



# Automate Content Processing with SharePoint Syntex

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# Kunal Kankariya

Principal Solutions Architect – Infotechtion



<https://linkedin.com/in/kunalkankariya/>



[@kunalkankariya](https://twitter.com/kunalkankariya)



[kksimplifies.com](https://kksimplifies.com)

- ❖ Principal Solutions Architect @ Infotechtion Ltd
- ❖ Microsoft Certified Trainer 2020 – 2021
- ❖ Some of the organizations that I have worked with – Hexaware, CGI, Cognizant and Infosys.
- ❖ I blog about all things M365 @ [kksimplifies.com](https://kksimplifies.com)
- ❖ I can speak in Hindi, Marwadi, Tamil and English
- ❖ My morning routine – Badminton 😊

# ABOUT INFOTECHTION



- **Infotechtion** specializes in improving and automating information management processes: retention, protection & governance, leveraging Microsoft Cloud.
- We are Microsoft partners, and since 2013 the leading consultants pioneering the design of Microsoft advanced data governance roadmap and making it relevant to our global clients.
- Our team is proud to be the pathfinders, to have successfully transitioned several large and global enterprises to modern automated information governance standards in Microsoft 365.
- We work closely with Microsoft engineering to define and improve Microsoft information governance and protection offerings for Microsoft 365 and beyond.
- Most of our clients are large enterprises with up to 300,000 users operating in highly regulated industries.
- Infotechtion has offices in the US, UK, and EU.





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# Challenges



## Content Discovery

Content Search

Disparate Information  
Sources

Context Switching

## Content Management

Content Classification

Maintaining Metadata &  
Taxonomies

Labour Intensive Data  
Entry

Compliance &  
Information Protection

# Project Cortex – Overview



## Knowledge Discovery

Topic Cards & Topic Center



## Content Services

Content Center



Leverages Microsoft Graph,  
AI & SharePoint



# SharePoint Syntex – Overview

## Understanding

### Content Understanding

- Create no-code AI models to classify and extract information from content to automatically apply metadata for knowledge discovery and reuse.

## Processing

### Content processing

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

## Governance

### Content analysis and management

- Control and manage content to improve security and governance with enhanced MMS and integration to Microsoft Information Protection.



# Content Processing – Options



## Manual

- Any type of content
- Labour Intensive
- Interactive – Content Types & Metadata

## Forms Processing

- Used mostly for structured or semi-structured content
- Pre-Built & Automated
- SMEs train the model
- Capture metadata from invoices, forms

## Document Understanding

- Used mostly for unstructured documents
- Custom & Assisted
- SMEs are less involved
- Capture metadata from letters or contracts



# Forms Processing Model



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Initiated from document library

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Model created in AI Builder

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Uses Power Automate

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Used for structured / semi-structured file formats

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Settable classifier

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Restricted to a single library

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

# Document Understanding Model



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Created in content center

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Model created in native interface

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Used for unstructured file formats

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Trainable classifier w/ optional extractors

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Can be applied to multiple libraries

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



# Setup SharePoint Syntex

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DEMO – Document Understanding Model

DEMO – Forms Processing Model



# Use Cases



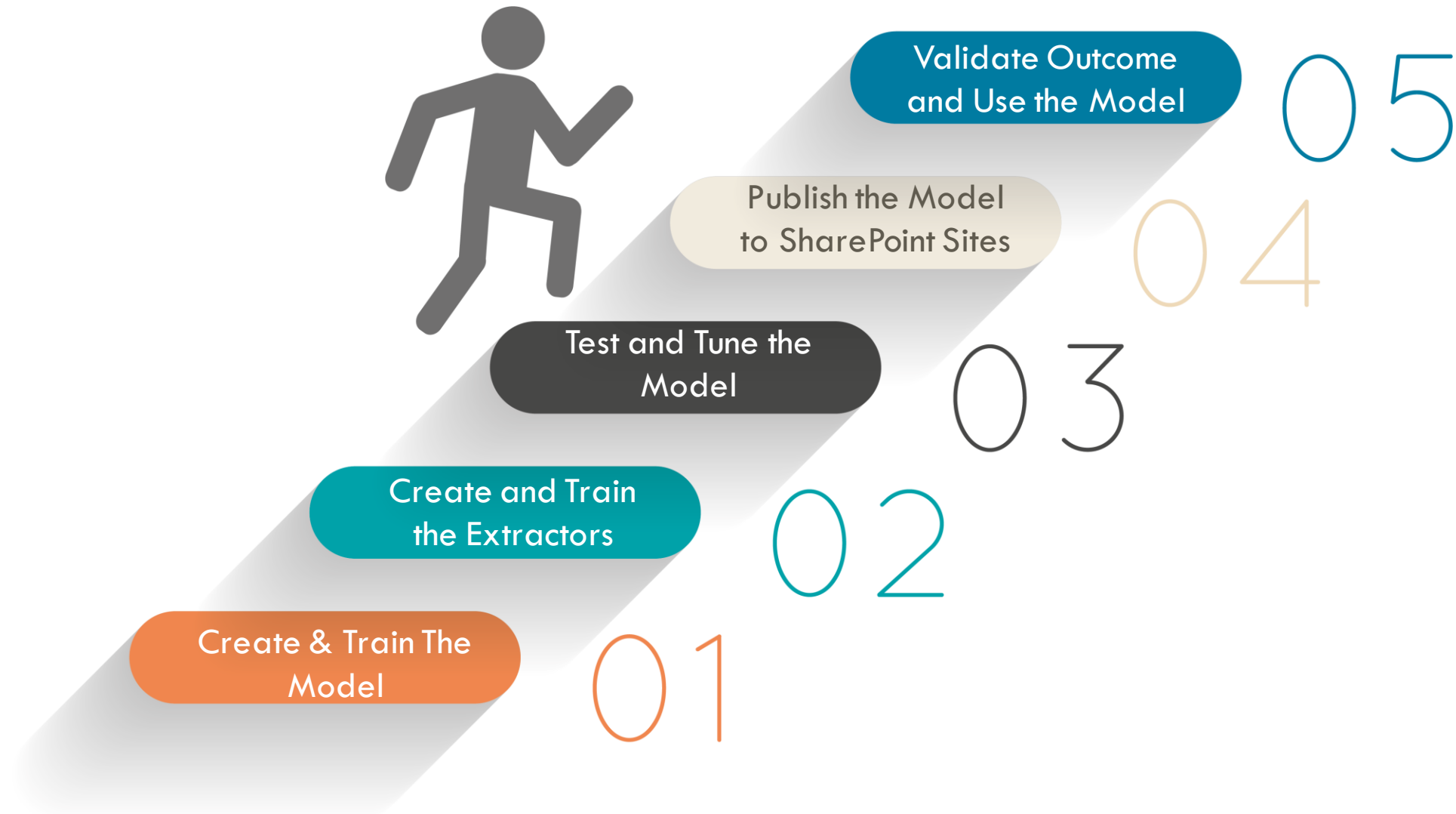
- Invoice processing
- Forms (Ex : Tax Forms)
- Resume review automation

Extracting structured entities from Semi structured formats

Extract information from unstructured formats especially Emails

- Case automation
- Email Metadata extraction
- Contracts / Agreements

# Summary



# Licensing



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5 USD / Per user / Per Month

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Anyone using, consuming, or otherwise benefiting from SharePoint Syntex capabilities requires a license.

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Forms Processing also requires AI Builder credits

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500 USD for One Unit of AI Builder Credits



Thank You !

