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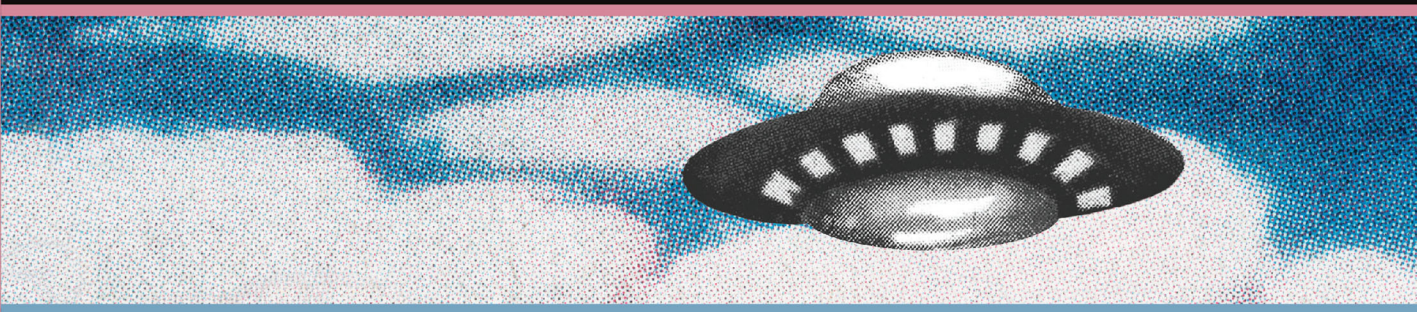
Bringing Practical Cloud AI to Content Management



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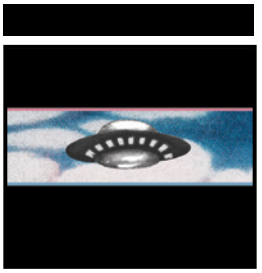
Microsoft® SharePoint® Premium in the Real World



Microsoft® SharePoint® Premium in the Real World

Bringing Practical Cloud AI to Content Management

Jacob Sanford
Woodrow Windischman
Dustin Willard, Microsoft MVP
Ryan Dennis

WILEY

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From Jacob: To my wife, Shannan, and my kids, Matthew, Casey, and Wendy. Thanks for all your support through this entire journey.

From Woodrow: For Charles Babbage, Alan Turing, Ada Lovelace, Grace Hopper, and all the other giants upon whose shoulders we are standing today.

From Dustin: To my six-year-old son, Drew Gordon Willard, anything is possible if you put your mind to it.

From Ryan: This book is dedicated to everyone who has ever thought "I could write a book." Yes, you can—and you should.

About the Authors

Jacob Sanford, with almost 25 years of experience in technology, I have dabbled in most things. But I have always, and I mean ALWAYS, been attracted to the bleeding edge technologies. It is what drives me. The first project I got on when I joined Slalom in September 2020 was creating a Cognitive Services AI solution for an International Retail client that wanted their HR questions that were asked in the Microsoft Yammer community to be asked automatically with little to no human intervention (although they wanted the answers to be shaped by SMEs when needed). The only problem was that I had never heard of Yammer. Or Cognitive Services. And I had never worked in AI. Or with Power Automate, really, which was another critical piece of technology we needed. But I made that project sing. I learned so much with that project and I decided right then and there, AI was my future. And I have never looked back.

I have since worked on several other AI projects and have also begun evangelizing the technologies surrounding Microsoft Syntex. The low-code/no-code AI implementations surrounding these SharePoint tools are such a powerful improvement to metadata extraction and an easy "toe in the water" approach to getting businesses interested in AI in their workplace; it has changed the landscape of AI for me.

I have also done some dabbling in AWS AI and have taken their classes on responsible AI because responsible/ethical AI is paramount to me and what I do. I have worked with AI4ALL in several capacities, including being a mentor for their summer program with high school kids doing a 10-week program to learn about AI technologies and careers from real AI professionals. This has been one of my favorite ways to give back and, frankly, to learn more about AI because these kids are *smart*.

Woodrow Windischman is passionate about helping people make things work. He leads digital transformation by bringing to bear his expertise in Microsoft 365, information management, and operational excellence (end user adoption and change management, compliance, and governance). He has hands-on experience across the entire modern work life cycle, from planning through configuration and administration.

As a multiyear Microsoft MVP, Woody helped define industry best practice in the SharePoint space. He was lead author for two books on SharePoint Designer. His background in compliance and governance, and his experience planning and deploying solutions, allows him to ensure that technology is truly serving the business.

He has international experience in roles such as business analyst, infrastructure architect, server administrator, trainer, developer, compliance coach, and technical writer. He has skills in identity, infrastructure, information architecture, search, UX, and more.

Dustin Willard, a Microsoft MVP in M365 Apps and Services, boasts a distinguished 15-year career as a veteran in the SharePoint and M365 arena. With expertise spanning the development, design, and architecture of enterprise solutions across various Microsoft technologies and industry verticals, Dustin has consistently emphasized the integration of solid information architecture with technology in every solution he crafts, reflecting his unwavering passion. Specializing in intranet builds, enterprise content management, employee experience, and search, Dustin currently directs his focus toward fostering community growth in Microsoft Viva and SharePoint Premium. Whether through conference speaking, book authorship, or supporting emerging technologists at local M365 user groups, he remains dedicated to advancing knowledge and collaboration. Currently, Dustin serves as the global Microsoft solution area lead at Slalom in Modern Work.

Ryan Dennis is a seasoned technology leader with many years in the Microsoft consulting space. Ryan is passionate about clients adopting technology innovations in the Microsoft ecosystem. He focuses on user experience, solution architecture, information architecture, delivery excellence, thought leadership, technical innovation, and customer success. Ryan has helped guide organizations toward adoption across many industry verticals and has a focus on modern work technologies, including SharePoint Premium, Microsoft Teams, and Microsoft Viva. Ryan has co-authored and published multiple books on Microsoft 365 and SharePoint and frequently contributes to the technical community.

About the Technical Editor

Sandar Van Laan has over 20 years of Microsoft technology experience and 15 years in consulting. He's interested and wants to be involved in the coming wave of AI technology revolutionizing the way we live and work. He lives in Atlanta, Georgia, with his wife and two kids and enjoys bicycling, reading, and video games.

Acknowledgments

From Jacob:
I would first like to thank my family for all their support throughout this entire process. Without their love and support, this book could never have happened. I would also like to thank the entire author team for carrying my weight when it was too heavy for me to carry alone. You guys made this book possible and there are not enough words to show my gratitude. I would be remiss to not thank the folks at Slalom for helping me get the tools necessary to write this book and their continued support throughout this journey. Specifically, I would like to thank Tim Tisdale for first hiring me at Slalom and giving me my first AI project years ago that helped kick-start the long learning process that got me to where I am today. I would also like to thank Thomas Edmondson and Gaston Cruz for their never-ending knowledge and help while writing this book. Finally, I would like to thank the people from Microsoft that helped answer questions and provided motivation and guidance when we needed it. This includes Freddy Naime, James Eccles, Steve Pucelik, and Chris McNulty. Thank you for all that you do.

From Woodrow:
I can't believe it has been over 10 years since I last wrote a book. I had almost forgotten how much time and effort go into it. Of course, when you're working with cutting-edge technology, you take the risk of things changing, and change they have!

While working on this, we survived a constant barrage of new features being added, and right at our final submission deadline, a complete overhaul of the product's name and packaging was announced. We've adjusted the text where we could, but the product itself will take some time to transition from being Microsoft Syntex to Microsoft SharePoint Premium. You will, therefore, continue to see both names referenced throughout the text.

I would like to thank the dedicated team at Wiley, as well as my co-authors, for everything they have done.

I also thank my lovely wife, Brenda, for her patience as I spent time squirreled away in my home office working on my chapters.

Finally, I would like to thank *you* for taking the time to pick up this book, and it is my sincerest wish that you find its contents helpful.

From Dustin:
Embarking on the journey of writing my first book was both exhilarating and challenging. Documenting insights on SharePoint Premium proved to be a formidable task, but the realization of this endeavor fills me with pride, anticipating its enduring value within the Microsoft community. I extend heartfelt appreciation to my unwaveringly supportive wife, Shannon, and my inspirational son, Drew, who consistently fueled my daily pursuit of excellence. Additionally, I am deeply grateful to my grandfather, Gordon Clark, whose mentorship and guidance have been invaluable throughout my life, especially in navigating life's significant obstacles. A debt of gratitude is owed to Microsoft, particularly to Chris McNulty, Ian Story, and Steve Pucelik, and Freddy Naime, whose collaboration significantly enhanced this work within the ever-evolving technological landscape. Special acknowledgment is reserved for my esteemed co-authors, Jacob, Woody, and Ryan, whose exceptional acumen enriched the collaborative process. I extend sincere thanks to the Wiley and Slalom teams for their invaluable support and patience throughout the publication journey, demonstrating unwavering professionalism in navigating unforeseen changes. To you, the reader, I express my sincerest hope that this book proves beneficial and that your enjoyment in reading it reflects the fulfillment we experienced in its creation.

From Ryan:
Writing a book is a challenging and rewarding journey that requires a lot of time, effort, and dedication. When I agreed to write another book, 10 years after the last, I knew it would be a fun and challenging experience. I'm not sure I was prepared for the number of speed bumps we would encounter on the journey, but as they say, the only constant is change.

First and foremost, I want to thank my wife, Mandi, for her unwavering support and patience. I also want to thank my son, Landen, for inspiring me every day to be better than yesterday. I think we found a good balance of finding the time to throw the baseball or play some basketball with him and the time I spent in my home office writing chapters. I really enjoyed authoring alongside Jacob, Dustin, and Woody—you are some of the sharpest people I know, and it was an honor to work with you. Finally, I want to thank the team at Wiley for allowing us to write this book and for their patience through the publishing process, especially as many things required change along the way. Last, but most certainly not least, to you the reader: I hope this book helps you and that you will enjoy reading it as much as we enjoyed writing it.

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Foreword—SharePoint Premium

Chris McNulty

I'm honored to be asked to contribute the foreword for this book, *Microsoft SharePoint Premium in the Real World*. I've known Jacob, Woody, Dustin, and Ryan for years and think you'll find this book to be a worthy addition to your knowledge about maximizing the value of your Microsoft 365 content. They've been actively engaged with Microsoft as we've developed new solutions, and they bring experienced, practical advice about making this vision real for you. Regardless of your role with content, this book is for you.

I joined Microsoft in 2015 to help drive our solutions for content management. For more than two decades, SharePoint has been the engine powering collaboration and content management for our customers. From its early days as a workgroup solution, it has skyrocketed in the cloud to become the world's leading content platform, highly flexible in driving core collaboration across applications like Office and Teams as well as custom applications. Every workday, our customers add over two billion documents to Microsoft 365 and to SharePoint. Understanding how best to shepherd and channel this intensity is more critical than ever.

Over the past 18 months, the digital world has seen the rise of generative AI, led by pioneering solutions like ChatGPT and Copilot, both powered by Microsoft. This is a massive opportunity to transform so much of our digital realm—across employee experience, collaboration, and business process. Generative AI like Copilot works best when it's grounded in content, leveraging the unique intellectual property, creativity, and competitive advantage stored in your files. AI loves content, and there's a huge opportunity since SharePoint is the world's home for content.

The range of digital transformation that we are witnessing is unprecedented. Full disclosure, I'm anchored in Microsoft-connected events—but I think these trends go beyond our own solutions to embrace the digital world.

First Wave—Cloud Beachhead (2012–2017)

In the first wave of public cloud, our customers began to shift on-premises, server-based workloads like Exchange and SharePoint to the cloud. From 2012 through 2017, we focused on re-platforming our digital capabilities as a basis for further cloud innovations.

Second Wave—Cloud Innovation (2017–2022)

Starting around 2017, Microsoft was again at the forefront of a second wave of digital transformation, bringing forth new, cloud-born applications and services that had never been possible in on-premises data centers. Fueled by nearly limitless capacity and power, and building on established patterns, Microsoft created new capabilities, such as Microsoft Teams, to transform meetings, communication, collaboration, and application delivery.

In 2020, driven by the COVID-19 pandemic, the world was able to leverage these first two waves to empower remote work and productivity as well as removing geography as a requirement for live meetings and communication.

Third Wave—Cloud AI (2022–present)

The third wave of digital transformation began in 2022, as classic AI patterns have been extended to everyday information workers. This third wave of digital transformation sits above existing cloud foundations and cloud innovations and defines new patterns of interacting with each other, and with our ideas and activities expressed as content in the Microsoft Cloud.

Going back to the foundational days of Project Cortex in 2019, Microsoft has been executing a vision that we can distribute AI and automation to everyone to ensure that we can build, interact with, and manage our most critical information throughout its full life cycle. The Microsoft Graph provides critical signals to tailor and personalize your content experiences. In this wave, Microsoft has introduced Copilot, built in partnership with OpenAI, as well as extended AI-enhanced solutions like Teams Premium, Syntex, and SharePoint Premium.

We have only just begun to imagine how this can work. Think about the simple *out of office* message. While you're away, it does a very simple thing—sending a

custom message—on your behalf. Imagine a world where AI can dynamically respond to new messages, automatically grounded in your communications and your content to respond automatically. In this world, you might leave your "out of office" attendant on all the time.

Information Worker Value

We are well beyond the early days of treating the cloud as a simple place for small teams to share files. They said "content is king" going back to the early days of enterprise content management in the 1990s. That is truer than ever before.

Last year, we announced SharePoint Premium, our new wave of integrated apps and services to drive content processing, business processes, and content governance for all content and all files, across every device, and for every user. Building on the patterns of Project Cortex and Microsoft Syntex, SharePoint Premium can automatically read, tag, classify, and process your content; drive workflows for approval and digital signatures; and build new content based on your templates and your data. And all of this is done without custom code, delivered through the apps you use every day: in Office, in Teams, in Outlook, and more.

Developer Value

SharePoint Premium and SharePoint Embedded offer a range of benefits for developers. With SharePoint Premium, developers can leverage the platform's ability to automatically process content.

SharePoint Embedded (SPE), on the other hand, provides developers with the ability to manage application files and documents within their customers' individual Microsoft 365 tenants rather than setting up a separate repository outside tenant boundaries. It creates a new scalable pattern to deliver file and document management capabilities in custom applications.

SPE allows developers to use backend capabilities such as versioning, sharing, search, coauthoring, retention, and sensitivity labels with content in custom apps. This can help customers scale and manage content, while connecting to their existing workflows and providing flexibility when they need it.

IT Pros and Admins

One of the key challenges for IT pros is ensuring the protection and retention of their organization's data in Microsoft 365. Data loss can occur due to accidental

deletion, malicious attacks, ransomware, or compliance violations. To help IT pros address these risks, we introduced two innovative solutions that are related to SharePoint Premium: Microsoft 365 Backup and Microsoft 365 Archive.

Microsoft 365 Backup provides a comprehensive backup solution for your data in SharePoint, OneDrive, and Exchange Online. It allows you to back up and restore data in place at unprecedented speeds and scale, using the same Microsoft trust boundary and security benefits as the rest of Microsoft 365 uses.

Microsoft 365 Archive is a cost-effective storage solution for your inactive or aging content. It allows you to archive data in place using tiered storage, retaining Microsoft 365's security, compliance, search, and rich metadata capabilities. You can define policies and rules to automatically move data to the archive tier based on criteria such as age, activity, or sensitivity. You can also access and manage your archived data seamlessly through the Microsoft 365 user interface.

Conclusion

I am always surprised and delighted to discover the myriad ways our customers leverage Microsoft 365 and SharePoint to create new solutions to business challenges that were unknown even a few years ago. I'm glad to help contribute, a bit, to bringing this book forward into the world to support your innovations in the new wave of digital cloud content. Thank you.

Chris McNulty is Director of Product Marketing for Microsoft 365, SharePoint Premium, OneDrive, SharePoint, and Stream. A co-creator of Microsoft Viva and Syntex, Chris's experience as CTO includes companies such as Dell and Quest Software. He was first recognized as a SharePoint MVP in 2013. A frequent speaker at events around the globe, Chris is the author of the SharePoint 2013 Consultant's Handbook *among other works. Chris holds an MBA from Boston College in Investment Management and has over 20 years' experience with John Hancock, State Street, GMO, and Santander. He blogs at* `https://techcommunity.microsoft.com` *and cohosts the Intrazone podcast at* `https://aka.ms/TheIntrazone`.

Introduction

Greetings, Professor Falken. Would you like to play a game?
Joshua, War Games

We are all, by any practical definition of the words, foolproof and incapable of error.

I'm sorry, Dave. I'm afraid I can't do that.
Hal 9000, 2001: A Space Odyssey

AI. Artificial Intelligence. For as long as there have been computers, popular culture has ascribed human—even superhuman—thoughts to these "electronic brains." We've given them names, relied on them for companionship and assistance, and feared for our lives when they have broken free of our control. At least in fiction.

Yet the reality has been far different. Data scientists have worked for decades to get computers to understand and retrieve information in the same way we humans do. Much progress has been made in specific areas, but the creation of an entity that truly mimics the human mind in all of its nuance remains elusive.

Even without achieving that holy (or unholy) grail, the fruits of AI research are all around us. Biometric access to computers and smart phones, automatic language translation, and digital assistants like Alexa and Siri are just a few of the applications taken for granted today, and more examples are on the horizon.

While "conversational" or "generative" AI—such as ChatGPT, Google Bard, and others—is stealing headlines, Microsoft SharePoint Premium is ensuring that the power of AI is also hard at work behind the scenes, analyzing documents, automating data collection, even managing information life cycles.

By picking up this book, you've taken the first step toward bringing this new set of AI technologies to bear on your business. While we're going to focus on Microsoft SharePoint Premium itself, you'll also learn how it integrates with a range of other tools and services. Working together, they will help your users find the needles in the ever-growing haystack of information being added to your systems on a daily basis.

Who This Book Is For

This book is a one-stop guide for anyone who wants to get up to speed on Microsoft SharePoint Premium and its related services. It is designed to help you discover how you can leverage this powerful set of tools to make information more readily available to your users.

- If you're an experienced information manager, you will find chapters to help you understand the practical capabilities of the tools.
- If you're a technologist, you'll get the ins and outs of configuring the system.

We'll also work to establish a common baseline for everyone from beginners to experts to understand what information management is and how the whole technology stack maps into these needs.

What This Book Covers

First and foremost, this book covers Microsoft SharePoint Premium. This is not just a single product but a family of tools that work together. The SharePoint Premium family uses content AI and machine learning to aid in the processing of documents throughout their entire life cycle.

This book also covers some of the features and functions of Microsoft 365—and particularly SharePoint Online—that are the beneficiaries of SharePoint Premium processing. In particular, metadata, content management, and the information life cycle are deeply intertwined.

We will talk about other pieces of the Microsoft Cognitive Services landscape, how they are leveraged by SharePoint Premium, and how they can be used to extend its capabilities.

We will also touch on other Microsoft 365 services that leverage these services, such as Copilot, Topics, and the Microsoft Purview compliance center.

How This Book Is Structured

The 11 chapters of this book cover three broadly related subjects. There are also two appendices.

First, we provide a baseline of concepts and terminology relating to artificial intelligence, information management, and the Azure cognitive services underpinning many SharePoint Premium features.

Next, we'll discusses the primary features of SharePoint Premium in relation to the business needs they address. Each chapter includes examples and exercises to help you see how these can apply in your organization.

Finally, we'll go beyond document processing and into detail on how SharePoint Premium integrates with other tools and business processes. We'll also shows you how to extend SharePoint Premium by leveraging tools available to both professional and "citizen" developers.

Appendix A helps you set up a sandbox environment, and Appendix B will cover late-breaking updates to SharePoint Premium that we couldn't incorporate into the main chapters.

What You Need to Use This Book

This book is structured so that you can get a high-level understanding of its concepts just by perusing its chapters. However, to get the most out of it, you will need access to a Microsoft 365 tenant that has the appropriate licensing to access Microsoft SharePoint Premium. There are several ways to accomplish this.

Of course, the easiest way is to use your own enterprise environment. However, it is likely that many information managers will not have the level of access or licensing they need. Most enterprises have strict policies regarding access to advanced features, especially if they could be interpreted as being "administrative" in nature.

This book will help you gain the understanding necessary to use these features effectively and successfully provide business justification for their enablement. However, until you complete the book and have that understanding, it may be hard to provide justification for your own access. Therefore, you will probably have to make use of a temporary environment. This is sometimes called a *sandbox*, which is basically someplace you can "play" safely. Appendix A, "Preparing to Learn Microsoft SharePoint Premium," will walk you through the steps for creating a sandbox environment.