

SharePoint Embedded for Enterprise Apps

NYC 2024



Every app will be a Copilot app.

Enterprise Al Apps in Three Easy Steps

1

Bring source data together into one **globally compliant** storage area for easy access.

2

Ensure inputs and outputs are properly secured for sensitive data via policies, ACLs, and retention.

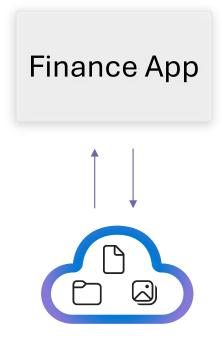


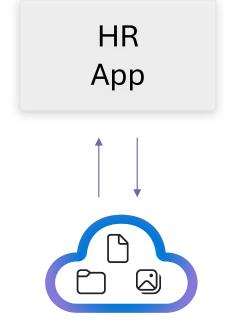
Integrate easily with common set of tools so people can easily interact with and actually use the data.

Files and Documents Are Everywhere

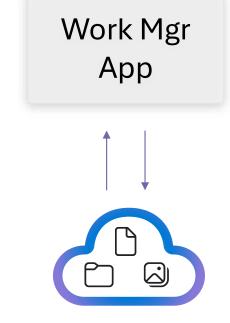
Line of business apps built by your organization

ISV developed apps purchased and used by your organization

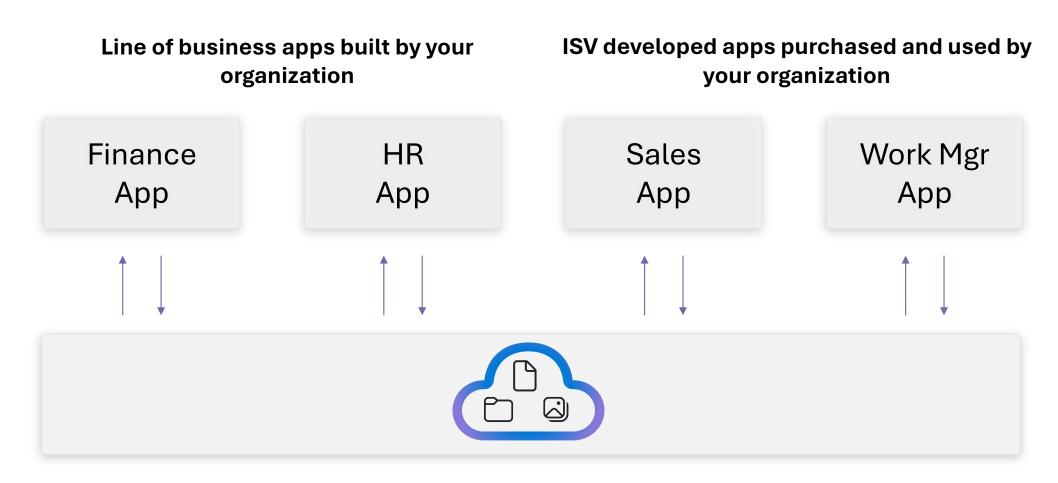








Unified Content Platform



Deliver consistent security, collaboration, content management and AI.



SharePoint Embedded

Embed Microsoft 365 features in your app



API only, headless SharePoint, for apps



Dedicated partition in your M365 tenant



M365 collaboration, security & compliance



Integrated content management & control



Microsoft 365 Copilot Ready



Consumptive APIs powered by Graph



M365 Business continuity promises

SharePoint Embedded is GA, Accessible Worldwide

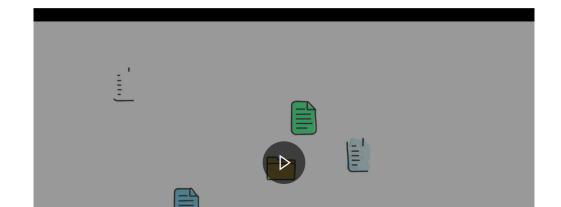
Announcing SharePoint Embedded General Availability

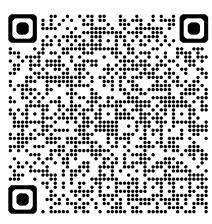


Published May 21 2024 09:49 AM



Today we're pleased to announce the general availability of SharePoint Embedded, a new way to build file and document centric apps. SharePoint Embedded allows you to integrate advanced Microsoft 365 features into your apps including full featured collaborative functions from Office, Purview's security and compliance tools, and Copilot capabilities. It also helps you build both enterprise line of business apps and independent software vendor (ISV) apps. SharePoint Embedded is a metered service with pay-as-you-go pricing. In addition, we are also excited to announce a private preview of SharePoint Embedded custom copilot experiences.

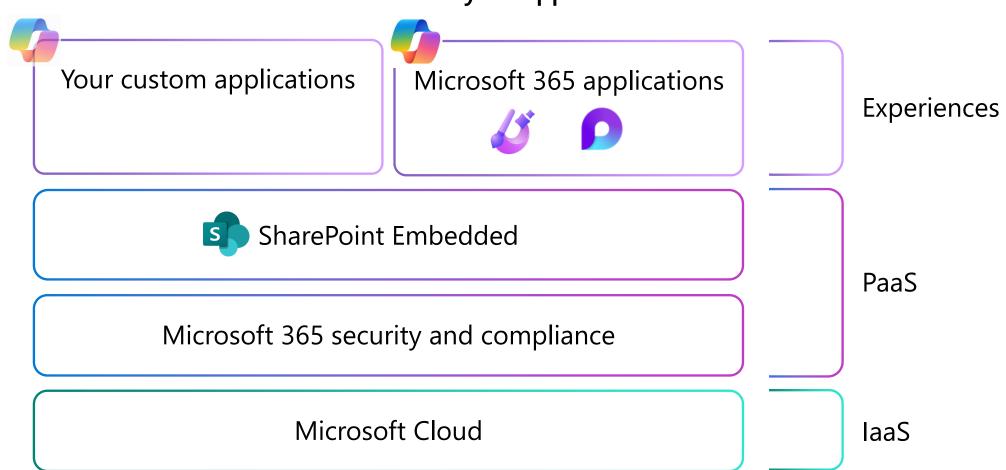






SharePoint Embedded

SharePoint for all your apps



Delivers M365 Features via Your App

Copilot & Al

- · M365 Copilot
- · Custom copilot
- Semantic Index & Search
- Document Processing
- DocumentSummarization
- · OCR
- Image Tagging
- Content Assembly

•

Security

- · eDiscovery
- Auditing
- Data loss prevention (DLP)
- Bring your own key (BYOK)
- GDPR / CCPA / etc.
- · Retention policies
- · Sensitivity labels
- · Conditional access

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Collaboration

- Word, Excel, and PowerPoint
- · Full Desktop Support
- Co-authoring/Live presence
- · @ Mentions
- Sharing to internal & external users
- Preview for popular file types like PDFs
- Fluid Framework support

•

Core Storage

- · Any file type
- Integrated search
- Content types & Metadata
- · 250 GB files
- · Automatic versioning
- · Redundant storage
- · File & folder perms
- · Recycle Bin
- • •

SharePoint Embedded Apps Deliver:

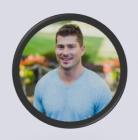
Copilot
Compliance
Collaboration
Core Storage

All within your Microsoft 365 tenant, so you can focus on your unique business value.

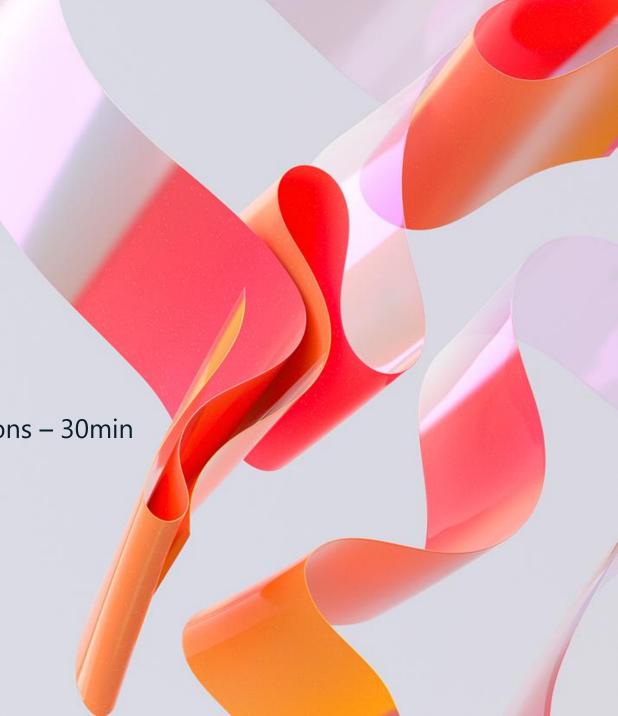


App Architecture

Basic concepts for SharePoint Embedded Applications – 30min



Marc Windle Principal Product Manager



After this session, you will...

- 1. Be able to explain the high-level architecture of a SharePoint Embedded application
- 2. Understand how apps manage content in SharePoint Embedded and how that enables Copilot, Compliance, Collaboration, and Core-storage features for that app



SharePoint Embedded

Embed Microsoft 365 features in your app



API only, headless SharePoint, for apps



Dedicated partition in your M365 tenant



M365 collaboration, security & compliance



Integrated content management & control



Microsoft 365 Copilot Ready

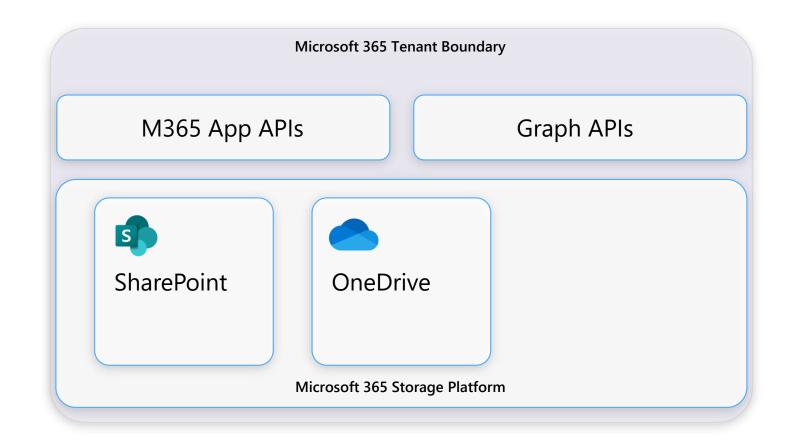


Consumptive APIs powered by Graph

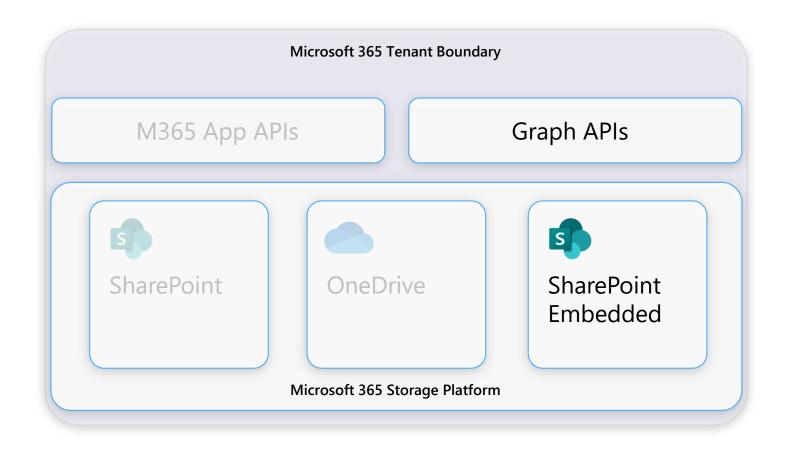


M365 Business continuity promises

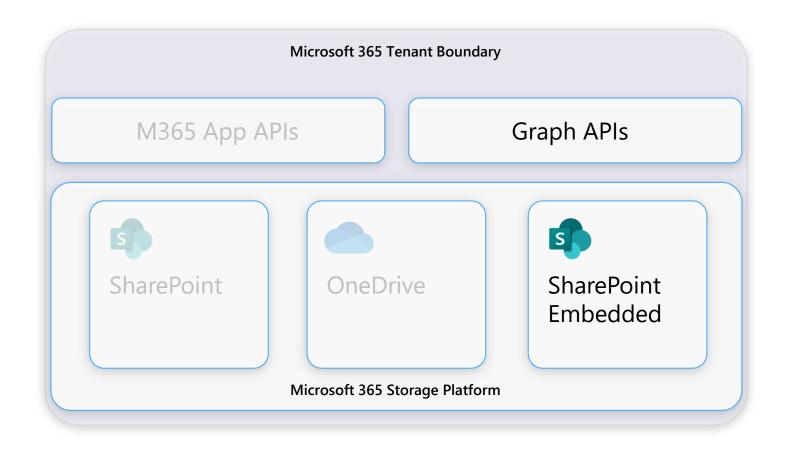
SharePoint Storage Partitions



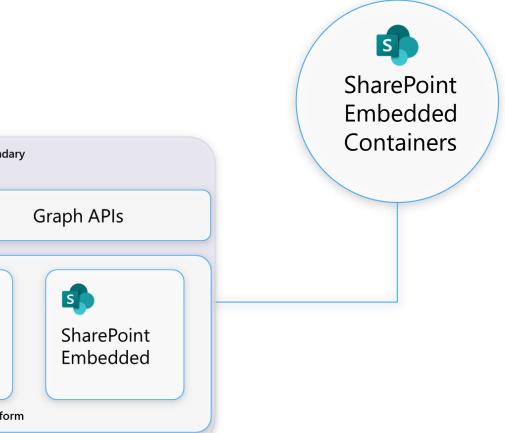
SharePoint Storage Partitions



SharePoint Storage Partitions

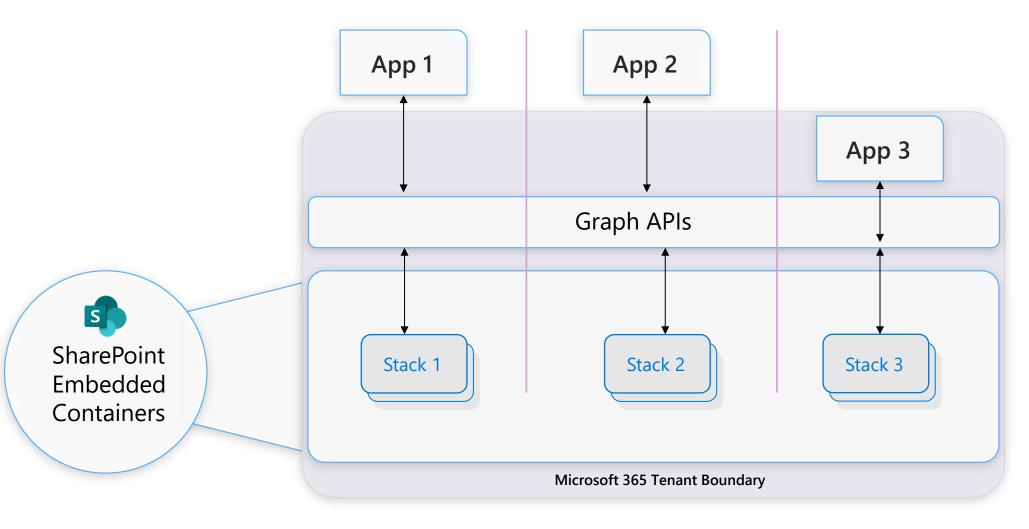


SharePoint Embedded Containers



- Similar to a SharePoint document library
- API-only access through your app
- App has full control over its containers
- Scale unit and security boundary
- Highly scalable 100k per app+tenant
- Management in SharePoint Admin w/ RBAC

Apps have dedicated storage



Permissions

Apps

- Specific access with Graph FileStorageContainer.Selected scope and role
- Avoid overly permissive grant requests on Sites and Files
- Using Delegated highly recommended where possible

Containers

- Built-in Reader, Writer, Manager, and Owner permission roles
- Can assign users and groups, including external depending on tenant settings

Files

- Can grant additive permissions at file or folder level within Container
- Built-in sharing experiences in Office

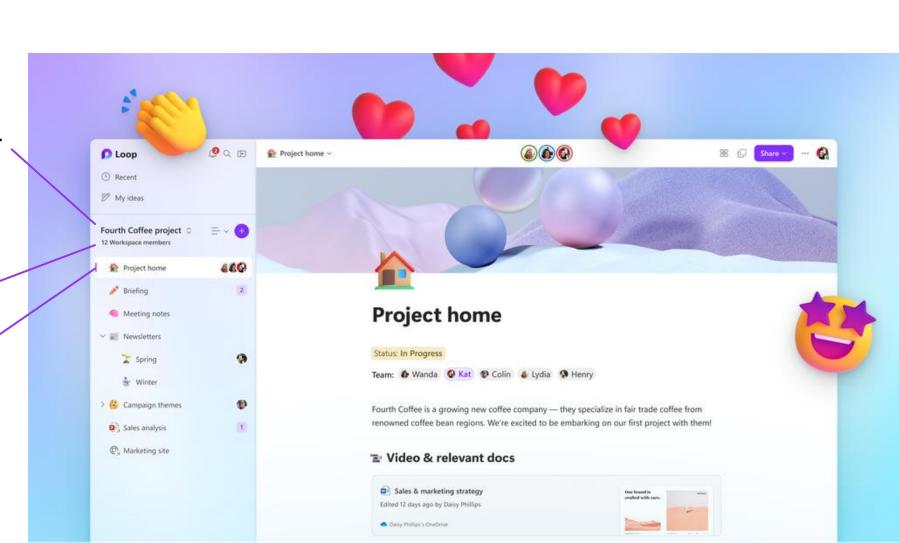
How Microsoft Loop uses SharePoint Embedded

Workspace is a Container

Members controlled w/

Container Permissions

Pages are Files



Recipe of a SharePoint Embedded App

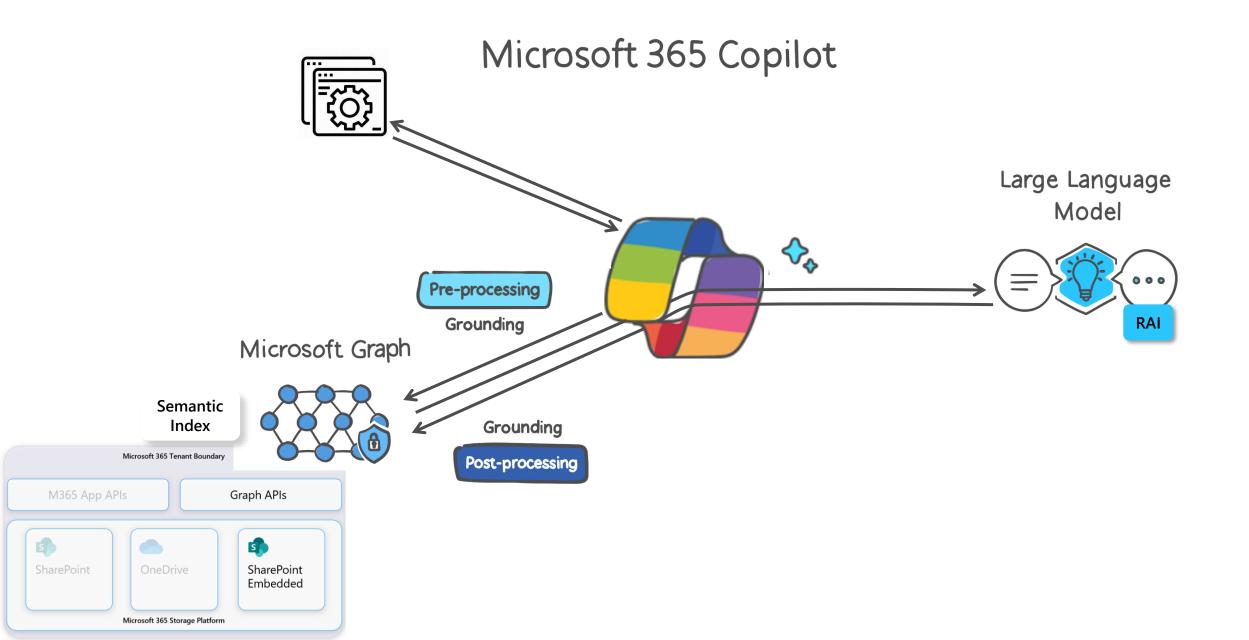
Enjoy Copilot, compliance, collaboration, and core-storage in your apps

INGREDIENTS

- 1x Azure Entra app registration
- 1x SharePoint Embedded 'Container Type'
- 1:many Container Type 'Registration' on a tenant

DIRECTIONS

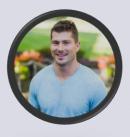
- 1. With VS Code or PowerShell, create a Container Type with your Entra app set as owner
- 2. Register your Container Type on M365 tenants that will use your app (including your own)
- 3. Create storage Containers on each tenant as needed (each tenant can have 100k for now)
- 4. Containers are headless Graph Drives manage up to 25TB of files and content in each





Hands on Lab: Getting Started

Hands on with SharePoint Embedded



Marc Windle Principal Product Manager



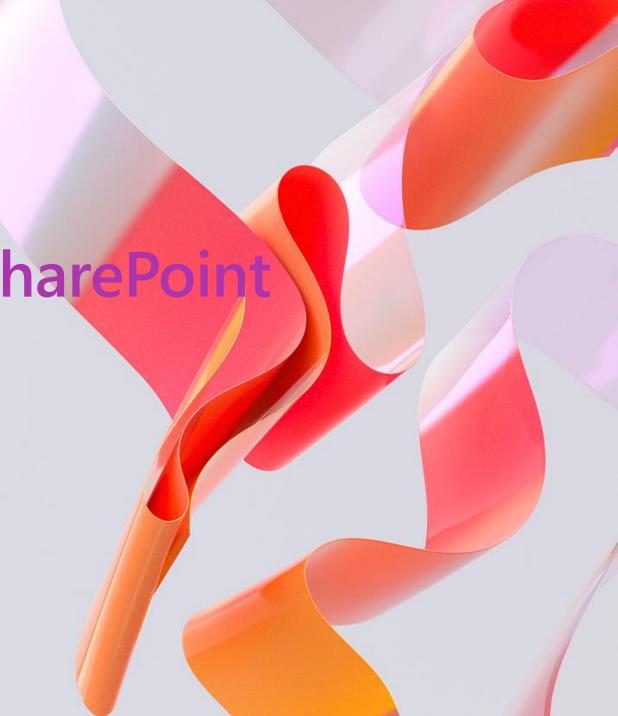
After this session, you will...

- 1. Understand how to get started with SharePoint Embedded development
- 2. Setup your first SharePoint Embedded app
- 3. Tried out the Container and Content management APIs
- 4. Run one of the sample SharePoint Embedded applications



Copilot and AI with SharePoir Embedded

SharePointEmbedded@Microsoft.com



Overview

· A case for enterprise AI and DMS

Custom copilot for your applications

· Roadmap

Getting started

AI will not make businesses irrelevant

But the competitor that uses AI will.

A once in a lifetime opportunity

Empower organizations to do more

by delivering AI-centric content applications

to end users and customers



An intelligent DMS is the key

Enterprises

Prime organization's content for Al applications

ISV

Contextualize my SaaS AI to customer's data

System Integrators

Help customers build and modernize their enterprise apps with Al

Building this next gen DMS is challenging

- Compliance is complex
- LLMs are evolving rapidly
- Use cases are nebulous
- ROI can be deceptive



SPE brings the M365 Copilot power to your applications



Custom copilot in *your* apps

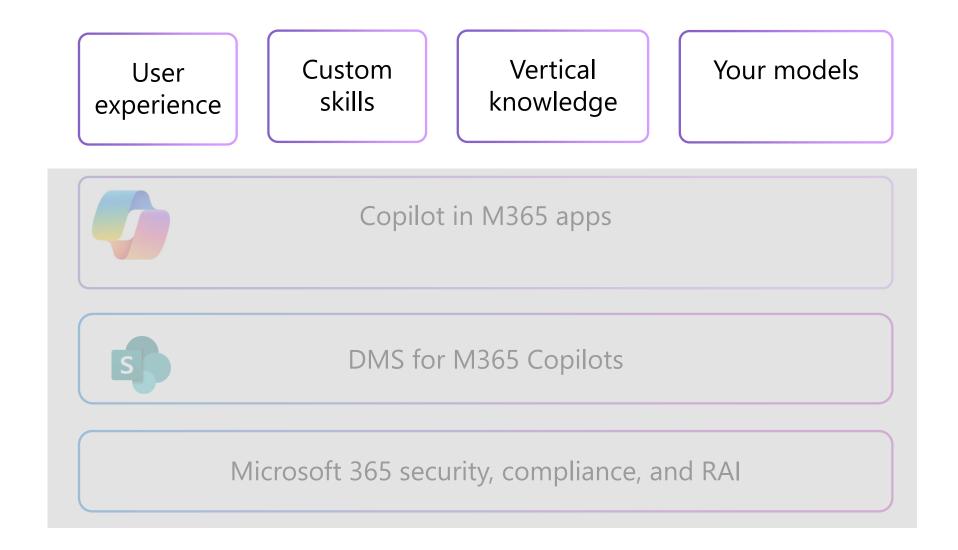


SPE as DMS for *your* copilots

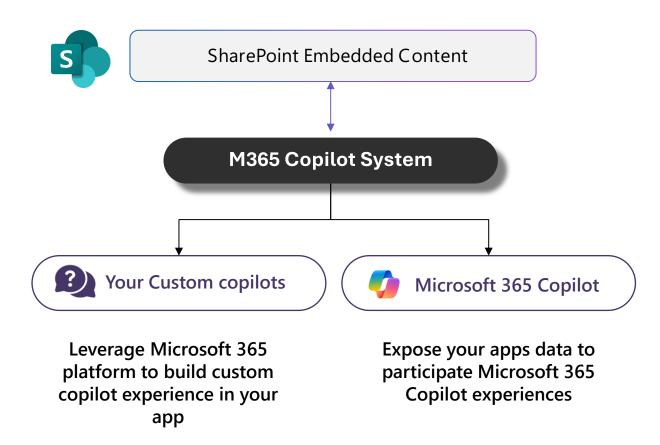
Microsoft 365 security, compliance, and RAI

- ✓ Grounded on customer's data
- ✓ M365 security and compliance
- ✓ Graph aware
- ✓ Responsible AI enabled
- **✓ Embeds in your applications**

So, you can focus on delivering your niche to customers



SharePoint Embedded + Copilot stack



Files stored in SharePoint Embedded can participate in the Microsoft 365 Copilot system

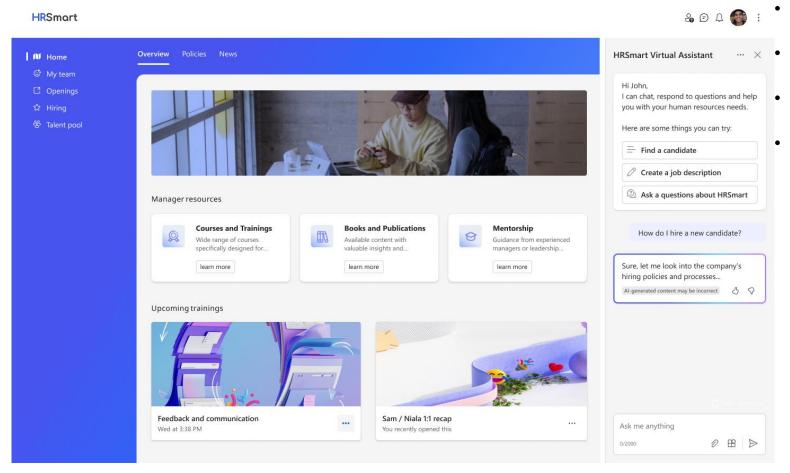
Content is added to the semantic index.

Vector embeddings auto generated

Full security descriptors included for security trimming

Data never leaves the tenant boundary

You can utilize this functionality today (in preview)



- Leverage Microsoft's copilot control in your app
- Integrated with the Microsoft Copilot system.
- Rich API surface to customize experience
- Use dynamic app context to refine chat experience

Use cases



Legal: Matter management. Summarize and highlight key changes on relevant legal content.



Audit: Generate concise summaries of audit findings and flag critical issues in financial documents for quick review.



Finance: Create detailed summaries of financial reports, highlighting key metrics and trends for easy analysis.



Healthcare: Summarize patient records and treatment histories, providing healthcare professionals with quick overviews for better decision-making.

SPE copilot and AI roadmap*

What's available today

Private preview of a configurable Copilot chat control in your app

Per user Copilot license required

Syntex OCR in private preview

Exploring next

Public preview of the Copilot chat control in your apps

PayG consumptive billing

Graph API access to Semantic index and Copilot platform

In the long run

Bring your own model to the SPE-hosted content

Copilot Studio integration

Custom skills

*Roadmap items are subject to change

Build a custom copilot in your SPE app today

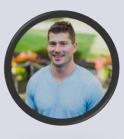
- 1. Make it real ship it is the only GTM. Get started at https://aka.ms/start-specopilot
- 2. Add value solve real problems for end users
- 3. Iterate evolve roadmap with your learning
- 4. Collaborate we are here to help.

Reach out to us at ContactSPECopilot@Microsoft.com for questions, use cases, feedback and more.



Hands on Lab: Metadata, Search, & Copilot

Bringing Copilot-powered experiences in your app



Marc WindlePrincipal Product
Manager



After this session, you will...

Part 1

- 1. Understand how to set metadata on containers and files
- 2. Understand how filter and search for containers and files
- 3. Understand how to control M365 discovery and search experiences for SPE content

Part 2

1. Add a Copilot-powered, customized chat experience to your SharePoint Embedded app



SharePoint Embedded

Security & Compliance



What you will learn in this session

- Learn how security and compliance works with SPE
- Configure sensitivity labels that are honored by Copilot
- Auditing events in SPE
- Use SPE containers in eDiscovery

Administrative Capabilities

Tenant Management

Audit

eDiscovery

BYOK

Labels

Data Loss Prevention (DLP)

GDPR / CCPA

Retention Policies

IP Address Policy

Conditional Access

Restricted Access Control

App Management

View all Apps

View App details

App level storage

App configuration settings

Set external setting

Container Management

View list of Containers

Details of a Container

Soft-Delete & Recover

Purge Containers

Find ownerless Containers

Set container properties

Add members to roles

S &C Management

Add Labels

Conditional Access Policies

Block Download policy

Allow/Deny Domain List

Restricted access control

Multi-Geo Move

Storage Management

Billing Administration for Direct to Customer

Flexible consumption billing

SharePoint Embedded is built to scale to the most demanding workloads

Standard

Customer pays for SharePoint Embedded consumption



Developer Tenant

Builds SharePoint Embedded Application



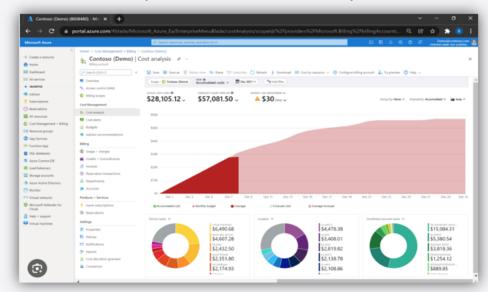
Consuming tenants

Use SharePoint Embedded Application in their tenant



Azure Subscription

Customer pays for consumption used in their app



Direct to customer

ISV/Developer Tenant pays for SharePoint Embedded consumption



Developer Tenant

Builds SharePoint Embedded Application



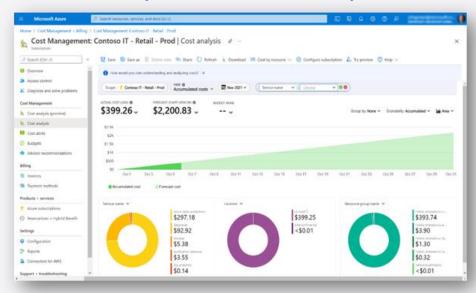
Consuming tenants

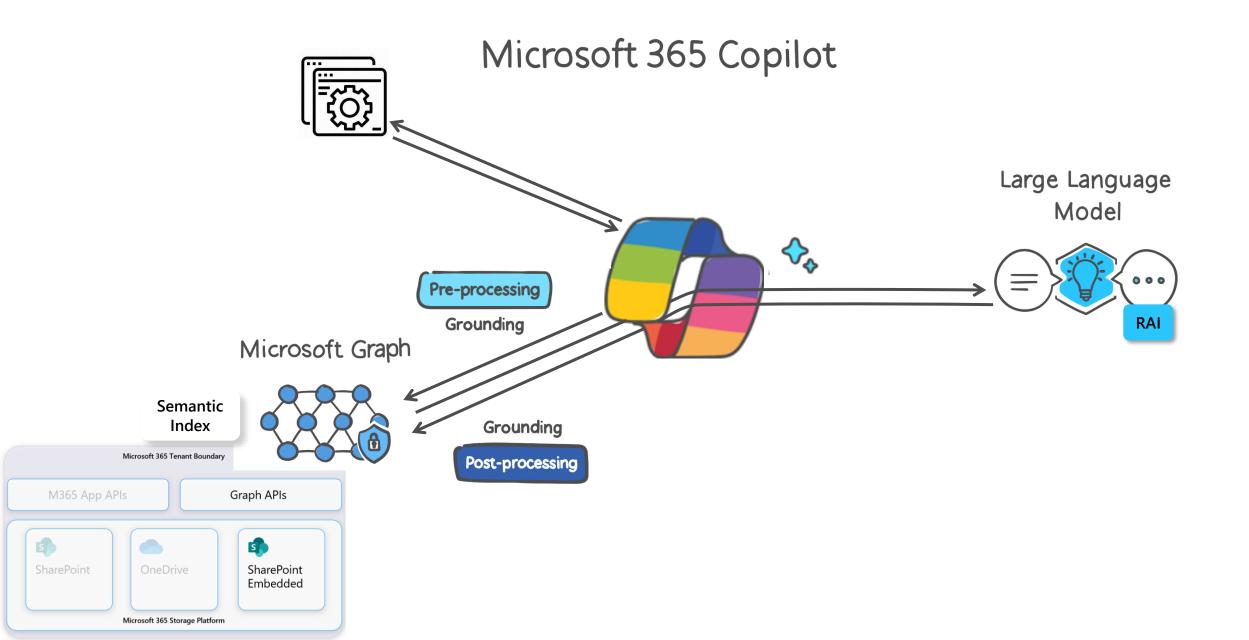
Use SharePoint Embedded Application in their tenant



Azure Subscription

ISV bills the customer for consumption used in the app



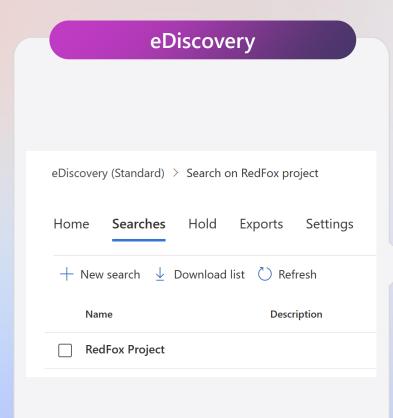


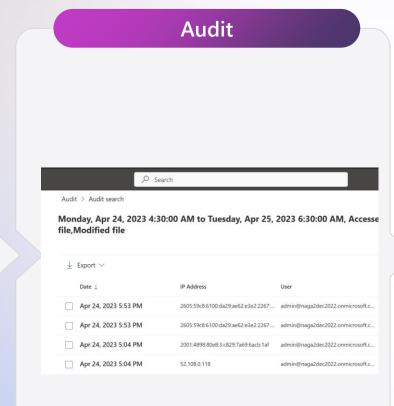
Microsoft Purview strengthens data security and compliance in Microsoft 365 Copilot

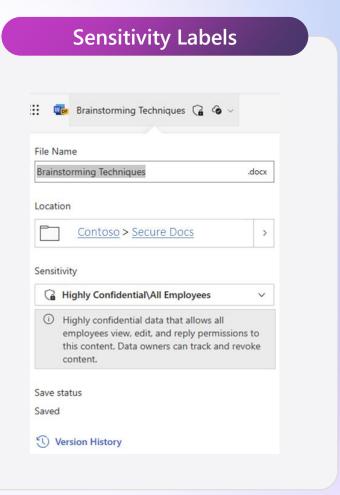


Microsoft Purview Integration

Microsoft 365 security & compliance policies automatically apply to SharePoint Embedded content



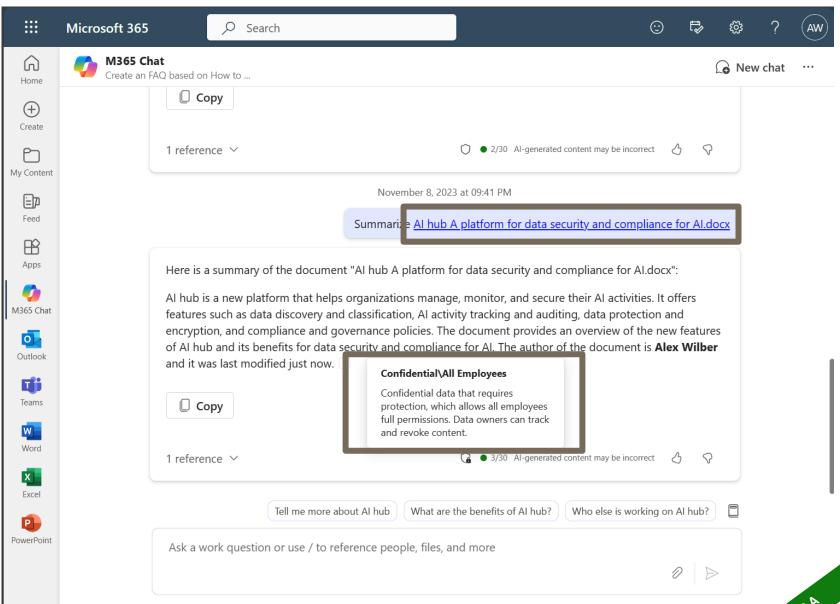




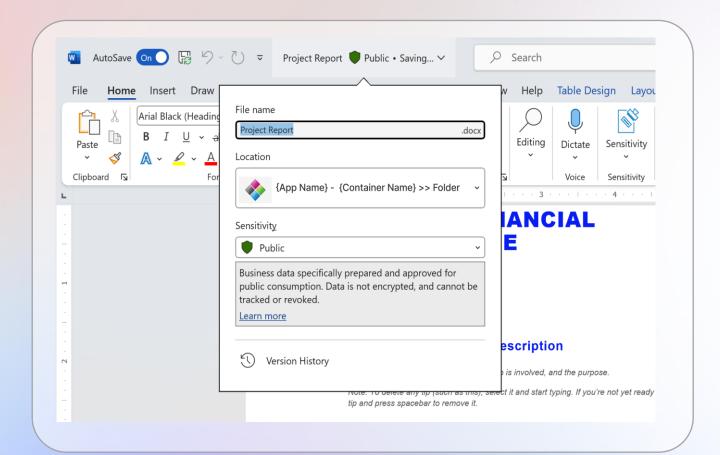
Copilot conversation inherits the sensitivity label of referenced file

A sensitivity label applies to the entire conversation.

Conversations inherit the most restrictive sensitivity labels from the references used to formulate a response.



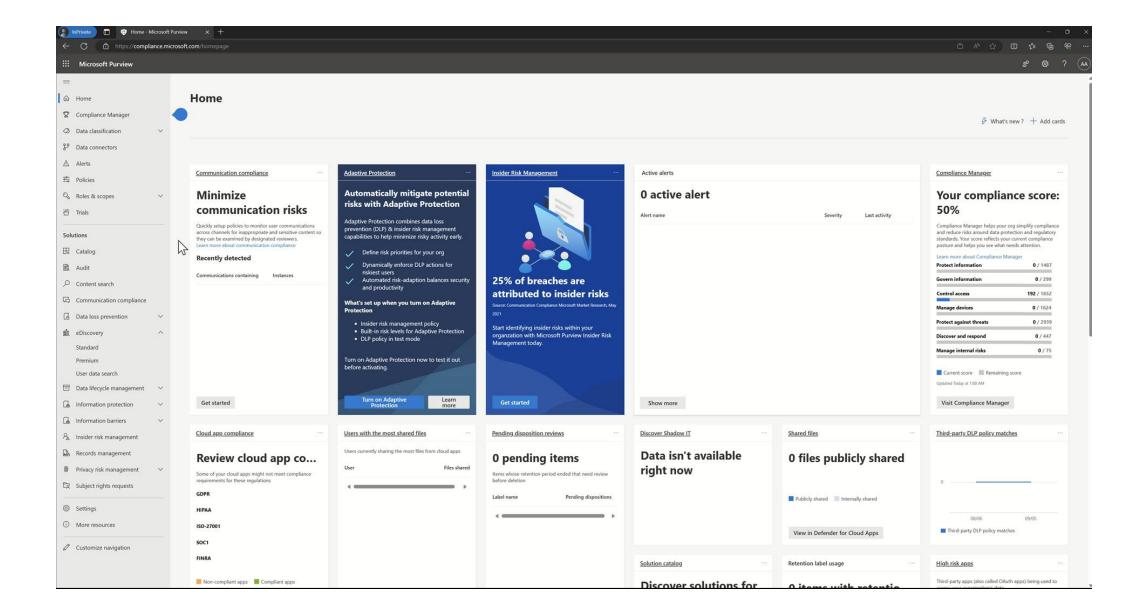
M365 Experience Integration



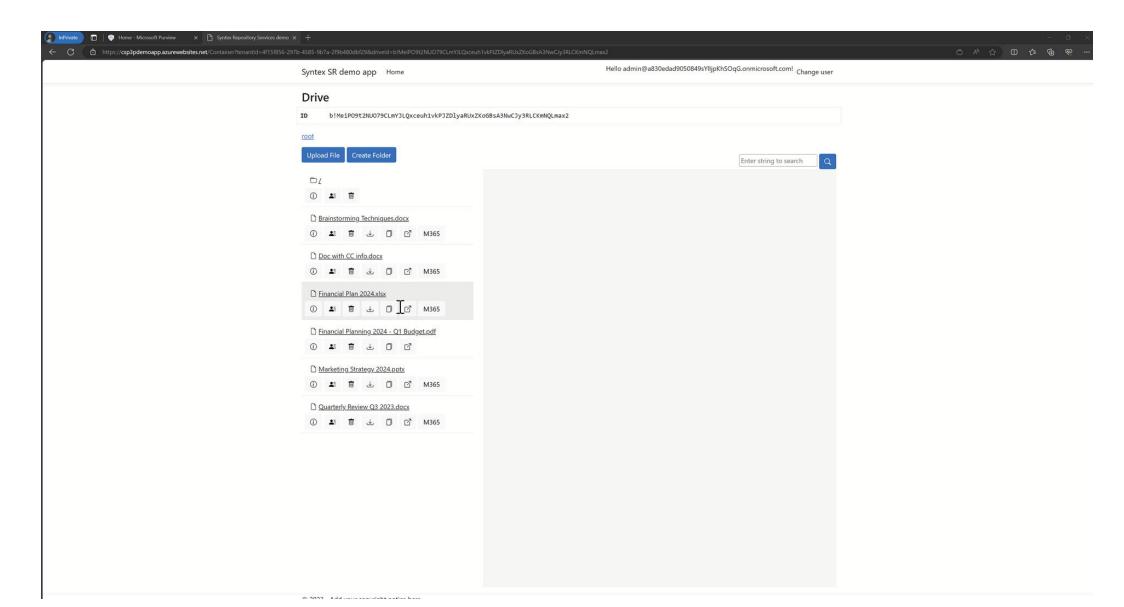
Familiar User Experience

- Full Office Web & Desktop Support
- Co-authoring & Collaboration
- · App Branding in Office
- M365 Discovery Office.com, Recommended
- Embeddable File & Document Previewer
- Configurable Sharing

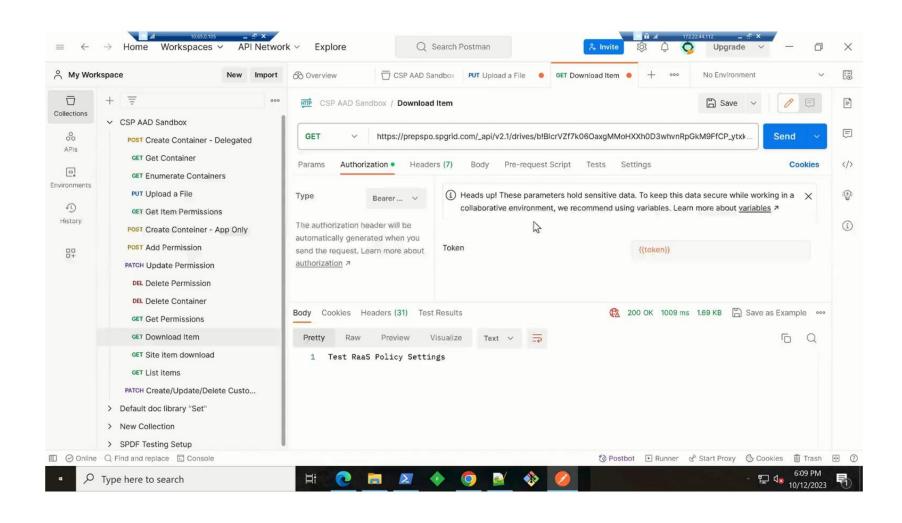
Audit Demo



eDiscovery Search Demo



Block Download Policy Demo





SharePoint Embedded

Value and Adoption

Common Use Cases



Claims processing

Securely receive claims submitted by your customers that are reviewed and processed using your business logic without creating a document management platform



Audit documents

Request supporting documents from your clients as you conduct an independent audit that only they have access to.



Identity documents

Onboarding customers, new employees or anyone who needs to provide government identity documents (passports, driver's license etc).



Legal matter management

Gather, collaborate and secure legal documents related to a specific case with your clients or other interested parties.

Most Implemented Features



Control user experience

You create the application to control the user experience, SharePoint Embedded provides the infrastructure to easily manage documents.



Extend line of business applications

With the flexible Graph API endpoints, integrate documents into existing line of business applications for a consistent user experience.



Office Online integration

Use the familiar Microsoft Office features in your applications while securing them with Microsoft Purview to enforce enterprise governance.



Variety of development platforms

Pro developers are using React, C# and the Power Platform to develop their production applications.

Defining your use cases

What to consider to ensure success with SharePoint Embedded

Core Storage

Allows developers to integrate Microsoft 365's document storage capabilities directly into their applications.

Provides API-only access to "File Storage Containers" within a Microsoft 365 tenant, which function like a SharePoint Document Library but are only accessible via APIs

Copilot

Using the data stored in containers, SharePoint Embedded uses Copilot to reason over this data through integration in your application.

You control the user experience; Copilot will provide advanced Al capabilities.

Collaboration

Integrate advanced Microsoft 365 features into your apps, including full-featured collaborative functions from Office. These features include viewing, editing, and coauthoring Office Word, Excel, and PowerPoint documents in both Office web and desktop.

Compliance

eDiscovery and unified audit log help you find and monitor content in SharePoint Embedded apps.

You can also secure data with DLP policies, sensitivity labels, retention policies, and conditional access.

Requirements will change during the implementation lifecycle

Validate and document use cases

How can your custom application leverage SharePoint Embedded capabilities, such as document management, collaboration, workflows, or analytics, to enhance the user experience and the business?

60%-75%

Projects succeed when use cases are identified and documented



Confirmation of application fit

Documented use cases

Identify success criteria

Support











Key Resources

SharePoint Embedded is an API-only solution that enables app developers to harness the power of the Microsoft 365 file and document storage, collaboration, compliance, and generative AI for any app and is suitable for building line-of-business and ISV applications.

aka.ms/sharepointembedded

General

- General availability announcement
- Overview video
- Product documentation
- Adoption content on Microsoft Adoption
- <u>Sign up</u> for ongoing information about SharePoint Embedded, SharePoint Premium, and the rest of our content management solutions

Administrator

- Details on how to Enable SharePoint Embedded
- Configure SharePoint Embedded
- Billing administration

Developer

- Graph API Reference
- Getting started using our Visual Studio Code extension
- How to create your first SharePoint Embedded application

SharePoint Embedded Roadmap

Area	2024			2025
	Q2 (Shipped)	Q3	Q4	Q1
Core Platform	Lock/unlock containers Discard item checkout X-container copy Clone container	Configurable recycle bin retention Multi-geo container provisioning Delete all versions Idempotent user containers w/ multi-geo awareness x-container move	3P access to 1P containers Item level restrictive permissions Custom groups	Bulk Permissioning
Admin and Billing	Container Admin UX and PowerShell Admin Graph APIs App level setting via PowerShell Egress Billing	Direct to customer Billing for ISVs Sort, filter and edit label in Admin UX	Update user membership Storage attribution Multi-geo UX support	Container type details in admin UX 3P guest app management UX
Office and Microsoft 365 in			App configured file open experience App Configured rename, save a copy, create a folder	
Sharing	Restricted Sharing		Container level external sharing	
DevX	VS Code extension updates preview		Graph APIs for container type mgmt Paid CT setup flow in VSC preview Telemetry in VSC GA VSC API explorer in VSC Power Platform Connector preview	Power Platform Connector GA Paid CT setup flow in VSC GA
Security and Compliance			Graph API to set item level labels Configurable DLP URL	
Copilot		Copilot app-chat control private preview	Copilot app-chat control public preview Grounding API on Graph Preview	Copilot app-chat control GA
Others		OCR for container content private preview	OCR for container content public preview Archive support for Containers - Preview	OCR for container content GA Archive support for Containers - Preview M365 Backup Preview

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