

Microsoft Power Platform for Process Intelligence

Introduction to a Process Mining workload with Velrada

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Business First.
Technology Second.



Last Updated
February 2024

**THAT'S
THE POINT**

A photograph of a young woman with dark hair, wearing a light pink button-down shirt, smiling and looking upwards and to the right. She is positioned behind the large purple text 'THAT'S THE POINT'.

Process Intelligence to fuel Hyper Automation

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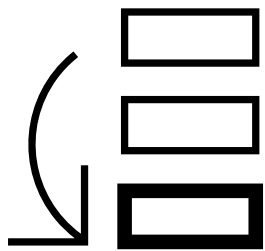
Introduction to Process Mining



Process Intelligence: Types of Mining

PROCESS MINING

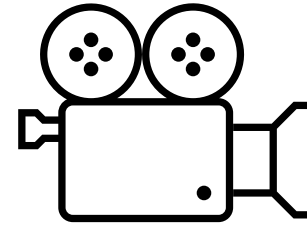
Utilise activity & event log files for in-depth understanding of organisation-wide processes.



- Identify inefficiencies & bottlenecks.
- Enhance transparency & compliance.
- Optimize resource allocation.
- Reduce operational costs.
- Drive data-driven improvements.

TASK MINING

Capturing user interactions to gain insights into manual tasks and workflows.



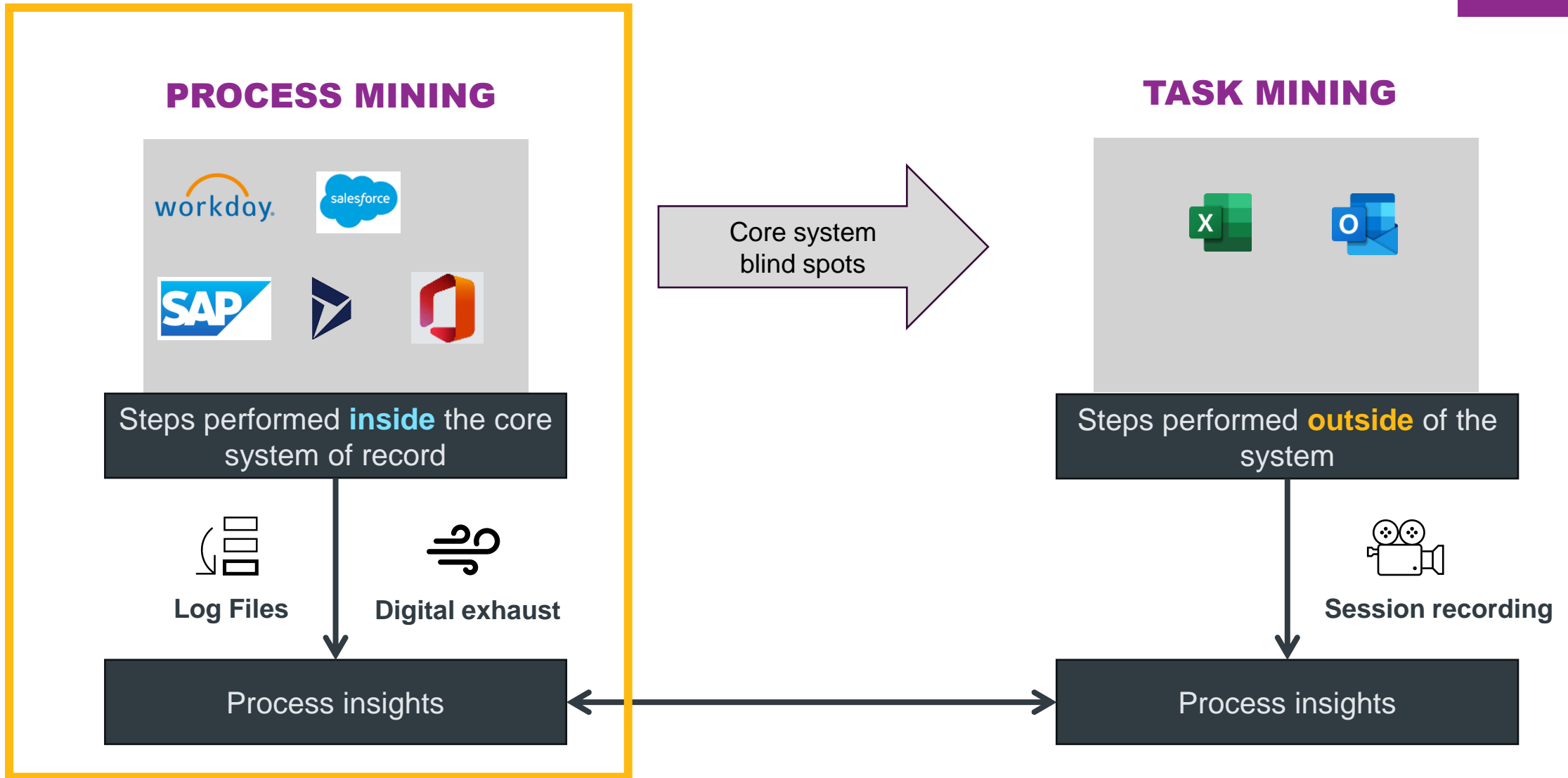
- Capture user interactions.
- Identify task patterns.
- Improve productivity.
- Automate repetitive tasks.
- Inform process optimization.

Outcome: Visualise the invisible.

Opportunity: Efficiency gains, cost reduction, informed decisions.

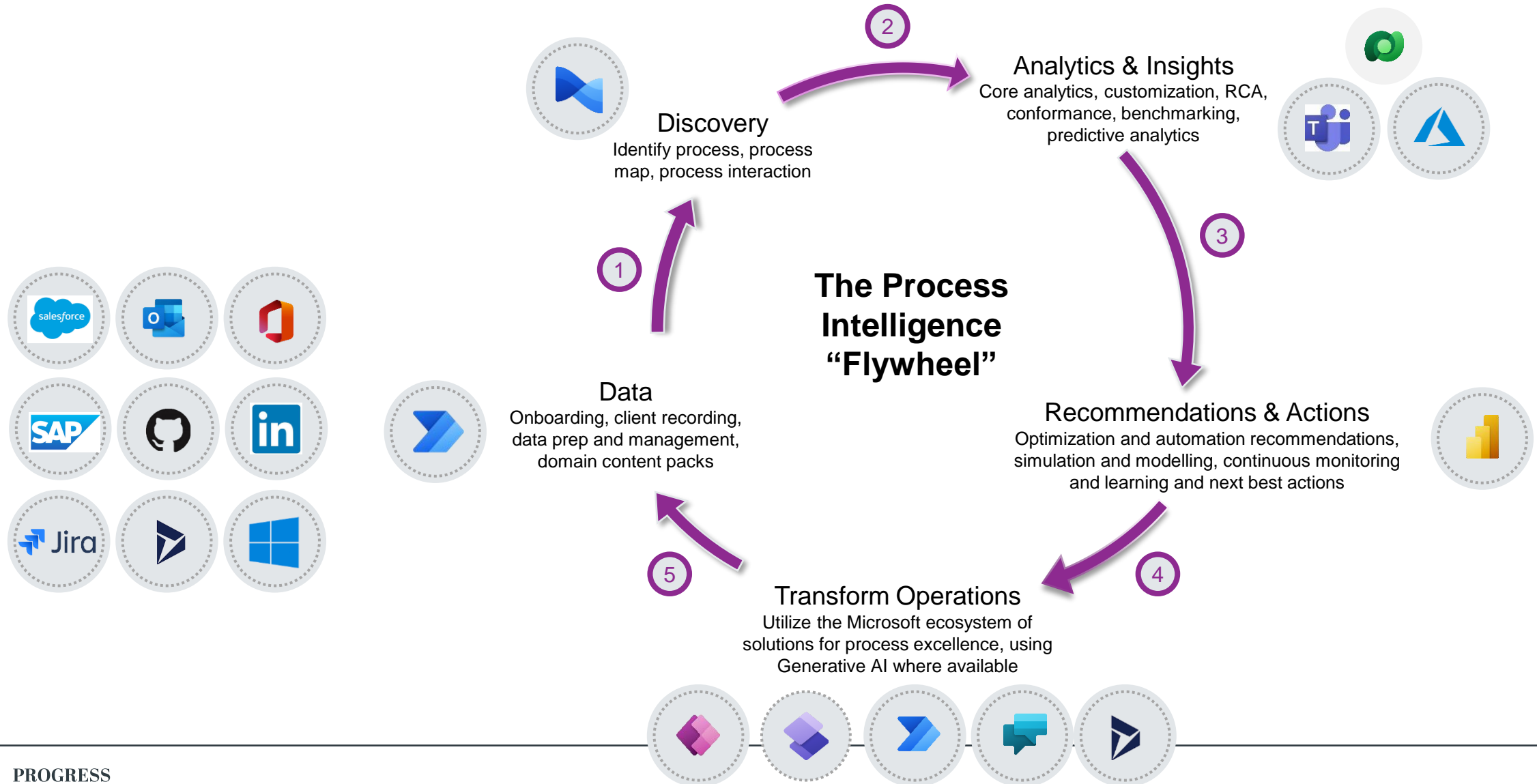


Technology to illuminate the process unknowns



Enabling Continuous Process Improvement

INTEGRATED INTO YOUR EXISTING MICROSOFT INVESTMENT



What is Process Mining?

TOOLING TO UNDERSTAND & OPTIMISE INTERNAL PROCESSES

- Process Mining is the tip of the spear to drive additional value to every business process or customer interaction.
- By analysing “event data” from your core systems of record, it allows for visualisation of processes & metrics.
- Businesses have processes that they have been using for years such as:
 - Employee Payroll in the HR department;
 - Case Management in Customer Service;
 - Procure to Pay in Finance, or;
 - Pack and Pick in Manufacturing.
- Users and solution implementers have no visibility into inefficiencies that have been in place for decades.
- Process Mining identifies the steps of the process to collect insights including:
 - Recursive loops;
 - Time taken;
 - Predecessors & successors, and;
 - Deviations between users;
- In 2022, Microsoft acquired industry leader “Minit” to add this capability to their platform. This is a product that has been developed since 2013. It was renamed “Power Automate Process Mining” and became Generally Available in the product in August 2023.



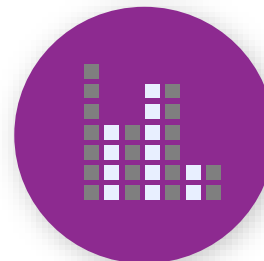
Uncover Inefficiencies

Get “x-ray” like visibility into processes that are taking too long or have bottlenecks, and compare with efficient processes.



Identify Opportunities

Get insights and directions for opportunities to automate and deploy solutions for in your company.

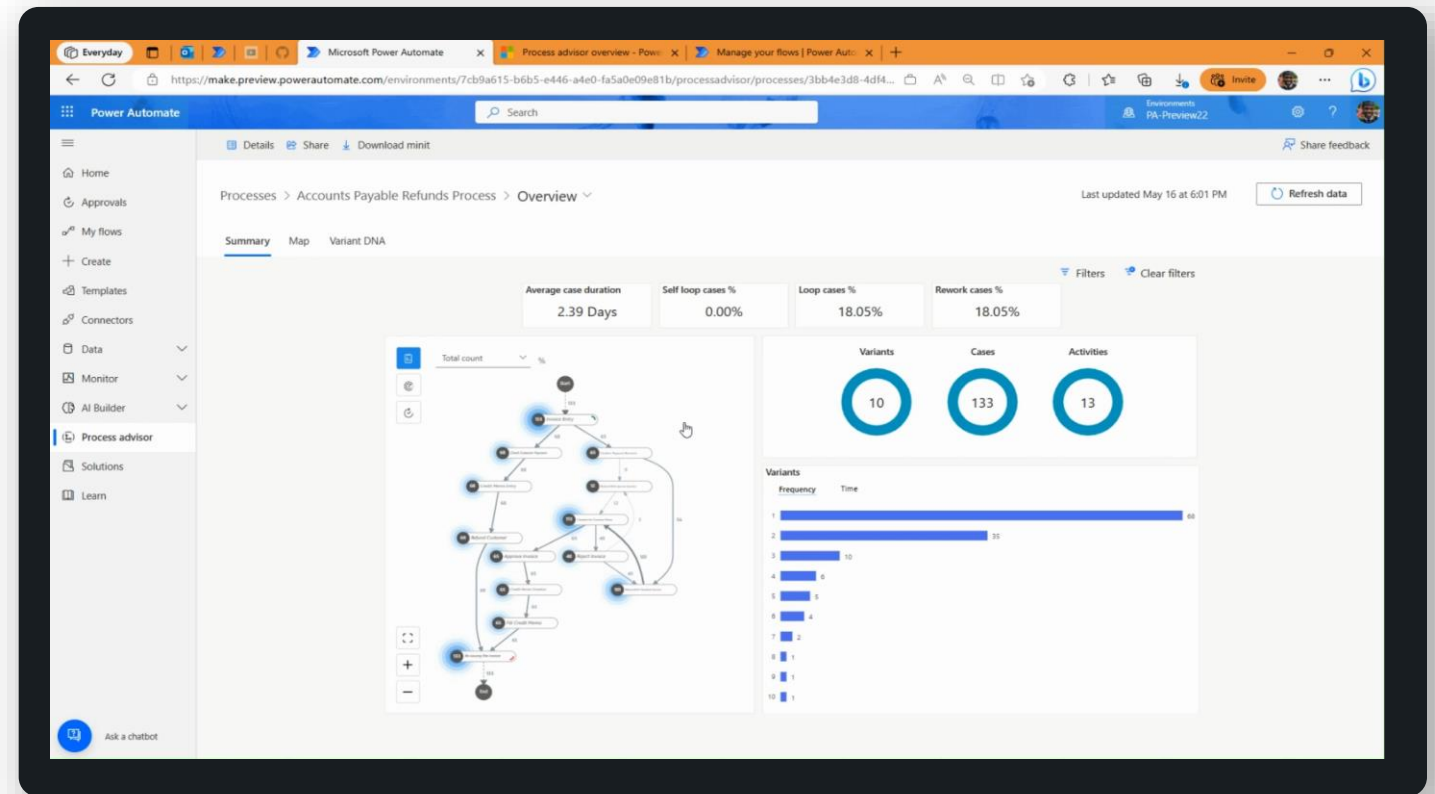


Continuous Monitoring

Track how your processes are performing with optimizations in place and continually bring improvements.

Repeating Steps Toward Process Mining

- 1) **Discovery** – Identification of various process at the company and prioritization of which to optimize first.
- 2) **Preparation** – Prepare data of the prioritized process, ingest it in the Mining engine and output of analytics.
- 3) **Improvement** – Deep analyses to identify root causes of bottlenecks and inefficiencies; deployment of solutions.
- 4) **Reporting** – Deep integration with Power BI enables customized reports, scorecards with Power Goals and Power BI AI features such as Q&A.



Infused with AI

COPILOT TO IDENTIFY PROCESS DATA & MAPPING

Step 2 of 3: Choose data source

Choose a directory or .csv file that contains your event logs data. The data must be correctly formatted. [Learn more](#)

Container / demo-data

Name	Size	Modified
P2P Demo.csv	13.34 MB	08/30/2023 10:50:39 AM

Welcome to Copilot in Process Mining

Be more efficient than ever with AI assistance. Simply tell Copilot in Process Mining what you want to do and it will help you get started.

Process discovered!
The most likely process mining business process given the file headers and data is the Procure-to-Pay (P2P) process.

The Procure-to-Pay (P2P) process is a business process that involves the acquisition of goods or services from a vendor, and the subsequent payment for those goods or services. The process typically includes steps such as creating a purchase order, receiving the goods or services, verifying the invoice, and making payment to the vendor. The goal of the P2P process is to ensure that goods and services are acquired in a timely and cost-effective manner, while also ensuring that payments are made accurately and on time.

Confirm process

AI-generated content may be incorrect

Ask a question about process mining

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Make sure AI-generated content is accurate and appropriate before using. This feature is in preview. [See terms](#)

Step 3 of 3: Map your data

For each of your attributes, map the column of attribute type correctly to set up your process map. **Case ID, Activity, and Event start** are required.

Case ID Activity Event Start

Showing 19 attributes

Attribute name	Attribute type	Attribute data type
CASE_ID	Event Level Attribute	Text
ACTIVITY	Event Level Attribute	Text
Event_start	Event Level Attribute	Text
Event_end	Event Level Attribute	Text
Resource	Event Level Attribute	Text
RESOURCE_HOURLY_RATE	Event Level Attribute	Text
Department	Event Level Attribute	Text
SSC	Event Level Attribute	Text
INVOICE_AMOUNT_USD	Event Level Attribute	Text

Confirm process

AI-generated content may be incorrect

Confirm auto-mapping

AI-generated content may be incorrect

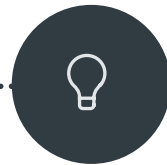
Mapping the process mining fields with your given fields would look like this:
Activity= ACTIVITY
StartTime= Event_start
CaseId= CASE_ID
Resource= Resource

Ask a question about process mining

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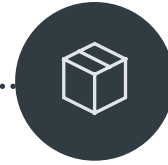
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Discovery



Identify, measure, prioritise

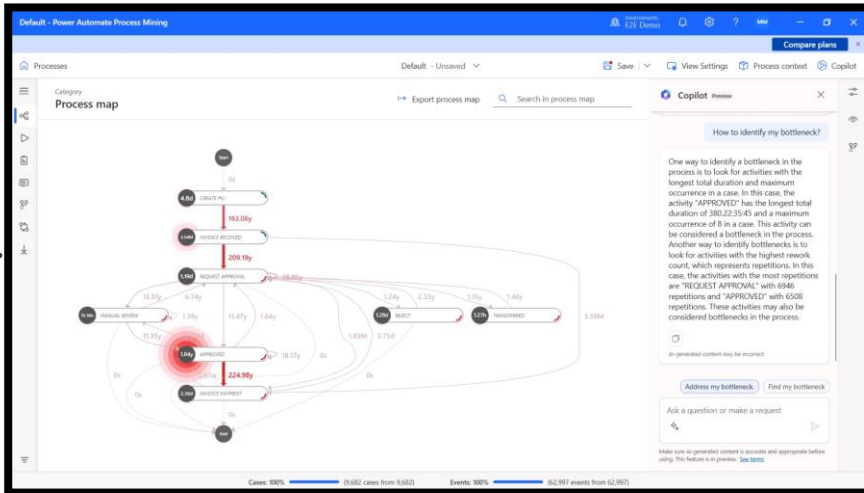
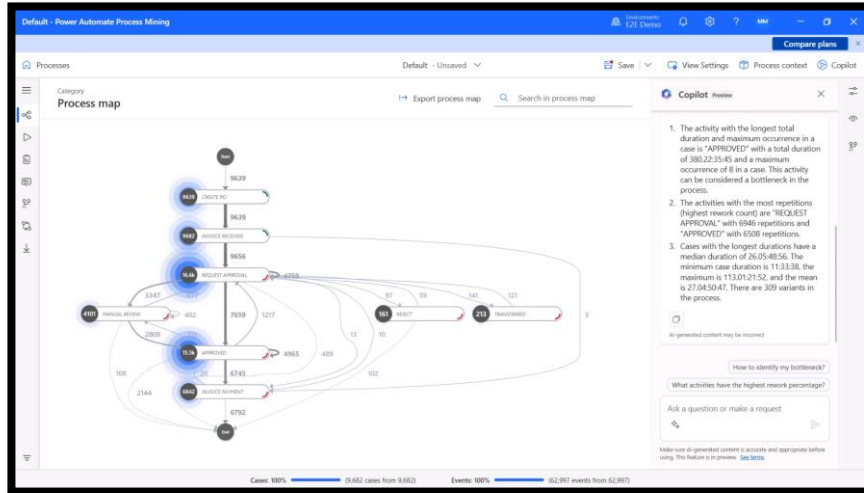
Preparation



Prepare, transform, ingest, validate

Infused with AI

COPILOT TO VISUALISE & INTERROGATE



Copilot Preview

Create a flow

One option to improve the process using Power Automate Cloud Flows is to create a flow that automates the approval process for the "REQUEST APPROVAL" activity. The flow can be triggered when a new request is submitted and can automatically route the request to the appropriate approver based on predefined rules. This can help reduce the time it takes to get approvals and improve the overall efficiency of the process.

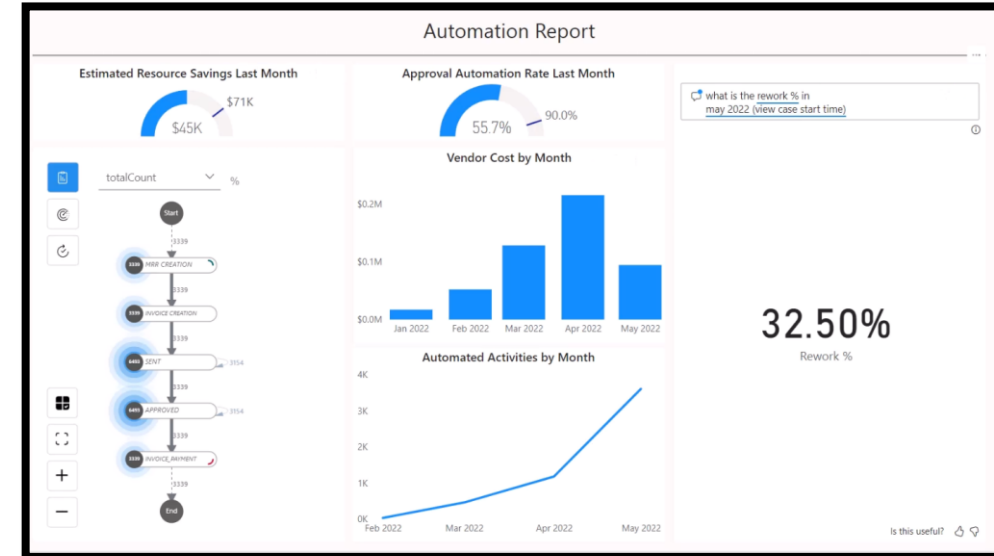
Update your app

One option to improve the process using Power App Enhancements is to add a feature that allows users to track the status of their requests in real-time. This can be done by creating a dashboard that displays the status of each request and provides users with the ability to filter and sort the data based on their needs. This can help users stay informed about the progress of their requests and reduce the need for manual follow-up.

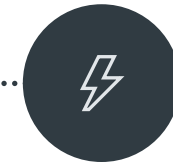
AI-generated content may be incorrect

Ask a question or make a request

Make sure AI-generated content is accurate and appropriate before using. This feature is in preview. [See terms](#)



Improvement



Analyse, simulate, automate

Standardise



Compare, identify root cause, predict

Reporting



Export, monitor, alert

Work with Velrada

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Outline of a Process Mining Workload

A person's hands are shown pointing at a laptop screen in a dimly lit office setting. The person is holding a blue pen in their right hand. The background is blurred, showing other laptops and office equipment. The overall tone is professional and focused.

Engagement Overview

PROCESS MINING – INTRODUCTION & PRODUCTION PILOT SPRINT

Engagement Length



Delivered typically across 2 weeks:

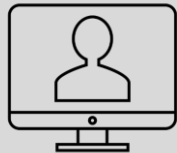
- 1 week of technology introduction, process discovery & preparation
- 1 week of analysis, outputs, and handover

Investment



- Engagement start at AUD \$26,000 (excl. GST)
- Available in both fixed-price and time & materials
- Not inclusive of Microsoft licensing

Session Delivery



Engagement can be delivered either:

- In person (your office or Velrada's)
- Remotely using Microsoft Teams

Pre-Requisites



- Velrada require ability to develop Power Platform & Process Intelligence within your tenant
- Microsoft licensing to implement Process Mining examples
- Ability to install Process Mining software on users PCs
- Client must be prepared for participating in discovery & design

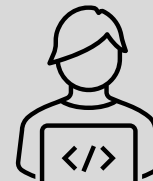
Client Participants



The engagement is collaborative & benefits from your input by:

- IT strategy & architecture leadership
- Current or future Automation CoE & Development team.
- Critical process owners

Velrada Resources



Our experienced resources utilised in this engagement:

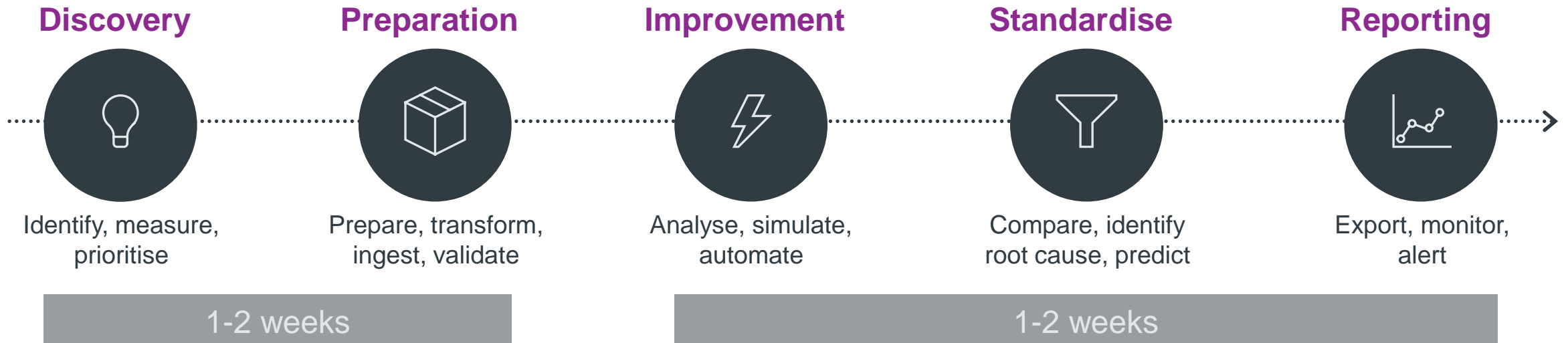
- Delivery Manager
- Power Platform Architect
- Power Platform Developer – *Automation specialisation*

Typical Velrada Engagement

PROCESS MINING – INTRODUCTION & PRODUCTION PILOT SPRINT

Engagement Overview

- Velrada can introduce your organisation to Process Mining through a pilot-sprint.
- By leveraging the expertise of our Power Platform consultants, we will showcase an end-to-end demonstration of the solution within your Microsoft tenant using data from your source system.
- The engagement will include 3 short workshops to kick-off data discovery, co-analyse, and playback the findings.
- We would work with a process SME and aim for the engagement to be completed within 2-3 weeks (depending on the type of process being explored & client SME support).



Preparing for Process Mining

KEY STEPS TO IDENTIFY & LEVERAGE SOURCES OF DATA

Through the initial stages of this engagement, Velrada will assist you with the following preparation steps for Process mining.

- 1) Identify your core systems of record. This could be Dynamics 365, Salesforce or SAP as an example.
 - 2) Identify Data Requirements – event & activity log information in your system of record need to provide some necessary data fields. This includes:
 - Correlation ID (*eg, Customer Number, Order Number, Case Number, etc*)
 - Activity Name (*eg, The step of the process such as “Case Submitted” or “Order Payment Received”*)
 - Timestamp (*When the event took place, started, and finished*)
 - 3) Locate the correct data - within the systems, locate the correct tables and fields that hold the event/activity data required. You may also need to filter out irrelevant data – some events may not be required.
 - 4) Connect to the data source
 - Recommended that direct connection to the data source is leveraged to ensure reporting is up to date.
 - Otherwise, compatible exports to a file (Text/CSV) are also supported.
 - You may also elect to use a Data Warehouse or Azure Data Lake to consume this information from also.
 - The Microsoft solution allows for Power Query to be leveraged to connect to a wide range of data sources to consume necessary data.
- Transformation & mapping of data within Power Query allows it to conform to the expected data format needed by the Microsoft Process Mining solution.



Progress is impossible without change.

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**PROGRESS
IS THE POINT**

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