reportable data a breeze!

With Microsoft's Power Automate, AI Builder, & ITRAK…it's simpler than you think."

Introductions

https://itrak365.com/about-us/#the-team

Tian Specht
Senior Developer

- 1 Year with ITRAK !
- 20 years in the software development industry
- Full stack development experience across a wide variety of languages, frameworks, and platforms

Tom Makarov
Customer Success Manager

- 1 Year with ITRAK !
- 18-year Software Industry veteran
- PM, Implementation, System Admin, Consulting, Help Desk, and more...

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Agenda

TECHNOLOGY

An Introduction to Power Automate

An Introduction to AI Builder

An Introduction to Robotic Process Automation (RPA)

How this all comes together

Demo

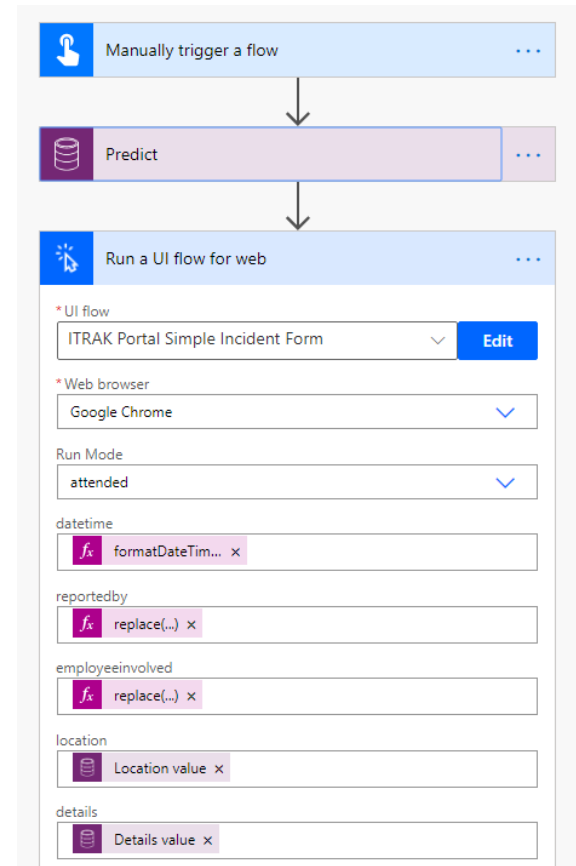**WHERE THIS CAN HELP**

Benefits

Examples where this can be used

How feasible is this right now?

Accessing this toolkit

Q&A

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Introduction To Power Automate

- Power Automate (formerly Microsoft Flow) lets you create automated workflows to implement business processes.

- Can be used to automate tedious manual processes or enable business logic.

- Workflows can be easily created using a drag and drop web-based interface.

- Has the ability to integrate with over 300 existing services using pre-built connectors and actions.

- Integrates with AI Builder to easily add artificial intelligence to your flows.

- Can also use robotic process automation (RPA) to integrate with existing desktop or web-based apps.

AI Builder – What Is It?

- New tool from Microsoft that was released for general availability at the start of April 2020.

- Is designed to allow businesses to harness the power of AI without requiring specialized coding or data science skills.

- Can be used by Power Automate to automate manual processes using a combination of AI recognition and robotic process automation (RPA).

- Contains a specialized processing model that can identify and extract field and table-based data from forms.

- Has the ability to predict outcomes based on historical data.

- Works with low or no code Power Apps to recognize text and visual information from your camera or images.

Training document — See details

Selected fields — See more

- Occurred Date/Time
- Reported by
- Employee involved
- Location
- Details

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Robotic Process Automation (RPA)

- Robotic process automation (RPA) is a capability of Power Automate that lets you automate manual processes in desktop or web-based applications.

- This gives you the ability to easily integrate with existing systems that do not have built-in support for automation.

- User interface flows can be created without code by recording mouse clicks, keyboard inputs, and entry of data.

- Flows can then be played back with different data values to automate data input.

- Connections between Power Automate and your local apps are protected with Microsoft security technology to keep data safe.

- Both attended and unattended automation options are available. Attended automation runs while you are logged into your computer and unattended automation runs without anyone needing to be logged in.

Command	Target	Value
click	id=56917574-5291-ea11-a811-000d3af3a7a7	
type	id=56917574-5291-ea11-a811-000d3af3a7a7	${datetime}
click	id=EmployeeLabel	
click	linkText=${reportedby}	
click	id=Employee2Label	
click	linkText=${employeeinvolved}	
click	id=LocationLabel	
click	id=rbOther	
click	id=OtherLocation	
type	id=OtherLocation	${location}
click	id=locationeditsaveclose	
click	id=accefeb6-5291-ea11-a811-000d3af3a7a7	

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Putting It All Together

Steps to create a Power Automate flow to import a paper form into ITRAK:

1. Use ITRAK to create the Form Type you will be importing to.

2. Create a new AI Builder model and train it using your paper forms (5 or more are required for training).

3. Create a new Web UI flow and record the process of filling out your ITRAK form using the Chrome web browser. Edit the flow as needed and add input parameters that will be replaced with dynamic values.

4. Create a new Power Automate flow and choose a trigger. There are many different triggers available, a few examples are:
   • Sharepoint: When a file is created in a folder
   • OneDrive: When a file is created
   • Office 365 Outlook: When a new email arrives

5. Add a "Predict" action that uses your AI Builder model.

6. Add a "Run a UI flow for web" action and configure the inputs.

7. Trigger the Power Automate flow.

8. If there are any issues with the flow, check the results.

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Demo

10 mins

https://web.microsoftstream.com/video/5044179c-e53b-42ed-a192-f98cd49c9d72

Questions?

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Summary of Capabilities

- Scan

- Recognize Text (excellent)

- Recognize Handwriting (depends on messiness)

- Map to forms

- Populate forms

- On-demand or Batching

- Instantly available for Actions, Reporting, Querying, etc. in ITRAK, Power BI and other reporting tools

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Benefits

- Saves time (vs. Manual Data Entry)

- Saves money

- Near-instant access to data

- Populates ITRAK directly!

- Allows you to discard old paper

- Improves Reporting by adding more to the dataset, quicker

- More complete view of your Data Ecosystem (no disjointed bits)

- Improves Decision Making capability

- Frees up people to do more meaningful or valuable work

Examples of where this could be used

- Paper Forms being filled out now and then doing double-entry to get it into ITRAK

- Paper Forms being filled out and then being re-entered by Data Entry people later

- Paper Forms being filled out and then scanned and emailed to management

- Old Forms that were never digitized. Want them for Historical Reporting

- Archiving

- Auditing

- Combining data 'islands' together (i.e. separate processes can now pool data in one place)

- Allow different offices/locations/sites to operate differently yet yield a singular data source

- Batching allows it to be more efficient too (vs. On Demand)

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How feasible/doable is this now?

- **Very!**
- Product is no longer in Microsoft beta (April 2020)

- Assuming that we're just:
  - Scanning a paper form
  - Mapping to an ITRAK form (done beforehand)
  - Recognizing the text/handwriting
  - Populating the ITRAK form
  - Reporting
- We only need to be able to access the data points

- Other scenarios would need further scoping
- Designed to be *almost* 'plug-n-play'
- Will have even more usage as features get developed

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How can I get my hands on this?

- *Can I see this for myself?*

- *What are the next steps if I want to implement this at my company?*

- *How are we going to deploy something like this if a customer is interested?*

- Install tools
- Microsoft Licensing
- Training

sales@neosystems.com or support@neosystems.com

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AND

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