



Document Processor using Microsoft Copilot



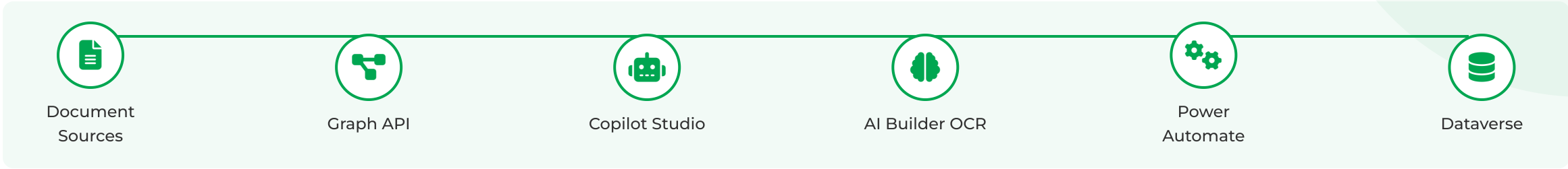
Transform your workflow with AI-powered document understanding, extraction, and intelligent automation

Document Processor Overview





Objective	Approach	Key Highlights	Expected Outcomes
<ul style="list-style-type: none">Automate document reading, extraction, and validation across formats such as invoices, contracts, and forms.Reduces manual review time and ensures data accuracy.Enables end-to-end document understanding through AI.	<p>Built using Copilot Studio + AI Builder + Power Automate + Dataverse:</p> <ul style="list-style-type: none">Reads uploaded PDFs, Word, or image files using OCR + GPT technology.Extracts key fields (vendor, date, item, clauses, etc.) and validates them.Identifies key entities across document types.Routes structured output to downstream systems (ERP/CRM).Enables auto-summarization and exception flagging for quick review.	<ul style="list-style-type: none">Supports multiple document types and templates.Extracts and validates data fields automatically.Integrates with approval workflows and record systems.Provides audit trail for every processed file.	<ul style="list-style-type: none">80% faster document processing and approval.90% reduction in manual entry errors.Real-time insights from large document batches.Improved compliance and data governance.


Technical Architecture & Deployment — Copilot Studio, Graph API, Power Platform




Core Components

**Copilot Studio**
Prompt orchestration for document parsing, field extraction, and validation with business rules

**Graph API**
Access documents from SharePoint, OneDrive, Exchange with webhooks for trigger-based processing

**AI Builder**
Pre-built and custom OCR models for extracting data from various document types and formats

**Power Automate**
Workflow orchestration for document routing, approvals, validation, and exception handling

Deployment Workflow

1

Prerequisites: M365 tenant with Copilot, Graph API access, Power Platform environment with Dataverse and AI Builder capacity

2

Provision solution: Import managed solution (tables, flows, Copilot Studio assets), configure Graph connections and document source permissions




3

Configure templates: Define document templates, train AI Builder models for extraction, create validation rules

4

Pilot → rollout: Start with single document type, monitor accuracy and processing times, then expand

Security & Governance

-  Entra ID app registration with least-privilege document access permissions
-  Document processing audit trails in Dataverse with full history of changes
-  DLP policies for sensitive document handling and RBAC for processing access

Implementation Details

- Document pickup via Graph API webhooks from SharePoint libraries, email attachments, or direct uploads
- Template matching to determine appropriate extraction model and validation rules
- Multi-stage processing: OCR → field extraction → validation → business rule checking
- Exception handling with human review interfaces via Power Apps
- Real-time monitoring dashboards with Power BI for processing metrics
- Integration with ERP/CRM systems for automated data entry through Dataverse connectors

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