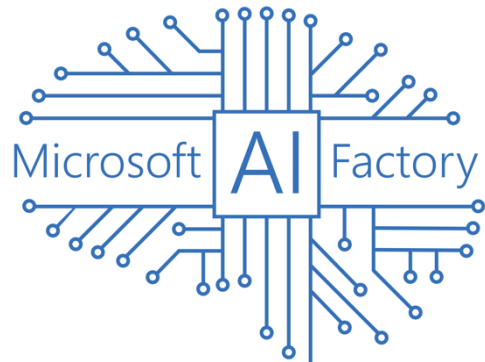




This webinar will start in a few moments...

Microsoft Syntex



*Microsoft AI to Transform Content
into Actionable Knowledge with
Microsoft Syntex*



3rd May 2023



Gabriel Malherbe
Management Executive

First Technology Digital



Gary Finberg
Solution Architect

First Technology Digital



Innovation

Application & Mobile Development
Integration & Cloud Development
DevOps & Quality Assurance Practice
IoT & Custom Monitoring Devices
Dynamics (Microsoft CE)



Automation & Integration

Business Process Automation
Low-code Development
Integration & Cloud Development
Virtual Development Teams



Digital Workplace

Content Management Platforms
Low-code Development on Power Platform
Employee Collaboration & Self Services
Microsoft Teams Teams Adoption
Employee engagement

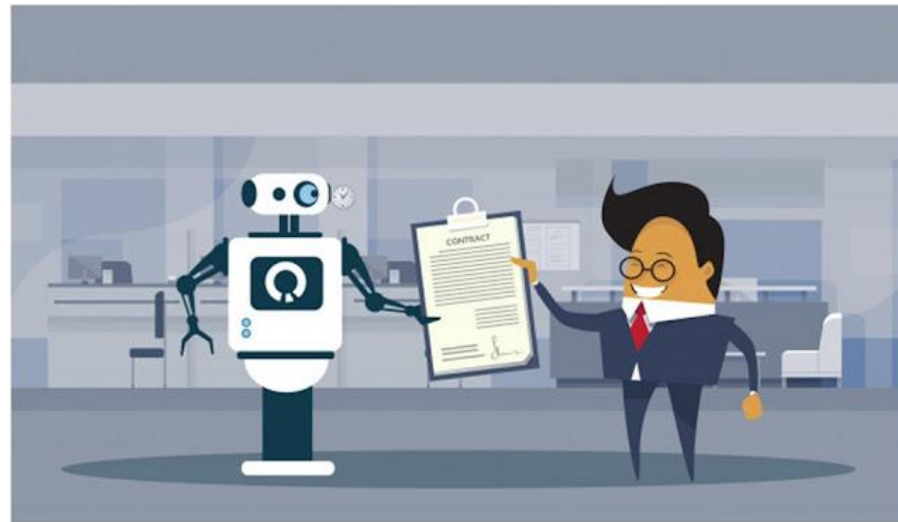


Data & Analytics

Infrastructure services
Remote database management
SQL and Azure BI stack



Is your business using any tools for document automation?



Would you like a free hands-on workshop with our team?

Call +27 10 501 0800 or reach us at info@firsttech.digital to get started!

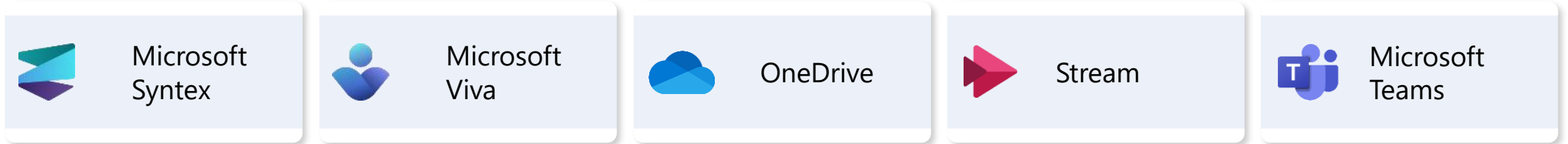


Gary Finberg
Solution Architect

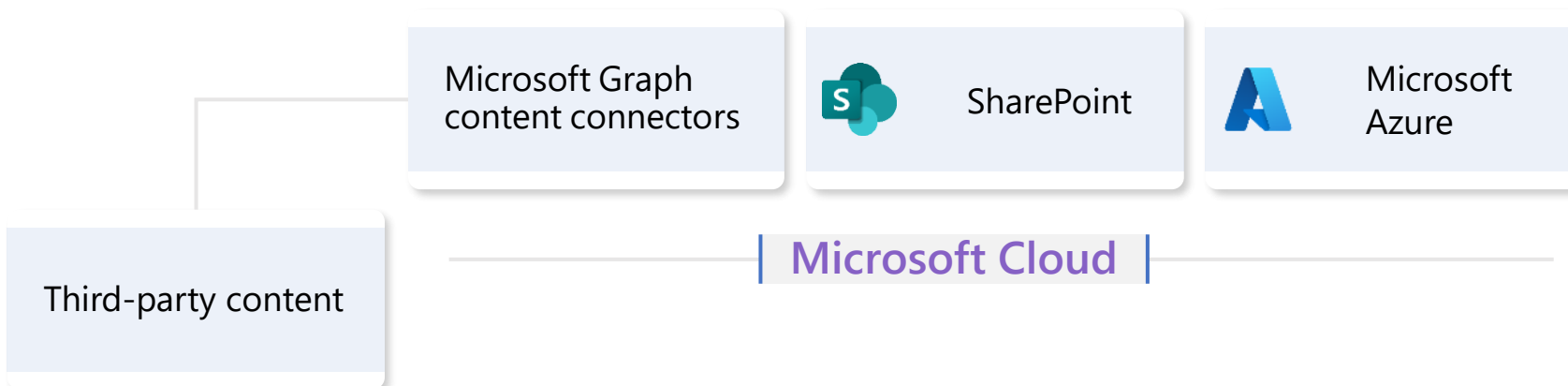
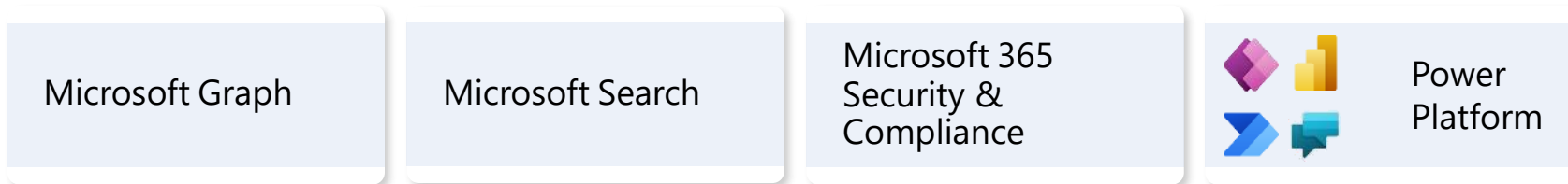
First Technology Digital

- What is Microsoft Syntex
- Syntex Demo
- Q&A

Content experiences



Content services platform



MS Syntex is a content understanding, processing, and compliance service, that uses intelligent document processing, content artificial intelligence (AI), and advanced machine learning to automatically find, organize, and classify documents in your SharePoint libraries

- 1 Content Understanding** - Create no-code **AI models** that capture expertise to **classify** and **extract** information to **automatically apply metadata** for knowledge discovery and reuse
- 2 Content Processing** - Automate **capture, ingestion and categorization** of content and streamline **content-centric processes** using Power Automate
- 3 Content Compliance** - Connect and manage content to improve **security** and **governance** with integration to Microsoft Purview (Security, Information Protection & Governance)
- 4 Content Services** - Establish consistent tagging with the taxonomy services and content types and turn content into intelligent templates and **build new documents** from your data with **content assembly**
- 5 Content Discovery** - Find documents and key facts with precise **metadata and natural language search** and identify usage of terms across your environment

Syntex is available as a user-based add-on for Microsoft 365 plans

To use Microsoft Syntex, you must have a license for each Syntex user. Microsoft Syntex is available only to customers currently licensed for Microsoft 365 F1, F3, E3, A3, E5, A5, Office 365 F3, E1, A1, E3, A3, E5, A5, Microsoft 365 Business Basic, Business Standard, Business Premium, or SharePoint Online K, Plan 1, or Plan 2.

Microsoft Syntex has two types of product offerings:

Microsoft Syntex per-user licensing (R89/month) - To use Microsoft Syntex, you must have a license for each Syntex user. If you remove all Syntex per-user licenses from your tenant at a future date (or your trial expires), users will no longer be able to create, publish, or run custom models

Microsoft Syntex pay-as-you-go - Pay-as-you-go is a way to pay for Microsoft Syntex using an Azure subscription. You can use it without any license commitment or upfront purchasing, but it only supports Prebuilt and Unstructured document processing

Centralized management for Syntex document understanding and forms processing in SharePoint



Integrated home for **managing SharePoint Syntex, AI models and processes** in Microsoft 365



Inherits content management and user experiences from **SharePoint**



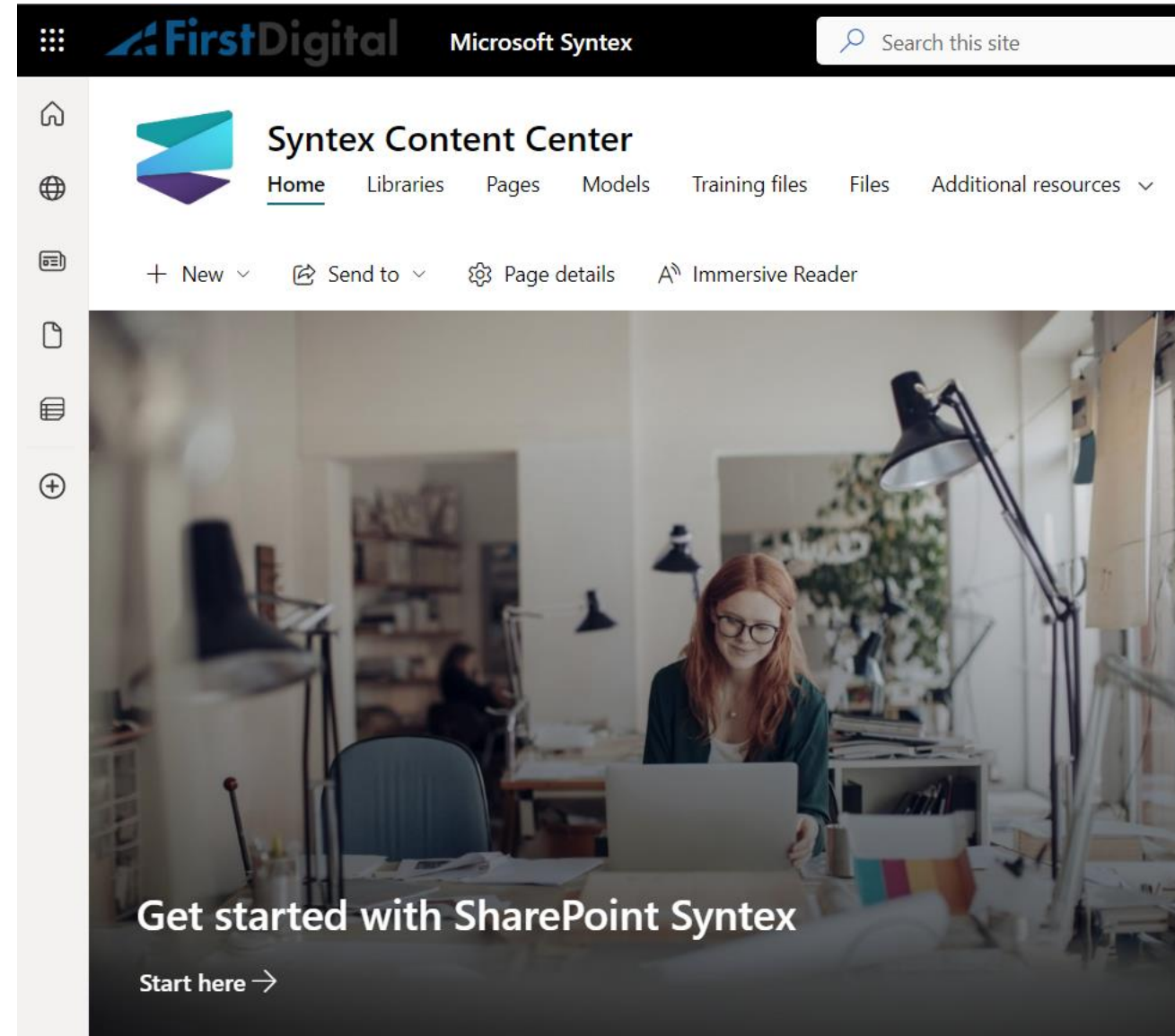
Develop and publish **AI models** for structured and unstructured documents



Monitor classification and process with embedded **analytics**



Process and share content with **Power Automate and rich formatting**

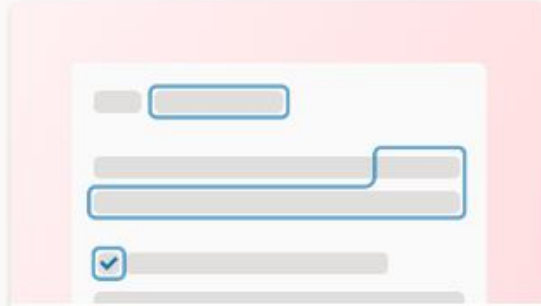


Train a custom model



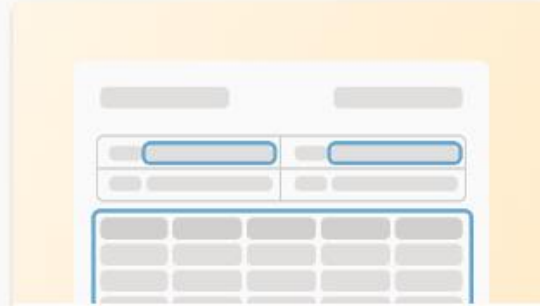
Teaching method

Teach a model how to understand text to classify and extract.



Freeform selection method

Train a model by selecting content anywhere in a file.



Layout method

Train a model by marking the location of the content to extract.

Set up a prebuilt model



Invoice processing

Save time processing invoices. Set up a model trained to extract invoice info.



Receipt processing

Save time processing expenses. Set up a model trained to extract receipt info.

Document Understanding

- Used for unstructured file formats
- Model created in native interface
- Extract sentences or specific regions of the document
- Trainable classifier w/ optional extractors
- Can be applied to multiple libraries



Train on 5-10 PDF, Office, mail files, including negative examples

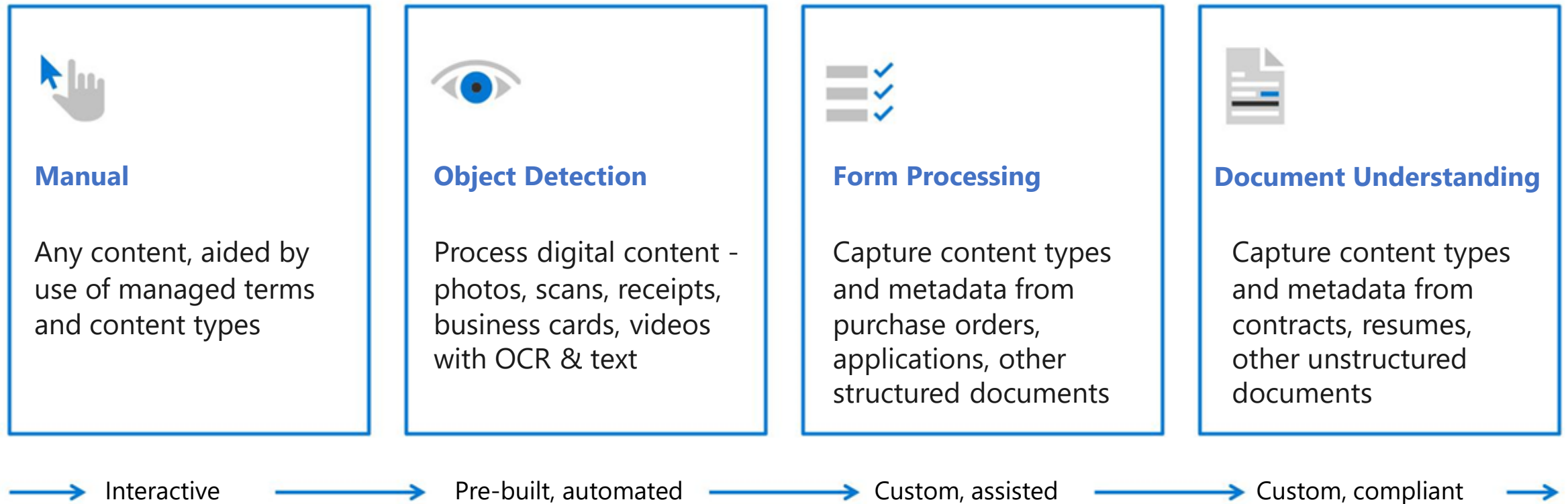
Form Processing

- Used for structured and semi-structured file formats
- Forms and Invoices
- Created from document library
- Leverages Power Platform and AI Builder
- Restricted to a single library



Train on PDF, JPG, PNG format, totaling 50MB/500pp

AI services and capabilities to make it easier to build content understanding and classification apps directly into the content management flow



- Reduce manual labour and avoid human error by automatically tagging, labelling and organizing content
- Improve the searchability of files with precise natural language and form-based search
- Integrated with MS Purview to enforce security and compliance with automatically applied sensitivity and retention labels to classified files
- Enhanced document collaboration with annotation, redaction, and PDF management
- AI classification can be help drive workflows and business process automation
- Build new files quickly with dynamic data-driven content assembly
- Fully extensible via MS Graph connectors: 130+ connectors available through partners

<https://aka.ms/GraphConnectors>

- Track data from invoices with form processing
- Track information from contracts with document understanding
- Automate Order processing
- To extract risks and safety methods from risk assessments - to identify gaps and missing information so that appropriate teams can be notified, and the risk addressed
- Common document types like contracts, invoices, CVs, loan agreements, credit applications etc.



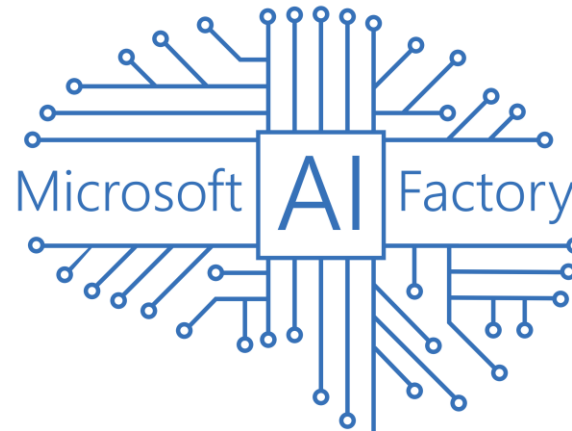
Microsoft Syntex Demo

- 1 Quick tour of the Syntex Content Center
- 2 Invoice OCR and Metadata Extraction
- 3 Unstructured Document Model
- 4 Modern Template Creation
- 5 Contracts Management Solution



- Microsoft Syntex: <https://learn.microsoft.com/en-us/microsoft-365/syntex/>
- Microsoft Syntex Licencing: <https://learn.microsoft.com/en-us/microsoft-365/syntex/syntex-licensing>
- aka.ms/SharePointSyntex - (Syntex Resources)
- aka.ms/SyntexRoadmap - (Syntex Roadmap)
- github.com/pnp/syntex-samples

First Digital Tech Summit (for this recording): <https://www.summit.firsttech.digital>



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