

KOENIG SOLUTIONS • COURSE OUTLINE

Streamlining Content Management: The Microsoft Syntex Course

Learn to build, manage and extend Microsoft Syntex models, templates, taxonomy and content solutions across SharePoint.

32 Hours

DURATION

9

MODULES

34

TOPICS

24

HANDS-ON ACTIVITIES

COURSE OVERVIEW

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.

WHO THIS COURSE IS FOR

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

PREREQUISITES

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.

What You Will Learn

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 SYLLABUS

9 Modules, 34 Topics

01

2 Hands-Ons

Introduction to Microsoft Syntex

TOPICS

What is Syntex? · Syntex Models · Intro to Syntex · Licensing

02

2 Hands-Ons

Build Syntex Models

TOPICS

Unstructured document processing · Freeform document processing · Structured document processing

03

6 Hands-Ons

Manage Syntex Models

TOPICS

Prebuilt models · Invoices Model · Receipts Model

04

3 Hands-Ons

Content Assembly

TOPICS

Create a modern template · Edit a modern template · Create a document from a modern template · Generate documents using Power Automate

05**4 Hands-Ons**

Content Processing and Query

TOPICS

Overview · Move or Copy a file · Use metadata to find content

06**Hands-On**

Taxonomy

TOPICS

Import using SKOS · SKOS Formatting Reference · Push Content type to hub · Term store reports

07**Hands-On**

Adoption

TOPICS

Get started driving adoption · Scenarios and use cases · Access the Environment

08**3 Hands-Ons**

Solutions and Templates

TOPICS

Overview of the solution · Licensing requirements · Learn how to use Syntex · Use the contracts management site template · Use the content center site

09**2 Hands-Ons**

Extensibility

TOPICS

- Overview
- Microsoft Syntex unstructured document processing model REST API
- REST Commands
- Create Model
- Get Model and Library Information

Practise What You Learn

#	MODULE	ACTIVITY
01	Introduction to Microsoft Syntex	■ Set up Syntex ■ Create a content center
02	Build Syntex Models	■ Create an enterprise model ■ Create a local model
03	Manage Syntex Models	■ Apply a model ■ Share an enterprise model ■ Discover other trained models ■ Add a retention label ■ Add a sensitivity label ■ Analyze model usage
04	Content Assembly	■ Create modern templates ■ Generate documents ■ Use with Power Automate
05	Content Processing and Query	■ Create a rule to move or copy a file ■ Use Annotations ■ Use Content query ■ Use Content processing
06	Taxonomy	Import a term set using a SKOS-based format
07	Adoption	Run a trial
08	Solutions and Templates	■ Step 1. Identify contract files and extract data ■ Step 2. Create your contract management channel ■ Step 3. Process your contracts with Power Automate
09	Extensibility	■ Create file classification request ■ Create folder classification request

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

FLEXIBLE DELIVERY

Learn the Way That Suits You

Classroom Training

Live Online Classes (ILO)

Fly-Me-A-Trainer (FMAT)

Flexi (Self-Paced)

1-on-1 Training

Ready to Get Started?

Talk to a learning advisor about schedules, group training and customised delivery.

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✉ info@koenig-solutions.com