

The background of the page features several thin, flowing orange lines that create a sense of movement and connectivity. These lines are scattered across the white background, with some looping around the central text and others extending towards the edges of the frame.

Whitepaper

Microsoft SharePoint Premium

Adding the power of
intelligent document
processing

How to get the most out of your
SharePoint investment



liberate. innovate. elevate

Introduction

Microsoft SharePoint Premium is a cloud-based service that offers advanced capabilities for content management, collaboration, and knowledge discovery. It is designed to help organizations transform their content into knowledge and insights and empower their employees to work more efficiently and effectively.

SharePoint Premium builds on the features of SharePoint Syntex, which was launched in 2020 as the first product of Microsoft's Project Cortex initiative. SharePoint Syntex used artificial intelligence (AI) to automate the capture, ingestion, and categorization of content, and to extract metadata and entities from documents. SharePoint Premium extends this functionality with new features such as:

Content processing: Enables users to apply AI models to their content and extract valuable insights, such as entities, keywords, and topics. It also supports eSignatures, content assembly, OCR and image processing

Content experiences: Allows users to create and consume engaging content experiences with file translation, video transcription, translation and indexing, and smart image analysis and search. It also allows to view files in over 400 formats and annotate a number of them, manage high-value business content including contracts, and securely share documents with external parties via a Document Portal.

Content governance: Provides insights to admins on data access and potential oversharing of content, allows to restrict access, provides governance policy recommendations, and allows to Backup and Archive SharePoint sites.

By using SharePoint Premium, organizations can leverage the power of AI to unlock the value of their content, enhance their productivity and innovation, and improve their governance and security.

Use Cases of SharePoint Premium

Let's explore several use cases SharePoint Premium supports with its advanced features:

Managing the end-to-end lifecycle of high-value content

Whether you receive content from outside of your organization and need to process it or create your own and you need to make sure it follows the right procedure before it can be released, SharePoint Premium allows you to automate both using AI features.

For processing inbound content, you can choose to utilize AI models that have been pre-trained to recognize and extract from content types like invoices, contracts, and receipts, or train your own model by teaching it to recognize content or its layout based on your own business examples.

Once you classified content and extracted valuable data, your documents will be a lot easier to organize and find by your end users. You will also be able to further process the results using e.g. Microsoft Power Automate flows or with your own business applications.

Generate standard documents using modern templates

Using a feature called Content Assembly in combination with SharePoint Lists and Power Automate, you can automate the generation of 'routine' documents that rely on a standardized layout and formatting but need dynamic content to personalize the final document.

Whenever a frontline worker creates a new entry in a list, a new document will automatically be generated and processed for publication. With the flexibility of Power Automate flows, any review and approval procedure in your organization can be seamlessly implemented.

Avoiding risk with records management & document governance processes

With the classification of content and by extracting key metadata, SharePoint Premium lays the ground for the automation of information security and compliance within Microsoft 365. You may use Microsoft Purview Data Lifecycle and Records Management features to enforce compliance, but its features rely on well-structured and contextualized content. SharePoint Premium handles this for you by classifying content into recognizable categories.

You may also secure content directly when classifying, by configuring SharePoint Premium models to apply retention labels automatically to classified content. This always beats manual tagging by end users, given that they may make tagging mistakes or simply cannot keep up with the volume of content being processed.

The same goes for sensitive content: AI models whether pre-trained or self-configured will recognize any content with sensitive data, and by labelling it allows for the automated application of protective information governance policies.

Key features of SharePoint Premium

As mentioned in the introduction, SharePoint Premium features can be organized into three categories. Let's look at these in a bit more detail.

Content processing: pre-trained versus trainable models

The Syntex part of SharePoint Premium allows the configuration of several types of AI models for content recognition and metadata extraction. There are three main categories:

1. Configurable models: you may choose to configure your own processing model by selecting either a Teaching method, a Freeform selection method, or a Layout-based method. Each will fit different types of content.

2. Prebuilt models: these models are pre-trained to recognize specific types of content. Currently, three models of this type are made available: Contract processing, Invoice processing and Receipt processing. More models of this type may be shared in the future.

3. Image recognition and special models:

Technically, these are accessed via Power Automate and reference the Azure AI Cognitive Services. They allow you to classify and detect objects in images or extract information from (scanned) business cards and identity documents.

As a special feature, Taxonomy tagging is now available. This allows SharePoint Premium to tag your content automatically using predefined keywords or topic categories like countries, departments or product names. The outcomes are ideally used to further process information to support your business processes by embedding the results into a Power Automate process.

Content experiences: enhancing the way you work with content

Being able to classify content and extract sensible metadata from it is one aspect to enhance the value of content – being able to work with it more intuitively is another. For this, SharePoint Premium offers a host of features that are seamlessly integrated with SharePoint. We lined them up for you:

1. File viewing: SharePoint allows you to upload any file regardless of its format, but now also allows you to open and view virtually any file, even if its format is not supported by your favourite Microsoft Office application. Over 400 file formats are now supported this way.

2. File annotation: Several file formats now also support annotation, directly from the file viewer. This can be very helpful when you process inbound files from SharePoint, and no longer do you have to switch to or integrate an external application.

3. eSignatures: For (finalized) PDF documents, SharePoint Premium supports SharePoint eSignature and in the course of 2024 will also support Adobe Acrobat Sign and DocuSign integration.

4. Content query: This feature offers an enhanced search experience by allowing the use of available metadata on content to filter search results.

5. Optical Character Recognition (OCR): OCR is now provisioned to extract readable text and key image objects from any scanned document of a supported file type. With this, scanned documents can be processed by SharePoint Premium document processing like any other machine-readable file and be indexed by Microsoft Search for easy finding and retrieval.

6. Merge and extract PDFs: You can merge two PDF files directly from SharePoint or extract individual pages from a PDF document and share them.

7. Document and video translation: This powerful feature auto-translates documents with supported file formats into a large number of other languages. Also, video transcripts and closed captioning (CC) files may be translated

Content governance: automate the lifecycle management of your content

With the arrival of Copilot, information governance has become a key prerequisite for the safe use of AI to support productivity. This topic is essential for a smooth adoption of a product like Copilot, so it is good to be aware that SharePoint Premium has various features that can help with this requirement.

Data insights and protection: SharePoint Premium provides insights to admins on how users currently access and share content across SharePoint sites and alerts them of any potential oversharing or data leakage risks. Admins can also use sensitivity labels and data loss prevention (DLP) policies to protect sensitive or confidential content from unauthorized access or exposure.

Access control and compliance: SharePoint Premium allows admins to restrict access to SharePoint sites based on various criteria, such as user identity, device, location, or network. Admins can also enforce multifactor authentication (MFA) and conditional access policies to enhance security and compliance. Additionally, admins can apply retention labels and policies to SharePoint sites to ensure that content is preserved or deleted according to legal or business requirements

Governance policy recommendations: SharePoint Premium leverages artificial intelligence (AI) to analyse your content and provide recommendations for improving your governance policies and practices. For example, it can suggest optimal retention periods, sensitivity levels, and DLP rules for your content, based on its type, usage, and value.

Backup and archive: the newly introduced product SharePoint Backup enables you to backup and restore SharePoint sites in case of accidental deletion, corruption, or ransomware attacks. SharePoint Archive supports the requirement to archive SharePoint sites that are no longer active or needed, but still need to be retained for compliance or historical purposes. Archived sites are moved to a separate and significantly cheaper storage location and have reduced functionality but can be restored as-is if needed.

SharePoint Restricted Search: it was just announced that as an extra approach to enable secure Copilot adoption, it is now possible to restrict for user groups which sites will be available as a Copilot source for them. This serves as an alternative to implement granular site access policies and may be a solution for large organizations that want to adopt Copilot without first having to scrutinize the access to a large body of older and newer sites.

The Role of AI in SharePoint Premium Copilot

AI plays a vital role in enhancing the functionality and value of SharePoint Premium features. Depending on the feature, different types of AI techniques are used, such as language models, neural networks, or machine learning algorithms. Here are some examples of how AI is used in SharePoint Premium:

Document recognition and data extraction models are based on machine learning, meaning you must train them yourself using a set of relevant business data or use a model pre-trained by Microsoft. The advantage of this approach is that you have a lot of control over the quality of recognition and extraction, but it takes effort to get the quality of results to an acceptable level, and regular quality improvement actions where content changes over time.

Automatic term matching of content versus your managed metadata taxonomy relies on a neural network-based mechanic paired with natural

language processing, called an inference engine, which tries to extract enough context from your content to match keywords with managed terms

Image recognition and object tagging uses neural networks that are trained on large sets of image data to distinguish patterns in images and tag them by matching them to pre-trained data. Again, this relies on the training of a model or the use of pre-trained models. Examples are the models that have been trained to recognize business card or identity paper data from scanned images.

Conclusion

SharePoint Premium adds significant value to your Microsoft 365 and SharePoint investment, by adding intelligence and context to the content you store in SharePoint. In effect, it even provides an incentive to move critical business context into SharePoint from e.g. network shared drives, as it will bring multiple opportunities in processing, governing, and making content productive for your business.

Microsoft continues to invest into its SharePoint Premium offering and rapidly expands its capabilities, to offer the best possible user experience and securing of information on an already highly popular platform for content management. Depending on your business needs, investing into Microsoft Premium will prove to be pivotal for the productivity increase and compliance of your daily content management practice, as several implementations across the globe and in various industries have already proven.

Also, feel free to contact us in case of any questions. We hope you enjoyed our whitepaper – look out for more in-depth knowledge sharing to be published shortly.



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