



Using Microsoft Syntex  
Bulk Content Assembly  
to automatically  
generate documents

# About Me - Leon Armston



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# Agenda

- What is Microsoft Syntex
- Microsoft Syntex Content Assembly
- Demo
  - SharePoint Syntex
- Find out more



# What is Microsoft Syntex

# Vision



Content AI utilises advancements in Cloud and AI to transform how content is created, processed, and discovered, empowering people, and automating workflows at scale.

# Microsoft Syntex is Content AI integrated in the flow of work.

- Putting people at the center, with content seamlessly integrated into collaboration and workflows, turning content from a cost into an advantage.
- Syntex automatically reads, tags, and indexes high volumes of content and connects it where it's needed—in search, in applications, and as reusable knowledge.
- It manages your content throughout its lifecycle with robust analytics, security, and automated retention



# Microsoft Syntex roadmap

## Enhance

### Available now

Structured document processing models (DPMs)  
Unstructured DPMs  
Content assembly

### Available soon

Annotations  
Freeform DPMs  
More prebuilt DPMs  
Taxonomy tagger

### Coming 2023

Image tagging  
Optical character recognition  
Summarisation  
Transcription  
Translation

## Connect

### Available now

Content query  
Contract management

### Available soon

Accounts payable  
Content processor

### Coming 2023

Advanced search  
Content query mgmt.  
eSignature  
Line of business app plugins

## Manage

### Available now

Automate security and retention

### Available soon

Advanced security mgmt mgmt.

### Coming 2023

Backup and restore  
Archiving

## Build

### Available soon

Data lake

# Syntex Content Assembly



# Content Assembly

- Aka Modern Mail Merge
- Helps to automatically generate standard repetitive business documents, such as contracts, statements of work, service agreements, letters of consent etc.
- Use an existing document to create a modern template, and then use that template to automatically generate new content using SharePoint lists or user inputs as a data source.

# Content Assembly

Remittance Advice

Refresh to preview

10/10 filled in

THANK YOU

PAID

THANK YOU

Remittance Advice – Mon Oct 31 2022

Allan Deyoung

Contract No

One Embarcadero Way, San Francisco, CA 90111

CON-119

From

Best For You Organics

12 Lake Washington Boulevard, WA, 98025

Description

Writing services

Amount Paid

\$42,000.00

Total

\$42,000.00

This payment will be in your bank on

Wed Mar 30 2022

Create a document from a template

Contractor

Allan Deyoung

Client

Best For You Organics

Client Address

12 Lake Washington Boulevard, WA, 98025

Contractor Address

One Embarcadero Way, San Francisco, CA 90

Contract ID

CON-119

Service Provided

Writing

Fee Amount

\$42,000.00

Remittance Date (manual)

Mon Oct 31 2022

Bank Date (manual)

Create document

Cancel

Create PDF  
and Word  
documents

# Syntex Content Assembly Roadmap

- |   |  |  |
|---|--|--|
| > | ■ ■ ■ SharePoint Syntex: Content Assembly - Create fields from images in documents                               | <b>GA:</b> October 2022                                |
| > | ■ ■ ■ SharePoint Syntex: Content Assembly - Choose fields in modern templates to create document library columns | <b>Preview:</b> August 2022<br><b>GA:</b> October 2022 |
| > | ■ ■ ■ SharePoint Syntex: Contracts Management In-product site template   | <b>GA:</b> October 2022                                |
| > | ■ ■ ■ SharePoint Syntex: Content Assembly - Placeholders for cell values in a table                              | <b>GA:</b> May 2022                                    |
| > | ■ ■ ■ SharePoint Syntex: Content Assembly - create pdf documents from modern templates                           | <b>Preview:</b> April 2022<br><b>GA:</b> May 2022      |
| > | ■ ■ ■ SharePoint Syntex: Content assembly  | <b>GA:</b> January 2022                                |

# Ignite Content Assembly Announcements

- Merge Documents
- Conditional Placeholders

# Content Assembly - Use Cases

- Employee Checklists
- Contacts/Agreements
- Letters
- Statements
- Reports
- Invoices/Quotes/Orders\*\*



# Demo



**Find Out More**

# Microsoft Syntex Assessment Tool

- Run the new updated FREE Microsoft 365 Assessment Tool on your tenant
- Currently there are modules for Syntex and SP2013 Workflows
- Syntex Assessment will gather data about SharePoint libraries & generate a Power BI report with recommendations of where Syntex might be used
- Recommendations are based on factors such as the size & structure of libraries, existing use of metadata or content types, and use of retention labels.



# Syntex Assessment Tool



## Libraries with custom columns

Custom columns are a simple yet powerful feature of SharePoint document libraries that enhance the discoverability and utility of content. They allow sorting and filtering, improve searchability, and can be used through process automation. Although powerful, they rely on users consistently and reliably adding metadata to files. Instead, content understanding models in Syntex can be used to automatically populate metadata based on the contents of a document. This improves efficiency and the consistency of metadata.

This page will help you identify which libraries are using custom columns, and the libraries which use the most columns. Libraries using a large number of columns are likely to be connected to metadata driven use cases. However they are also at greater risk from human error or omission when adding metadata.

25 libraries in the assessment results are using custom columns, with 7 using 10 columns or more.

**Recommended action:- review the libraries using the most columns to identify whether Syntex content understanding can be used to automate the creation of metadata.**

### All libraries with custom columns

Library Name	Url	Custom Columns	Last Used
Documents	/sites/ContosoDocs/Shared Documents	27	22/04/2022 14:48:04
Invoices	/sites/operations/Invoices	14	23/04/2022 10:52:21
Trade Confirmations	/sites/ContosoDocs/TradeConfirmations	13	22/04/2022 14:46:47
Benefit Changes	/sites/ContosoDocs/BenefitChanges	11	22/04/2022 14:47:38
Benefits	/sites/HumanResources/Benefits	11	22/04/2022 14:55:44
Services Agreements	/sites/ContosoDocs/ServicesAgreements	11	22/04/2022 14:47:16
Contract Notices	/sites/ContosoDocs/ContractNotices	10	22/04/2022 14:47:09
Purchase Orders	/sites/ContosoDocs/Purchase Orders	6	22/04/2022 15:09:45
Training audit	/sites/newemployeeonboarding/Training audit	5	15/04/2022 00:06:26
Documents	/Shared Documents	3	15/04/2022 06:30:48
Documents	/sites/Learning/Shared Documents	3	14/04/2022 20:20:00
Documents	/sites/Mark8ProjectTeam/Shared Documents	3	15/04/2022 01:05:00
Dashboard assets	/Dashboard assets	2	14/04/2022 22:48:35
Demo Docs	/DemoDocs	2	14/04/2022 22:55:58
Documents	/sites/Communications/Shared Documents	2	15/04/2022 01:18:46
Documents	/sites/contosoteam/Shared Documents	2	16/04/2022 10:42:08
Documents	/sites/Design/Shared Documents	2	15/04/2022 01:16:16
Documents	/sites/GlobalSales/Shared Documents	2	14/04/2022 21:14:36
Documents	/sites/RetailOperations/Shared Documents	2	14/04/2022 21:24:29
Documents	/sites/SalesAndMarketing/Shared Documents	2	15/04/2022 23:26:54
Documents	/sites/salesbestpractices/Shared Documents	2	14/04/2022 17:27:13
Retail Images	/sites/Retail/Retail Images	2	14/04/2022 23:26:47

Site Collection

All

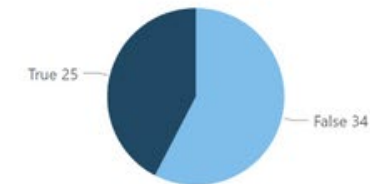
Site

All

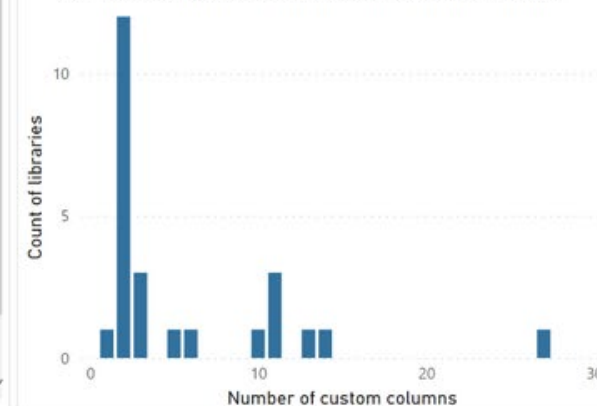
List Template

All

### Libraries where custom columns are used



### Count of libraries by number of custom columns



# SharePoint Lookbook - Syntex Content Centre

SHAREPOINT SYNTAX CONTENT CENTER

CONTENT CENTER

**Content intelligence for everyone!**

Use this site to learn more about SharePoint Syntex. We'll introduce you to the tools you'll need to create and train your own models. You can then use this site as a central content repository or as the control center for managing your own SharePoint Syntex models.

Models can be trained and evaluated using your own content. However, to apply the models to libraries, a license for SharePoint Syntex is required.

Site features

Web parts used

Content included

Add to your tenant >

You must be a tenant administrator to deploy this template.

Resources

Whether you're starting from scratch or you've installed this example on your tenant, here are some resources to help you create and personalize your site.

[Introduction to SharePoint Syntex](#)

[Licensing for SharePoint Syntex](#)

Contoso Electronics SharePoint Syntex

Syntex Content Center

Home Libraries Pages Models Training files Files Additional resources Site contents Edit

Get started with SharePoint Syntex

Start here →

Streamline everyday processes and tasks

Learn about model types


SharePoint Syntex in 6 simple steps

Manage compliance

Welcome to the SharePoint Syntex sample content center!

Learn how SharePoint Syntex can help your organization best achieve its goals. Imagine working more effectively with your content and the data within it to create stronger business processes.

- Get an overview of SharePoint Syntex and see what you can do
- Learn about different types of content understanding models and their use cases
- Review our page about how to get started and take the interactive tour



DEMO

**Take a tour of how to create a document understanding model**

See how to build document understanding models in the models library. When you're done with the tour, you can go to the models library and enable a pretrained sample model to see in more detail how all these pieces work together.

[Demo how to create a model →](#)

\*SharePoint Syntex Licence NOT Required  
[aka.ms/sharepointlookbook](https://aka.ms/sharepointlookbook)

# SharePoint Lookbook - Contracts Management Template

SHAREPOINT SYNTAX CONTRACTS MANAGEMENT

CONTRACTS MANAGEMENT

Syntax powered solutions to automate your contract needs

This SharePoint Syntax powered site is designed to help you jump-start your contract management needs. Use the Contracts Management site to let employees know about recent updates to agreements or policies, to give various departments an easy way to request a contract, and to provide a secure place to keep your organization's contract templates.

The site also lets employees use preconfigured sample models to extract and classify information from documents, and to perform advanced searches to quickly find metadata within your agreements.

Site features

Web parts used

Content included

Add to your tenant >

You must be a tenant administrator to deploy this template.

Resources

Whether you're starting from scratch or you've installed this example on your tenant, here are some resources to help you create and personalize your site.

[Introduction to SharePoint Syntax](#)

Contoso Electronics SharePoint Syntax

Search this site

Contracts Management

Contract library Regions Templates Contract requests Clients Models Edit

+ New Send to Page details Immersive Reader

Published 11/1/2021 Edit

Review the new internal review process

Learn about policy changes for Q4

See updated guidelines for Non-Disclosure agreements

Request a contract to be drawn up for your team. A contract manager will get back to you

Request a contract

Templates

Name	Modified	Modified By
Non Disclosure agreements	November 8	Bruno
Service agreements	6 days ago	Bruno
Statements of work	6 days ago	Bruno
Place your contract templates ...	October 26	Bruno
Healthcare update agreement [...]	October 26	Bruno
Service Proposal (Sample).docx	October 26	Bruno
Statement of Work (Sample).docx	October 26	Bruno

See all

Activity

Contract-documentation

Bruno Edited 2 days ago

Legal-review

Bruno Viewed 2 days ago

Approval-process

Bruno Edited 2 days ago

See all

Resources

Client review process

Approval process

Legal review

Contract documentation

\*SharePoint Syntax Licence Required  
aka.ms/sharepointlookbook

# Find Out More

- [aka.ms/Syntex](https://aka.ms/Syntex) - (Syntex Resources)
- [aka.ms/Syntex/Start](https://aka.ms/Syntex/Start) - (Getting Started With Syntex)
- [aka.ms/SyntexRoadmap](https://aka.ms/SyntexRoadmap) – (Syntex Roadmap)
- [github.com/pnp/syntex-samples](https://github.com/pnp/syntex-samples)
- [bit.ly/LeonSyntexSeries](https://bit.ly/LeonSyntexSeries)



# Thank You/Any Questions?



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