

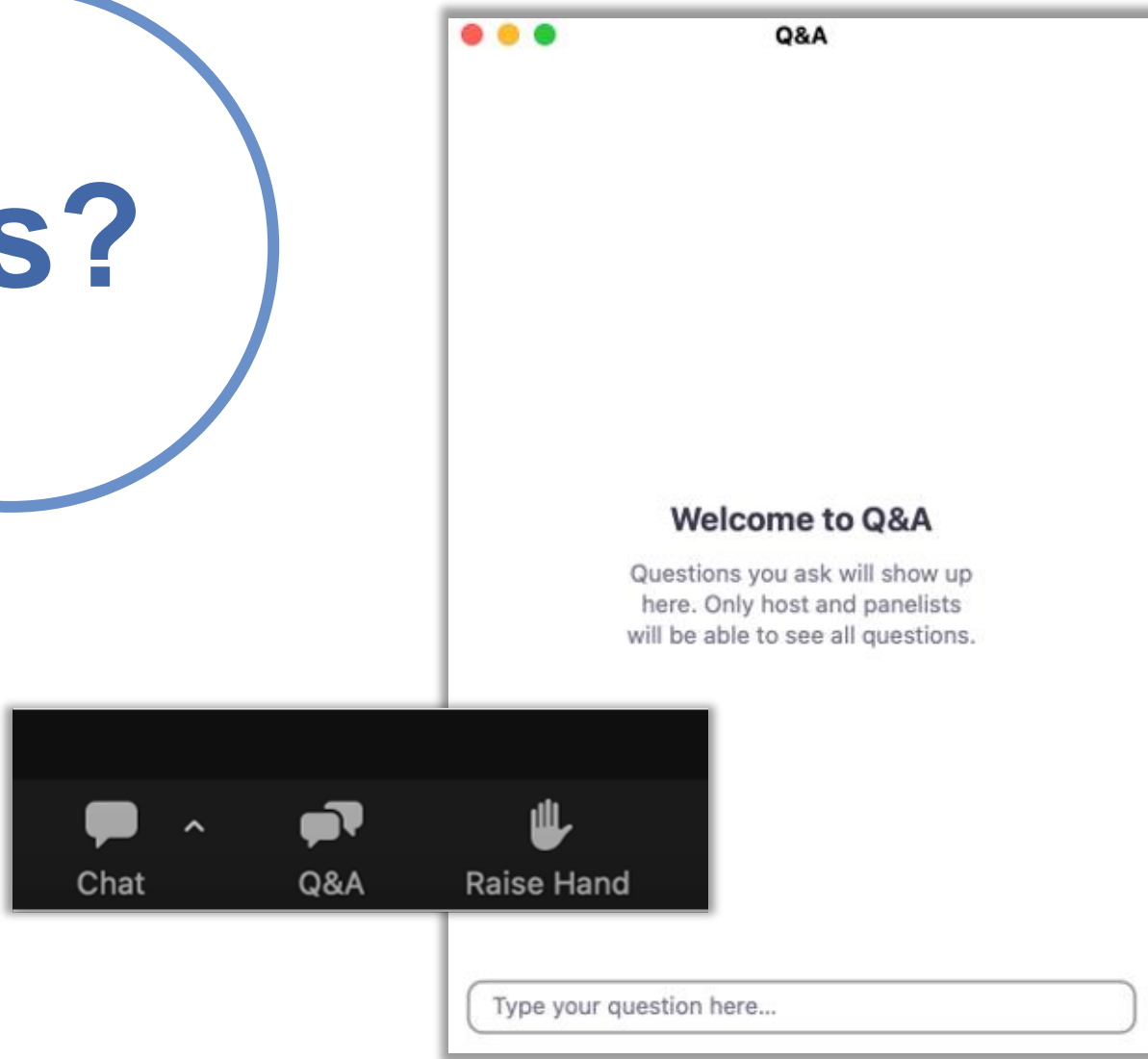


Evolving the Office of Finance:

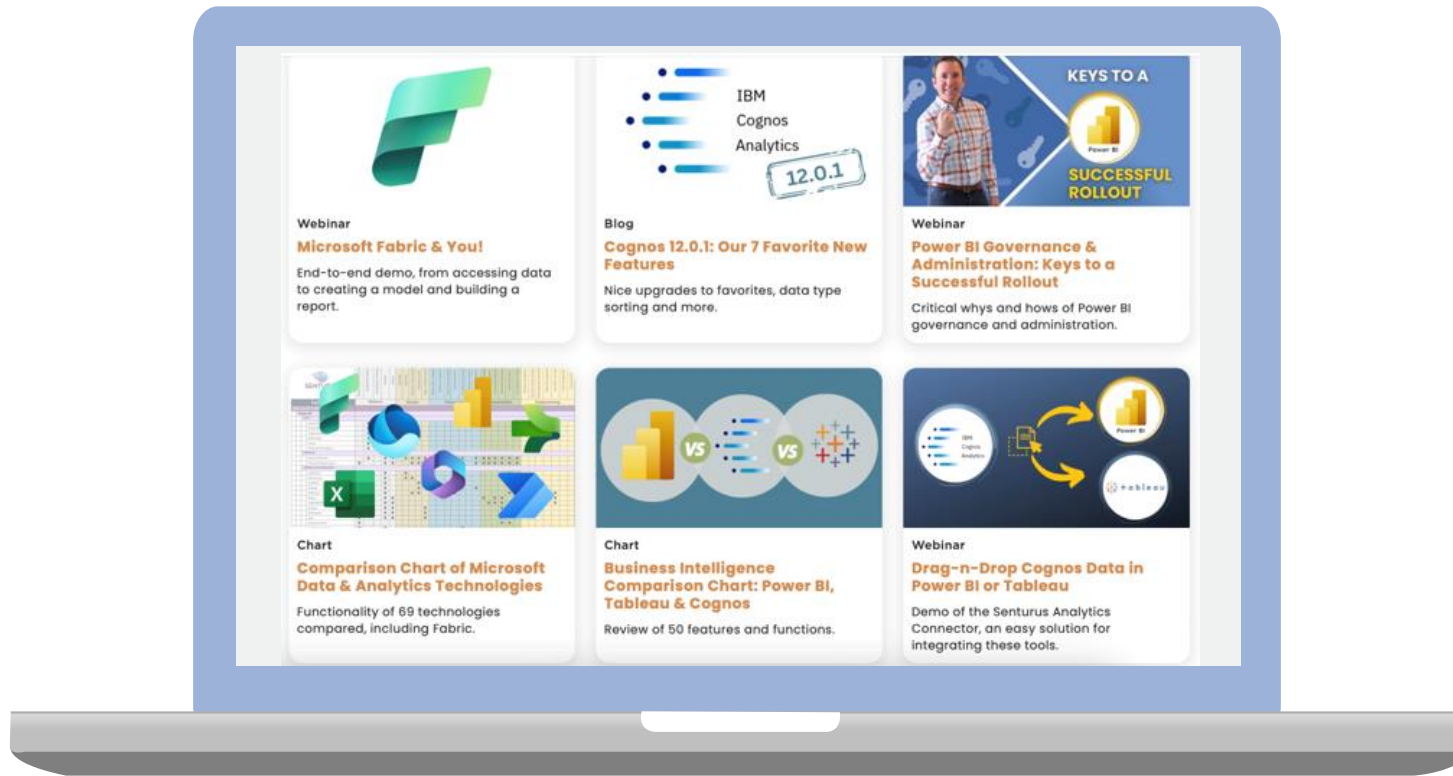
Copilot for Finance & Power Automate

Questions?

Click Q&A at
the bottom of
your screen



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Agenda

- Introductions
- The data-driven Office of Finance
- Copilot for Finance
- Power Automate
- Demos
- Additional resources
- About Senturus
- Q&A

Introductions



KEITH KNOWLES

Managing Director
Senturus, Inc. & Envisor



PAT POWERS

Data & Analytics Consultant & Trainer
Senturus, Inc.



Poll

Is your Office of Finance “data driven?”

- ☐ Yes
- ☐ No
- ☐ I’m not sure what that means

The data-driven Office of Finance

DATA-DRIVEN

- Elevates their “seat at the table” to a strategic, proactive partner
- Democratizes data & insights
- Invests in real-time data solutions
- Have automated their labor-intensive tasks

REALITY FOR MOST

- Reactive to requests for data and analyses
- Controls most of the information
- Somewhat blind to financial performance prior to close
- Has staff focused on repetitive data tasks

Only 20% of CFOs surveyed claim they are data-driven

Pillars of a data-driven OoF

Real-time

Stop waiting for the close

Get real-time financial performance

Democratization

Up your strategic game & drive business growth

Understand opportunities across your organization

Governance

Know where your data has been

Democratize your data safely and securely

AI / Automation

Replace human robots with AI & RPA

Automate labor-intensive processes

Automation opportunity

Activities that can be automated using demonstrated technologies, %¹



Source: McKinsey analysis

42% of Finance tasks can be fully automated.

An additional 19% can be mostly automated.

Prime targets

- Contract administration
- Payables / Invoice processing
- Receivables forecasting
- Reconciliations
- Anything that's manually processed is worth a look



OoF automation targets

ACCOUNTING

- Automating complex journal entries
- Performing and documenting account reconciliations
- Calculating and applying allocations
- Maintaining fixed-asset accounts

FINANCIAL PLANNING & ANALYSIS

- Building standard management reports
- Consolidating and validating budget and forecast inputs
- Gathering and cleaning data for analysis

ACCOUNTS PAYABLE

- Entering nonelectronic-data-interchange invoices
- Performing 2 and 3-way invoice matches
- Processing expense-approval requests
- Completing audits (e.g., duplicate supplier payments)

PAYROLL

- Flagging time-sheet errors and omissions
- Auditing reported hours against the schedule
- Calculating deductions
- Harmonizing data across multiple timekeeping systems

ACCOUNTS RECEIVABLE

- Generating and validating invoices
- Applying cash to outstanding balances
- Analyzing and processing disputes
- Creating reports (e.g., accounts receivable aging, credit holds)

OTHER

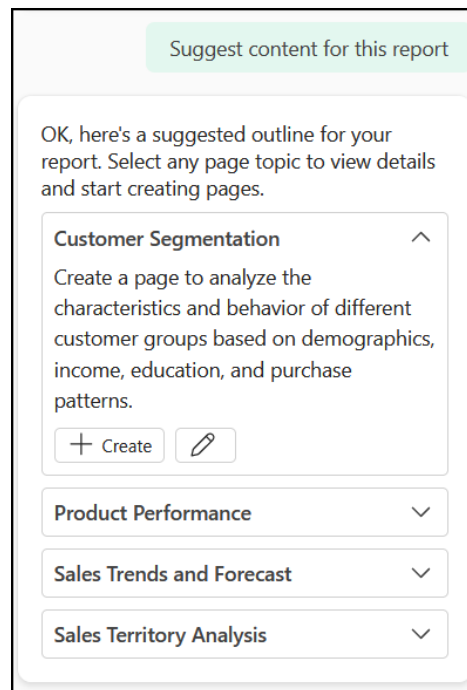
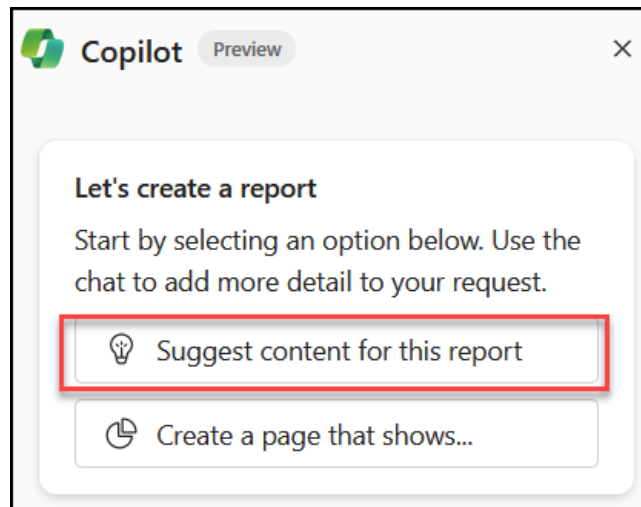
- Preparing external reporting templates
- Conducting transaction audits of high-risk areas
- Preparing wire transfer requests

Copilot for Finance



What is Copilot?

- Copilot is Microsoft's AI tool.
- Copilot for Fabric/Power BI is helping uncover new insights.



- Copilot is providing new ways of helping users understand their world

Copilot applications

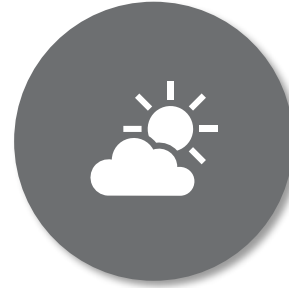
Copilot is making waves in all aspects of business!



REPORTING



SALES



FORECASTING



FINANCE

Enhances Microsoft 365

- 01** Integrates into tools you know:
Outlook, Excel
- 02** Had specialized insights and workflows
tailored to finance experts
- 03** Works seamlessly with Microsoft tools
to provide relevant context to financial
operations!



Benefits for Excel



Offers automated comparisons, guidance for issues and simplifies reconciliation of records

Works with Outlook to produce customer account data



Uses conversations prompts to look for discrepancies, risks and errors

Can produce visuals from raw data that can be quickly shared in Outlook and Teams



What if?



Use Copilot to create
“what if” scenarios



Copilot will produce
financial models based
on variables



Includes an “Explain”
button to show behind
the scenes



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Integration with Outlook

Allows Finance to manage workflows, alerts and updates directly in email

Best practices



01 Review your data. Remember, AI is only as good as the data we provide it.

02 Use the insights and forecasts for strategic decision making.

03 Don't forget about security. Make sure you're complying with all applicable financial data rules.



Power Automate



Power Automate overview

Power Automate can:

- Automate business processes
- Send automatic reminders
- Move data between systems on a schedule
- Automate local tasks

It's all about automation!

Let's automate something. What should it do?

Get started by selecting an example or describing your own automation idea.

Every month, copy all files from OneDrive folder to another OneDrive folder

Copy all rows from an Excel file to another excel file with a click of a button

When a new item is created in SharePoint, send me an email

Describe in detail how you want your automation to work

Generate

Power Automate overview

- Using a simple, low-code interface, Power Automate makes it easy for non-technical users to automate tasks
- Examples for different industries can be found on the Power Automate documentation page



Power Automate overview

'Update release note' (code view)

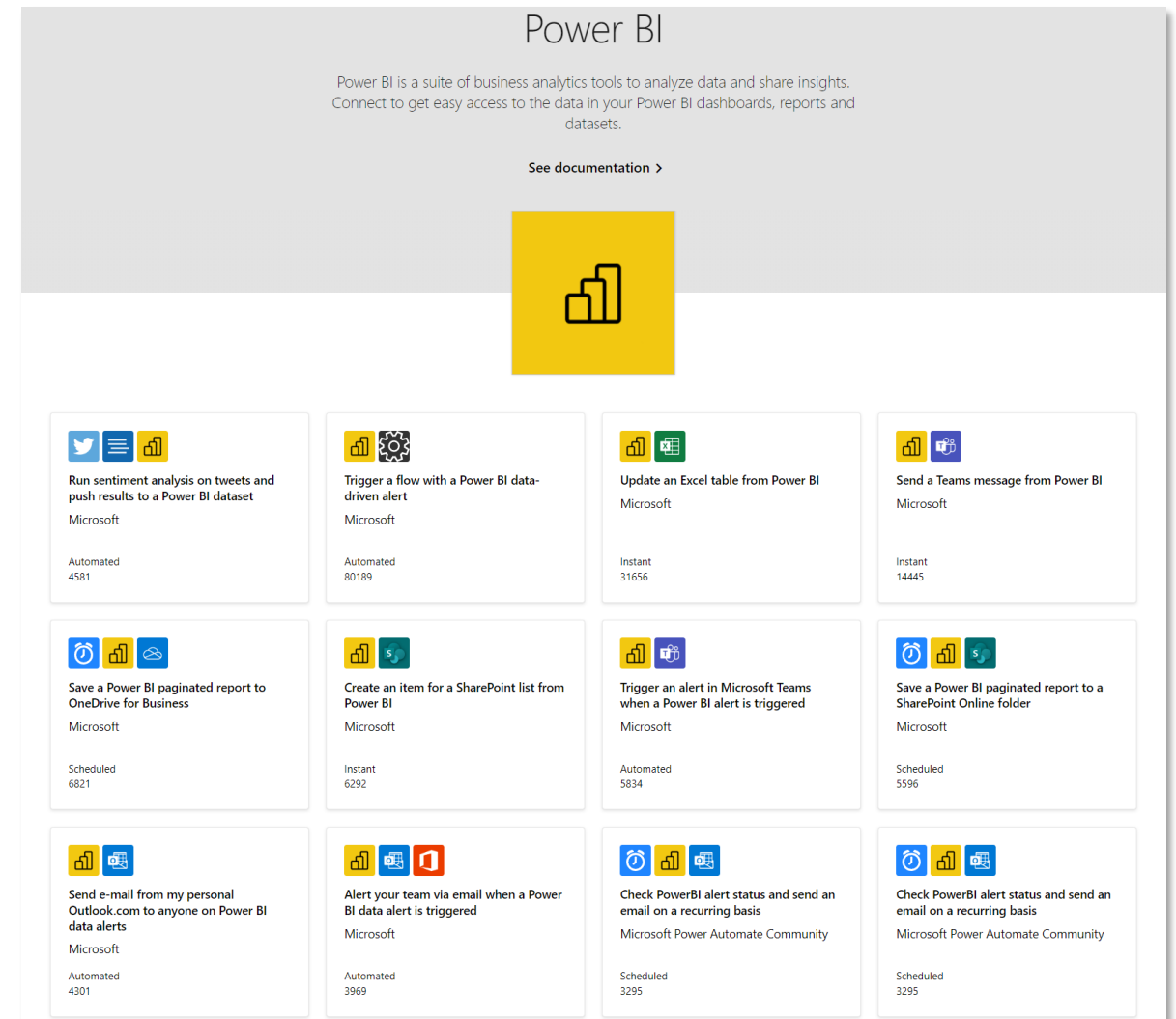
```
3      "host": {
4        "connection": {
5          "name": "@parameters('$connections')
['shared_commondataservice']['connectionId']"
6        }
7      },
8      "method": "patch",
9      "body": {
10        "crcfc_name": "@{actionOutputs('Make_object')['title']}",
11        "crcfc_listoffeatures": "@{actionOutputs
('Get_list_of_features')}",
12        "crcfc_businessvalue": "@{actionOutputs('Make_object')
['description']}"
13      },
14      "path": "/v2/datasets/@{encodeURIComponent(encodeURIComponent
('default.cds'))}/tables/@{encodeURIComponent(encodeURIComponent
('crcfc_releasenotes'))}/items/@{encodeURIComponent
(encodeURIComponent(items('Each_found_note')['crcfc_releasenoteid'])
)}",
15      "authentication": "@parameters('$authentication')"
```

Done

- While you don't need to be a developer, Power Automate allows for the task code to be viewed and edited
- All the events and triggers are in full JSON representation

Start with a template

Numerous templates are available from the Power Automate site to get you started within Power BI.



Power Automate AI Builder

- Power Automate offers AI Builder actions that enable usage of all model types in flows. Adding AI Builder actions in your flow allows you to:
 - Perform model inference by using outputs of upstream actions (email attachments received, SharePoint files dropped, created records in a Microsoft Dataverse table and so on).
 - Process model inference results in downstream actions (send by email, store in Dataverse records, message in Teams and so on).

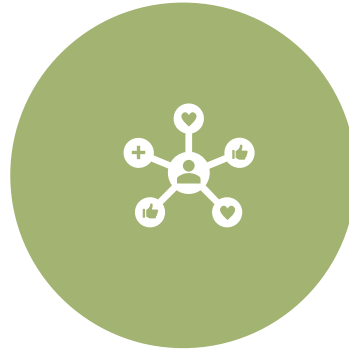
Power Automate AI Builder use cases

INVOICE PROCESSING



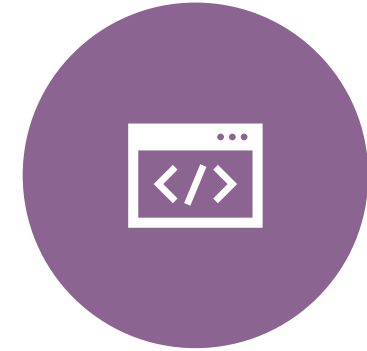
Extract relevant columns and tables from invoices and seamless transfer to a database

DEMATERIALIZED DOCUMENTS




Use the AI Builder text recognition model to extract information from forms and secure in a central system

FILTER BY LANGUAGE




International emails and documents can be routed easily with AI Builder language detection

Create a new process



Process mining

- Connect, transform, and upload data from a wide variety of sources.
- Visualize a process map and gain insights from data.
- Understand complex business processes across your organization



Task mining


- Record the actions required to complete a process.
- Visualize a process map to analyze actions and get insights.
- Use these insights and guided recommendations to begin automating.

Set up a process using recordings or imported data.
[Learn more](#)


Process name *

Description

Data source *



Import data



Recordings

☒ Dataflow
☐ Azure Data Lake (preview)

Process advisor

With the process advisor capability in Power Automate, you can:

- Record existing business processes and analyze them to increase efficacy
- Track completion times and map various actions that are involved

The first step to automating a solution is knowing the process. Process advisor helps simplify that task.

Monitoring and troubleshooting flows

Troubleshooting

- Power Automate community provides excellent help for figuring out issues.
- Be mindful of security processes in place that can interfere with triggers and other automated processes.

Monitoring

- Monitor with the CoE Power BI dashboard.
- This dashboard monitors Power apps, Power Automate and chatbots to give an overview of your environment.
- Available from Microsoft Build in a Starter Kit.



Demos

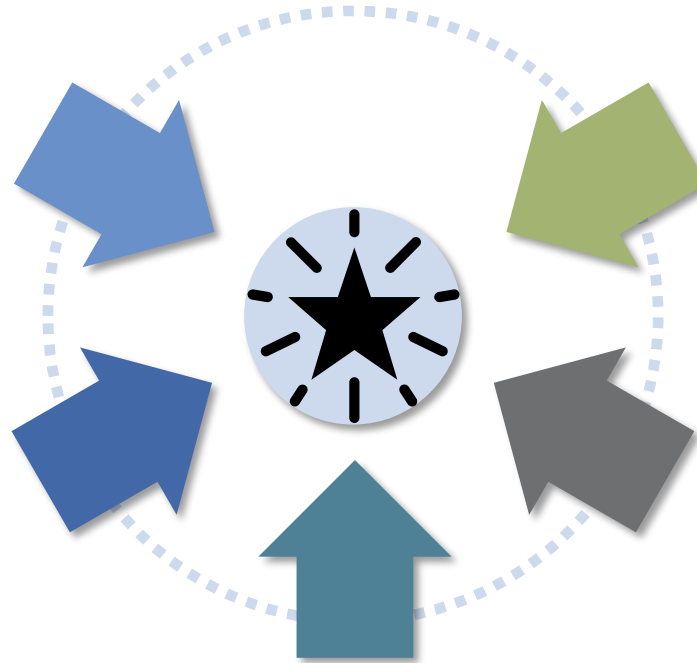
Summary

INCREASED PRODUCTIVITY

Automation of routine tasks in analysis and reporting

DECISION MAKING

Make faster, smarter decisions with real-time data analysis and predictive modeling.



BETTER ACCURACY

Reduce human error resulting in more reliable insights

INTEGRATION

Integrate with Outlook and your 365 apps for seamless workflows

CUSTOMIZABLE

Tailor Copilot to your business needs and financial practices from budgeting to forecast

Summary

Plan out

Discuss with users the types of regular tasks they do that would benefit from automation.



Install

Install the Power Automate app on the appropriate users' desktops and servers.



Automate!

Start making flows to help improve efficiency and reduce redundant, time-consuming tasks.

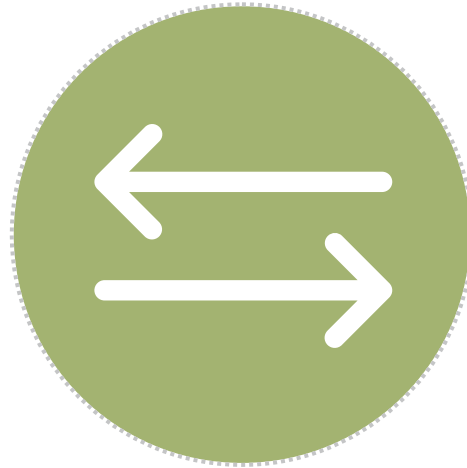
Events and resources

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JUNE 26

**Q&A: Microsoft
Power Automate**



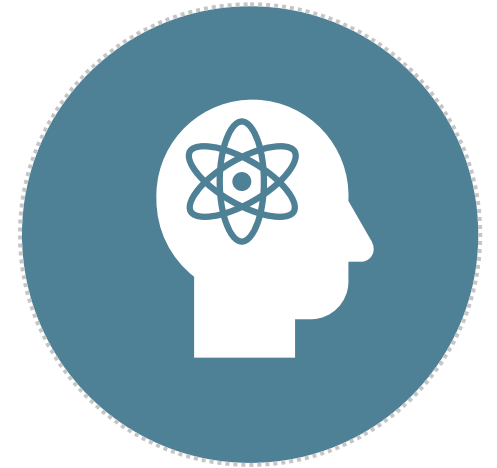
JULY 18

**Drag & Drop Cognos
Data into Power BI or
Tableau**



BLOG

**Is Your Culture
Ready for AI? 5
Factors for Securing
Adoption & Cultural
Change**



**KNOWLEDGE
CENTER**

**Blogs, webinars and
resources available
24/7**

Additional resources



**INSIDER
VIEWPOINTS**



**UNBIASED
REVIEWS**



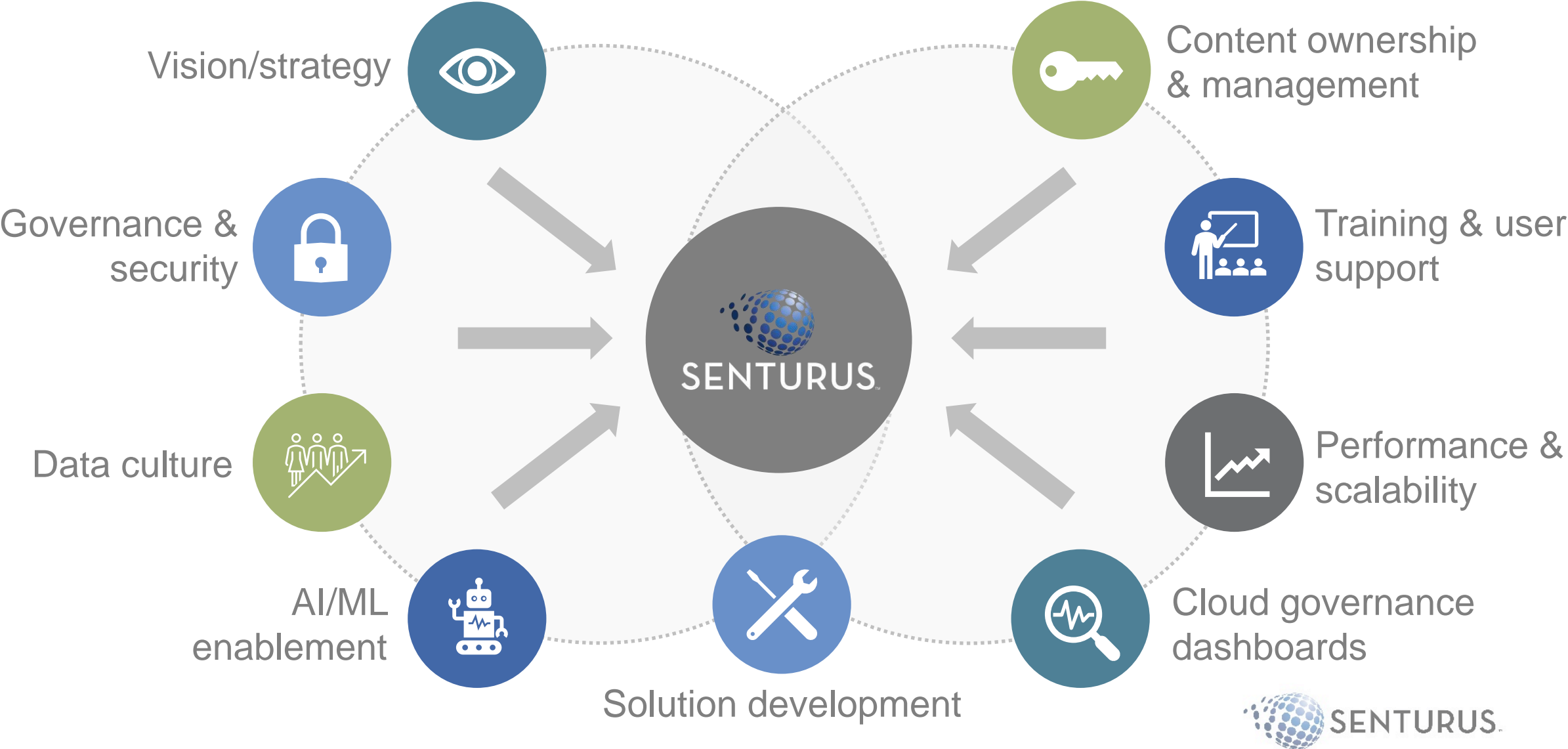
**TECHNICAL
TIPS**



**PRODUCT
DEMOS**

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Modern BI: accelerated & accessible



NETGEAR

Shutterfly

KORBEL
CALIFORNIA CHAMPAGNE

TRINCHERO
Family Estates

patagonia

jamba

GHIRARDELLI
CHOCOLATE

SEPHORA

WAGNER
ASIA EQUIPMENT LLC

CAT

Genentech
A Member of the Roche Group

Peet's
COFFEE

VISA



KELLY-MOORE
PAINTS



Abbott



FREMONT
BANK



AVISTA

AMERICAN
ELECTRIC
POWER

BIO-RAD

GILEAD

KAISER PERMANENTE

UCSF

University of California
San Francisco

intuit

TriNet

PG&E



History of success

23 years

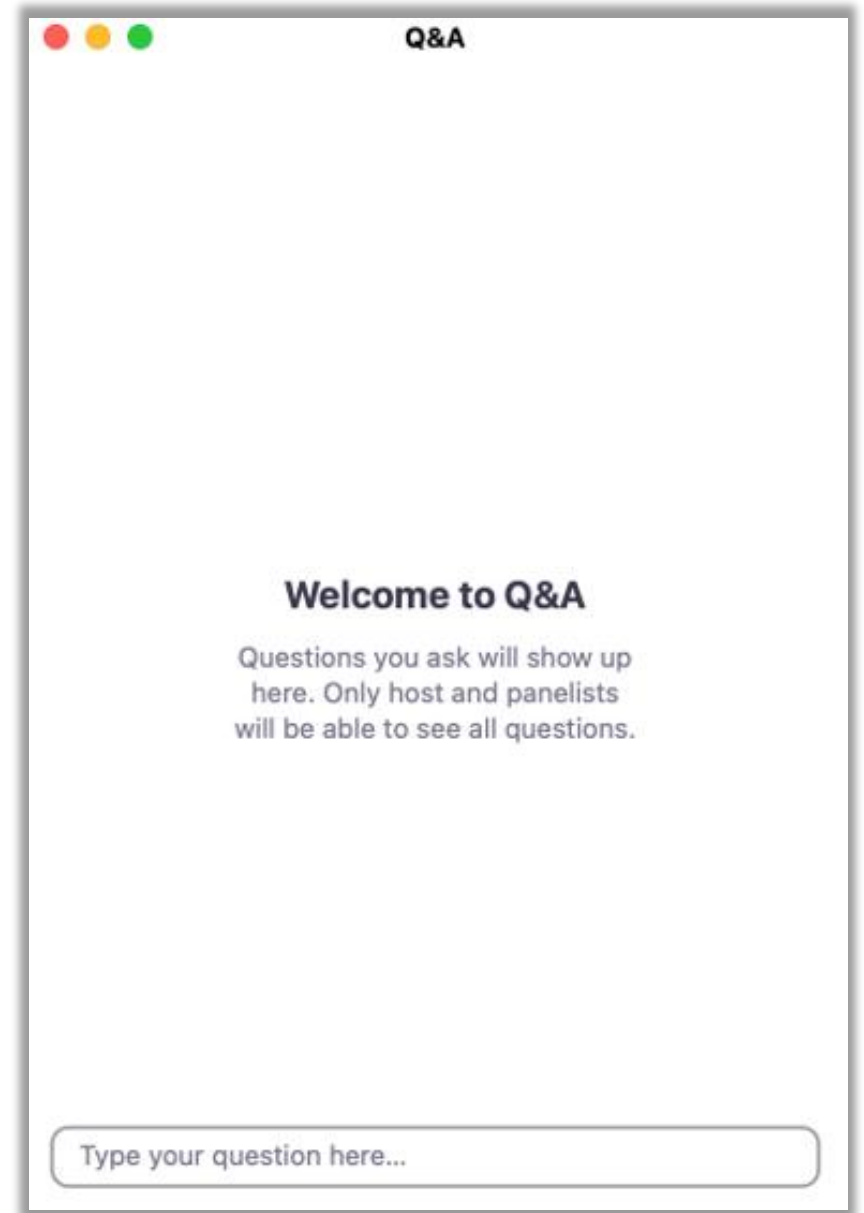
1400+ clients

3000+ projects

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Q&A

If your question or issue is broader than what we can answer today, contact us at: info@senturus.com and we will set up a free consultation.

A screenshot of a web application window titled "Q&A". The window has a white background and a thin grey border. At the top left, there are three colored circles (red, yellow, green) representing window controls. The title "Q&A" is in the top right corner. In the center, the text "Welcome to Q&A" is displayed in bold, followed by a paragraph: "Questions you ask will show up here. Only host and panelists will be able to see all questions." At the bottom, there is a rounded rectangular input field with the placeholder text "Type your question here...".

Q&A

Welcome to Q&A

Questions you ask will show up here. Only host and panelists will be able to see all questions.

Type your question here...



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Thank You!

Let's keep in touch



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