



Microsoft Viva

Harness collective knowledge and expertise

Microsoft Viva: Topics & Syntex Fundamentals

Karl Kocar

Jack Lewis

Syntex Model Labs

Turn content into knowledge



Download Lab Files

- Document Understanding **Lab Doc** and Training Files:

<https://github.com/karlkocar/SyntexDocUnderstanding-Training>

- Document Understanding Testing:

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- Forms Processing **Lab Doc** and Training Files:

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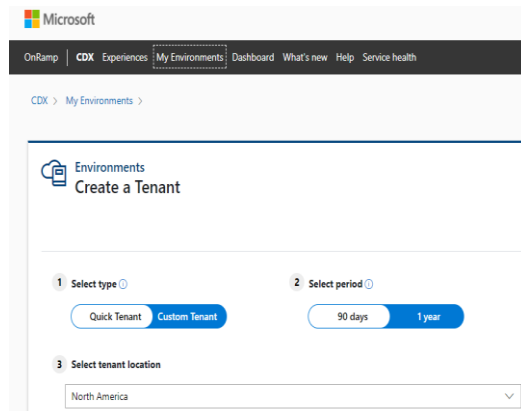
<https://github.com/karlkocar/SyntexFormsProc-Testing>

Prerequisites

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- Microsoft 365 Viva Tenant from: [Modern Workplace Digital Experiences \(microsoft.com\)](https://modernworkplace.microsoft.com/)

1) Create a 90-day Quick Tenant located in North America.



The screenshot shows the Microsoft Viva 'Create a Tenant' interface. At the top, there's a navigation bar with 'OnRamp', 'CDX', 'Experiences', 'My Environments', 'Dashboard', 'What's new', 'Help', and 'Service health'. Below this, a breadcrumb trail shows 'CDX > My Environments >'. The main heading is 'Environments Create a Tenant'. The form consists of three steps: 1. 'Select type' with buttons for 'Quick Tenant' (selected) and 'Custom Tenant'; 2. 'Select period' with buttons for '90 days' (selected) and '1 year'; 3. 'Select tenant location' with a dropdown menu showing 'North America'.

2) Viva Tenants can be found at the bottom of tenant list.

Microsoft VivaCreate Tenant

This demo environment includes the content to help you showcase and highlight Microsoft Viva, including Syntex, Topics, and Connections. It supplies the most complete demo content to showcase Microsoft 365 to your customer, since it includes trial licenses and pre-hydrated content for the full Office 365 E5 suite, along with Viva – with the one exception of Microsoft Defender for Endpoint.

90-day environment not eligible for extension

Lab Videos

- <http://myteams.blog/2021/07/12/building-a-document-understand-model/>
- <http://myteams.blog/2021/05/12/syntex-forms-processing-power-automate/>

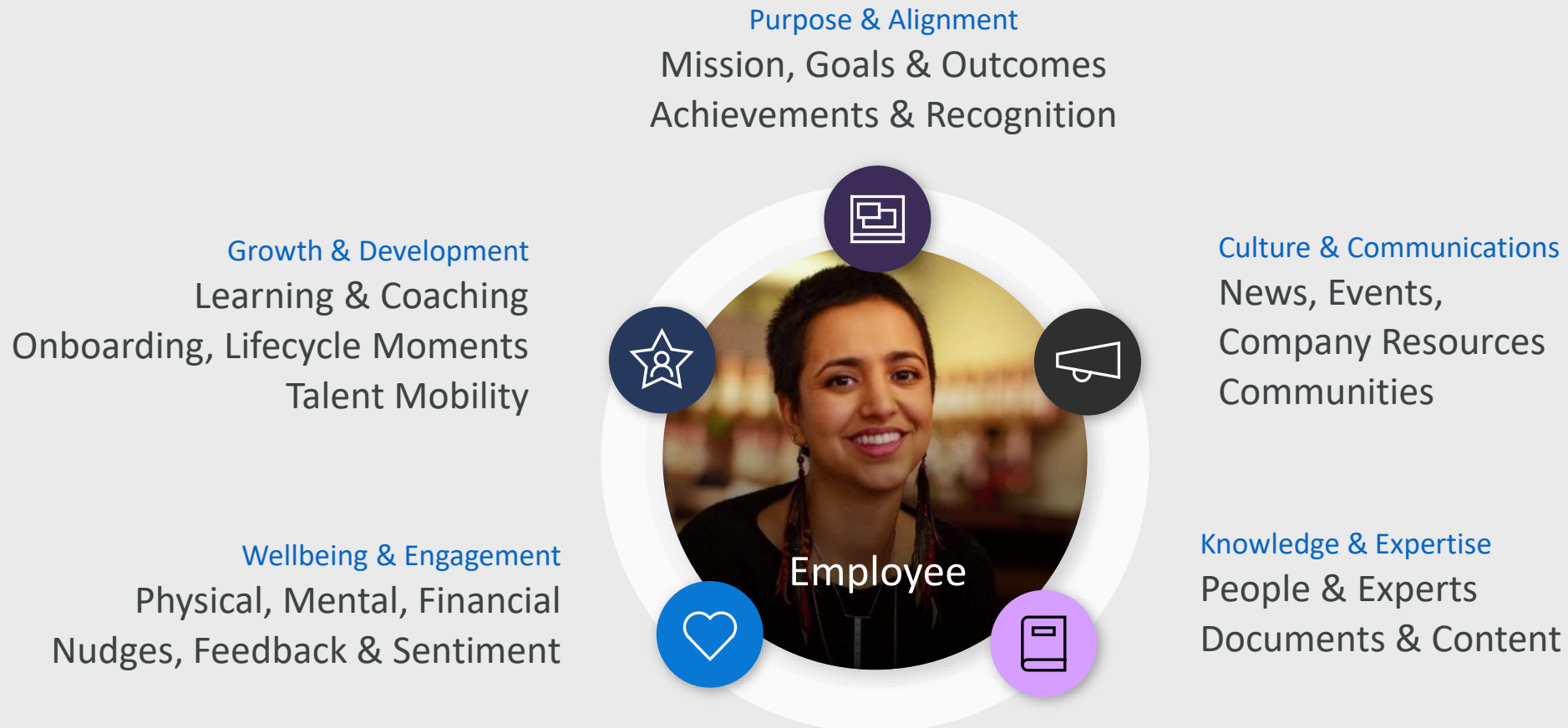


Agenda

- Introduction to Viva
- Viva Topics 101
- Topics Demonstration Walkthrough
- What is Syntex?
- Syntex Model Labs

What is an Employee Experience Platform (EXP)

A digital platform that helps organizations create a thriving culture with engaged employees and inspiring leaders

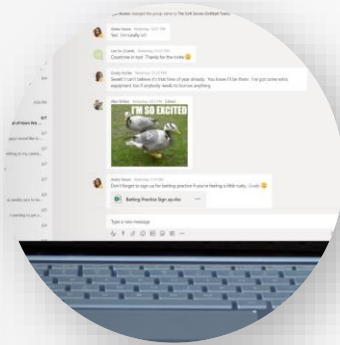




Microsoft Teams



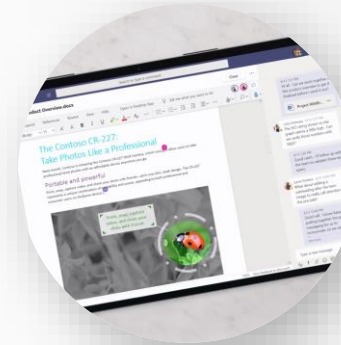
Meet



Chat



Call



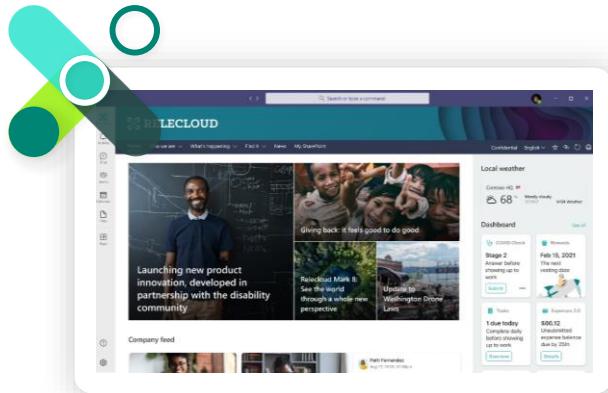
Collaborate



Apps

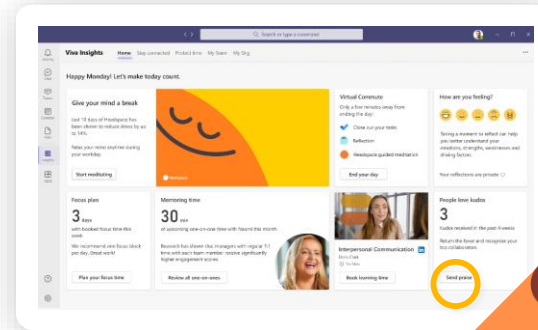
Microsoft Viva

Empower people and teams to be their best



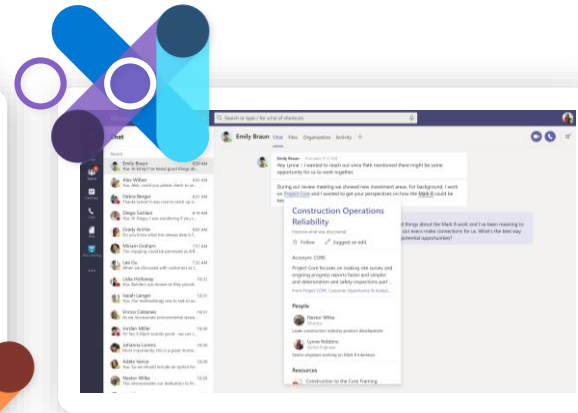
Connections

Culture and communications



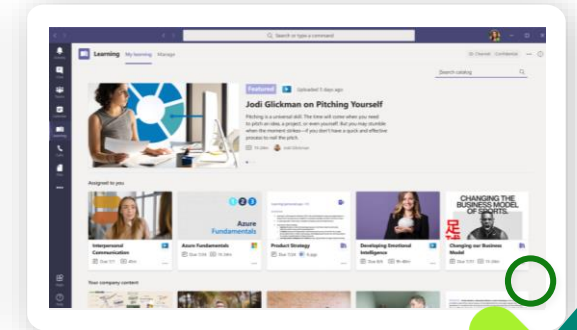
Insights

Productivity and wellbeing



Topics

Knowledge and expertise



Learning

Skilling and growth



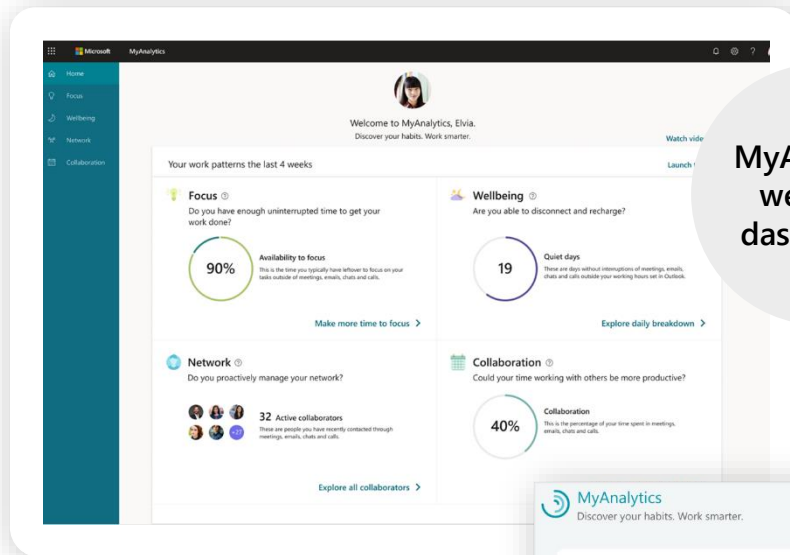
Microsoft Viva

**Viva Insights: Create a culture
where people and business thrive**



Personal insights to build better work habits

Understand how you work

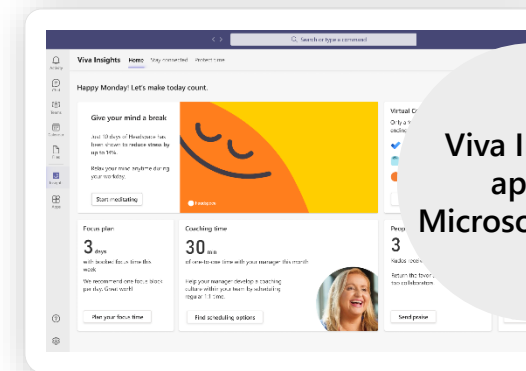


MyAnalytics web app dashboard

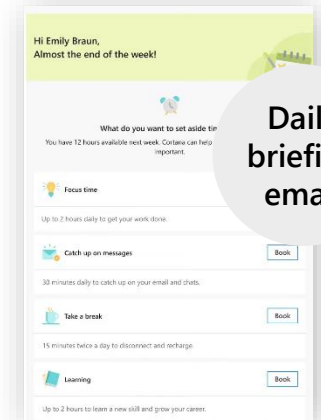


MyAnalytics digest emails

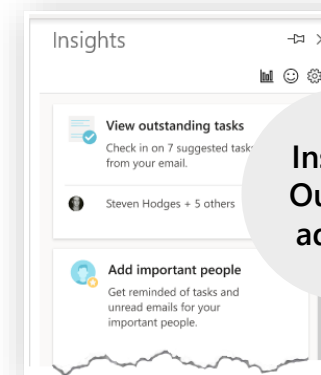
Take action in the flow of your work



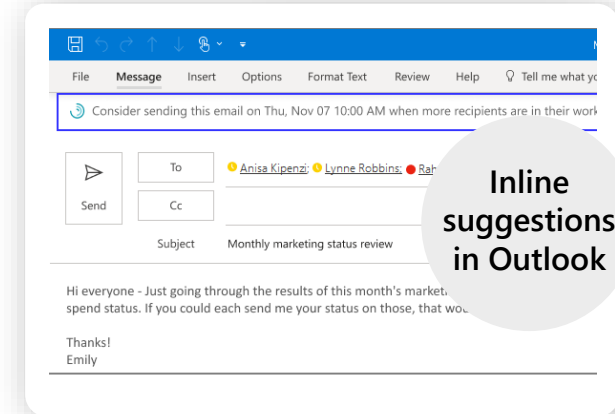
Viva Insights app in Microsoft Teams



Daily briefing email



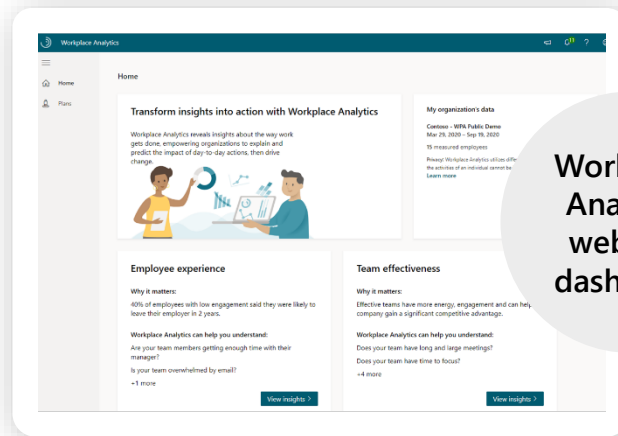
Insights Outlook add-in



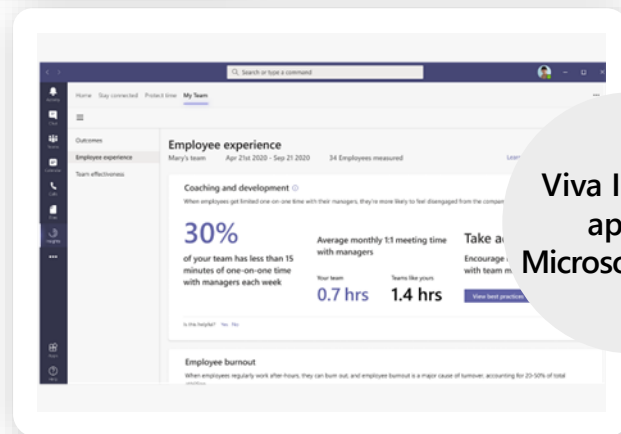
Inline suggestions in Outlook

Manager insights to foster healthy, successful teams

Understand team norms and work patterns

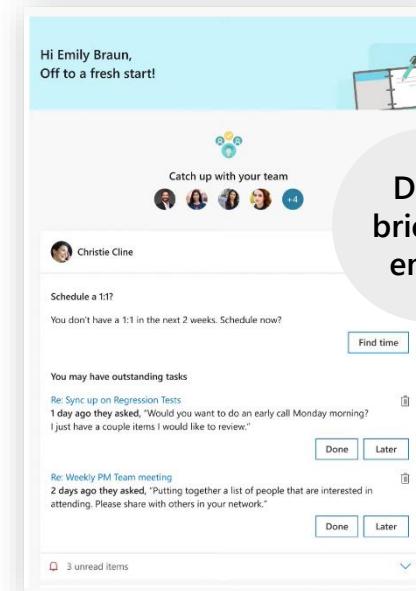


Workplace Analytics web app dashboard

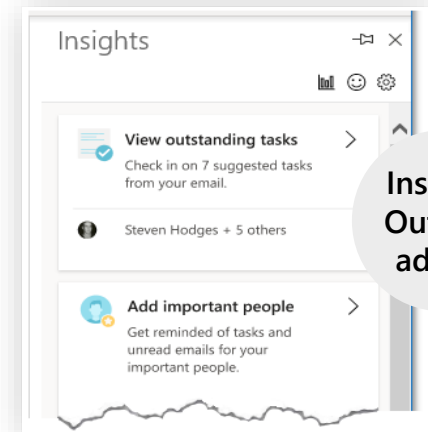


Viva Insights app in Microsoft Teams

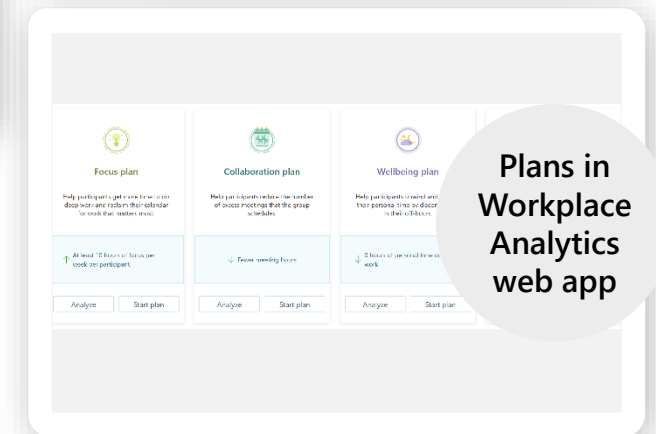
Take action in the flow of your work



Daily briefing email



Insights Outlook add-in

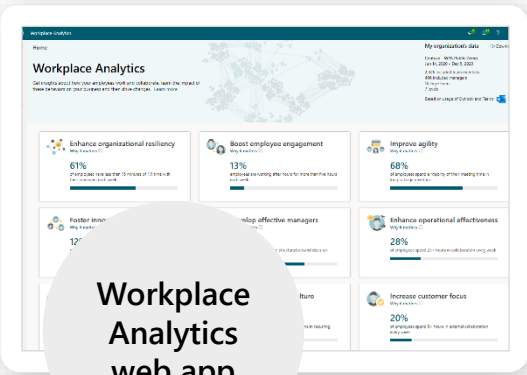


Plans in Workplace Analytics web app

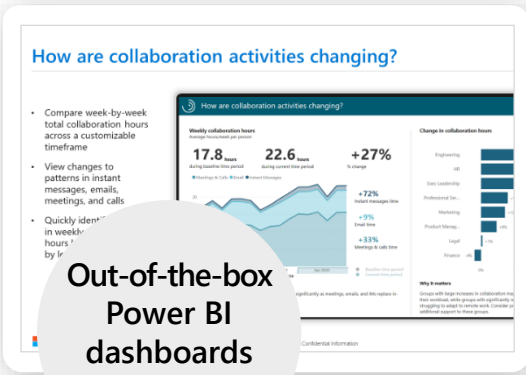
Data is aggregated and de-identified by default

Leader insights to address complex business challenges

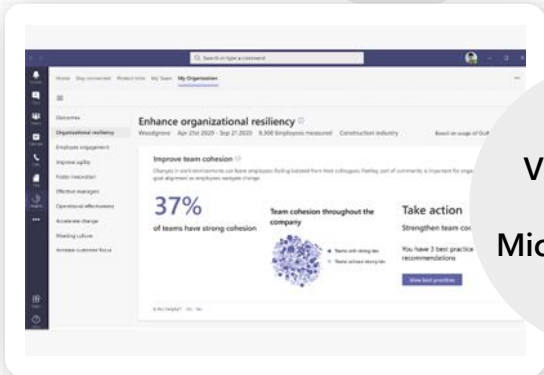
At-a-glance insights and scenario-specific dashboards



Workplace Analytics web app



Out-of-the-box Power BI dashboards and reports

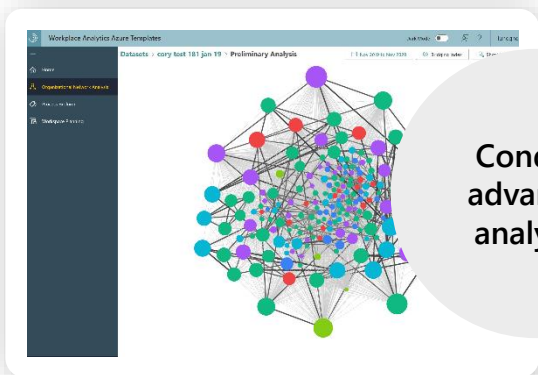


Viva Insights app in Microsoft Teams

Tools for custom analysis and deep exploration



Custom insights on business outcomes important to you



Conduct advanced analytics



Analyst

Key partner:
Custom analysis based on business scenarios

Data is aggregated and de-identified by default

Microsoft Viva

Viva Connections: Create a culture of communication

Viva Connections Communications and culture

Keep everyone connected

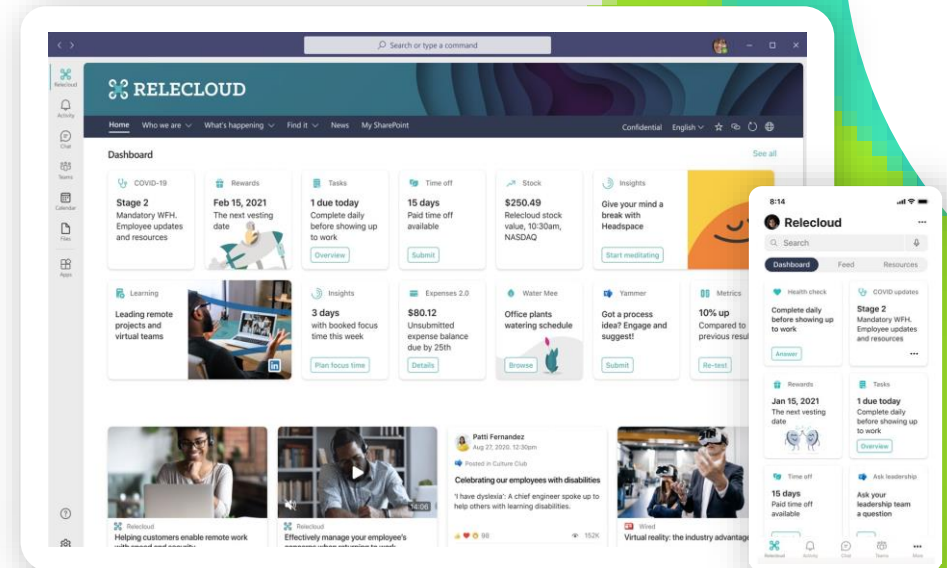
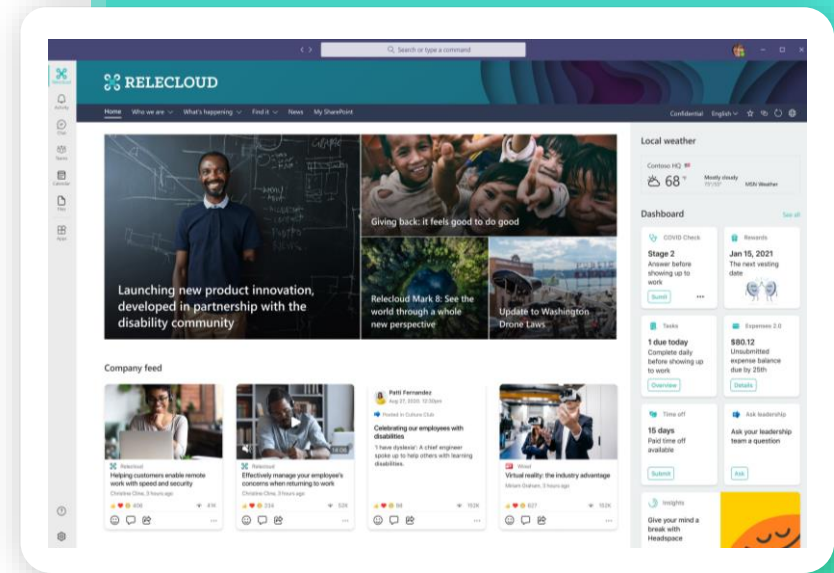
Encourage meaningful connections across the organization by enabling employees to easily discover relevant communications and communities.

Make it easy for people to contribute

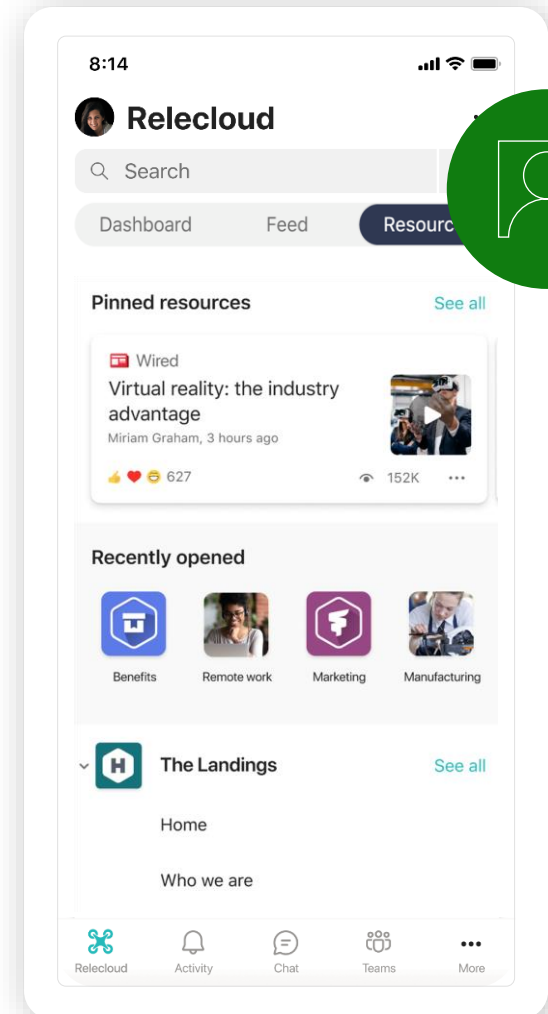
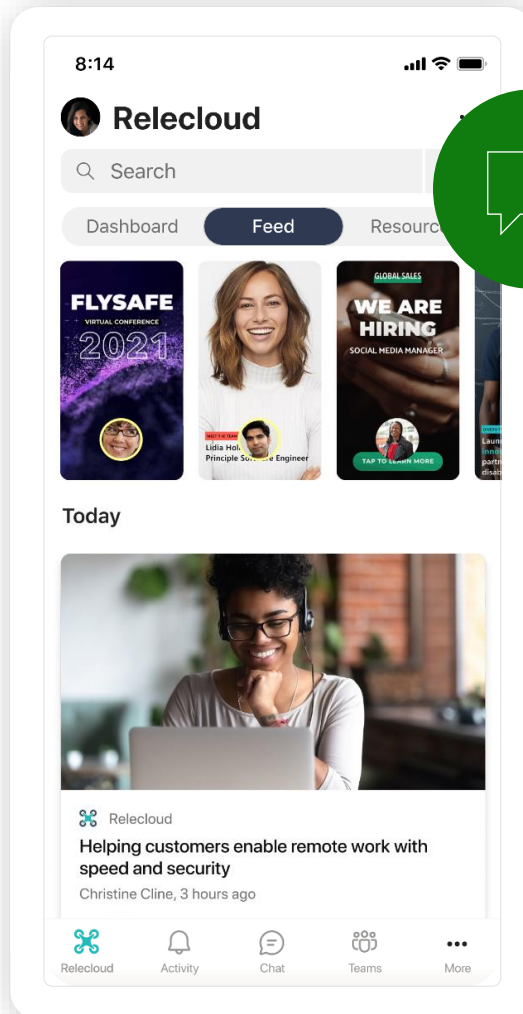
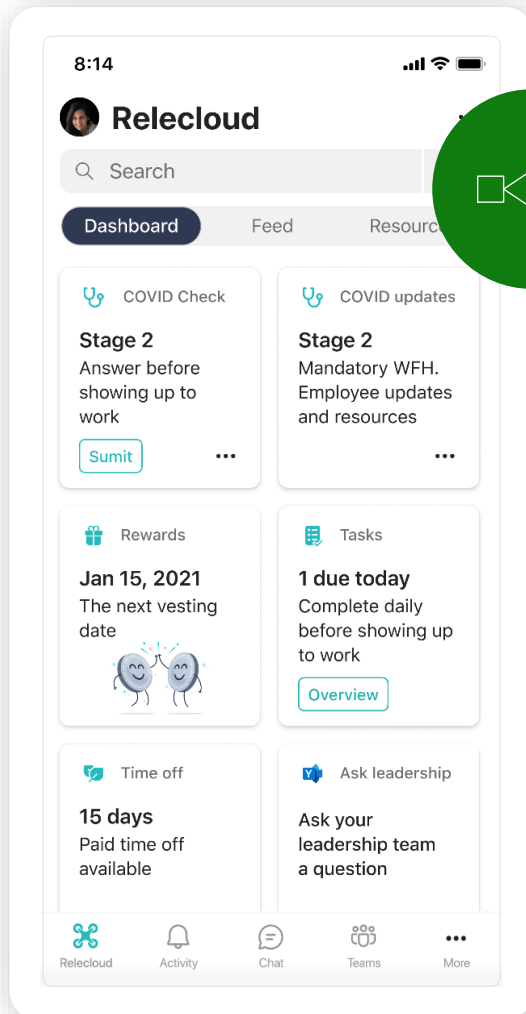
Foster a culture of inclusion by empowering every employee to contribute ideas and share feedback.

Unite and inspire your organization

Align the entire organization around your vision, mission, and strategic priorities.



Viva Connections mobile



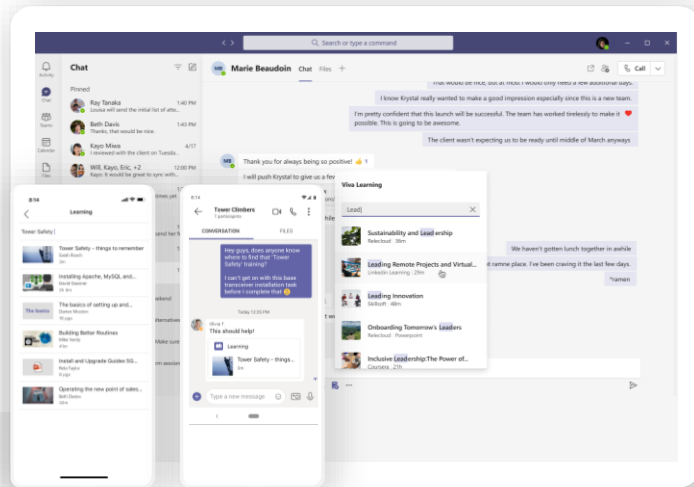
Microsoft Viva

Viva Learning: Create a culture of learning

Viva Learning

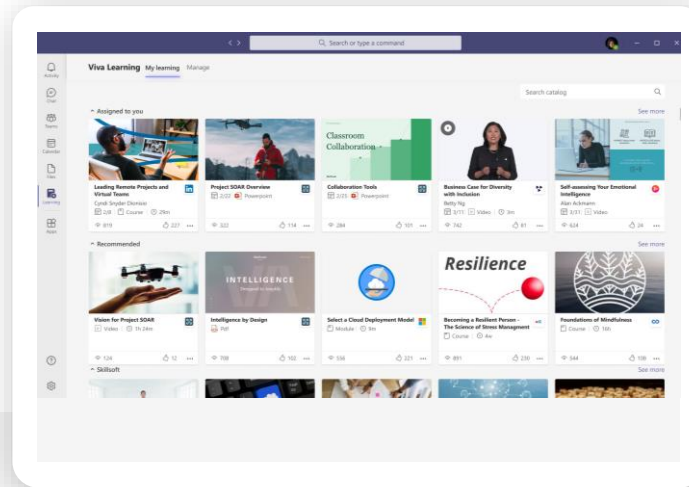
Making formal and informal learning widely accessible, so it's easier to learn while working and develop the skills the organization needs

Make learning a natural part of the day



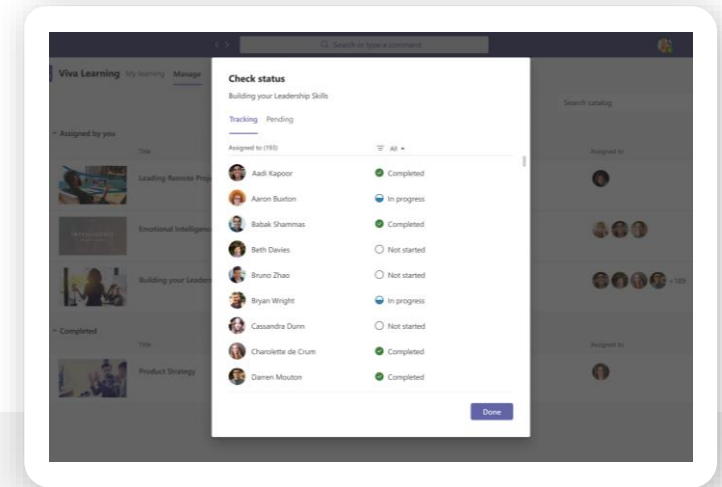
Foster a culture of learning by enabling employees to easily discover, share, and engage with learning integrated into Microsoft Teams

Make all your learning content available in one place



Simplify the learning experience by bringing together world class content from LinkedIn Learning, 3rd parties, Microsoft Learn, and your organization's own custom content

Drive results that matter



Empower leaders and employees to curate, assign, and track learning aligned with business outcomes

Viva Topics

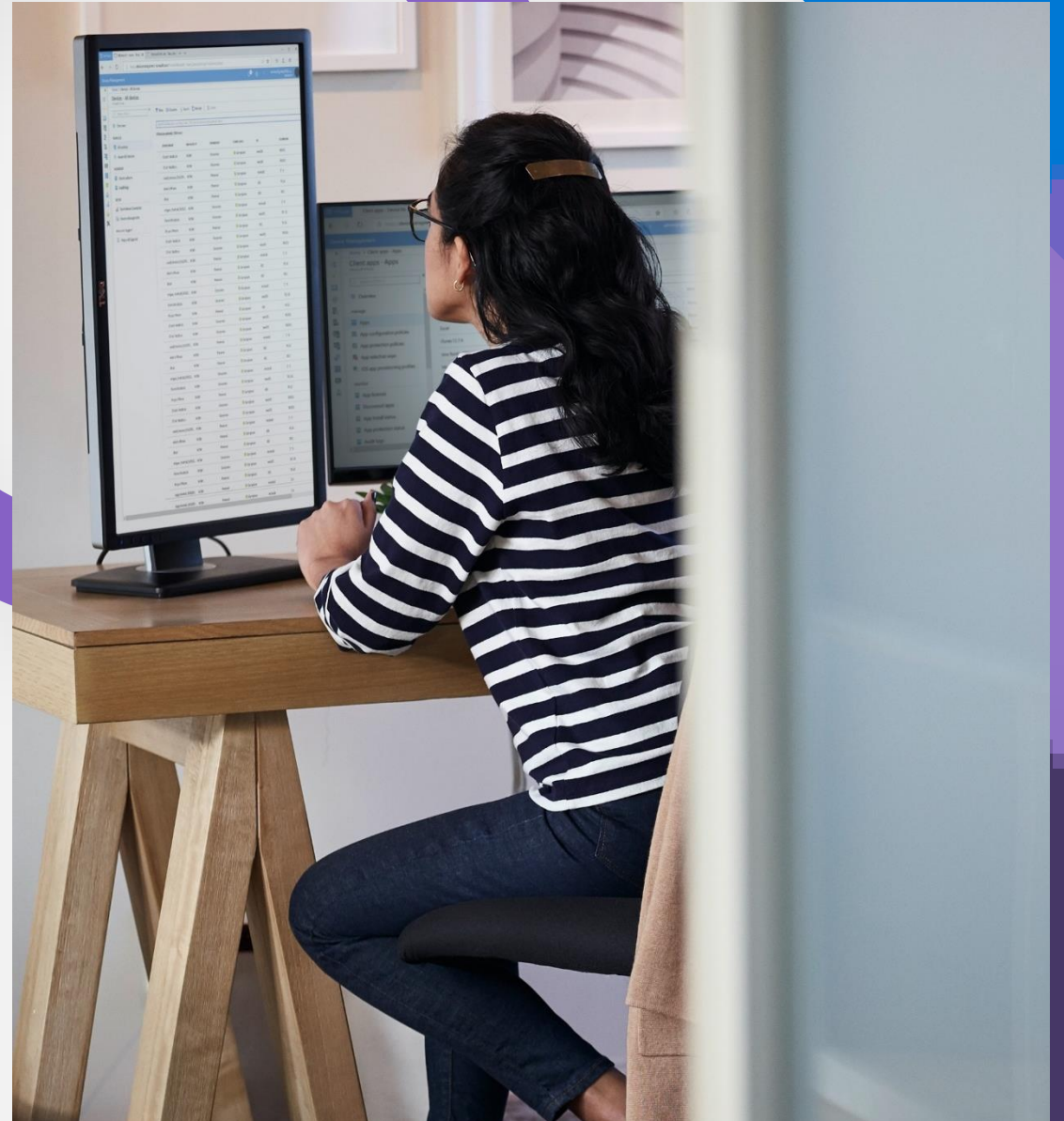
Knowledge put to work



People spend about an hour
a day – or up to seven weeks a year –
searching for or recreating information

Spiceworks/ZD survey commissioned by
Microsoft, February 2021

<https://aka.ms/viva/topics/spiceworks>



New employee onboarding is costly



Typical company ROI, for improving onboarding times:
\$9.7 to \$17.1 million



Improved discovery:
\$42 million to \$127 million

Source: Forrester (July 2020)
New Technology: The Projected Total Economic Impact™ of Project Cortex



Viva Topics

Knowledge challenges

Finding the right information

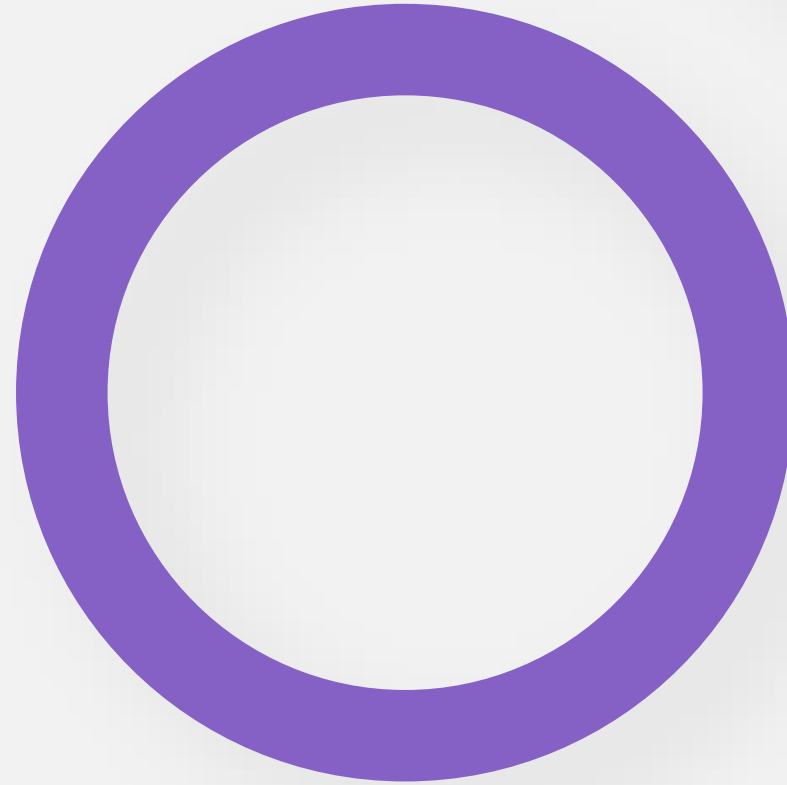
Knowing where to search, for what, and which search results to trust is challenging

Traditional search methods

The way people search is often inefficient, and spread across numerous platforms or apps

Loss in productivity

Using multiple tools drives context switching



Viva Topics

Knowledge and expertise

Turn content into usable knowledge

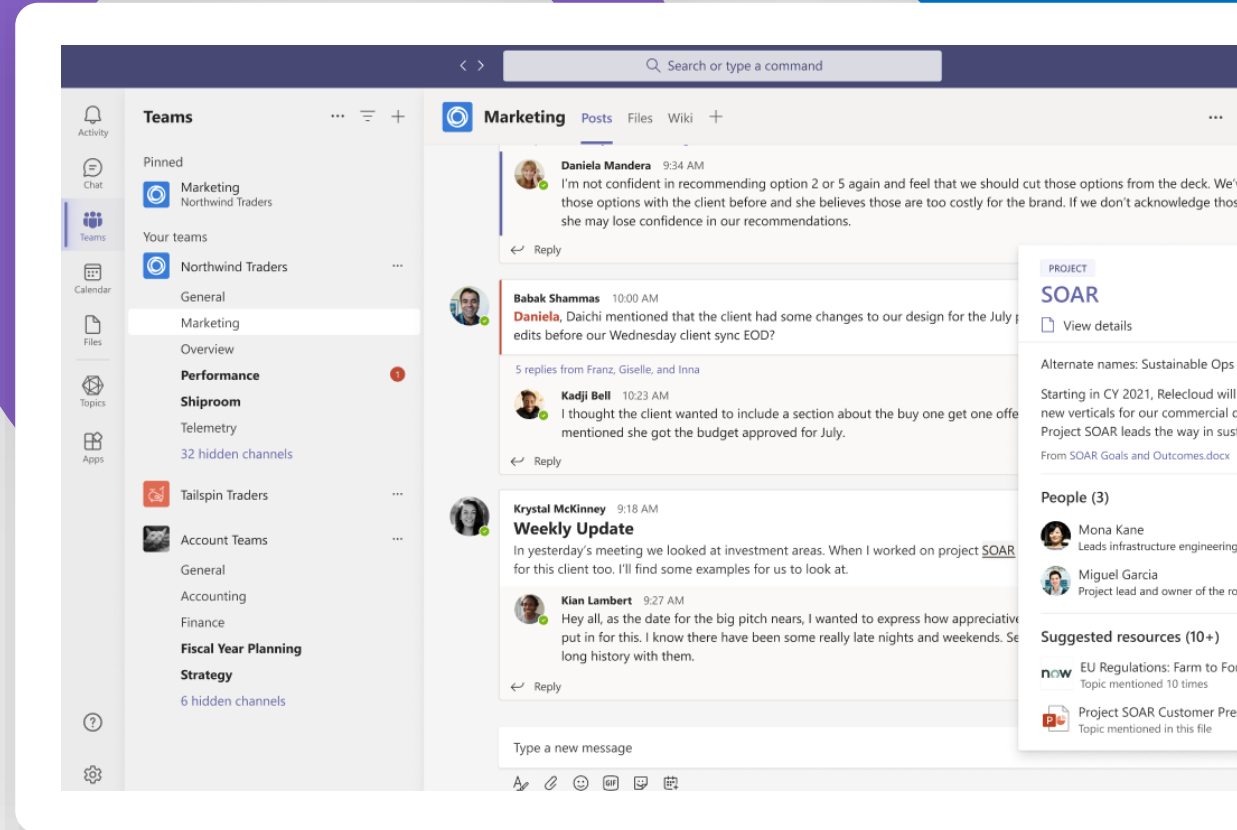
Use AI to reason over your organization's content and automatically identify, process, and organize it into easily accessible knowledge

Organize knowledge into topic pages

Enable your organization's experts to share and refine knowledge through curated topic pages, automatically generated and updated by AI

Make knowledge easy to discover and use

Deliver relevant topic cards in the apps people use everyday



Topics Demo Walkthrough

Knowledge put to work



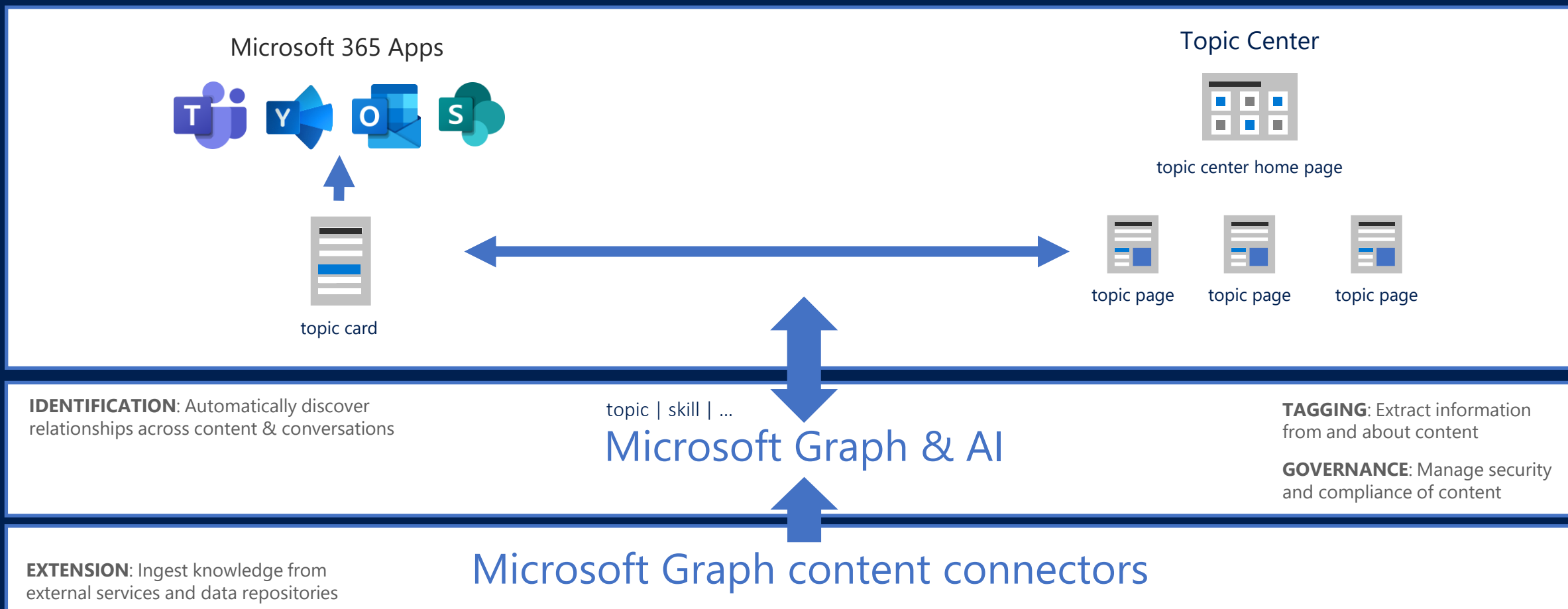
Knowledge Functionality

A

Knowledge curation & discovery

DISCOVERY: Where *users* connect to knowledge (content and experts) about topics

CURATION: Where *users* explore topics and experts manage topics



Assess Your Customer's Content Readiness

- ✓ Perform an analysis of your current environment. This analysis is known as a Content Inventory, which will give you a clear picture of all your content, indicating what you have and highlighting what's missing
- ✓ Remember, only you know your data, how it's used and who uses it. Engage your content owners for assistance to quantify and qualify your data and determine if some data needs to be archived or deleted
- ✓ Start by looking at your content and categorizing it in two phases:
 - 1) **Discovery** - Identify what content exists and its currency and relevance to the organization
 - 2) **Assessment** - Determine if content needs to be moved into or out of M365 or if content is obsolete or redundant and can be deleted. Determine if a search connector can be of value to expose content external to M365 to Project Cortex
- ✓ Consider what content should be included in Project Cortex and what content should be excluded
- ✓ Evaluate your existing metadata and content types and consider disposition and enterprise readiness
- ✓ If you have data in an existing on-premise system and are considering migrating this to M365, take stock of what customizations are in place including branding, functionality, workflows, forms, reporting and dashboards

Viva Topics Launch Partners



Preferred
Content Services

						Advisory Implementation Migration Capture Hardware/ OEM Workflow Knowledge mgmt. Compliance/ Records mgmt. Extensions

Topics Teams Integration

Video Demonstration



What is Syntex?

Turn content into knowledge





Why build a model?

Models are a means to an end,
they facilitate another outcome



View formatting



Library sorting and/or filtering



Process automation



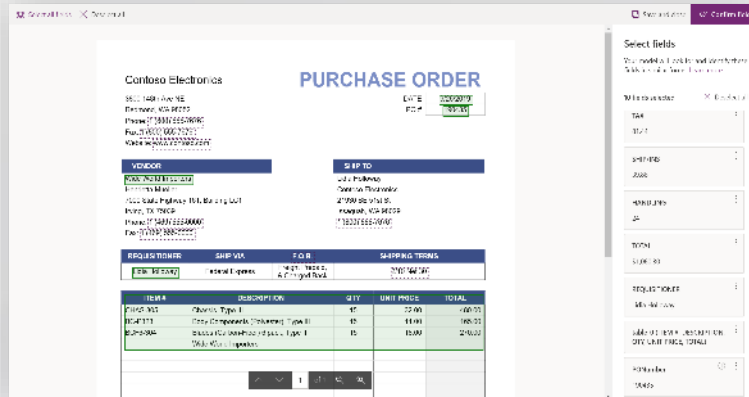
Compliance



Search

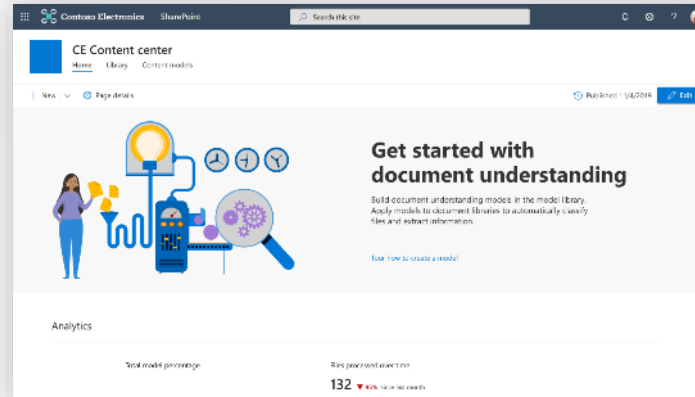
SharePoint Syntex

Content services that work the way you do



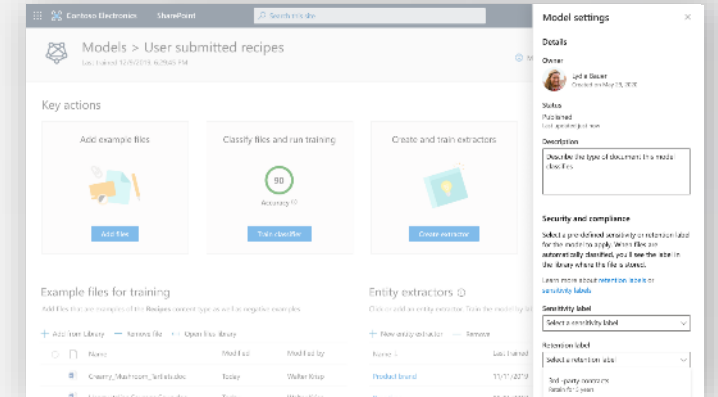
Content understanding

Create no-code **AI models** that capture expertise to **classify** and **extract** information to **automatically apply metadata** for knowledge discovery and reuse



Content processing

Automate **capture, ingestion, and categorization** of content and streamline **content-centric processes** using Power Automate



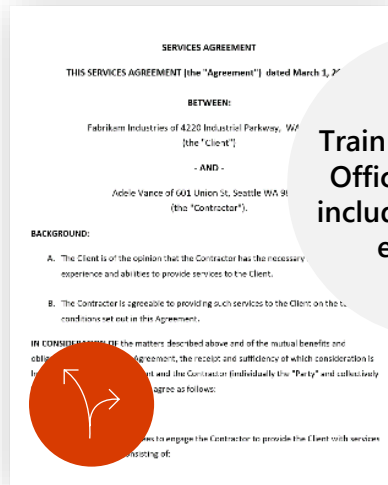
Content compliance

Connect and manage content to improve **security** and **governance** with integration to Microsoft Information Protection & Governance

Model training flow and type based on file format and use case

Document understanding

- Created in content center
- Model created in native interface
- Used for unstructured file formats
- Trainable classifier w/ optional extractors
- Can be applied to multiple libraries



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

Form processing

- Created from document library
- Model created in AI Builder
- Used for semi-structured file formats
- Settable classifier
- Restricted to a single library



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

SharePoint Syntex - Compliance integration

Leverage MIP label policies for sensitivity and retention



Retention label defines record policy based on document **age** or external **event**



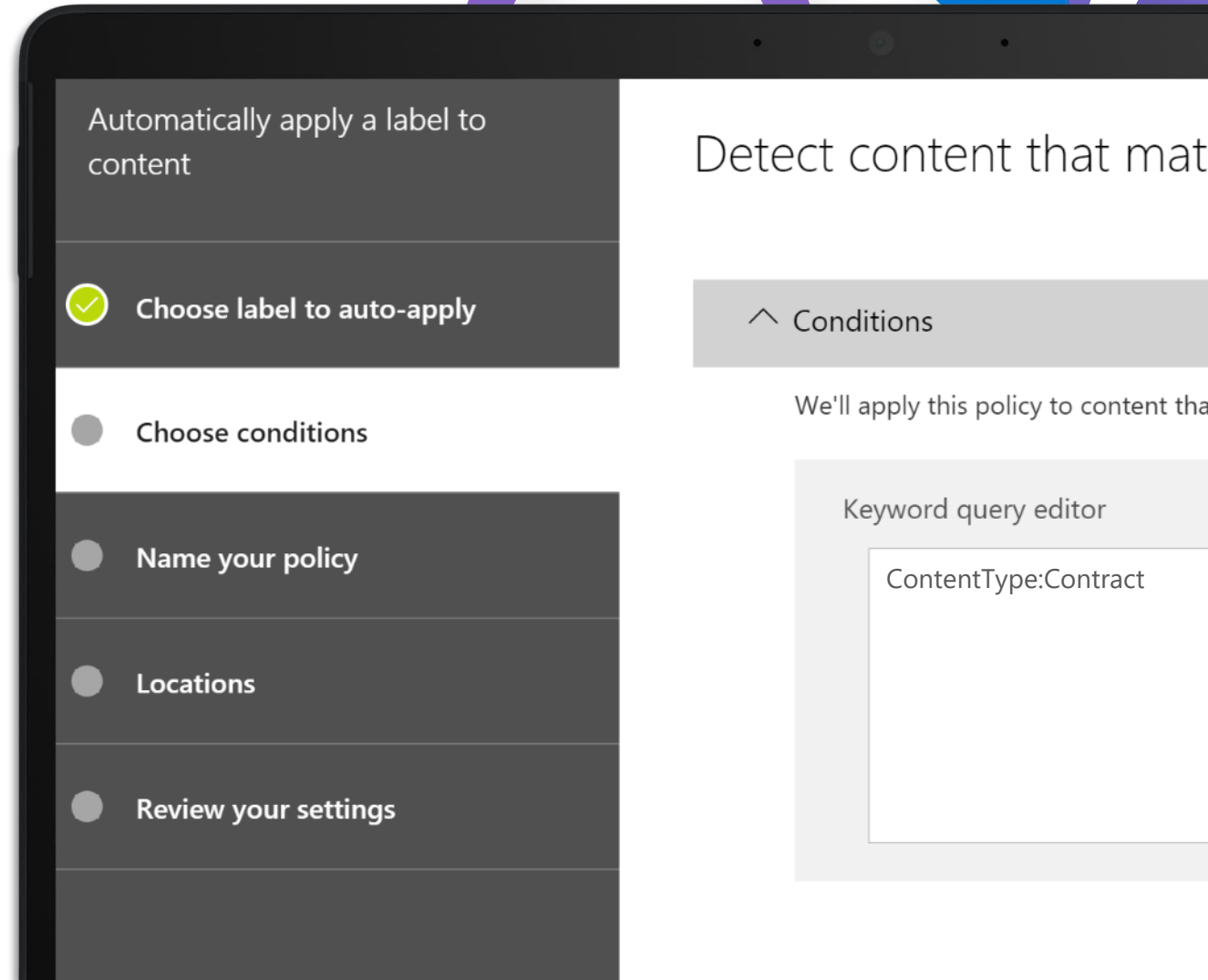
Sensitivity label sets DLP, encryption, sharing, conditional access policies



Labels can be applied **interactively** by users

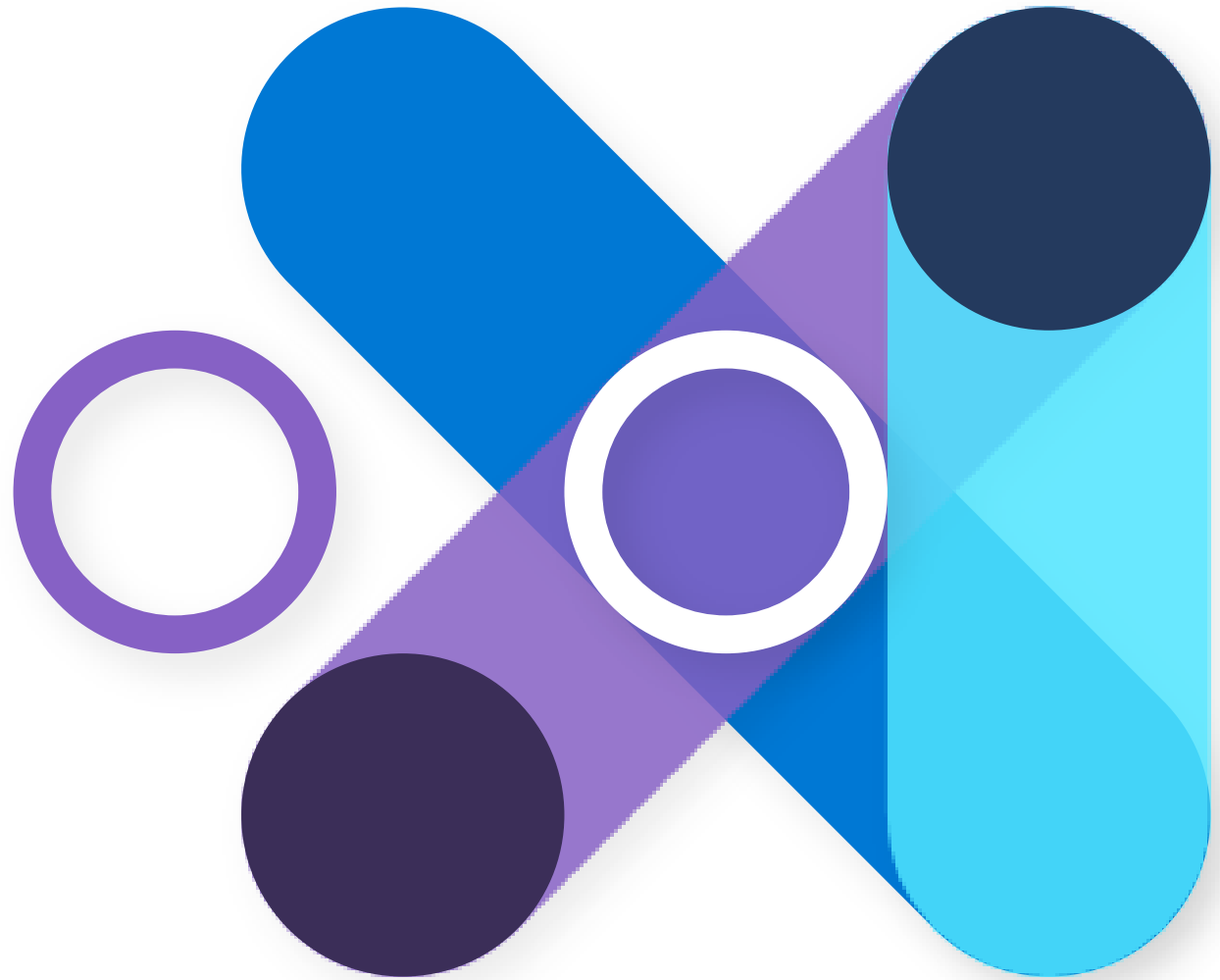


Labels can be applied **automatically** by SharePoint Syntex AI models



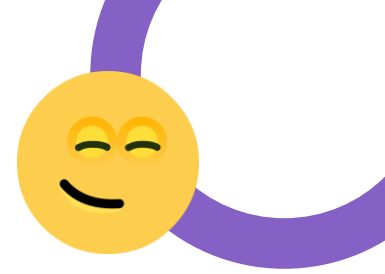
Demo:

SharePoint Syntex



<http://myteams.blog/2021/05/12/syntex-forms-processing-power-automate/>
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Forms processing takeaways



All models are currently stored in the default environment

Ability to use named environments is rolling out soon



Connection from AI Builder to SharePoint through Power Automate

An opportunity for customization



OOTB experience ties a model to a single library

But it is available in CDS for use elsewhere



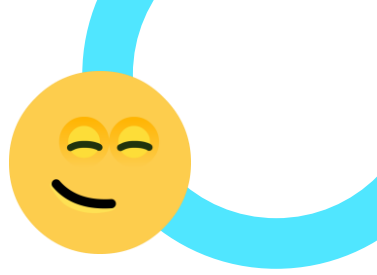
Use collections to group layout types into a single model



Training data will temporarily leave the tenant compliance boundary

Temporary processing in the Azure region local to the Power Platform environment

Document understanding takeaways



Explanations are not hard pattern matches

Don't try and build hard pattern matches, think like you're teaching a human



Multiple models can be run on a single library

Each file is analyzed against every model, so be mindful of performance for your scenario



A model does not always need an extractor

Your use case could be satisfied with just a classifier



Custom explanations can be saved and reused within a content center

Knowledge & Content Services roadmap 2021

	Experiences	Foundation	Language support	Clouds
Viva Topics	<ul style="list-style-type: none">• GA of v1• Topics in Microsoft Search in Bing• Topics in Yammer and Teams – Preview• Resolve topic name similarities• Topic management metadata• Support for extended topic types	<ul style="list-style-type: none">• Graph connected content available for knowledge indexing• Shared components for topics• API in Microsoft Graph	<ul style="list-style-type: none">• Extended language support French, German, Spanish	GCC availability (unlikely GCC High/DoD)
SharePoint Syntex	<ul style="list-style-type: none">• Extractors position awareness• Dynamic explanation templates• Search within training files• Retention label support for Form Processing• Add MMS columns to modern view	<ul style="list-style-type: none">• New pre-built models• Model management• Community models & scripts• APIs Microsoft Graph• Scripts for batch ops	<ul style="list-style-type: none">• Extended language support French, German, Italian, Spanish	GCC availability

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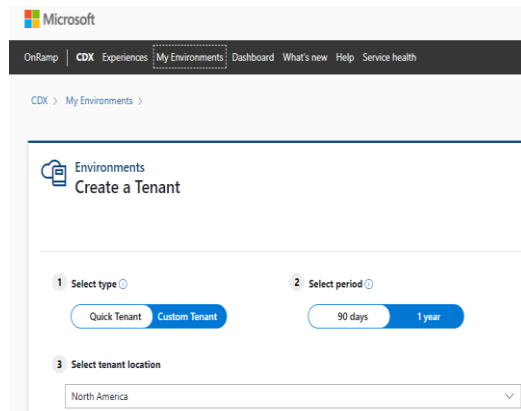
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