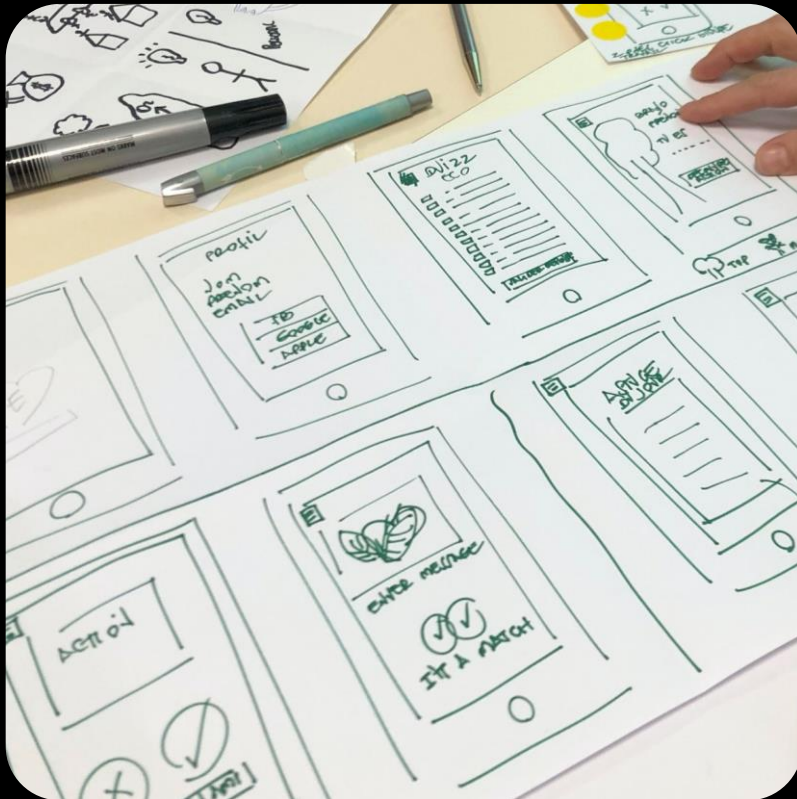


AI Document Automation Solution Overview

Inject ai capabilities into business processes to drive productivity into your everyday administrative and support functions.



AI Document Automation

- Artificial intelligence can streamline and enhance countless business processes across an organization. However, for many businesspeople, it's difficult to know what exactly it means to “use AI” in their day-to-day tasks.
- Low code AI tools enable business users to inject powerful AI capabilities into existing workloads. With prebuilt templates and easy to configure Syntex models, anyone can readily integrate AI functionality like metadata extraction, prediction, image and text classification to intuitively add AI to their business applications and intelligently automate processes and tasks.
- Putting powerful AI into the hands of those closest to customers and business problems enables you to truly capture the opportunity of AI, transforming business processes and systems, better engaging customers, and better predicting business outcomes.

Introduction: Evolution of Enterprise Knowledge



Isolated Documents No AI



Document Automation AI Support



Connected Content AI Recommendations



Broad Knowledge Base AI Interface

Discovery

- **Push:** Individual documents are actively shared via Email, Teams, SharePoint
- **Pull:** Individuals discover potentially relevant documents through navigation or search

- **Push:** Documents suggested in the flow of work, such as prior to a meeting
- **Pull:** AI extracts context to help improve search results and sorts documents to the right locations.

- AI helps curate the knowledge base, actively linking and highlighting relevant information and guiding users to it

- Single source of the truth knowledge base, underlaying all business processes.
- Paradigm shift from search-and-find to ask-and-answer questions using natural language to one or many agents.

Understand

- In-app searches to find specific keywords (text-based document only)
- Users manually review resulting content to judge relevance and usefulness

- AI-supported document summarization, translation and interpretation of relevant content, typically on an item-by-item basis

- AI-supported document summarization, translation and interpretation of relevant content from multiple locations simultaneously

- AI driven knowledge base curation, by comparing all available data sources and all human interactions

Extraction

- Users manually extract relevant pieces of information.

- AI extracts relevant data/information from specific documents and makes that available to search indexes and/or applications

- AI extracts relevant data from a large collection of documents and makes that available to search indexes and/or applications

- Natural language used to query the knowledge base; next-best questions and recommendations help the user explore concepts in more depth

Generation

- Users manually create new documents
- Basic mail merge allows information to be seeded into templates with a predefined structure

- AI-supported text document generation, to automatically fill pre-defined document templates

- Generative AI creates content from scratch, using other content as reference points for both substance and style

- Generative AI creates content from scratch, using other content as reference points for both substance and style, and content is refined as users provide feedback

Overview

Process

Persona

Use Case

Opportunity

1. INVOICE PROCESSING



Accounts Payable Manager

- The AP manager receives an invoice.
- User needs to check the invoice against the purchase order and relevant general ledger (GL) account.
- The clerk routes the invoice for approval.
- Once approved, the clerk schedules payment against the invoice.

- Automatic flow that leverages document upload, document categorization and document processing

2. AUDIT / RESEARCH



Finance Analyst

- The Finance Analyst receives a set of documents for review.
- Need to review, summarize and extract key information.
- Information is used to create custom PowerPoint presentation
- Access / Security protocols need to be always in place

- Opportunity to leverage AI for search, document summarization and document creation

3. RFP PREPARATION



Sales Specialist

- Sales specialists receives RFP in a foreign language.
- Requirement to translate the document in English.
- Need to search to retrieve data from similar past RFPs
- Once information is collected, need to write a new RFP.

- Opportunity to leverage AI for document Translation, document search and document generation

4. HIRING



Recruitment Lead

- Recruitment lead receives a wide range of personal information from recruit
- Information needs to be store securely with the right level of access,
- Information is then used to prepare contract and follow internal process.

- Automatic flow that leverages document categorization, document creation and digital signatures

MS Solutions



Syntex



Open AI



Power Platform



Azure Services: Data, Web,
AI/ML, Purview, Blob



RPA/Automation



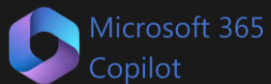
SharePoint Online



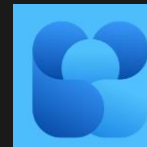
Analytics



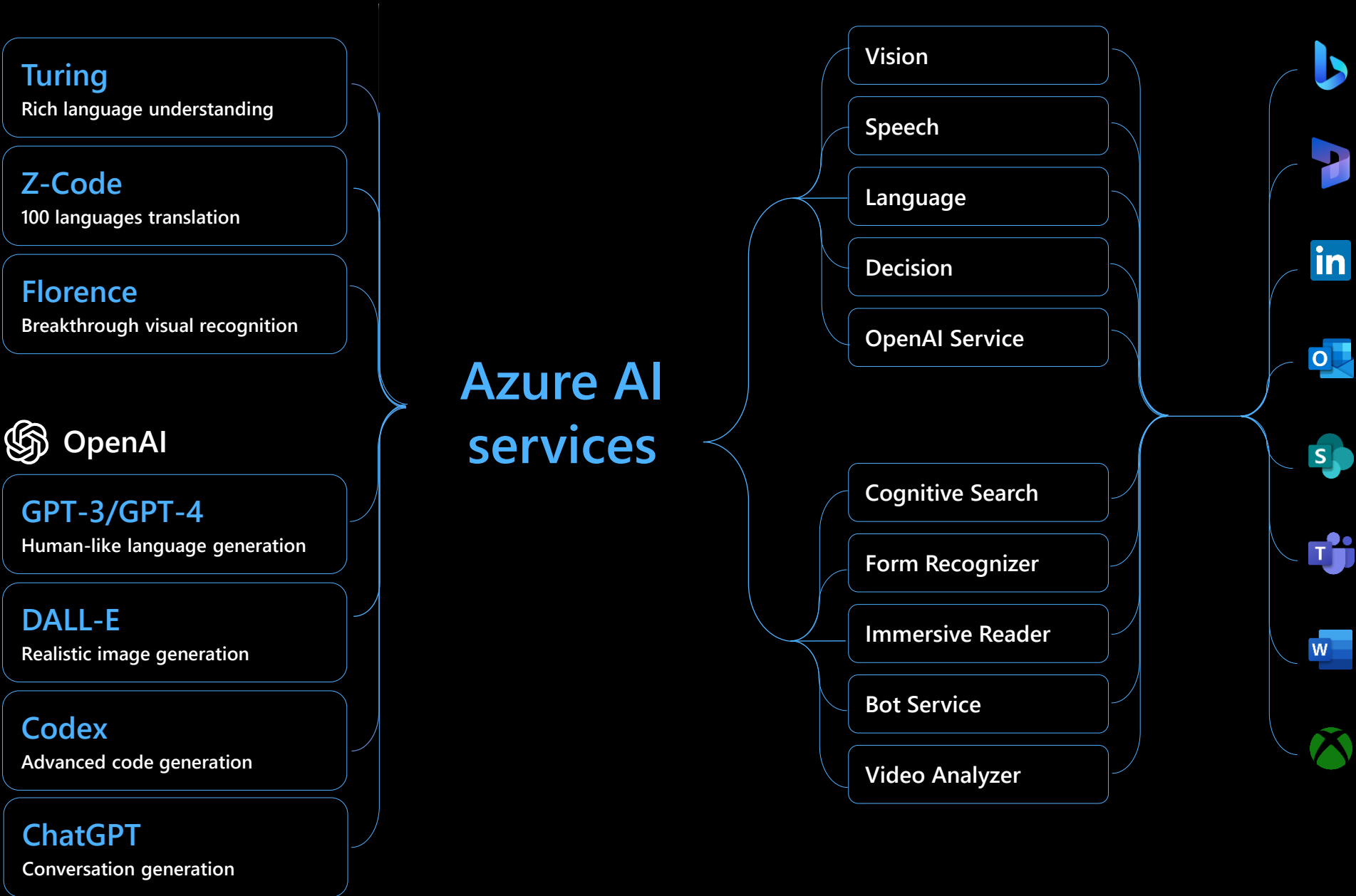
Yammer / Teams



Co-Pilot

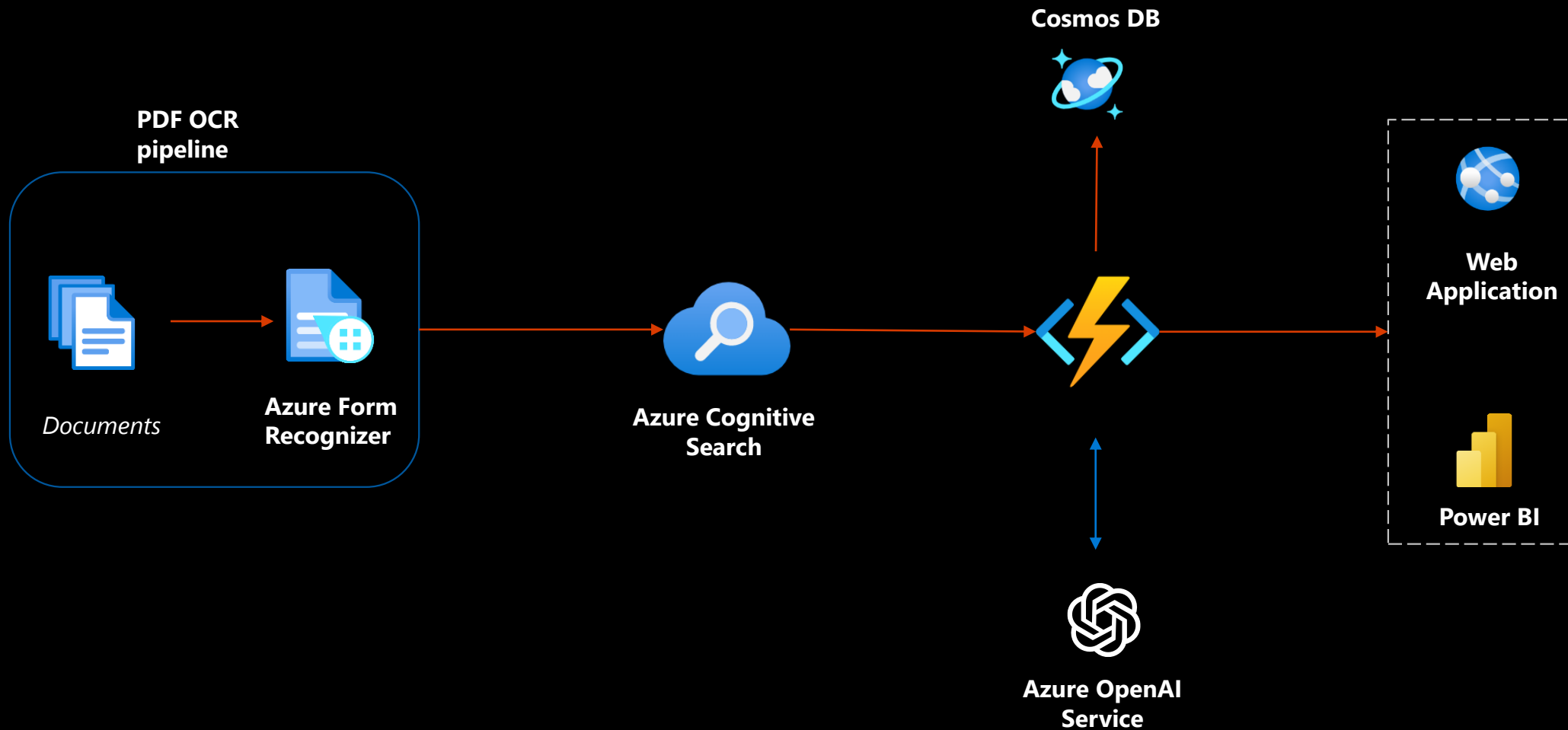


Viva Insights



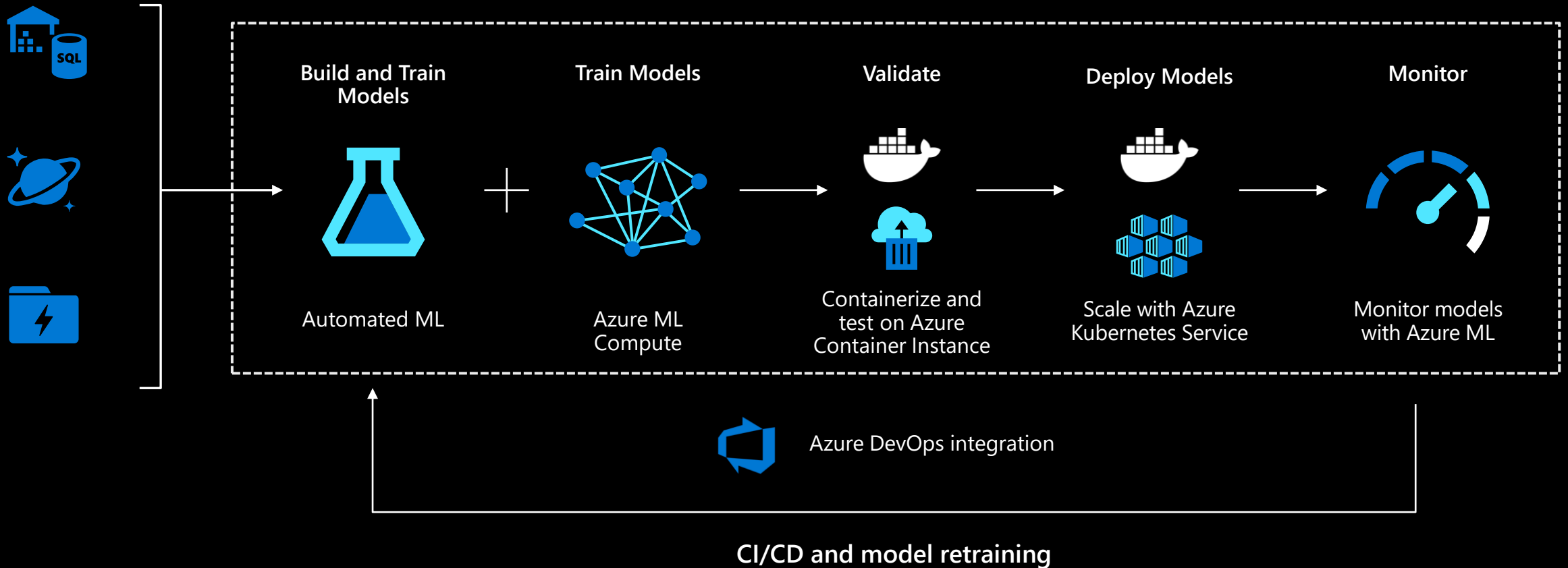
Document Process Automation

Extract rich insights from documents and summarizing them



Deploy machine learning models at scale

Azure Machine Learning service



Microsoft Portfolio for AI

