

Streamlining Content Management: The Microsoft Syntex Course

Course Description

The Microsoft Syntex course is a comprehensive guide to streamlining content management using Microsoft's powerful Syntex tool. This course covers everything from building and managing Syntex models, to creating modern templates and processing and querying content. You'll also learn about taxonomy and how to use it effectively, as well as real-world adoption strategies and solutions. Finally, you'll explore the extensibility of Syntex, including how to use its REST API and create file and folder classification requests. By the end of this course, you'll have a deep understanding of Syntex and how to leverage its capabilities to make content management easier and more efficient than ever before.

Audience

The target audience for the Microsoft Syntex course would be professionals and teams responsible for managing large amounts of content in their organization. This could include content managers, document controllers, records managers, and other similar roles. Additionally, individuals responsible for designing and implementing content management solutions would benefit from this course, including IT professionals and business analysts. As such, learners for this course may have some basic knowledge of Microsoft SharePoint, Microsoft Teams, or other Microsoft productivity tools, but this is not a requirement as the course is designed to be accessible to beginners as well.

Pre-requisite Knowledge/Skills

To get the most out of the Microsoft Syntex course, learners should have a basic understanding of Microsoft Office applications and general computer skills. Familiarity with SharePoint and Teams would also be helpful, but it is not required. Some experience with content management systems and processes would also be beneficial. Overall, the course is designed to be accessible to both beginners and experienced professionals, and learners can expect to gain a solid understanding of Syntex and how it can be used to streamline content management processes.

Course Objectives

After completing this module, you should be able to:

- Understand the purpose and benefits of using Microsoft Syntex for content management.
- Build and manage Syntex models for unstructured, freeform, and structured document processing.
- Learn how to apply prebuilt Syntex models, including Invoices and Receipts models.
- Create and edit modern templates for generating documents using Power Automate.
- Use metadata and content processing to find and manage content effectively.
- Learn about taxonomy and how to import and use term sets using SKOS-based formats.

- Explore strategies for driving adoption of Syntex within your organization.
- Gain practical knowledge of Syntex solutions and how to leverage them, including the contracts management site template.
- Understand the extensibility of Syntex and how to use its REST API to create file and folder classification requests.
- Analyze model usage and effectively share enterprise models with others in your organization.

Course Outline

The course comprises 32-hours of theory and labs.

Module	Topic	Subtopic	Hands-On
1	Introduction to Microsoft Syntex	What is Syntex?, Syntex Models, Intro to Syntex, Licensing	Set up Syntex, Create a content center
2	Build Syntex Models	Unstructured document processing, Freeform document processing, Structured document processing	Create an enterprise model, Create a local model
3	Manage Syntex models	Prebuilt models, Invoices Model, Receipts Model	Apply a model, Share an enterprise model, Discover other trained models, Add a retention label, Add a sensitivity label, Analyze model usage
4	Content assembly	Create a modern template, Edit a modern template, Create a document from a modern template, Generate documents using Power Automate	Create modern templates, Generate documents, Use with Power Automate
5	Content Processing and query	Overview, Move or Copy a file, Use metadata to find content	Create a rule to move or copy a file, Use Annotations, Use Content query, Use Content processing
6	Taxonomy	Import using SKOS, SKOS Formatting Reference, Push Content type to hub, Term store reports	Import a term set using a SKOS-based format

Module	Topic	Subtopic	Hands-On
7	Adoption	Get started driving adoption, Scenarios and use cases, Access the Environment	Run a trial
8	Solutions and Templated	Overview of the solution, Licensing requirements, Learn how to use Syntex, Use the contracts management site template, Use the content center site	Step 1. Identify contract files and extract data, Step 2. Create your contract management channel, Step 3. Process your contracts with Power Automate
9	Extensibility	Overview, Microsoft Syntex unstructured document processing model REST API, REST Commands, Create Model, Get Model and Library Information	Create file classification request, Create folder classification request