



Getting started with Project Cortex and SharePoint Syntex

A Gravity Union Webinar

Housekeeping

1. Use the Q/A panel to ask questions or share comments
2. The recording will be posted on our YouTube channel:
[\(Gravity Union – YouTube\)](#)

What we'll cover today

- ✓ Why do we need Artificial Intelligence?
- ✓ What is Cortex and what does it do?
- ✓ Where is Microsoft headed with Cortex?
- ✓ Tour of the Cortex/Syntex features and a demo
- ✓ How to prepare for SharePoint Syntex

Introductions



Jas Shukla

Director of Business Development

- ✓ 15 years experience in enterprise technology consulting
- ✓ Previously with Microsoft on the SharePoint product team
- ✓ UX designer in a previous life



Michael Schweitzer

President and CEO

- ✓ 20 years of enterprise technology experience
- ✓ Microsoft and Collabware certified
- ✓ Collabware MVP recipient
- ✓ Finalist, Information Governance Expert of the Year 2017
- ✓ Vancouver Office 365 user group board member
- ✓ ARMA Canada guest speaker
- ✓ Collabware User Group Board Member
- ✓ SharePoint Saturdays guest speaker
- ✓ Over 100 SharePoint ECM projects completed



Jeff Dunbar

Senior SharePoint Consultant

- ✓ Deep experience with SharePoint and Collabware planning, requirements and implementation
- ✓ PowerApps, Power Automate and Microsoft 365 expert
- ✓ Microsoft and Collabware certified

Who we are

Compliance-inspired, user experience driven consultancy helping organizations on their digital transformation journey into Microsoft 365

Gold
Microsoft Partner



Gold Certified
Collabware Partner



Content Services Microsoft Partner

- Recognized by Microsoft for the success we deliver to customers with Microsoft Content Services technology
- We partner with Microsoft and provide feedback on the product functionality and roadmap
- Special support from Microsoft for our project work



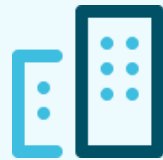
Content Services
Partner Program
Charter Member

Industry Expertise

Gravity Union works with organizations across Canada and the US to transform organizations with SharePoint and Microsoft/Office 365 coupled with Collabware CLM, Collabspace or Microsoft 365 Security and Compliance.



Federal and Provincial Governments



Municipal Governments



Healthcare



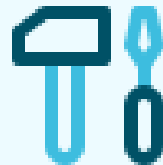
First Nations



Insurance



Energy and Utilities



Engineering and Construction



Banking and Finance



Regulatory Bodies



Transportation

Quick Facts

50+

Years of combined
Collabware
experience

10,000+

Users using our
SharePoint and
Office 365 solutions

40+

Microsoft
certifications

25+

Collabware and
Collabspace projects

10+

Years of average
SharePoint
experience across
our team

18

Collabware Certified
Consultants

50+

Million documents
migrated and
managed in our
solutions

100%

Project success rate

Why do we need AI?

I'm scared of robots



90% of the world's data
was created in the past 2
years?!

Various Big Data sources from 2013 and on

MICROSOFT TECH

Microsoft Teams jumps 70 percent to 75 million daily active users

Microsoft Teams is getting closer to Zoom than many expected

By Tom Warren | @tomwarren | Apr 29, 2020, 6:02pm EDT



Listen to this article



How we get value from content

The value of your content stored within the enterprise is realized when:

- ✓ We can find it / search for it
- ✓ **It's** described properly
- ✓ **It's** organized properly
- ✓ **It's** secured properly
- ✓ **It's** classified properly

We're not good at managing content

Unfortunately, we're not very good at:

- ✓ Placing content in the right location
- ✓ Tagging the content with metadata
- ✓ Classifying content for privacy, security and retention (records management)

Improved governance and control

“The business really doesn’t care or understand if something is a record or not. They just want to get access to their files, and all of this is much more complicated when working from home. This is our opportunity to automate information management.”

— AllM Report: Mastering Your Microsoft 365 and SharePoint Investment, January 2021



allm Industry Watch

Mastering Your Microsoft 365 and SharePoint Investment:
Moving from Rapid Adoption to Sensible Maturity

In Partnership with

AvePoint creospark Volo EGNYTE GRAVITY UNION Microsoft

Improved search and discovery

We all know metadata is important to search and surfacing relevant documents, but people **can't or don't enter it.**

“A searchable record of knowledge can reduce, by as much as 35 percent, the time employees spend searching for company information.”

— Source: McKinsey and International Data Corp
The social economy: Unlocking value and productivity through social technologies



How we can leverage AI

- ✓ Consistently organize, tag, classify and understanding content properly
- ✓ Further turn our data into knowledge by connecting people to the information that they need.
- ✓ Allows people to focus on higher value activities

AI will help with

- ✓ Ensuring content becomes discoverable
- ✓ Turning data into knowledge
- ✓ Supporting your needs around for privacy, security and compliance
- ✓ Supporting added value downstream processes

ROI (savings over 3 years)

~\$1.2M

Estimated savings from content classification and curation

~\$42M

Estimated savings with improved discovery

~\$860K

Estimated savings in legacy tools and professional services

It's been a long time
coming

Microsoft continues to lead in Content Services

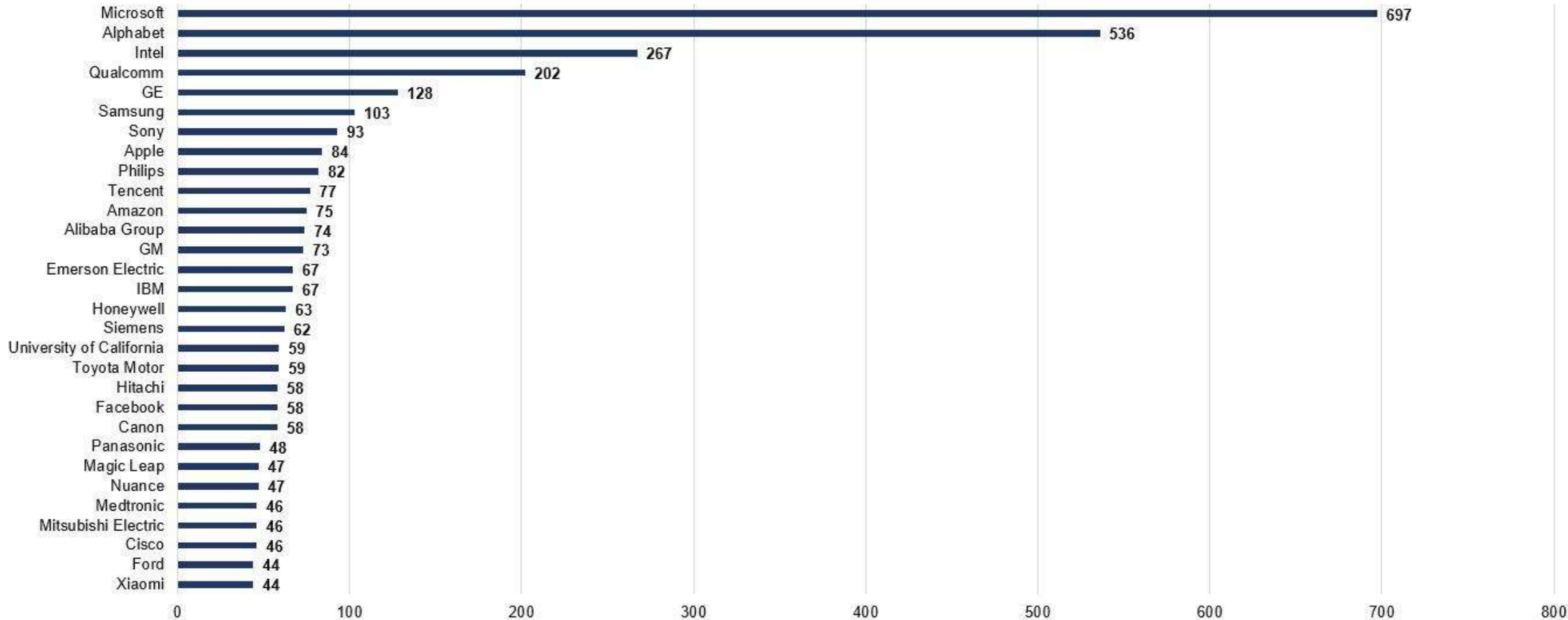


Microsoft is leading in AI R&D



Leading Companies and Research Institutions in Artificial Intelligence
Ranked by number of world class patents, Competitive Impact>3.5, November 2018

Source: Kai Gramke, Managing Director, Econsight Patent Analytics



MEMO



Alt Text: A person wearing glasses and a suit

Michael Schweitzer

- CEO of Gravity U
- Collabware MVP
- mschweitzer@gr

Introducing Microsoft Project Cortex

Artificial Intelligence and Machine Teaching



Project Cortex is a Microsoft 365 initiative that applies advanced artificial intelligence (AI) to empower people with knowledge and expertise in the apps you use every day.

Microsoft

What is it?

- ✓ A collection of solutions that add AI to content services
- ✓ Connects content in Microsoft 365 and external systems
- ✓ Enables you to manage your information and streamline processes with
 - ✓ Advanced security
 - ✓ Compliance
 - ✓ Automated workflows

Diving Deeper

The vision for Cortex

Intelligent content services

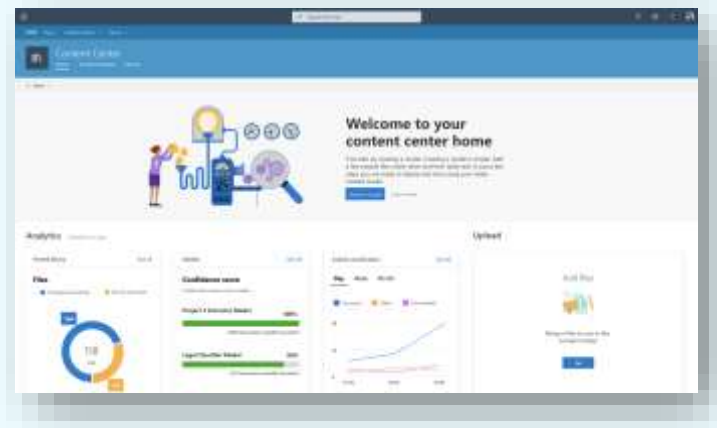
Content understanding

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



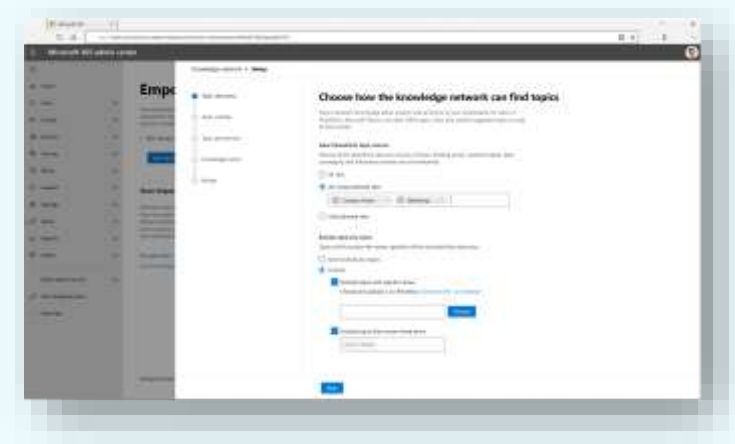
Content processing

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



Content compliance

Control and manage content to improve **security** and **governance** with integration to Microsoft Information Protection.



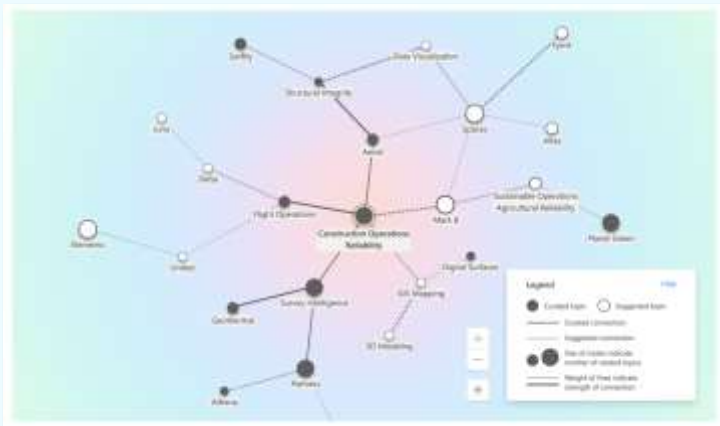
Knowledge Management

- ✓ Uses **AI** to organize your content into a **knowledge network** of shared topics
- ✓ Powers individual **productivity** and improves workplace intelligence
- ✓ Extract **topics** from emails, conversations, files, and more
- ✓ Understand **relationships** between activities, meetings, projects, roles, and more

Knowledge discovery and curation

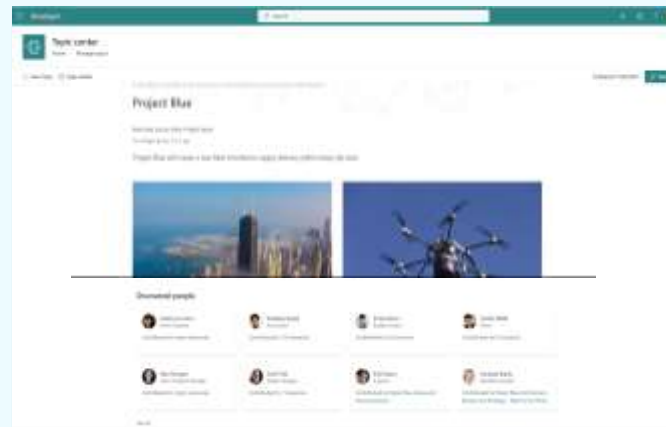
Knowledge identification

Cortex applies AI to **identify knowledge and experts** in Microsoft Graph and automatically organizes them into related **topics**.



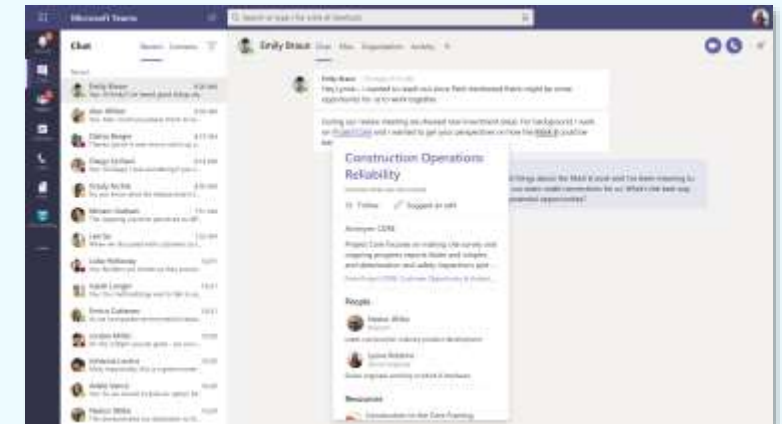
Knowledge curation

Cortex curates knowledge into **topic pages**. Experts can refine topics, and Cortex learns to update topics automatically.



Knowledge discovery

Topic cards find you in the apps you use every day and discover topics across your organization with **topic centers** or Microsoft Search.



Source: Microsoft, 2020

New message Mark all as read Undo

Folders

- Inbox 57
- Drafts
- Sent Items
- Deleted Items
- Junk Email
- Archive
- Clutter
- Conversation Hist...
- Notes
- New folder
- In-Place Archive -I...
- Groups
 - Communications
 - Market Managem...
 - Consumer Retail

Focused Other Filter

- Microsoft Planner**
You've been assigned a t... Mon 5:32 PM
Hi Irvin, Megan Bowen assigned a new ta...
- Last week
- Megan Bowen**
Megan Bowen has invite... Sat 8:42 AM
Here's the site that Megan Bowen shared...
- Communications**
You've joined the Comm... Sat 8:33 AM
Work Brilliantly Together Welcome to the...
- Last month
- Market Management**
You've joined the Marke... Thu 9/26
Work Brilliantly Together Welcome to the...
- Consumer Retail**
You've joined the Consu... Thu 9/26
Work Brilliantly Together Welcome to the...
- Contoso on Yammer**
Updates from New Empl... Thu 9/26
Contoso Updates from your Yammer gro...
- Contoso on Yammer**
Updates from New Empl... Wed 9/25
Contoso Updates from your Yammer gro...

Actions from today's meeting



Nestor Wilke
Thu 5/28/2020 9:07 AM
Contoso - Core Team



Thanks everyone for attending the weekly standup.

Following up on the actions we had this afternoon with the Mark 8 team. When we're looking at the geothermal sensors, we should optimize the heat variability for different regions. For example, if the site being mapped for CORE has significant ground temperature swings, the mapp time the summer or winter rolls around notification on this setting, given the s projects, but its better to have settings compensate for the variability.

Construction Operations Reliability

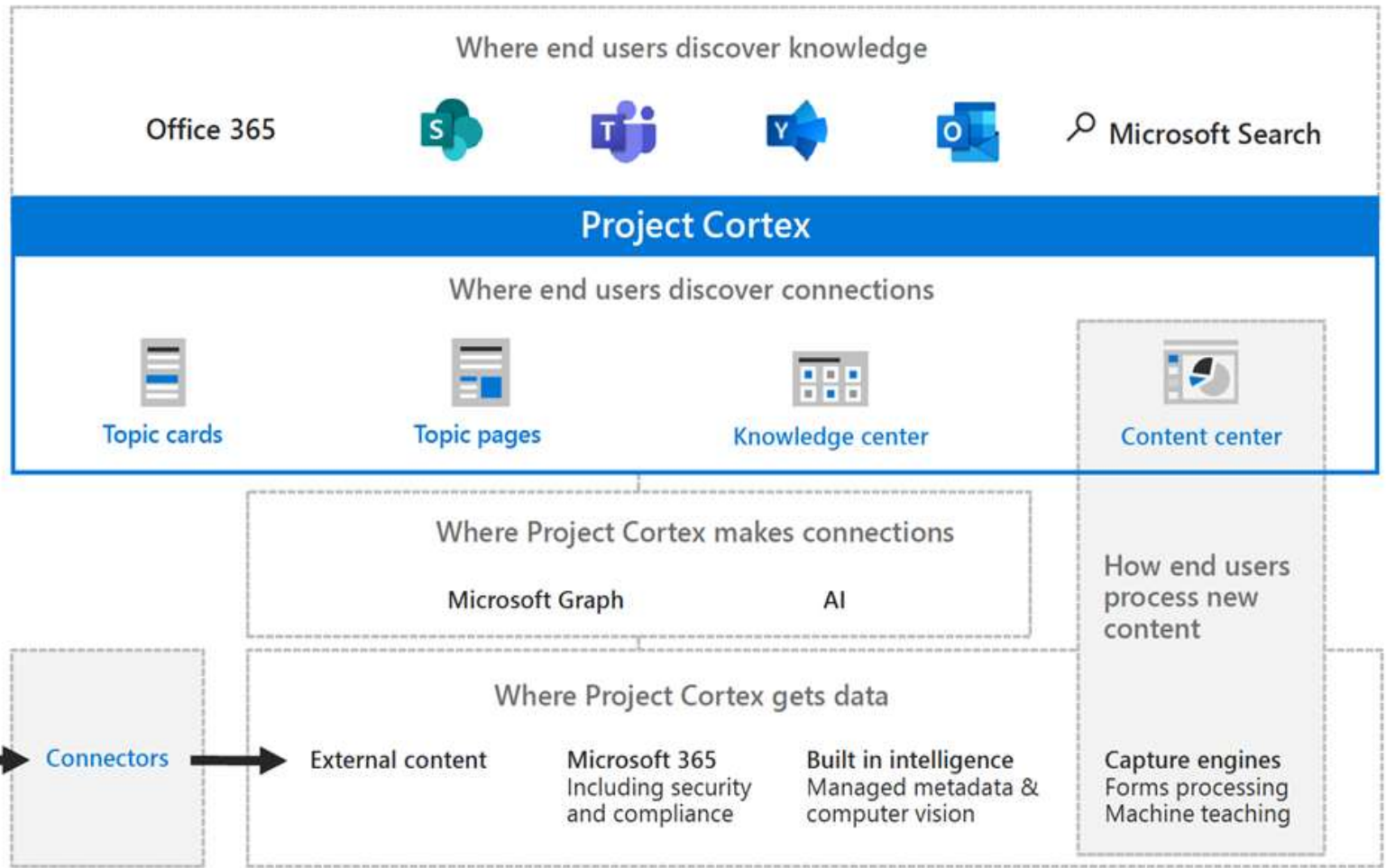
Improve what was discovered
Follow Suggest an edit

Acronym: CORE
Project Core focuses on making site survey and ongoing progress reports faster and simpler, and deterioration and safety inspections part ...
From Project CORE: Customer Opportunity & Analy...

People

- Nestor Wilke
Director
Leads construction industry product development
- Johanna Lorenz

Cortex Architecture



Better together: People + AI

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



Manual



**Automated
object detection**

Smart, right out of the box

for photos, scanned files,
receipts, business cards



Forms processing

*Customize for
your org's forms*

for forms, claims,
applications, invoices,
medical forms



**File classification and
entity extraction**

*Taught by your
subject matter experts*

for contracts, business
agreements, proposals,
manuals, resumes

SharePoint Syntex

A Project Cortex Offering Already Available

What is it?

- ✓ A subset of Project Cortex
- ✓ Builds on the SharePoint platform
- ✓ Uses AI and machine **teaching** to **amplify** human expertise
- ✓ Automates content processing
 - ✓ Identify and classify documents
 - ✓ Metadata extraction
- ✓ Transforms content into knowledge

Why use SharePoint Syntex?

Benefits:

- ✓ Improve the quality of your time
- ✓ Drive efficiencies and cost savings
- ✓ Reduce human error
- ✓ Improve compliance and reduce risk through automatic labeling
- ✓ Discover content faster, simpler, and more accurately

Data Entry to Knowledge Worker

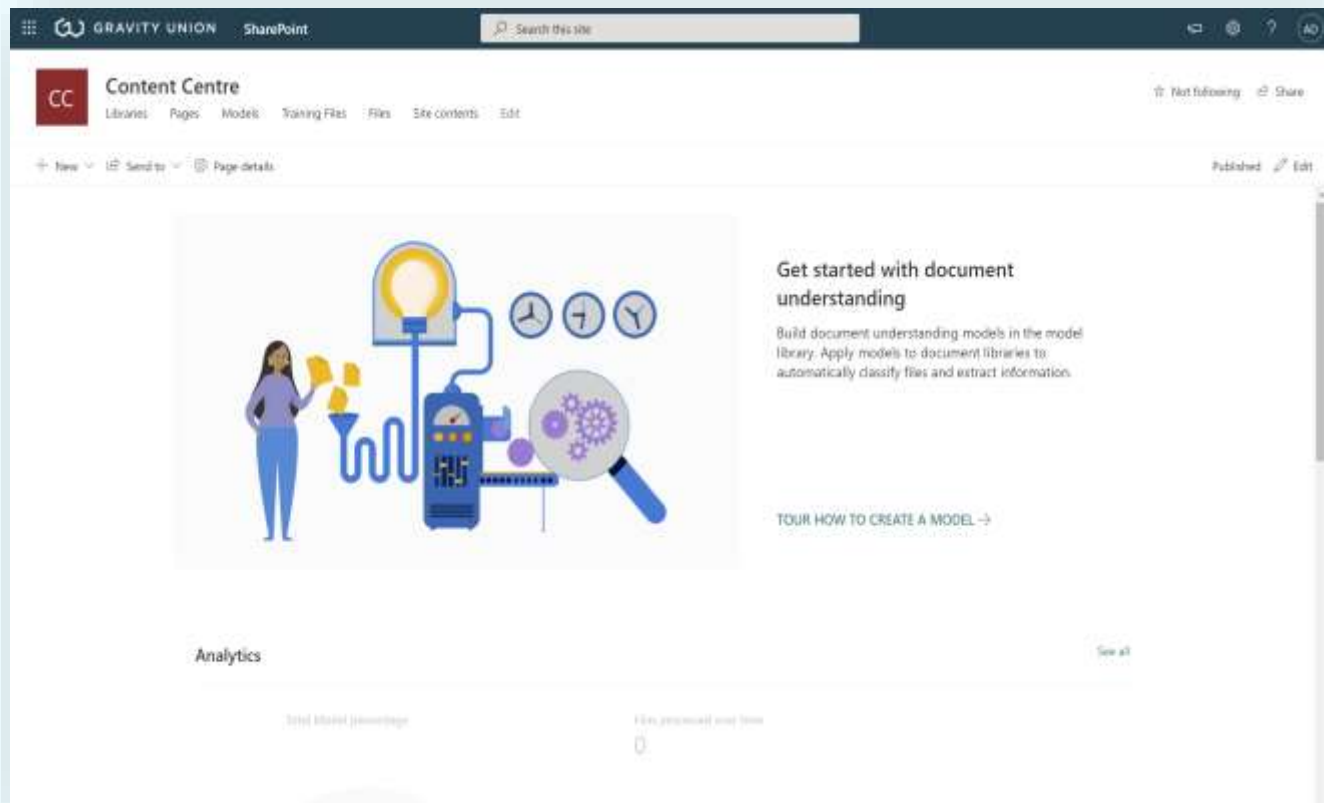
- ✓ Replace manual data entry
 - ✓ Let AI Models conduct classification and extract data
- ✓ Subject Matter Experts train models rather than enter data
- ✓ Empower users to utilize the data rather than enter it
- ✓ Employees help curate content along side AI
- ✓ Employees build and train the machine to do classification and extraction for them

Content Centers

Content Centers

- ✓ Use to create, edit and manage models (machine teaching)
- ✓ Can also contain the Document Libraries you store files (although this might not be best practice)
- ✓ Provides Analytics on the models

Content Centers



- ✓ Create one or many
- ✓ Create them for different business areas
- ✓ Design based on needs and security

Content Processing & Understanding

Two types of models within Syntex

Model Types

Two types of models based on the file format and use case

FORM PROCESSING

- Created from a 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, total 50 MB/500pp

DOCUMENT UNDERSTANDING

- Created in the content center
 - Model created in SharePoint Syntex
 - Used for unstructured file formats
 - Trainable classifier with optional extractors (metadata)
 - Can be applied to many libraries
 - Train on 5-10 PDF, Office, or email files; must include negative results
-

Demo

Document Understanding

A contracts example

Label Train Test

Label by selecting text in at least 5 examples. Train after you've labeled.

0/1 of required negative example file

Labeled examples

+ Add example files - Remove

	Name	Label
<input checked="" type="checkbox"/>	125-Mike-Weir.pdf	
<input type="checkbox"/>	Charles Cote - Profile.docx	
<input type="checkbox"/>	Dylan Zimmerman Agreement.docx	
<input type="checkbox"/>	Jas Shukla Agreement.docx	
<input type="checkbox"/>	Jeff Dunbar Agreement.docx	
<input type="checkbox"/>	Mike Schweitzer Agreement.docx	
<input type="checkbox"/>	Sophie Ke Agreement.docx	

125-Mike-Weir.pdf [View original](#)

← Previous file File 1 of 7 Next file →

Is this file an example of Contracts? Yes No

Gravity Union Solutions Ltd.
Suite 1240
605 Robson Street
Vancouver, BC
V6B 5J3
BILL TO INVOICE # 125
Mike Weir
MOLINARI STREET
Sarnia, ON
INVOICE DATE 01/05/2020
DUE DATE 31/05/2020
Invoice Total \$ 3,675.00
QTY DESCRIPTION UNIT PRICE AMOUNT
20 SharePoint Upgrade 175.00 3,500.00
Subtotal 3,500.00
GST 5.0% 175.00
TERMS & CONDITIONS
Net 30

Label by selecting text in at least 5 examples. Train after you've labeled.

🕒 1/1 of required negative example file

Labeled examples

+ Add example files — Remove

	Name	Label
<input type="radio"/>	 125-Mike-Weir.pdf	Negative
<input type="radio"/>	 Charles Cote - Profile.docx	Negative
<input checked="" type="radio"/>	 Dylan Zimmerman Agreement.docx	
<input type="radio"/>	 Jas Shukla Agreement.docx	
<input type="radio"/>	 Jeff Dunbar Agreement.docx	
<input type="radio"/>	 Mike Schweitzer Agreement.docx	
<input type="radio"/>	 Sophie Ke Agreement.docx	

Dylan Zimmerman Agreement.docx 🔗 View original

← Previous file File 3 of 7 Next file →

Is this file an example of **Contracts**? Yes No

SERVICES AGREEMENT

THIS AGREEMENT is made as of November 03, 2020. (the "Effective Date")

BETWEEN:

GRAVITY UNION SOLUTIONS LIMITED, a corporation

incorporated in British Columbia with its office at 1060-1188 West Georgia Street, Vancouver, BC V6E 4A2

(the "Corporation" or "Gravity Union")

AND:

Dylan Zimmerman

(the "Contractor")

WHEREAS:

The Corporation has need for a contractor to assist with various projects relating to its consultancy business focused on SharePoint ECM with Collabware CLM solutions (the "Business"); and The Contractor has the experience and qualifications to provide support services needed by the Corporation and is willing to provide such services to the Corporation under the terms of this Agreement.

NOW THEREFORE THIS AGREEMENT WITNESSES THAT, for good and valuable consideration (the receipt and sufficiency of which are hereby acknowledged), the Corporation and the Contractor agree as follows:

Label by selecting text in at least 5 examples. Train after you've labeled.

🕒 1/1 of required negative example file

Labeled examples

+ Add example files - Remove

<input type="checkbox"/>	Name	Label
<input type="checkbox"/>	125-Mike-Weir.pdf	Negative
<input type="checkbox"/>	Charles Cote - Profile.docx	Negative
<input type="checkbox"/>	Dylan Zimmerman Agreement.docx	Positive
<input type="checkbox"/>	Jas Shukla Agreement.docx	Positive
<input type="checkbox"/>	Jeff Dunbar Agreement.docx	Positive
<input type="checkbox"/>	Mike Schweitzer Agreement.docx	Positive
<input checked="" type="checkbox"/>	Sophie Ke Agreement.docx	

Sophie Ke Agreement.docx [View original](#)

← Previous file File 7 of 7 Next file →

Is this file an example of Contracts? Yes No

SERVICES AGREEMENT
THIS AGREEMENT is made as of October 15, 2017. (the "Effective Date")
BETWEEN:
GRAVITY UNION SOLUTIONS LIMITED, a corporation
incorporated in British Columbia with its office at 1060-1188 West Georgia Street, Vancouver, BC
V6E 4A2
(the "Corporation" or "Gravity Union")
AND:
Sophie Ke
(the "Contractor")
WHEREAS:
The Corporation has need for a contractor to assist with various projects relating to its consultancy
business focused on SharePoint ECM with Collabware CLM solutions (the "Business"); and
The Contractor has the experience and qualifications to provide support services needed by the
Corporation and is willing to provide such services to the Corporation under the terms of this
Agreement.
NOW THEREFORE THIS AGREEMENT WITNESSES THAT, for good and
valuable consideration (the receipt and sufficiency of which are hereby acknowledged), the
Corporation and the Contractor agree as follows:

Create an explanation ✕

Explanations help identify the type of document or information you are trying to extract.

Name

Type

Phrase list

List words, phrases, numbers, or other characters that can be used to identify the information you are trying to extract. Add each phrase on a separate line. [Learn more about phrase lists.](#)

+ Add a list of phrases from a template

What to match within each phrase

- Only exact capitalization**
For example, "For" would match "For" and not "for"

Create an explanation ✕

Explanations help identify the type of document or information you are trying to extract.

Name

Type

Pattern list

List patterns of numbers, letters, or other characters that can be used to identify the information you are trying to extract. Add each pattern on a separate line.
[Learn more about pattern lists.](#)

+ Add a list of patterns from a template

What to match within each pattern

- Only exact capitalization**
For example, "For" would match "For" and not "for"
- Any digit from 0-9**
For example, "000" would match any three digits
- Any letter from a-z**
For example, "aaa" would match any three letters

Explain how to identify the document or information you are trying to extract.

Explanations

Train Model

+ New Save as template Remove

Name	Type	Active
<input type="radio"/> Agreement	Phrase list	<input checked="" type="checkbox"/> On
<input type="radio"/> Date	Phrase list	<input checked="" type="checkbox"/> On

Trained files Remove

Name	Label	Evaluation
<input type="radio"/> 125-Mike-Weir.pdf	Negative	Match
<input type="radio"/> Charles Cote - Profile.docx	Negative	Match
<input type="radio"/> Dylan Zimmerman Agreement.docx	Positive	Match
<input type="radio"/> Jas Shukla Agreement.docx	Positive	Match
<input checked="" type="radio"/> Jeff Dunbar Agreement.docx	Positive	Match

125-Mike-Weir.pdf

View original

Previous file File 5 of 7 Next file

Open in Label

Correctly predicted as a negative example

- Correct - Incorrect

Gravity Union Solutions Ltd.
 Suite 1240
 605 Robson Street
 Vancouver, BC
 V6B 5J3
 BILL TO INVOICE # 125
 Mike Weir
 MOLINARI STREET
 Sarnia, ON
 INVOICE DATE 01/05/2020
 DUE DATE 31/05/2020
 Invoice Total \$ 3,675.00
 QTY DESCRIPTION UNIT PRICE AMOUNT
 20 SharePoint Upgrade 175.00 3,500.00
 Subtotal 3,500.00
 GST 5.0% 175.00
 TERMS & CONDITIONS
 Net 30

New entity extractor



You can use an existing column to populate with extracted data, or create a new one.

New Extractor name *

Advanced settings



Associated Column

Your model will be deployed using a column within a content type. Either create a new column, or use an existing one.

- Create a new column
- Use an existing column

Column data type



Label at least 5 examples. Train after you've labeled.

Labeled examples

+ Add example files - Remove

	Name	Label
<input type="radio"/>	125-Mike-Weir.pdf	
<input type="radio"/>	132-Steve-Nash.pdf	
<input type="radio"/>	Charles Cote - Profile.docx	
<input type="radio"/>	Dylan Zimmerman Agreement.docx	Dylan Zimmerman
<input type="radio"/>	Jas Shukla Agreement.docx	Jas Shukla
<input type="radio"/>	Jeff Dunbar Agreement.docx	Jeff Dunbar
<input checked="" type="radio"/>	Mike Schweitzer Agreement.docx	
<input type="radio"/>	Sophie Ke Agreement.docx	

Mike Schweitzer Agreement.docx [View original](#)

← Previous file File 7 of 8 Next file → [Save](#)

No label Accessibility Mode Off

SERVICES AGREEMENT
THIS AGREEMENT is made as of January 01, 2015. (the "Effective Date")
BETWEEN:
GRAVITY UNION SOLUTIONS LIMITED, a corporation
incorporated in British Columbia with its office at 1060-1188 West Georgia Street, Vancouver, BC
V6E 4A2
(the "Corporation" or "Gravity Union")
AND:
Michael Schweitzer
(the "Contractor")
WHEREAS:
The Corporation has need for a contractor to assist with various projects relating to its consultancy
business focused on SharePoint ECM with Collabware CLM solutions (the "Business"); and
The Contractor has the experience and qualifications to provide support services needed by the
Corporation and is willing to provide such services to the Corporation under the terms of this
Agreement.

Identify patterns that always occur with the labeled entity and the characters around it. Add an explanation for each.

Explanations

Train Model

+ New ▾ Save as template Remove

Name	Type	Active
<input type="radio"/> Name	Phrase list	<input checked="" type="checkbox"/> On

Trained files — Remove

	Name	Prediction	Evaluation
<input type="radio"/>	125-Mike-Weir.pdf	No label	Match
<input type="radio"/>	132-Steve-Nash.pdf	No label	Match
<input type="radio"/>	Charles Cote - Profile.docx	No label	Match
<input type="radio"/>	Dylan Zimmerman Agreement.docx	Dylan Zimm...	Match
<input checked="" type="radio"/>	Jas Shukla Agreement.docx	Jas Shukla	Match

Jas Shukla Agreement.docx [View original](#)

← Previous file File 5 of 8 Next file →

Open in Label

■ - Predicted ■ - Labeled

Accessibility Mode Off

SERVICES AGREEMENT
 THIS AGREEMENT is made as of October 15, 2017. (the "Effective Date")
 BETWEEN:
 GRAVITY UNION SOLUTIONS LIMITED, a corporation
 incorporated in British Columbia with its office at 1060-1188 West Georgia Street, Vancouver, BC
 V6E 4A2
 (the "Corporation" or "Gravity Union")
 AND:
Jas Shukla
 (the "Contractor")
 WHEREAS:
 The Corporation has need for a contractor to assist with various projects relating to its consultancy
 business focused on SharePoint ECM with Collabware CLM solutions (the "Business"); and
 The Contractor has the experience and qualifications to provide support services needed by the
 Corporation and is willing to provide such services to the Corporation under the terms of this
 Agreement.
 NOW THEREFORE THIS AGREEMENT WITNESSES THAT, for good and
 valuable consideration (the receipt and sufficiency of which are hereby acknowledged), the
 Corporation and the Contractor agree as follows:
 1.1 Services
 Subject to the terms and conditions hereof, the Contractor shall provide to the Corporation certain
 services SharePoint and Collabware ECM consulting services (the "Services"). The Contractor shall

Label Train Test

Identify patterns that always occur with the labeled entity and the characters around it. Add an explanation for each.








Explanations

Train Model

+ New ▾  Save as template  Remove

Name	Type	Active
<input type="radio"/> Date	 Pattern	<input checked="" type="checkbox"/> On
<input type="radio"/> Effective Date	 Phrase list	<input checked="" type="checkbox"/> On


Trained files 

 Name	Prediction	Evaluation
<input type="radio"/>  125-Mike-Weir.pdf	No label	Match
<input type="radio"/>  132-Steve-Nash.pdf	No label	Match
<input type="radio"/>  Charles Cote - Profile.docx	No label	Match
<input checked="" type="radio"/>  Dylan Zimmerman Agreement.docx	November 0...	Match
<input type="radio"/>  Jas Shukla Agreement.docx	October 15, ...	Match
<input type="radio"/>  Jeff Dunbar Agreement.docx	July 5th, 2018	Match

125-Mike-Weir.pdf

 View original

← Previous file File 4 of 6 Next file →

 Open in Label

 - Predicted  - Labeled

Accessibility Mode Off

No label

Gravity Union Solutions Ltd.
Suite 1240
605 Robson Street
Vancouver, BC
V6B 5J3
BILL TO INVOICE # 125
Mike Weir
MOLINARI STREET
Sarnia, ON
INVOICE DATE 01/05/2020
DUE DATE 31/05/2020
Invoice Total \$ 3,675.00
QTY DESCRIPTION UNIT PRICE AMOUNT
20 SharePoint Upgrade 175.00 3,500.00
Subtotal 3,500.00
GST 5.0% 175.00
TERMS & CONDITIONS
Net 30



Key actions

Add example files

Add files

Classify files and run training

100
Accuracy ⓘ

Train classifier

Create and train extractors

Create extractor

Apply model to libraries

Apply model

Example files for training

+ Add from library — Remove ↔ Open library

File name	Modified	Modified By
Dylan Zimmerman Agreement.docx	10m ago	Jeff Dunbar
Jas Shukla Agreement.docx	10m ago	Jeff Dunbar
Jeff Dunbar Agreement.docx	9m ago	Jeff Dunbar
Sophie Ke Agreement.docx	9m ago	Jeff Dunbar
Mike Schweitzer Agreement.docx	9m ago	Jeff Dunbar
Charles Cote - Profile.docx	9m ago	Jeff Dunbar
125-Mike-Weir.pdf	9m ago	Jeff Dunbar

Entity extractors

Select or add an entity extractor. Train the model by labelling entities in the example files you've added.

+ New entity extractor — Remove

Name	Last trained on	Explanations	Accuracy %
Contractor	1/8/2021, 11:10:12 AM	1	● 100

Libraries with this model

This classifier and its extractors have been applied to the following libraries.

+ Add library ↻ Sync all — Remove

<https://m365x629418.sharepoint.com/sites/SyntaxTrial/Shared%20Documents>



Home

Conversations

Documents

Shared with us

Notebook

Pages

Site contents

Recycle bin

Edit

+ New

↑ Upload

📄 Edit in grid view

🔄 Sync









📁 Add shortcut to OneDrive

📊 Export to Excel

⚙️ Power Apps

🤖 Automate

Documents ⓘ

 Name	Content Type	Contractor	Confidence Score	Classification D...
 Charles Cote - Profile.docx	Document			1/8/2021 11:15 AM
 Denny Chow - Profile.docx	Document			
 Dylan Zimmerman Agreement.docx	Document			
 Jas Shukla Agreement.docx	Contracts	Jas Shukla	99.6481%	1/8/2021 11:15 AM
 Jeff Dunbar Agreement.docx	Document			
 Mike Schweitzer Agreement.docx	Contracts	Michael Schweitzer	99.6481%	1/8/2021 11:15 AM
 Sophie Ke Agreement.docx	Document			

+ New

Upload

Edit in grid view

Sync

Add shortcut to OneDrive

Export to Excel

Power Apps

Automate

...

Contracts



Documents

Name	Content Type	Contractor	Effective Date	Confidence Score	Classification Date	Modified
Charles Cote - Profile.docx	Document				1/8/2021 11:44 AM	1/8/2021 11:14 AM
Denny Chow - Profile.docx	Document				1/8/2021 11:44 AM	1/8/2021 11:14 AM
Dylan Zimmerman Agreement.docx	Contracts	Dylan Zimmerman	11/3/2020 12:00 AM	99.6481%	1/8/2021 11:39 AM	1/8/2021 11:14 AM
Jas Shukla Agreement.docx	Contracts	Jas Shukla	10/15/2017 12:00 AM	99.6481%	1/8/2021 11:51 AM	1/8/2021 11:14 AM
Jeff Dunbar Agreement.docx	Contracts	Jeff Dunbar		99.6481%	1/8/2021 11:16 AM	1/8/2021 11:14 AM
Mike Schweitzer Agreement.docx	Contracts	Michael Schweitzer	1/1/2015 12:00 AM	99.6481%	1/8/2021 12:02 PM	1/8/2021 11:14 AM
Sophie Ke Agreement - Copy.docx	Contracts	Sophie Ke	10/15/2017 12:00 AM	99.7032%	1/8/2021 11:51 AM	1/8/2021 11:31 AM
Sophie Ke Agreement.docx	Contracts	Sophie Ke	10/15/2017 12:00 AM	99.6481%	1/8/2021 11:34 AM	1/8/2021 11:14 AM

Form Processing

An Invoice example

+ New

Upload

Edit in grid view

Sync

Add shortcut to OneDrive

Export to Excel

Power Apps

Automate

...

≡

Contracts

Documents

Name

Content Type

Contractor

Create a model to process forms

Go to AI Builder

Set a reminder

Power Automate

AI Builder

Charles Cote - Profile.docx

Document

Denny Chow - Profile.docx

Document

Dylan Zimmerman Agreement.docx

Contracts

Dylan Zimmerman

11/3/2020 12:00 AM

99.6481%

Jas Shukla Agreement.docx

Contracts

Jas Shukla

10/15/2017 12:00 AM

150

99.6481%

Jeff Dunbar Agreement.docx

Contracts

Jeff Dunbar

50

99.6481%

Mike Schweitzer Agreement.docx

Contracts

Michael Schweitzer

1/1/2015 12:00 AM

300

99.6481%

Sophie Ke Agreement - Copy.docx

Contracts

Sophie Ke

10/15/2017 12:00 AM

75

99.7032%

Sophie Ke Agreement.docx

Contracts

Sophie Ke

10/15/2017 12:00 AM

99.6481%

Create a model to process forms ✕

Use AI to extract your forms' key details-- including a flow to automatically save them to columns for newly uploaded files. [Learn more](#)

Name *

Advanced settings ^

Content type

Your model will be deployed using a content type. Either create a new one, or use an existing one.

- Create new
- Select one

Library view for this model

Set the view as default

Continue in AI Builder

Create

Cancel

- Choose information to extract
7 fields
- Add collections of documents
- Tag documents
- Model summary

Choose information to extract

Fields Tables (preview)

You'll tag these fields in the documents.

- Client Name ×
- Client Address ×
- Invoice Number ×
- Invoice Date ×
- Due Date ×
- Amount ×
- Conditions ×

Next

- ✓ Choose information to extract
7 fields
- **Add collections of documents**
1 collection
- Tag documents
- Model summary

Add collections of documents

Add sample documents for your model to study. Put similar documents into the same collection.

Create a collection for each layout ⓘ

New collection

Add documents ⓘ



The screenshot shows an invoice from Gravity Union. The header includes the company name and logo. Below that, there are fields for 'Invoice Number' and 'Invoice Date'. The main body of the invoice contains a table with columns for 'Item', 'Description', 'Unit Price', and 'Quantity'. The 'Invoice Total' is listed as \$ 1,675.00. At the bottom, there are fields for 'Due Date' and 'Payment Terms'.

Gravity Union

5 documents

Back

Analyze

Add at least five sample documents for each collection.

Gravity Union Solutions Ltd.

Suite 1240
605 Robson Street
Vancouver, BC
V6B 5J3



BILL TO

Mike Weir
MOLINARI STREET
Sarnia, ON

INVOICE # 125

INVOICE DATE 01/05/2020

DUPLICATE DATE 31/05/2020

MOLINARI STREET Sarnia, ON

Invoice

\$ 3,675.00

QTY	DESCRIP	AMOUNT
20	SharePoint	3,500.00
	Subtotal	3,500.00
	GST 5.0%	175.00

Client Address

Invoice Number

Invoice Date

Due Date

TERMS & CONDITIONS



Fields

- Client Name
- Client Address
- Invoice Number
- Invoice Date
- Due Date
- Amount
- Conditions

Back

Next



Gravity Union Solutions Ltd.

Suite 1240
605 Robson Street
Vancouver, BC
V6B 5J3



BILL TO

Steve Nash

INVOICE #

132

INVOICE DATE

01/06/2020

DUE DATE

31/07/2020

Invoice Total

\$ 4,410.00

QTY	DESCRIPTION	UNIT PRICE	AMOUNT
24	PowerApp Development	175.00	4,200.00
		Subtotal	4,200.00
		GST 5.0%	210.00

TERMS & CONDITIONS

Net 30

Gravity Union



< Document 5 of 5 >

Fields

- Client Name ...
- Client Address ...
- Invoice Numl Not available in document
- Invoice Date Not available in collection
- Due Date ...
- Amount ...
- Conditions ...



- ✓ Choose information to extract
7 fields
- ✓ Add collections of documents
1 collection
- ✓ Tag documents
5 documents tagged
- **Model summary**

Model summary

Review your model's details below. If everything looks good, select Train. [Learn more about training](#)

Model type

Form Processing

Owner

Admin Jeff Dunbar

Collections

1

Data source



My device

Number of images

5 images

Information to extract



Fields

Details

Client Name

Client Address

Invoice Number

Invoice Date

Due Date

Amount

Conditions

Back

Train



Your model is training

This may take a while. You can close this window and come back later.

[Go to models](#)

Your model isn't published yet. Publish to use it in apps and flows. [Learn more](#)

Models > Invoice

Form Processing • Not published • # Admin Jeff Dunbar

Training document

[See details](#)



Publish

Quick test

Selected fields

[See more](#)

Client Name

Client Address

Invoice Number

Invoice Date

Due Date

Amount

Conditions

How your model is used



Power Automate
Model isn't published



Power Apps
Model isn't published


- Home
- Learn
- Apps
- Create
- Data
- Flows
- Chatbots
- AI Builder
- Build
- Models**
- Solutions

Edit model Share Settings Delete

Models > Invoice

Form Processing • Published • # Admin Jeff Dunbar

Training document See details



Use model **Quick test** ⋮

Selected fields See more

- Client Name
- Client Address
- Invoice Number
- Invoice Date
- Due Date
- Amount
- Conditions

Create a flow

Start AI Builder form processing when a new file is created

By Microsoft

Extract text from images or PDFs to columns in a SharePoint library by applying an AI Builder form processing model.

Sign in

This flow uses the following apps. A green check means you're ready to go.

-  **SharePoint**
Permissions ✓ ⋮
-  **Common Data S...** +

Create flow Cancel



Your flow was successfully created.

Your Form processing model is processing new documents added to your SharePoint document library. Click [Go to SharePoint](#) to be redirected to your document library.



SharePoint Syntex

Public group

☆ Not following

👤 2 members

- Home
- Conversations
- Documents**
- Shared with us
- Notebook
- Pages
- Site contents
- Recycle bin
- Edit

+ New
↑ Upload
📄 Edit in grid view
🔄 Sync
📁 Add shortcut to OneDrive
📊 Export to Excel
📱 Power Apps
⚙️ Automate
⋮

☰ Invoice
🔍
🕒
✎

Documents ⓘ

ⓘ We are analyzing your file. One or more of the columns will be updated with discovered values. [Learn more](#)

Name	Content Type	Client Name	Client Address	Invoice Number	Invoice Date	Due Date	Amount	Conditions	Classification
📄 119-Georges-St-Pierre.pdf	Document								
📄 124-Christine-Sinclair.pdf	Document								
📄 125-Mike-Weir.pdf	Document								
📄 131-Hayley-Wickenheiser.pdf	Document								
📄 132-Steve-Nash.pdf	Document								
📄 Charles Cote - Profile.docx	Document								1/8/2021 1
📄 Denny Chow - Profile.docx	Document								1/8/2021 1
📄 Dylan Zimmerman Agreement.docx	Contracts								1/8/2021 1
📄 Jas Shukla Agreement.docx	Contracts								1/8/2021 1



Documents ⓘ

📄	Name ▾	Content Type ▾	Client Name ▾	Client Address ▾	Invoice Number ▾	Invoice Date ▾	Due Date ▾	Amount ▾	Conditions ▾	Classifica
📄	119-Georges-St-Pierre.pdf	Invoice	Georges St-Pierre	123 Dorval Montréal, QC G1A 0A2	119	01/03/2020	31/03/2020	2,000.00	Net 30	1/8/2021 1
📄	124-Christine-Sinclair.pdf	Invoice	Christine Sinclair	Maywood Street Burnaby, BC VAZ 2G7	124	01/04/2020	01/05/2020	4,305.00	Net 30	1/8/2021 1
📄	125-Mike-Weir.pdf	Invoice	Mike Weir	MOLINARI STREET Sarnia, ON	125	01/05/2020	31/05/2020	3,675.00	Net 30	1/8/2021 1
📄	131-Hayley-Wickenheiser.pdf	Invoice	Hayley Wickenheiser	Shaunavon, Saskatchewan	131	01/06/2020	31/07/2020	551.25	Net 30	1/8/2021 1
📄	132-Steve-Nash.pdf	Invoice	Steve Nash		132	01/06/2020	31/07/2020	4,410.00	Net 30	1/8/2021 1
📄	Charles Cote - Profile.docx	Document								1/8/2021 1
📄	Denny Chow - Profile.docx	Document								1/8/2021 1
📄	Dylan Zimmerman Agreement.docx	Contracts								1/8/2021 1
📄	Jas Shukla Agreement.docx	Contracts								1/8/2021 1
📄	Jeff Dunbar Agreement.docx	Contracts								1/8/2021 1

Flows > Invoice - Process form information from AI Builder to SharePoint

Details Edit

Flow
Invoice - Process form information from AI Builder to SharePoint

Description
Extract text from images or PDFs to columns in a SharePoint library by applying an AI Builder form processing model.

Owner
Admin Jeff Dunbar

Status
On

Created
Jan 8, 01:34 PM

Modified
Jan 8, 01:34 PM

Type
Automated

Plan
Per-user plan

Connections Edit

- Common Data Service (current envir adminjeff@gravityuniondev.cc ✓
- SharePoint Permissions adminjeff@gravityuniondev.cc ✓

Owners Edit

- AD Admin Jeff Dunbar

28-day run history All runs

Start	Duration	Status
Jan 8, 01:36 PM (12 min ago)	00:00:27	Succeeded
Jan 8, 01:36 PM (12 min ago)	00:00:33	Succeeded
Jan 8, 01:36 PM (12 min ago)	00:00:13	Succeeded
Jan 8, 01:36 PM (12 min ago)	00:00:12	Succeeded
Jan 8, 01:36 PM (12 min ago)	00:00:22	Succeeded

When a file is created (properties only)

*Site Address: SharePoint Syntex -
https://m365x629418.sharepoint.com/sites/SyntexTrial

*Library Name: Documents

Folder: Select a folder, or leave blank for the whole library

Show advanced options

Condition

Or

- File name ends with pdf
- File name ends with png
- File name ends with jpeg
- File name ends with jpg

+ Add

if yes

Get file content

*Site Address: SharePoint Syntex -
https://m365x629418.sharepoint.com/sites/SyntexTrial

*File Identifier: Identifier

Show advanced options

Predict

*Model: Invoice

*Document type: body/content

*Document: File Content

Update file properties using AI Builder model results

*Site Address: SharePoint Syntex -

if no

Add an action

- Home
- Learn
- Apps
- Create
- Data
- Flows
- Chatbots
- AI Builder
 - Build
 - Models**
- Solutions

+ Build a model

Search

Models

My models Shared with me

	Name	Last trained ↓	Permission	Owner	Status
	Invoice	14 min ago	Owner	# Admin Jeff Dunbar	Published

Documents ?

Name	Content Type	Contractor	Effective Date	Hourly Rate	Confidence Score	Classification D...	Modified	Modified By
119-Georges-St-Pierre.pdf	Invoice					1/8/2021 1:36 PM	1/8/2021 1:36 PM	Admin Jeff Dunbar
124-Christine-Sinclair.pdf	Invoice					1/8/2021 1:36 PM	1/8/2021 1:36 PM	Admin Jeff Dunbar
125-Mike-Weir.pdf	Invoice					1/8/2021 1:36 PM	1/8/2021 1:36 PM	Admin Jeff Dunbar
131-Hayley-Wickenheiser.pdf	Invoice					1/8/2021 1:36 PM	1/8/2021 1:36 PM	Admin Jeff Dunbar
132-Steve-Nash.pdf	Invoice					1/8/2021 1:36 PM	1/8/2021 1:36 PM	Admin Jeff Dunbar
Charles Cote - Profile.docx	Document					1/8/2021 11:44 AM	1/8/2021 11:14 AM	Jeff Dunbar
Denny Chow - Profile.docx	Document					1/8/2021 11:44 AM	1/8/2021 11:14 AM	Jeff Dunbar
Dylan Zimmerman Agreement.docx	Contracts	Dylan Zimmerman	11/3/2020 12:00 AM		99.6481%	1/8/2021 11:39 AM	1/8/2021 11:14 AM	Jeff Dunbar
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Jeff Dunbar Agreement.docx	Contracts	Jeff Dunbar		50	99.6481%	1/8/2021 12:37 PM	1/8/2021 11:14 AM	Jeff Dunbar
Mike Schweitzer Agreement.docx	Contracts	Michael Schweitzer	1/1/2015 12:00 AM	300	99.6481%	1/8/2021 12:02 PM	1/8/2021 11:14 AM	Jeff Dunbar
Sophie Ke Agreement - Copy.docx	Contracts	Sophie Ke	10/15/2017 12:00 AM	75	99.7032%	1/8/2021 11:51 AM	1/8/2021 11:31 AM	Jeff Dunbar
Sophie Ke Agreement.docx	Contracts	Sophie Ke	10/15/2017 12:00 AM		99.6481%	1/8/2021 11:34 AM	1/8/2021 11:14 AM	Jeff Dunbar

Next Steps

Questions to help prepare

- ✓ What business processes can be improved?
- ✓ Who will build and maintain the models?
- ✓ Where will models be built and applied?

Business scenarios

- ✓ Contracts, proposals processing
- ✓ Invoice processing
- ✓ Hiring and resumes
- ✓ Improve search results
- ✓ ...

Aligning Roles



Content Services Admin

Understands the knowledge system, assigns access and has rights over all content services settings. Manages service requests, and monitors service health.



Knowledge Manager

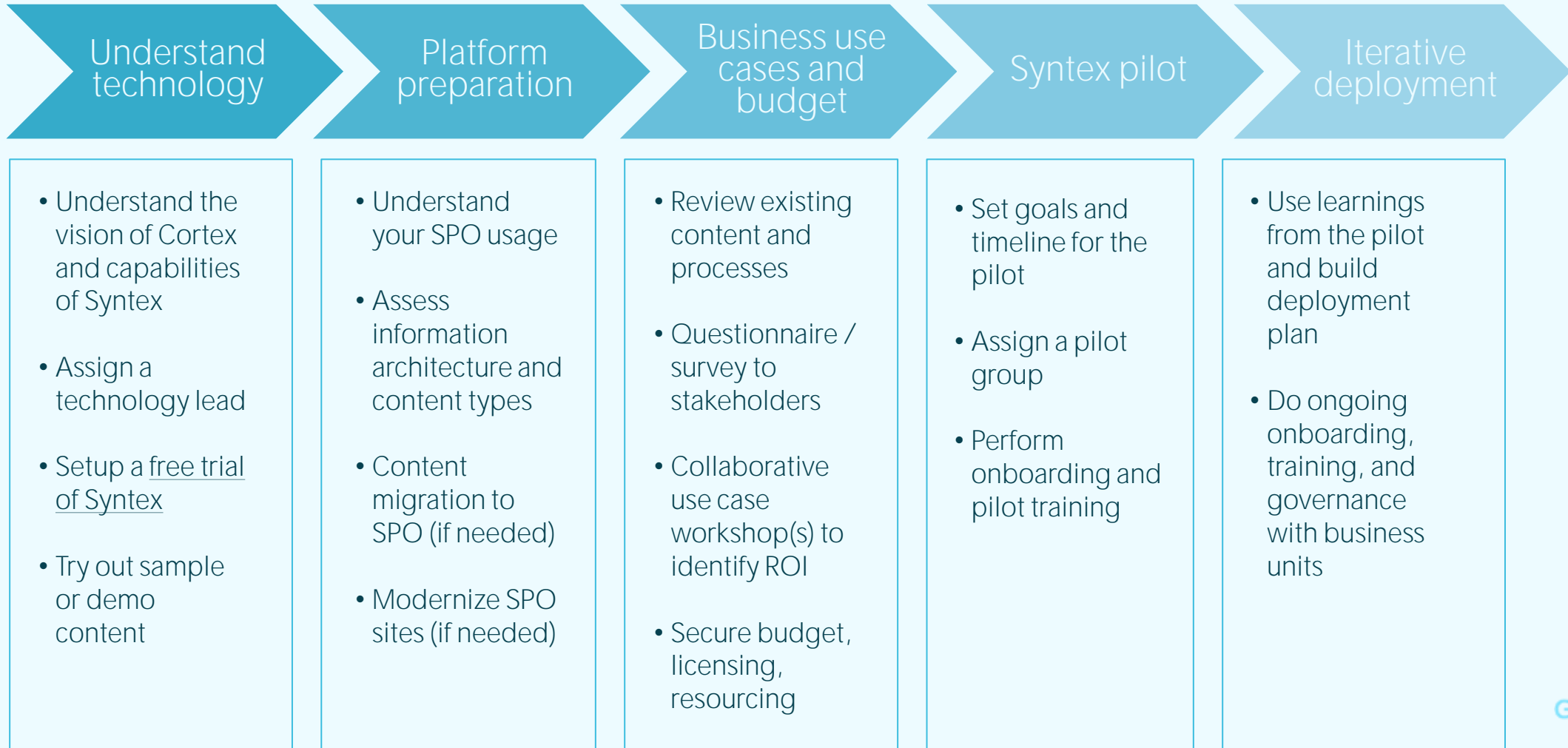
Responsible for the quality of information shared. Selects resources to be mined, the structure and visibility of knowledge.



Subject Matter Expert

Works in the area and has expertise on a topic. Organizes and curates knowledge in the area.

A process to get started with Syntex



SharePoint Syntex resources

Blog announcement: aka.ms/SharePointSyntex/Announce

SharePoint Syntex product page: aka.ms/SharePointSyntex

Video: aka.ms/SharePointSyntex/Video

Demo: aka.ms/SharePointSyntex/Demo

Documentation: aka.ms/SharePointSyntex/documentation

Skilling sessions: https://adoption.microsoft.com/virtual-hub/search?_sft_vh_product=sharepoint-syntex

Q&A

Next webinar



Understanding the Microsoft 365 Audit Trail

Webinar on February 25, 2021

<https://go.gravityunion.com/m365audit>



Thank you for
joining!

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www.gravityunion.com



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