Agenda
Connect people with knowledge, experts and insights
Savings through improved governance and control

Content classification and curation: $1.2 million to $3.3 million

Improved discovery: $42 million to $127 million

Reduced legacy tools & professional services: $864,482 to $1.2 million

Source: Forrester (July 2020)
New Technology: The Projected Total Economic Impact™ of Project Cortex
Modernize content services with Microsoft 365

What our customers are telling us

- Disconnected silos across LOBs & legacy systems
- Labor intensive, error prone data entry & interpretation
- Managing and applying metadata & taxonomies
- Compliance, records & retention management

Microsoft 365 solves these challenges

- Content understanding
- Content processing
- Content governance
“Microsoft 365 holds a commanding position in the marketplace for cloud office suites. Social media analysis reinforces this, with Microsoft as the vendor with the highest share of conversations in the CSP space. The content services provided by Microsoft, underpinned primarily by SharePoint, are tightly integrated into most aspects of the suite and are the default content repository. Gartner clients are increasingly evaluating Microsoft 365 as the foundational component of their content services strategies.”

Source: Magic Quadrant for Content Services Platforms, Gartner, November 2020
https://aka.ms/gartner-csp20
Knowledge and Content Services
Knowledge & Content Services
Reimagine content and knowledge in Microsoft 365

Connecting people to knowledge
Tap into shared topics, resources and experts in the context of your work

Content processing
Intelligently categorize content and automate processes

Content compliance
Connect and manage content to improve security and compliance

Microsoft Graph & Microsoft AI

Content Services
Knowledge & Content Services overview

Project Cortex

Knowledge curation and discovery

- Microsoft 365 Apps
  - Topic card
- Topic center
  - Topic center home page
- Topic page
- Topic page
- Topic page

SharePoint Syntex

- Content centers
  - Content processing
- Metadata and content compliance

Microsoft Graph and AI

Microsoft Graph content connectors
Knowledge & Content Services overview

Project Cortex

A Knowledge curation and discovery

Discovery
Where users connect to knowledge (content and experts) about topics

Microsoft 365 Apps

Topic card

Curation
Where users explore topics and experts manage topics

Topic center

Topic center home page

Topic page

Topic page

Topic page

B SharePoint Syntex

Processing
Where process owners build models, ingest content and organize process-related content, and users access content as part of business process

Content centers
content processing

Metadata and content compliance

Identification
Automatically discover relationships across content & conversations

Tagging
Extract information from and about content

Governance
Manage security and compliance of content

Extension
Ingest knowledge from external services and data repositories

Microsoft Graph and AI

Microsoft Graph content connectors
Content services
Introducing SharePoint Syntex
Microsoft
SharePoint Syntex

Introducing:
Content services that work the way you do
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
Evolution of content AI

Conventional machine learning

• "Black box" AI
• Large training sets
• Human expertise reviews results later
Evolution of content AI

Machine teaching
• Human-centric AI
• Small sample sizes
• Experts review results early

Experts tag a small sample set
AI encodes human expertise as tagging rules
New content is tagged
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 using SharePoint Syntex.

- **Manual**
  - Any content, aided by use of managed terms and content types

- **Object detection**
  - Process digital content - photos, scans, receipts, business cards, videos with OCR & text

- **Form processing**
  - Capture content types and metadata from purchase orders, applications, other structured documents

- **Document understanding**
  - Capture content types and metadata from contracts, resumes, other unstructured documents

Interactive → Pre-built, automated → Custom, assisted → Custom, compliant
Model 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

**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 5-10 PDF, Office, mail files, including negative examples

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

Modern, thumbnail-centric view with viewers for **300+ file types** delivered through Microsoft Teams and SharePoint

Uses responsive design and accessibility standards to look great on **any device**

**Sync** files to any device with OneDrive

**Move** files among libraries with metadata, versions and policy

**Bulk editing**, check-in/check-out and approvals, signals, modern document set
Strengthening the metadata foundation

- Coherent/consistent across Microsoft 365
- Search enrichment find content based on terms
- Consistent tagging experience with contextual term suggestions and auto tagging
- Improved enterprise content type publishing, discovery, and enforcement with unified taxonomy services
New metadata capabilities with SharePoint Syntex

- **Taxonomy extractors**: Match extracted content to managed terms for consistent metadata application.
- **Term store reports**: Understand the composition of your term store to better manage.
- **Content type push**: Ensure that your critical content types are automatically added to new lists in hubs (and their associated sites).
- **New import format**: Define richer import files with a new format based on SKOS, with support for properties and multiple term sets.
Microsoft Graph content connectors

Extend Microsoft 365 experiences

Build your experience

Microsoft Graph APIs

Microsoft Graph

Connectors

Your enterprise data sources

Microsoft built connectors

- Azure Data Lake
- File Share
- Enterprise Websites
- MediaWiki
- ServiceNow
- Microsoft SQL Server
- Azure SQL
- Azure DevOps

130+ connectors available through partners

https://aka.ms/GraphConnectors
SharePoint Syntex - Compliance integration

RetentionPolicy 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

Analytics and file plans provide scaled management of label usage and policies
Microsoft 365 content compliance
Integrate security and compliance with SharePoint Syntex

Information Protection
Built-in labeling and protection experience in Office apps, Office 365 services, other Microsoft services like Power BI, Edge, and Windows

Built in encryption and key management
Assure proper oversight and control of content at rest, in transit and as-shared

Information Governance
Intelligent and built-in retention and records management

Advanced eDiscovery
Quickly find and respond with only the relevant information

Advanced Audit
Power fast and effective forensic and compliance investigations with user and admin activity data retained up to 10 years
Results: Improved precision and consistency

Manage metadata, taxonomy and content types

Seamless tagging with contextual suggestions

Integration with content understanding and compliance

Discover

Process

Govern

MIP sensitivity and retention labels
Demo
Microsoft SharePoint Syntex licensing

Packaging
Add-on to M365 E3/E5 Plans, priced per user

Forms processing
Includes 1MM AI Builder monthly credits for form processing, 300 users minimum

Content connectors
500 items indexed by content connectors per E5 user, pooled
# Knowledge & Content Services roadmap

<table>
<thead>
<tr>
<th>Available soon</th>
<th>Early 2021</th>
<th>Top of mind</th>
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<tbody>
<tr>
<td><strong>SharePoint Syntex (GA October 2020)</strong></td>
<td><strong>SharePoint Syntex</strong></td>
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<tr>
<td>• Document understanding</td>
<td>• Enhanced capabilities</td>
<td>• Interconnected experiences of topics, expertise and metadata</td>
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<tr>
<td>• Build AI models to extract metadata from documents such as agreements &amp; forms</td>
<td>• Expanded model types, central model management</td>
<td>• Content Assembly &amp; Adaptation Experiences</td>
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<td>• Content center</td>
<td>• Advanced content experiences</td>
<td>• Automated Q&amp;A</td>
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<td>• New destination &amp; functionality</td>
<td>• Solution &amp; business process focused</td>
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<td>• Taxonomy</td>
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<tr>
<td>• Advanced capabilities, Graph API</td>
<td>• Seeding into Knowledge, improvements across Microsoft 365</td>
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<tr>
<td><strong>Knowledge</strong></td>
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<td>• Topic experiences</td>
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<td>• Topic pages and cards in SharePoint</td>
<td>• across Microsoft 365</td>
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<tr>
<td>• Auto identification of projects</td>
<td>• Auto identification of more entities, across connected data</td>
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<td>• Control sources of automated indexing for topics in your organization</td>
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Knowledge & Content Services preferred partners
https://aka.ms/SharePointSyntex/partners
SharePoint Syntex resources

Blog announcement: aka.ms/SharePointSyntex/Announce

SharePoint Syntex page: aka.ms/SharePointSyntex

Video: aka.ms/SharePointSyntex/Video

Demo: aka.ms/SharePointSyntex/Demo
Catch up on Ignite 2020 sessions

Ignite 2020 ([microsoft.com/ignite](microsoft.com/ignite))

**Keynotes**
Enabling collaboration, communication, and knowledge sharing with Microsoft Teams, SharePoint, Project Cortex, and more (Jeff Teper)

**Sessions**
Project Cortex: Knowledge discovery and content intelligence in Microsoft 365 (Naomi Moneypenny, Chris McNulty)

Ask the Experts: Project Cortex: Knowledge discovery and content intelligence in Microsoft 365 (Naomi Moneypenny, Chris McNulty)

Manage information lifecycle and records intelligently with Microsoft Information Governance (Tina Ying, Roberto Yglesias)

Virtual Hub / Employee experience / Knowledge ([aka.ms/VirtualHub/knowledge](aka.ms/VirtualHub/knowledge))

30 sessions related to Knowledge in Microsoft 365