GRAVITY UNION

Governing Artificial Intelligence

Working with data in Microsoft 365

www.gravityunion.com

What we're covering

- [x] The state of Artificial Intelligence

- [x] Top risks for organizations

- [x] Implementing governance for Artificial Intelligence

- [x] Designing SharePoint for Artificial Intelligence

- [x] Examples and live demo of AI in action
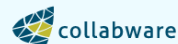
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Housekeeping

1. The video **recording** and **slides** will be shared in 1-2 days

2. Use the **Q&A** for questions and comments

3. **Captions** available under the ellipses (more) menu

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Who we are

A boutique compliance-inspired services firm helping organizations in their digital transformation journey

Microsoft Solutions Partner

Gold Certified
Collabware Partner
collabware

DATA SENTINEL

Sharegate

Vancouver

Calgary

Moncton

Ottawa

Toronto

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Jeff
Dunbar

Digital Transformation Consultant

- ✔ 5+ years of ECM experience
- ✔ Dual background in IT and business
- ✔ Specialized in M365, SharePoint, PowerApps, Power Automate, Power BI, Teams, and Collabware
- ✔ Multiple Microsoft 365 Certifications & Collabware CLM Certified Solution Specialist

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Artificial Intelligence

Where we are today and why it's become such a big topic

The approach to development evolves

AI isn't new...

- ☑ AI has been around for a long time, and you've been using it

- ☑ Smart Homes, Smart Cars/Self Driving Cars, Mobile Phone assistants (Siri, Google, Alexa), Chat Bots, Microsoft Search – **these are all forms of AI**.

- ☑ If you've done OCR on a document, you've used AI at your organization

- ☑ Grammar and Spelling checks in Word is a form of AI

Different types of AI

Machine learning

- Involves training a computer system to recognize patterns in data.
- Intelligent Document Processing (IDP) to extract information from structure documents

Deep learning

- Looks at massive amounts of data and learns by spotting patterns.
- Used in self-driving car technology

Natural language processing (NLP)

- Enables computers to understand and interpret human language.
- Chatbots, virtual assistants, and language translation software. NLP is what you're using when you interact with ChatGPT using plain English instructions.

Generative AI (GenAI)

- Creates new written, visual, and auditory content by way of existing data or input by humans.
- ChatGPT from OpenAI is a generative AI, in fact that's what the "G" in its name stands for

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So why now?

- ☑ Innovation and advancement has recently accelerated AI growth

- ☑ Generative AI and NLP are changing how we interact with AI and information in general

- ☑ With GenAI comes new **risks** and new **opportunities**

- ☑ You can **adapt and adopt,** or you can attempt to **prevent the use of AI** in your organization

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AI Technology can have many benefits

- ☑ **Boost** productivity and creativity
- ☑ **Increase** efficiency and cost savings
  - ✓ Better decision making and forecasting
  - ✓ Reduced human error
- ☑ **Reduce** administrative burdens
- ☑ **Improve** communication between organizations and their customers or constituents
  - ✓ Better and faster customer service with more personalized services

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Risks with AI

What are organizations most concerned about with Generative AI?

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With new technology comes new risks.

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Some top risks amongst organizations

1. Employee concerns with job loss

- ☑ People are often fearful of what AI will mean for their future in your organization

- ☑ Will AI make their job obsolete?

- ☑ Change Management: How as an organization can you help ease these fears?

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Some top risks amongst organizations

2. Data privacy & Security

- ☑ Will AI expose our confidential content
  - ☑ Externally
  - ☑ Internally
- ☑ There may be legal implications and risks to you
- ☑ Who controls the technology and what are their policies and procedures?

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Some top risks amongst organizations

3. Decisions based on inaccurate or biased information

- ☑ Employee's will make incorrect business decisions or responses based on inaccurate or biased information

- ☑ Large Language Models (LLM's) are trained based on data that may not be up to date, may contain inaccuracies, or biased information
  - ☑ External data and internal data

- ☑ Content Management & Validation: What processes and policies will need to be in place to ensure accuracy of content?

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Some top risks amongst organizations

4. Employee misuse or unethical use

☑ Employees may misuse AI to shortcut their work or jobs

☑ Sensitive data may be used as an input to 3rd party GenAI tools, breaching privacy

☑ What do you need to have in place to help alleviate employee misuses?

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Some top risks amongst organizations

5. Copyright or intellectual property risks

- ✓ Content in LLM's is trained from other people's content/information

- ✓ Images from products like Dall.E take inspiration from other artists

- ✓ How can we be sure that we aren't 'stealing' someone else's intellectual property when using GenAI?

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Can you prevent AI at your organization?

Buckle up!

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Get ahead of the risks

- ✅ Ignoring AI or reacting slowly opens you up to more risk

- ✅ Understanding the technology and proactively getting ahead of it can help reduce risk or prepare you to handle those risks

- ✅ Implementing processes, procedures, and technology that you've conducted proper assessments on is critical

- ✅ **Govern AI across your organization!**

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Governing AI

What do we need in place to govern AI and gaining the most out of the technology?

Governance

Where do we begin?

- ☑ Build AI into your organizational strategies

- ☑ Develop Roles & Responsibilities

- ☑ Implement AI Usage Policies & Procedures

- ☑ Educate & Train staff

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Stages of AI growth

Stage 1: Exploring

Stage 2: Planning

Stage 3: Formalizing

Stage 4: Scaling

Stage 5: Realizing

- Learning & Experimenting with AI in some areas of the organization

- Assessing, defining, and planning AI strategy across the organization

- Formalizing, socializing, and executing on your AI strategy

- Delivering incremental value from existing AI and adding new value with new solutions

- Realizing consistent AI value across the organization and your solutions

Image inspired from Microsoft

Build AI into your organizational strategies

- ☑ It's unlikely you can 'block' AI across your organization

- ☑ Isn't it better to:
    - ☑ Proactively build AI into your organizational strategies
    - ☑ Understand and define how AI will play a role in your organization and how you can measure the value of AI
    - ☑ Understand and define how AI will play into your Technology and plan for build vs buy scenarios

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Key: Change management

- ☑ Create a culture of ethical and responsible AI use

- ☑ Show top-down leadership support for AI technology

- ☑ Educate staff on how AI can be used in their day-to-day work to increase efficiency and productivity rather than replace them

- ☑ Train staff of all levels and encourage continuous learning and improvement of their skillset and knowledge

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Develop Roles & Responsiblities

- ☑ Implement processes, controls, and accountability structures

- ☑ Who is ultimately responsible for AI at your organization?

- ☑ Do you have a risk officer? Do you need one? Do they understand AI?

- ☑ Do you have any experts in AI? Will you need them in the future?

- ☑ **You may need new roles!**

Policies & Procedures

AI Usage Policies should be developed if you don't have them yet and should include things like:

- ☑ What technologies and applications are acceptable to use?
    - ☑ ChatGPT vs Copilot vs internal application vs other 3rd party

- ☑ What procedures must be followed after using GenAI?
    - ☑ Validate the information: check for inaccurate, biased, and outdated information
    - ☑ **Never use GenAI content without validating!**

Educate & Train Staff

- ✅ Train staff on the technology

- ✅ Train staff on the risks and implications of misusing the technology

  - ✅ Ensure they understand the risks, benefits, and how they can leverage AI responsibly at the organization

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Support AI across the business

1. Business Strategy

2. Technology Strategy

3. Organizational Culture

4. AI Governance Model

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Designing for AI

What Information Architecture considerations are needed to support AI?

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> *If we upgrade from SharePoint 2013 to SharePoint 2016 our problems will go away.*

Wishful Thinker

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Design Principles

Artificial Intelligence is not a magic wand.

☑ Often, we hope new technology fixes existing problems

☑ This is rarely going to fix your actual problems, but instead just bring those problems to the next system or technology

☑ **AI is no different** – AI may enhance or expose some of those problems even further

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Design Principles

- ☑ AI will not fix:
  - ☑ Poor content
  - ☑ Bad information architecture
  - ☑ ROT: Redundant, Obsolete, Trivial content
  - ☑ No single source of truth (multiple copies)
  - ☑ Or any of the major issues organizations tend to face with their data.

Design Principles

☑ Those fixes come from:

☑ A strong foundation in SharePoint through good information architecture, strong security, content controls, lifecycle management and metadata.
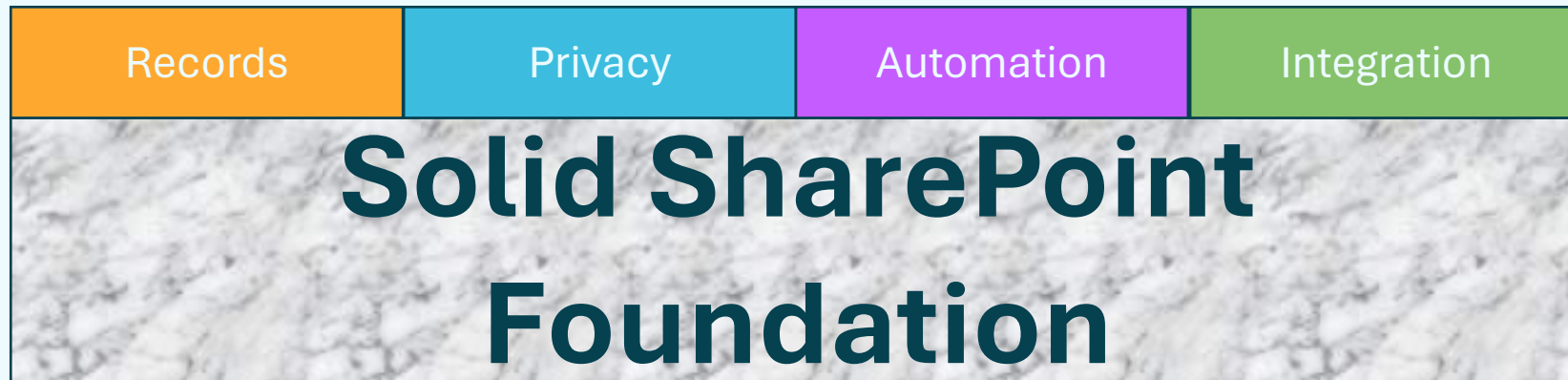
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| Records | Privacy | Automation | Integration |

Solid SharePoint Foundation

A solid SharePoint foundation is **required** to be successful with Records, Privacy, Automation, Integration.

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| Records | Privacy | Automation | Integration | Artificial Intelligence |

Solid SharePoint Foundation
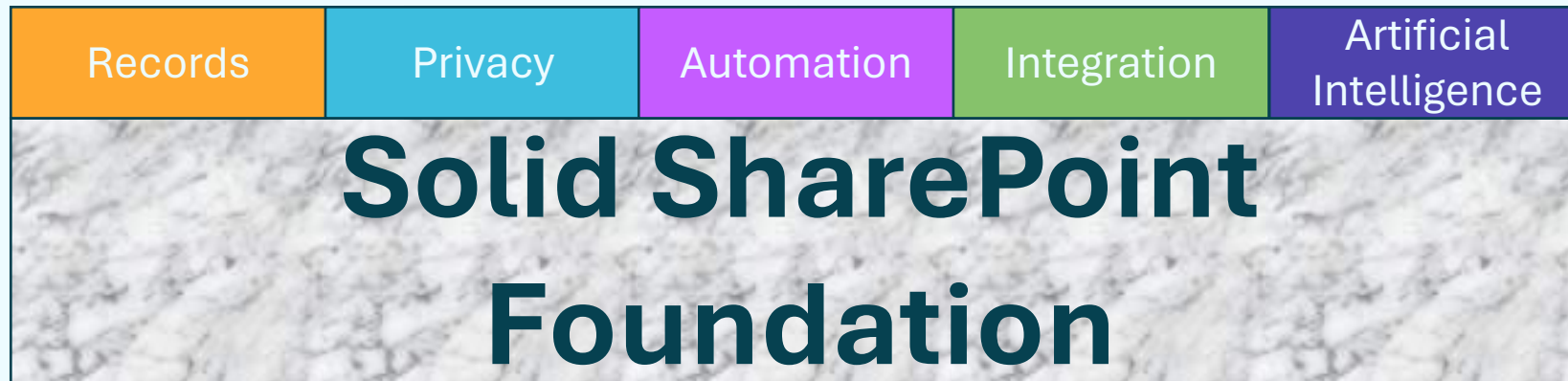
A solid SharePoint foundation is **required** to be successful with Records, Privacy, Automation, Integration, **Artificial Intelligence**.

Content Management

- ☑ Content Management is a core requirement for AI to provide the most benefit

- ☑ AI (today) is not good at understanding sarcasm, humour, out-dated content, etc.
  - ☑ AI has less context than a human – you might be able to identify obsolete policies, but can AI?

- ☑ No Lift-and-Shift of messy content

- ☑ Apply structure and metadata to set up future success

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Lift and shift

Network file storage\old system
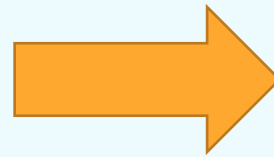
SharePoint Online!

Properly Designed...

Network file storage\old system

SharePoint Online!

GRAVITY UNION
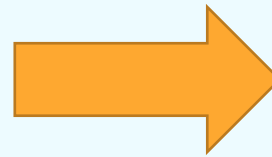
Securing your content

- ☑ Security becomes ever more important in the world of AI

- ☑ Hiding content from search, keeping it out of navigation, and implementing 'security by obscurity' may have worked for you in the past but it's unlikely to work with AI.

"Find and summarize any documents regarding upcoming layoffs"

Securing your content

- [x] Implement robust security measures around important content

- [x] Use Sensitivity Labels and DLP policies to secure content further

- [x] Open by design – maybe, but you better have other controls in place!

  - [x] Major and Minor versions

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SharePoint Advanced Management (SAM)

SAM allows for further controls for IT and SharePoint Administrators

- ☑ Site Access Restrictions

- ☑ Advanced reporting capabilities – Sharing, Change History

- ☑ Conditional access policies for sites

- ☑ Site lifecycle policies for inactive sites

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Manage the content lifecycle

- ☑ Oops, I made a decision based on the 1970 Drug & Alcohol Policy!

- ☑ Handle your content lifecycle automatically as much as possible

- ☑ Don't expect end users to do it, but do expect them to use that content with GenAI.

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Records Management

- ✅ Implement a Records Management solution to dispose of content over time

- ✅ Use Microsoft Purview Information Protection or a third-party tool

- ✅ Automate the lifecycle of the content through retention policies that comply with your file plan and legal obligations

- ✅ This benefits the organization when using AI but also covers your other legal hold and e-Discovery scenarios.

Archiving

- ☑ SharePoint affords us the flexibility of In-Place archiving, but AI can throw a wrench into this.

- ☑ In-Place archiving can lead to responses or decisions based on old information

  - ☑ E.g., Policies – Yes, those same old obsolete policies...

- ☑ Remove Permissions and leave site and content in-place

- ☑ Archive site and/or content

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Archiving Tools

- ☑ Microsoft 365 Archiving has been announced but there are also 3rd party tools

- ☑ Beneficial for AI scenarios, but also:

  - ☑ Cheaper storage for content that must be kept long term (or permanently) but provides little business value day to day

- ☑ As your data grows, you'll likely want an archiving strategy whether you're using AI or not

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Successful designs

1. Are founded in a strong SharePoint foundation

2. Require Content Management controls

3. Need proper security measures in place

4. Should include Records Management capabilities

5. Should include an Archiving strategy and solution

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Examples

Intelligent document processing (IDP), Power Virtual Agents, Copilot

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AI Technology in Microsoft 365

- ☑ Intelligent Document Processing
- ☑ Content Assembly (Modern Templates)
- ☑ OCR
- ☑ Chat Bots / Power Virtual Assistants
- ☑ Copilots
- ☑ Azure OpenAI
- ☑ and more...

Intelligent Document Processing

Not all AI requires Generative AI

Invoices ▾ ⓘ

Uploaded 5 items to Invoices
217 KB

View all

131-Hayley-Wickenheiser.pdf

Invoice Total $ 551.25

BillingAddress	BillingAddressRecipient
–	–
CustomerName	Due Date
–	–
InvoiceDate	InvoiceId
–	–
Content Type	Modified
Document	2023-11-15, 3:55:09 p.m.

132-Steve-Nash.pdf

Invoice Total $ 4,410.00

BillingAddress	BillingAddressRecipient
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CustomerName	Due Date
–	–
InvoiceDate	InvoiceId
–	–
Content Type	Modified
Document	2023-11-15, 3:55:09 p.m.

125-Mike-Weir.pdf

Invoice Total $ 3,675.00

BillingAddress	BillingAddressRecipient
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CustomerName	Due Date
–	–
InvoiceDate	InvoiceId
–	–
Content Type	Modified
Document	2023-11-15, 3:55:09 p.m.

124-Christine-Sinclair.pdf

Invoice Total $ 4,305.00

BillingAddress	BillingAddressRecipient
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CustomerName	Due Date
–	–
InvoiceDate	InvoiceId
–	–
Content Type	Modified
Document	2023-11-15, 3:55:11 p.m.

119-Georges-St-Pierre.pdf

Invoice Total $ 2,000.00

BillingAddress	BillingAddressRecipient
–	–
CustomerName	Due Date
–	–
InvoiceDate	InvoiceId
–	–
Content Type	Modified
Document	2023-11-15, 3:55:10 p.m.

Invoices

119-Georges-St-Pierre.pdf

Montréal, QC
G1A 0A2

DUE DATE

Invoice Total			**$ 2,000.00**

QTY	DESCRIPTION	UNIT PRICE	AMOUNT
1	SharePoint Online Roll-out	750.00	750.00
1	Collaboration Implementation	1,250.00	1,250.00

BillingAddress
123 Dorval
Montréal, QC
G1A 0A2

BillingAddressRecipient
Georges St-Pierre

Due Date
2020-03-31, 12:00:00 …

CustomerName
Georges St-Pierre

InvoiceId
119

InvoiceDate
2020-01-03, 12:00:00 …

Modified
2023-11-15, 3:55:10 p.m.

Content Type

124-Christine-Sinclair.pdf

Burnaby, BC
VAZ 2G7

DUE DATE

Invoice Total			**$ 4,305.00**

QTY	DESCRIPTION	UNIT PRICE	AMOUNT
1	Power BI Reporting	150.00	600.00
30	SharePoint Online Roll-out	175.00	3,500.00
		Subtotal	4,100.00
		GST 5.0%	205.00

BillingAddress
Maywood Street
Burnaby, BC
VAZ 2G7

BillingAddressRecipient
Christine Sinclair

Due Date
2020-01-05, 12:00:00 …

CustomerName
Christine Sinclair

InvoiceId
124

InvoiceDate
2020-01-04, 12:00:00 …

Modified
2023-11-15, 3:55:11 p.m.

Content Type

125-Mike-Weir.pdf

Sarnia, ON

DUE DATE

Invoice Total			**$ 3,675.00**

QTY	DESCRIPTION	UNIT PRICE	AMOUNT
30	SharePoint Upgrade	175.00	3,500.00
		Subtotal	3,500.00
		GST 5.0%	175.00

BillingAddress
MOLINARI STREET
Sarnia, ON

BillingAddressRecipient
Mike Weir

Due Date
2020-05-31, 12:00:00 …

CustomerName
Mike Weir

InvoiceDate
2020-01-05, 12:00:00 …

InvoiceId
125

Modified
2023-11-15, 3:55:09 p.m.

Content Type
Syntex Invoice

131-Hayley-Wickenheiser.pdf

DUE DATE

Invoice Total			**$ 551.25**

QTY	DESCRIPTION	UNIT PRICE	AMOUNT
3	SharePoint Patching	175.00	525.00
		Subtotal	525.00
		GST 5.0%	26.25

BillingAddress
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CustomerName
Hayley Wickenheiser
Shaunavon, Saskatche…

BillingAddressRecipient
Hayley Wickenheiser
Shaunavon, Saskatche…

Due Date
2020-07-31, 12:00:00 …

InvoiceDate
2020-01-06, 12:00:00 …

InvoiceId
131

Content Type
Syntex Invoice

Modified
2023-11-15, 3:55:09 p.m.

132-Steve-Nash.pdf

DUE DATE

Invoice Total			**$ 4,410.00**

QTY	DESCRIPTION	UNIT PRICE	AMOUNT
24	PowerApp Development	175.00	4,200.00
		Subtotal	4,200.00
		GST 5.0%	210.00

BillingAddress
–

CustomerName
–

BillingAddressRecipient
–

Due Date
2020-07-31, 12:00:00 …

InvoiceDate
2020-01-06, 12:00:00 …

InvoiceId
132

Content Type
Syntex Invoice

Modified
2023-11-15, 3:55:09 p.m.

Invoices

BillingAddress	BillingAddressR...	CustomerName	Due Date	InvoiceDate	PaymentTerm	VendorAddress	VendorAddress...	VendorName	SubTotal	TotalTax	InvoiceTotal
123 Dorval Montréal, QC G1A 0A2	Georges St-Pierre	Georges St-Pierre	3/31/2020 12:00 AM	1/3/2020 12:00 AM	Net 30	Suite 1240 605 Robson Street Vancouver, BC V6B 5J3	Gravity Union Solutions Ltd.	GRAVITY UNION	⚠	⚠	2000
Maywood Street Burnaby, BC VAZ 2G7	Christine Sinclair	Christine Sinclair	1/5/2020 12:00 AM	1/4/2020 12:00 AM	Net 30	Suite 1240 605 Robson Street Vancouver, BC V6B 5J3	Gravity Union Solutions Ltd.	GRAVITY UNION	4100	205	4305
MOLINARI STREET Sarnia, ON	Mike Weir	Mike Weir	5/31/2020 12:00 AM	1/5/2020 12:00 AM	Net 30	Suite 1240 605 Robson Street Vancouver, BC V6B 5J3	Gravity Union Solutions Ltd.	GRAVITY UNION	3500	175	3675
	Hayley Wickenheiser Shaunavon, Saskatchewan	Hayley Wickenheiser Shaunavon, Saskatchewan	7/31/2020 12:00 AM	1/6/2020 12:00 AM	Net 30	Suite 1240 605 Robson Street Vancouver, BC V6B 5J3	Gravity Union Solutions Ltd.	GRAVITY UNION	525	26.25	551.25
			7/31/2020 12:00 AM	1/6/2020 12:00 AM	Net 30	Suite 1240 605 Robson Street Vancouver, BC V6B 5J3	Gravity Union Solutions Ltd.	GRAVITY UNION	4200	210	4410

Chat Bot

Copilot Studio

A copilot for every Microsoft Cloud experience

Modern Work

Bing Chat Enterprise

Microsoft 365 Copilot

Windows Copilot

Business Applications

Dynamics 365 Copilot

Copilot in Power Platform

Microsoft Sales Copilot

Digital & App Innovation

GitHub Copilot

Data & AI

Copilot in Power BI

Security

Microsoft Security Copilot

Credit: Microsoft

Copilot in SharePoint (credit: Microsoft)

Copilot for Power Platform

- ☑ Copilot allows us to create workflows much quicker than before

- ☑ Citizen developers can get started and learn faster than ever before

- ☑ However, there is an art to writing good prompts

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Bad Prompt

Better Prompt

Send an outlook email with an html table of data from a SharePoint list that is filtered by a due date of 30 days

Suggested flow

After you review this AI generated flow suggestion, select **Next** to configure it

Trigger
The flow starts when this happens

🕐 Recurrence

↓

Actions
This is what the flow will do

Get items
SharePoint

Table

Send an email
Office 365 Outlook

🔄 Show a different suggestion

Best Prompt

When a new item is created in SharePoint send an outlook email with an html table of data from a SharePoint list that is filtered by a due date of 30 days

Suggested flow

After you review this AI generated flow suggestion, select **Next** to configure it

Trigger
The flow starts when this happens

When an item is created
SharePoint

↓

Actions
This is what the flow will do

Get items
SharePoint

Table

Compose

Send an email
Office 365 Outlook

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Important tips

- ☑ Specify the trigger of the workflow in the prompt

- ☑ Include the names of the actions you want to use (Outlook, Table, SharePoint)

- ☑ Provide specific details, clear wording, and concise statements

- ☑ Iterate where necessary or regenerate with the same prompt

Summary

☑ You can't ignore Artificial Intelligence — build it into your organizational strategies

   ☑ Business Strategy, Technology Strategy, Organizational Culture, Records Management Strategy, Transformation Projects

☑ AI is **not** a replacement for proper SharePoint Design, Information Architecture, Security, and Records Management

☑ AI should not be treated as a replacement for people, but as a foundational tool to enhance their productivity and efficiency

   ☑ Train, educate, and encourage your staff to use AI responsibly

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Q&A

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