

FORVISTM

Why & How to Extract Data From PDF With Power Automate

September 2023

Business Technology Solutions

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About FORVIS

Services

- Assurance
- Tax
- Consulting

FORVIS ranks among the nation's top 10 public accounting firms, helping unlock the potential of our clients, people, and communities. We deliver an **Unmatched Client Experience**[®] with assurance, tax, and consulting services that reflect our exceptional capabilities and uncommon commitment to excellence. Discover how our forward vision can help you prepare for what's next.



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Business Technology Solutions

FORVIS' Business Technology Solutions can help support digital transformation across your organization with enterprise resource planning (ERP) and customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, and support services.

In addition, our Insights & Automation services include business intelligence (BI) and robotic process automation (RPA) assessments, implementations, and training.

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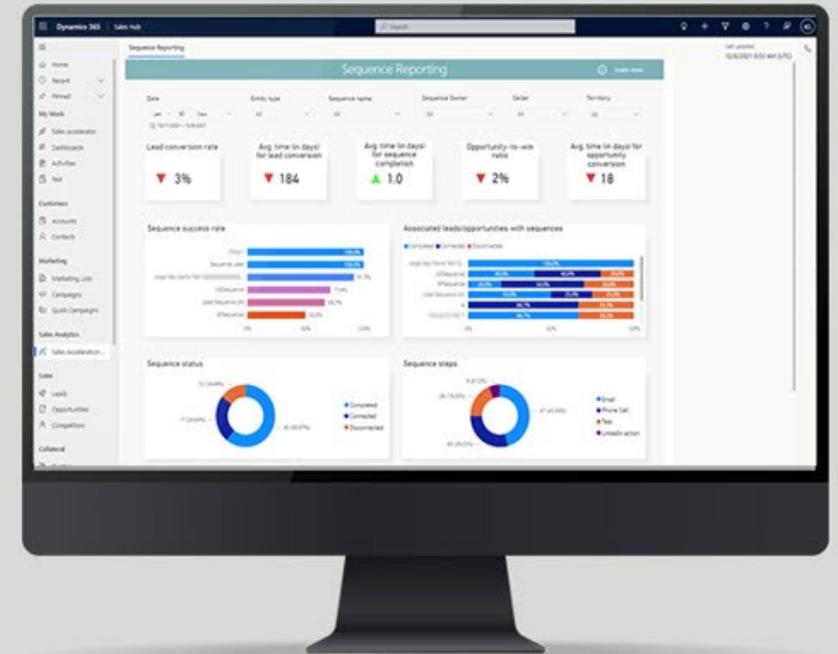
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Microsoft
Partner

Sage Partner

ORACLE
NETSUITE
Solution Provider

salesforce
PARTNER



**From sales forecasting to financial reporting,
learn what CRM and ERP technologies can do.**

Meet the Presenter



Kevin Liebergen

Lead Consultant

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Insights

In the realm of data lies endless possibilities. With each Insight, unleash the power of the data to craft a story that empowers & enlightens your team.

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Business Intelligence (BI) Assessments

Review of the current reporting tools that are being used & layout an actionable road map of opportunities in the near-term & long-term initiatives



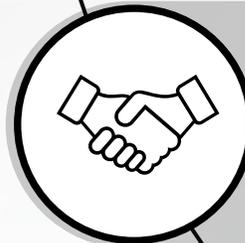
Training

Delivering personalized training of Solver &/or PowerBI to meet your reporting requirements



Power BI & Solver Implementation

Process of getting data from the source systems & creating a single source of truth that tells a compelling story



Outsourced BI

Utilized a seasoned BI consultant who works with your team on a part-time basis based on a committed # of hours each week/month

Automation

Discover the transformational potential of automation by unlocking newfound efficiencies & fueling innovation to achieve more than ever expected.

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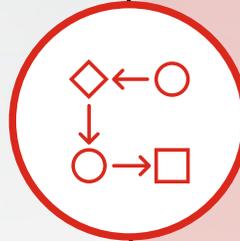
Technology Advisory/Ideation

Assess current set of technologies & provide an actionable road map of opportunities for near-term & long-term initiatives. Execute Alpha/Beta POCs



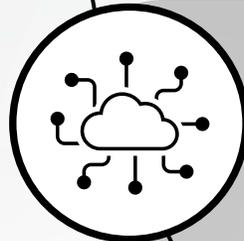
Power Platform Assessments

Assess usage of Microsoft's Power Platform & identify opportunities to expand use. Review adoption, governance, & application life cycle management



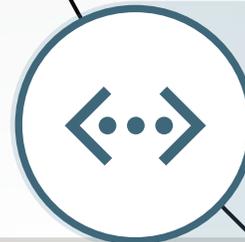
Automation

Utilize Microsoft's Power Platform & Microsoft Azure Services to deliver solutions that meet customers' requirements



App-to-App Integrations

Utilize Microsoft's Power Platform &/or Azure Services to integrate data between disparate systems, e.g., HRIS, ERP, CRM, QC, etc.



Outsourced Citizen Developer

Utilize a seasoned Automation consultant to work with your team on a part-time basis based on a committed # of hours each week/month. Work in an agile fashion to determine requirements & execute

Why Use AI Models?

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Why Use AI Models?

- Predefined & custom models available
- Process incoming invoices & receipts
- Extract text from images & PDF documents (OCR)
- Extract information from identity documents & business cards
- Translate text to >90 languages
- Extract custom entities like brand & model from text
- & more!

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How To Extract Data From PDF

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Extract Custom Information From Documents

- Use this to define & then identify the information we want to extract
- Defined & tailored to our specific documents
- Trained with our own data to help improve accuracy
- Can do structured or unstructured documents

Demo Time!

- Santa Claus needs help gathering data from wish lists!
- We will ...
 - Create a custom AI model
 - Create a Power Automate flow to use the model
 - Put the data in an Excel spreadsheet for review by Santa & the elves!



Setup

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Things To Think About ...

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Things To Think About ...

- Does my document formatting matter?
 - Elements that are too close or not in line are harder to read
 - Train the model on as many examples as you can
- How do I handle errors?
 - What if data is not found? (Use the feedback loop or other methods)
 - How do I continue to improve the model?
- How else could I use this data?
 - Match it to data in my ERP or accounting system
 - Attach the files to records in my other systems
 - Many possibilities with Power Automate

Microsoft Syntex

- Are you dealing with SharePoint lists?
 - Will monitor SharePoint list for new files
 - Can process files & update data right back into a SharePoint list
 - Works on top of AI models & Power Automate so you don't need to set up all of it manually
- Also works with Teams, OneDrive, & Exchange!

Other Models

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Translate Text Into Another Language

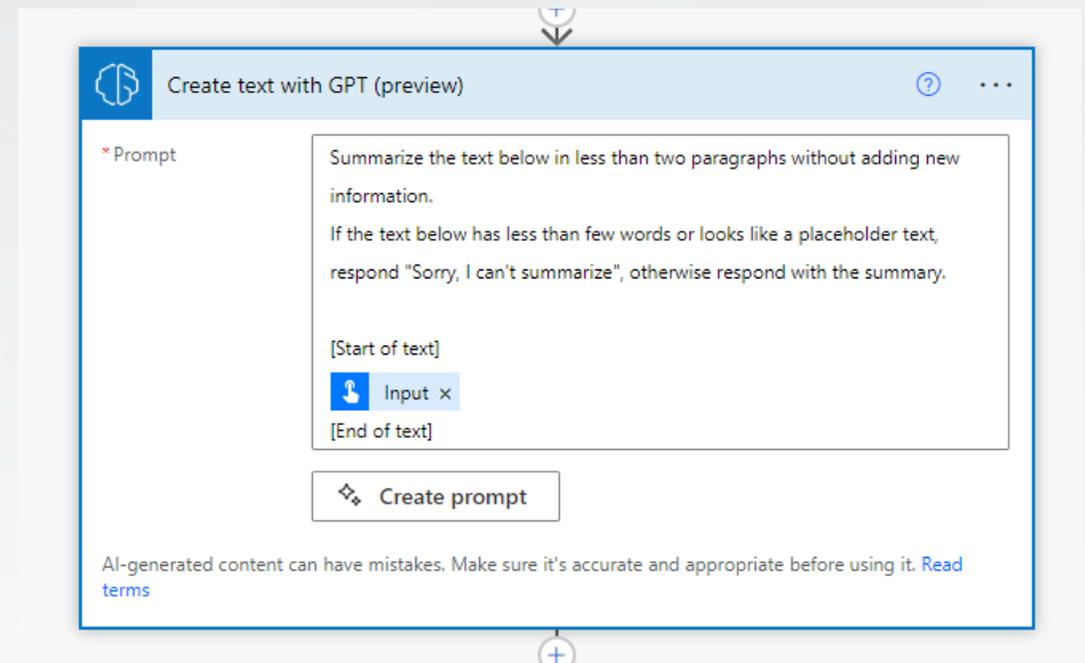
- Can be used in a Power Automate Flow to translate
- Provide the text to translate & the language to translate to
- Can provide language to translate from or have it detected automatically
- Not a custom model so nothing to configure

The screenshot displays a Power Automate flow with three steps:

- Manually trigger a flow:** This step has two input fields. The first is labeled "My Text" with a placeholder "Please enter your input". The second is labeled "Target Language Code" with a placeholder "Please enter your input".
- Translate text into another language:** This step is configured with:
 - *Text:** My Text
 - *Translate to:** Target Langua...
 - *Translate from:** Detect automatically
- Send me an email notification:** This step is configured with:
 - *Subject:** New message posted
 - *Body:** | Translated text (Target Langua...); | Translated text x |
| Original text (Detected langu...); | My Text x |

Create Text With GPT

- Allows you to create a prompt & have it process text based on the prompt
- Can create your own prompt or use the sample one provided for summarizing
- Ex.: You could summarize incoming documents & provide link to full documents

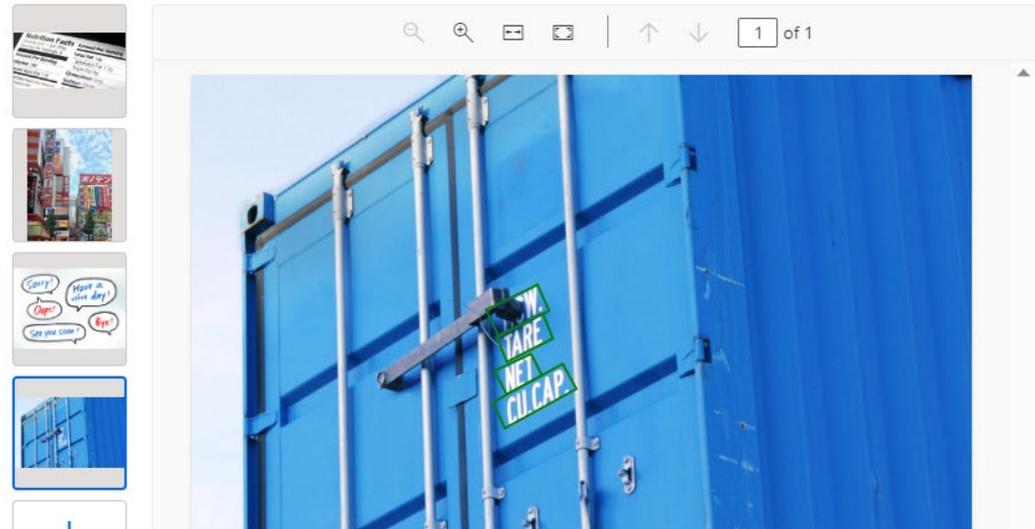


Extract All Text In Photos & PDF Documents

... With optical character recognition (OCR)

Extract all the text in photos and PDF documents (OCR)

The text recognition prebuilt model extracts all text in photos and PDF documents. It uses state-of-the-art optical character recognition (OCR) to extract printed and handwritten text in images (JPG, PNG, BMP, PDF) into machine-readable character streams. Check out our [learn module](#) to get started with using a text recognition model in a flow or an app.



Extracted information ⓘ

W.

TARE

NET

CU.CAP.

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Extracted information ⓘ

Nutrition Facts Amount Per Serving

Serving size: 1 bar (40g)

Serving Per Package: 4

Total Fat 13g

Saturated Fat 1.5g

Amount Per Serving

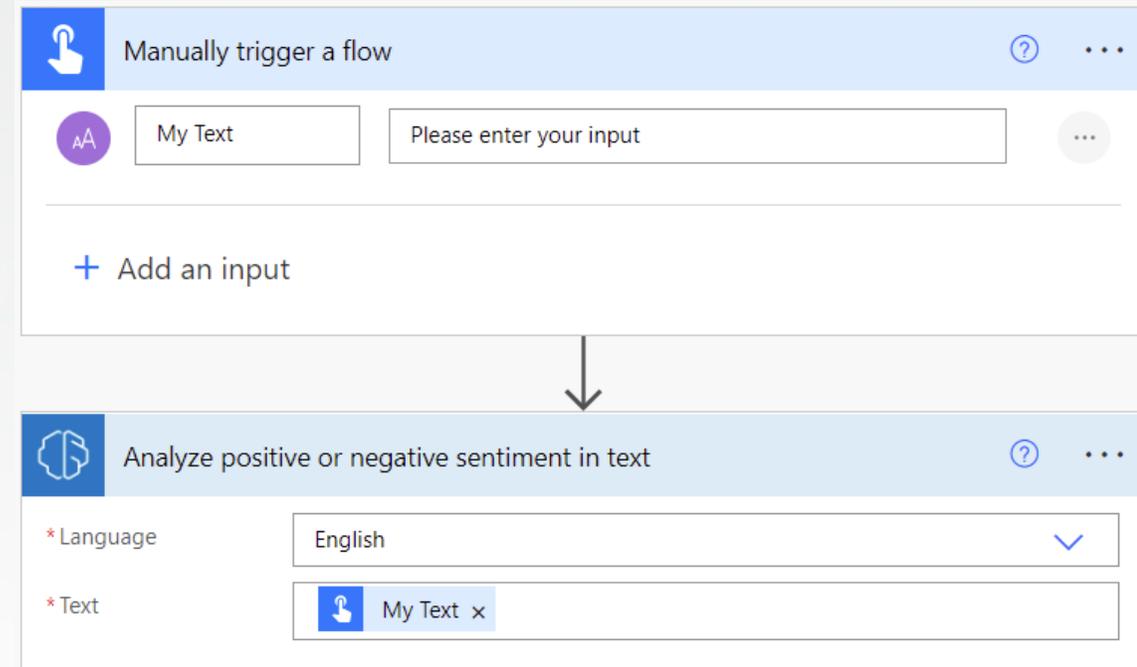
Trans Fat 0g

Calories 190

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Analyze Positive or Negative Sentiment

- Find out if text is positive, negative, or neutral
- Ex.: Run a Power Automate Flow on incoming emails to determine if negative emails are received so you can respond quickly
- Returns overall sentiment as well as a probability of positive, negative, or neutral



& Many More!

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Q&A

Use the Q&A tool to submit any questions you may have

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Contact



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