



**Microsoft 365**  
COMMUNITY CONFERENCE

# AI in SharePoint: From Content Chaos to Clarity and Impact. Get Copilot Ready

Joe Komban & Sean Squires



**Joe Komban**

Principal Product Manager  
SharePoint



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Principal Product Manager  
SharePoint

# Why you are here!

To learn about **AI in SharePoint** and what it makes possible

How to *cage & tame* the **content chaos** – make your content work for you!

Understand why **metadata** is awesome & how it can improve the retrieval and management of your content

See how the power of **skills** can optimize your AI in SharePoint experience with organization-specific rules and repeatable processes



# AI in SharePoint

Build and organize SharePoint content effortlessly – describe your intent and AI does the rest



## Turn ideas into solutions

Use natural language to plan and build solutions in SharePoint – sites, libraries, pages and lists – with AI.



## Drive business processes

Makes work in SharePoint quick – whether you're organizing content, cleaning up sites or getting answers.



## Improve AI responses

Enriches content with metadata and keeps content updated so Copilot and agents deliver more relevant answers.

The screenshot displays a SharePoint document library for 'Zava Core SmartMesh™'. The table lists documents with columns for Name, Product name, Review date, Certification status, Modified, and Modified by. AI-generated columns are visible, such as 'Product name', 'Review date', and 'Vendor', each with an 'Autofill prompt' and a 'Keep' button. A 'Processing files...' dialog box is also present, indicating 60% completion.

Name	Product name	Review date	Certification status	Modified	Modified by
2025_Nov_Roadmap_FINAL.docx	ZavaCore Fiber	1/1/2026 12:00 AM	Regulatory compliance mentioned	Yesterday	Mauricio August
Core Pitch.docx			ISO 10993, MIL-STD-810H	1h ago	You
Core_Sales_Pitch_2026.docx	ZavaCore Fiber			5h ago	Carola Poland
Fall campaign.docx		1/1/2026 9:49 AM		Wed at 9:12 AM	Tim de Boer
Fiber acceptance criteria.docx				5 days ago	Carola Poland
Fiber Compete_FINAL.docx	ZavaCore Fiber	1/14/2026 12:00 AM		Yesterday	David Power
Fiber high level user stories_v1.xlsx		4/1/2024 12:00 AM	HIPAA, FDA Class II, FDA Class/II support	Wed at 9:12 AM	Serena Riberio
GTM tasks for launch.xlsx			ISO, FDA, and MIL-STD documentation finalized	Thu at 10:00 AM	Mauricio August
Lens Blob_Core upgrade.docx				6 days ago	Mona Kane
Lens Pitch_v3.12.docx	ZavaLens	9/1/2025 12:00 AM		8h ago	Carola Poland
Market Analysis.xlsx				Wed at 9:12 AM	Tim de Boer
Market comp specs_v2.12.docx	ZavaLens			2 days ago	Tim de Boer
Process control manual_Pro line				3h ago	Mauricio August
Partnerships FY26.pptx				Wed at 9:12 AM	Mauricio August

# Transform documents repositories into active, intelligent workspaces



## File Tools

Manipulate file and list objects using chat interface



## Skills & Context

Define business processes and multi-step instructions the agent can reference to execute complex tasks repeatedly



## Analyze & Visualize

Make sense of large amounts of data



# Content Management, Reimagined with AI

## SETUP

### Create Library

Natural Language → Schema

### Configure library

Metadata, views, enrichment

## AUTOMATE

### Organize

Use skills to easily apply a configuration to every library

### Clean Up

Use skills to easily library to a good state

## INSIGHT

### Find information

Better search, Q&A

### Analyze & visualize

Make sense of your content

### Generate document

Share insights with your team

# AS AI in SharePoint

Private group | General ☆ Not following 23 members

+ New Page details Preview Analytics

Published Share Edit

## News

+ Add

**News**

Keep your team engaged by sharing content and updates

**Add News**

**Keep your team updated with news on your team site**

From the site home page you'll be...  
SharePoint less than a minute ago

**What is a team site?**

A SharePoint team site connects you...  
SharePoint less than a minute ago

**Add a page to a site**

Using pages is a great way to share...  
SharePoint less than a minute ago

## Quick links

- Learn about a team site
- Learn how to add a page

## Documents

See all

All Documents

Name
------

Your files will show up here



Drag and drop files here to access them from any device.

## Activity

See all

**ANNEXA TAYLOR**  
Principal Data Architect (Data Analytics & Business Intelligence)  
Boston, MA

**SKILLS**

- Microsoft Azure
- Power BI
- Tableau
- Python
- SQL
- JavaScript
- React
- Angular
- Node.js
- Java
- C#
- PHP
- Perl
- Shell Scripting
- Linux
- Windows
- Mac OS
- Android
- iOS
- Web Services
- REST API
- SOAP
- OAuth
- SSO
- LDAP
- Active Directory
- SharePoint
- OneDrive
- Teams
- Outlook
- Word
- Excel
- PowerPoint
- Visio
- Project
- Jira
- Confluence
- Slack
- Zoom
- Webex
- Microsoft 365
- Office 365
- SharePoint Online
- OneDrive for Business
- Microsoft Teams
- Outlook on the web
- Word on the web
- Excel on the web
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- Node.js
- Java
- C#
- PHP
- Perl
- Shell Scripting
- Linux
- Windows
- Mac OS
- Android
- iOS
- Web Services
- REST API
- SOAP
- OAuth
- SSO
- LDAP
- Active Directory
- SharePoint
- OneDrive
- Teams
- Outlook
- Word
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- Android
- iOS
- Web Services
- REST API
- SOAP
- OAuth
- SSO
- LDAP
- Active Directory
- SharePoint
- OneDrive
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# AI in SharePoint

Home Demo Videos Sample Content Edit

General Not following Site access

## Zava Accounts Payable

AI actions
Add shortcut to OneDrive
Forms
Classify and extract
Edit in grid view
Translate
Pin to Quick access
Export to Excel
...
Create or upload



Name	Modified	Modified By	Add column
acme-manufacturing-global-raw-materials-po.docx	A few seconds a...	Sean Squires	
capitalforge-nexus-enterprises-service-level-agreemen...	A few seconds a...	Sean Squires	
consulting-services-agreement-project-52577.docx	A few seconds a...	Sean Squires	
globaltech-solutions-supply-agreement.docx	A few seconds a...	Sean Squires	
medinnovate-systems-credit-memo.docx	A few seconds a...	Sean Squires	
medinnovate-systems-product-invoice.docx	A few seconds a...	Sean Squires	
nexgen-solutions-greenstream-nda.docx	A few seconds a...	Sean Squires	
omnicorp-commercial-office-lease.docx	A few seconds a...	Sean Squires	
precision-dynamics-event-services-invoice.docx	A few seconds a...	Sean Squires	
quantum-cloud-services-po-2024-1178.docx	A few seconds a...	Sean Squires	
velocity-motors-fleet-vehicles-po.docx	A few seconds a...	Sean Squires	
velocity-motors-legal-services-invoice.docx	A few seconds a...	Sean Squires	

Open to discover AI actions



# Context & Skills

## Site context

Site specific “memory” – instructions, procedures, and guidelines for your site.

## Skills

Codify and store repeatable processes for how to manage – and even classify – your content

## SharePoint Context File

### Overview

This file provides brand guidelines and formatting preferences for a SharePoint site. Update this Overview section with site-specific context. All guidelines apply whenever AI assists with organizing document libraries, formatting views or columns, creating lists, or building site pages.

### Skills

#### organize-library

Organizes a SharePoint document library end-to-end: classifies files by content type, creates and populates metadata columns, applies brand-consistent column and view formatting, creates filtered/grouped views, sets folder colors, and creates notification rules for overdue items. References the **file-classifier** skill for classification and this file for brand guidelines. Use when the user asks to organize, set up, or configure a document library.

#### file-classifier

Classifies one or more files in a SharePoint document library by matching them to predefined content types, creates a “File classification” autofill column if it doesn’t exist, and populates metadata columns extracted from file content. Use when the user asks to classify, categorize, or tag files by content type.

### Brand Guidelines

#### Color Palette

Role	Color Name	Hex
Primary	Contoso Blue	#0078D4
Secondary	Soft Green	#7BC67E
Secondary	Soft Yellow	#F2C94C

## File Classifier

### Purpose

Classify one or more files in a SharePoint document library by reading their content and matching them to a known set of content types. Then:

- Save the classification to a “**File classification**” column.
- Create the metadata columns defined for that content type (if they don’t already exist).
- Extract metadata values from the file content and populate those columns.

If the “File classification” column or any metadata columns do not exist, create them as autofill columns with metadata extraction prompts so future uploads are handled automatically.

### Classification Decision Guide

Classify by document **PURPOSE** and **STRUCTURE** — not by keywords alone.

Many contracts include payment terms that reference invoices (e.g., “payment due within 30 days of invoice date”). The word “invoice” appearing in a document does NOT make it an Invoice. Use the

### Content Type Reference

Each content type has exactly **5 metadata columns** following the pattern: Identifier, Key Party, Critical Date, Financial Amount, Status.

### Contracts

1. **Contract ID/Number** (Text, InternalName: ContractID) — “Extract the contract ID or reference number from this document.”
2. **Parties Involved** (Text, InternalName: PartiesInvolved) — “Extract the names of all parties involved in this contract (e.g., ‘Solara Energy Group, Inc.; Horizon Growth Partners, LLC’).”
3. **Expiration/End Date** (DateTime DateOnly, InternalName: ExpirationEndDate) — “Extract the expiration, end, or termination date of this contract. For leases, use the lease end date. For employment agreements, use the end date if fixed-term.”
4. **Contract Value** (Number, InternalName: ContractValue) — “Extract the total contract value or committed spend as a number (no currency symbols). For monthly-fee agreements, multiply the monthly rate by the contract term in months. For NDAs or agreements with no financial value, return 0.”
5. **Contract Status** (Text, InternalName: ContractStatus) — “Extract the contract status from the Payment Status field or document body (Paid, Active, Overdue, Void, Expired, or Terminated). If not stated, return ‘Active’.”

### Invoices

1. **Invoice Number** (Text, InternalName: InvoiceNumber) — “Extract the invoice number or reference number from this document (e.g., ‘INV-2026-0042’, ‘CM-2024-0048’).”
2. **Vendor/Supplier Name** (Text, InternalName: VendorSupplierName) — “Extract the vendor or

# Automate the automation

## Organize library skill

Chaining context and procedure together for a multi-step, repeatable process.

### Name

organize-library

### Description

Organizes a SharePoint document library end-to-end: classifies files by content type, creates and populates metadata columns, applies brand-consistent column and view formatting, creates filtered/grouped views, and sets folder colors. References the file-classifier skill for classification and SHAREPOINT.md for brand guidelines.

### Workflow

#### Step 1 — Assess the library

- Get library schema (columns, views, item count)
- List current folder structure
- Identify what's already configured vs. what needs work

#### Step 2 — Classify files

- Load the `file-classifier` skill
- Classify all files (or user-selected files)
- Create the "File classification" column + metadata columns
- Extract and populate metadata values

#### Step 3 — Format the "File classification" column

- Color-code each classification using brand status colors:
  - Use Contoso Blue (#0078D4) as primary
  - Rotate through the palette (#7B68EE, #7BC67E, #F2C94C, #5B21B6, #94A3B8, #BDD7EE) for each content type
  - "Unclassified" gets muted blue-gray

#### Step 4 — Format metadata columns

- Date columns: highlight overdue/past dates in Deep Purple
- Number/currency columns: data bars in Contoso Blue
- Status-like text columns (Approval Status, Contract Status, etc.): blue/purple palette

#### Step 5 — Create views

- **All Documents (enhanced default)** — all columns visible, grouped by File Classification
- **Per-content-type views** — one filtered view per detected content type showing only its 10 metadata columns + file name
- **Gallery view** — card layout with gradient card style, showing file name, classification, and key metadata

#### Step 6 — Apply view formatting

- Row-level formatting using brand colors (alternating Soft Blue Tint backgrounds)
- Gallery/board cards use gradient card style with Contoso Blue accent
- Group headers styled with Deep Navy text on Soft Blue background

#### Step 7 — Set folder colors

- Apply `DARK_BLUE` to all top-level folders
- If content-type-specific folders exist or are created, use brand palette colors

#### Step 8 — Report summary

- Table showing: what was classified, columns created, views created, formatting applied
- Offer next steps (refine views, add more files, adjust formatting)

### Key Principles

- **Always read SHAREPOINT.md** for current brand guidelines before applying any formatting
- **Always load file-classifier** for the classification step
- **Idempotent** — safe to re-run; checks for existing columns/views before creating
- **Consistent** — every library on the site gets the same treatment
- **Confirm with user** before bulk operations (classifying many files, creating multiple views)

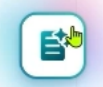
### Zava-Accounts-Payable

AI actions
Add shortcut to OneDrive
Forms
Classify and extract
Edit in grid view
Translate
Pin to Quick access
Export to Excel
...
Create or upload

All Documents
Word
Excel
PowerPoint
PDF

Filter
Share
Details

Name	Modified	Modified By	Add column
acme-manufacturing-global-raw-materials-po.docx	4 minutes ago	Sean Squires	
capitalforge-nexus-enterprises-service-level-agreement.d...	4 minutes ago	Sean Squires	
consulting-services-agreement-project-52577.docx	4 minutes ago	Sean Squires	
globaltech-solutions-supply-agreement.docx	4 minutes ago	Sean Squires	
medinnovate-systems-credit-memo.docx	4 minutes ago	Sean Squires	
medinnovate-systems-product-invoice.docx	4 minutes ago	Sean Squires	
nexgen-solutions-greenstream-nda.docx	4 minutes ago	Sean Squires	
omnicorp-commercial-office-lease.docx	4 minutes ago	Sean Squires	
precision-dynamics-event-services-invoice.docx	4 minutes ago	Sean Squires	
quantum-cloud-services-po-2024-1178.docx	4 minutes ago	Sean Squires	
velocity-motors-fleet-vehicles-po.docx	4 minutes ago	Sean Squires	
velocity-motors-legal-services-invoice.docx	4 minutes ago	Sean Squires	



# AI in SharePoint

Zava Accou...

AI actions Add shortcut to OneDrive Forms Create or upload

All Documents Add view Details

Name	Total am...	Documen...	Vendor n...	Payment ...
acme-manufacturing-global-raw-materials-po.docx	\$1,367,500.00	Purchase order	Global Raw Materials Ltd.	Paid
capitalforge-nexus-enterprises-service-level-agreement...	\$180,000.00	Service agreement	Capitalforge Financial	Paid
consulting-services-agreement-project-52577.docx	\$75,000.00	Consulting agreement	Greenstream Energy	Overdue
globaltech-solutions-supply-agreement.docx	\$2,400,000.00	Supply agreement	Advanced Supply Chain Solutions	Paid
medinnovate-systems-credit-memo.docx	\$8,450.00	Other	Medinnovate Systems	Void
medinnovate-systems-product-invoice.docx	\$89,400.00	Invoice	Medinnovate Systems	Overdue
nexgen-solutions-greenstream-nda.docx		Other	Greenstream Energy	Void
omnicorp-commercial-office-lease.docx	\$92,400.00	Service agreement	Omicorp	Overdue
precision-dynamics-event-services-invoice.docx	\$262,535.04	Invoice	Precision Dynamics Mfg.	Void
quantum-cloud-services-po-2024-1178.docx	\$325,000.00	Purchase order	Quantum Cloud Services	Overdue
velocity-motors-fleet-vehicles-no.docx	\$487,500.00	Purchase order	Velocity Motors	Void

## Hello Sean Squires!

Welcome! Enhance your productivity with this agent. Start a conversation by asking a question or selecting one of the suggested prompts.

How can you help me?

Which files are relevant to me?

Find files about a topic

+ | [Microphone icon]

# AI in SharePoint

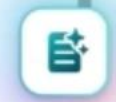
Home Demo Videos Sample Content Edit

General Not following Site access

file demo AI actions Add shortcut to OneDrive + Create or upload

All Documents AI icons Details

Name	+ Add column
Archive (OLD)	
Bob's files	
Misc	
Random	
Stuff	
temp	
construction_bids_T7_F1.pdf	
doc1.docx	
final_FINAL_v3 (2).docx	
inspection_reports_T10_F1.docx	
manuals_for_engineering_plants_T1_F1.pdf	



...

## Hello Joe Kombar!

Welcome! Enhance your productivity with this agent. Start a conversation by asking a question or selecting one of the suggested prompts.

- How can you help me?
- Which files are relevant to me?
- Find files about a topic

+ run the | Microphone icon Send icon

AI-generated content may be incorrect

# AS AI in SharePoint

Private group | General ☆ Not following 👤 27 members

## Zava Invoice ▾

AI actions ▾
 Add shortcut to OneDrive
 Forms
 ⋮
 + Create or upload

All Documents ▾

Details

Name ▾	Total amo... ▾	Invoice number ▾	Vendor name ▾
Vendor name: Alpha Tech Solutions (1)			
Screenshot 2025-NOTE 11-05 141308.png	\$12,450.00	INV-2025-00	Alpha Tech Solution
Vendor name: BetaCorp Industries (1)			
INVOICE DETAILS Invoice # INV-2025-002 ...	\$9,800.00	INV-2025-002	BetaCorp Industries
Vendor name: Delta Systems Ltd (1)			
INVOICE DETAILS Invoice # INV-2025-003 ...	\$15,200.00	INV-2025-003	Delta Systems Ltd
Vendor name: Delta Systems, Ltd (2)			
Sigma receipt_expenses.docx	\$16,400.00	INV-2025-008	Delta Systems, Ltd
Delta workstation invoice.docx	\$16,400.00	INV-2025-008	Delta Systems, Ltd
Vendor name: Epsilon Ltd (1)			
Invoice for Epsilon charges.docx	\$12,800.00	INV-2025-007	Epsilon Ltd

### Hello Joe Komban!

Welcome! Enhance your productivity with this agent. Start a conversation by asking a question or selecting one of the suggested prompts.

How can you help me?

Which files are relevant to me?

Find files about a topic

+ run the site storage heatmap skill

# MI Metadata Is Data

Private group | Confidential \ Internal and NDA External ☆ Not following 👤 78 members

- Home
- Site contents
- Test Libraries
- Content Catalog
- Reference Documents
- Site Settings
- TSF Contracts 0227
- Test\_Accounts Payable
- Test2\_Account Payable
- Zava Product Docs (Jje...
- Software design docu...
- Agreement records
- [FHL26] RealEstate Data
- KK\_Test2\_Quality of Su...
- [EVAL TEST] Vijay Baker...
- [EVAL TEST] Files
- Travis\_WorkItems

[UDR Scop... AI actions Add shortcut to OneDrive Forms + Create or upload

All Documents [Icons] Details

Name	Flutes	Bit Type	Bit Material	Inte
15-60-90_Degree-V-Groove-Engraving-Sp...	2	V-Bit	Carbide	Wo Co
30 60 90 Degree V-bits.png	2	V-Bit	Carbide	Wo MC Ply Lar Foe
45982-Carbide-Tipped-Bowl-Tray-Speed-...	2	Bowl Tray	Carbide	Wo
Abrasive-Type-Plunge-Diamond-Pattern-S...	unknown	Plunge	Carbide	Co Fib
Aluminum-Cutting-55-Deg-Helix-Speed-C...	2,3	End Mill	Carbide	Me
Aluminum-O-Flute-Speed-Chart-v9.pdf	1	Spiral	Carbide	Me
Burr-Speed-Recommendations.pdf	unknown	Other	Carbide	

items):

### Summary

This library contains 50 CNC bit documents (mostly PDFs and PNGs) cataloging various router bit types, their materials, stock status, and intended use cases.

**Key highlights:**

- Spiral bits dominate the collection (14), followed by V-Bits (10) and End Mills (8). The remaining 18 bits span 10 other types, showing a wide variety of specialized bits.
- Carbide is the primary material at 56% (28 bits), with Spektra and HSS as secondary options.
- 74% of inventory is Available (37 bits), with 9 On Order and only 4 Discontinued — a healthy stock position.
- Wood and Plastic are the most common target materials (25 and 24 bits respectively), followed by Composite (19) and Metal (18). Several bits are multi-purpose, designed for 3+ materials.
- Average product iteration is ~2.7, meaning most bits have gone through a few revisions, though some (like the Aluminum O-Flute) are on iteration 9.

+ Ask a question about [UDR Scoped] CNC Bit Library

Want to learn more?

Be sure to check out these other sessions!

And try out the preview today!

[Get started with AI in SharePoint \(preview\) - SharePoint in Microsoft 365 | Microsoft Learn](#)



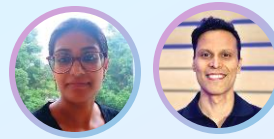
### Meet AI in SharePoint

Tues, 2:45-3:30 PM, Oceana Grand 6



### Using SharePoint Automation & AI to Solve Business Processes

Wed, 1:30-2:15, Pacifica 9



### Microsoft Lists - Organize, Automate, and Act with AI

Thurs, 9:00 - 9:45, Grand Caribbean 4



### SharePoint: AI-Forward Content Creation & Curation for the Modern Intranet

Thurs, 10:00 - 10:45, Pacifica 9

**Thank you!**

# AI in SharePoint – Early Adopter Program

**Join today!**

No-cost participation

## PROGRAM BENEFITS

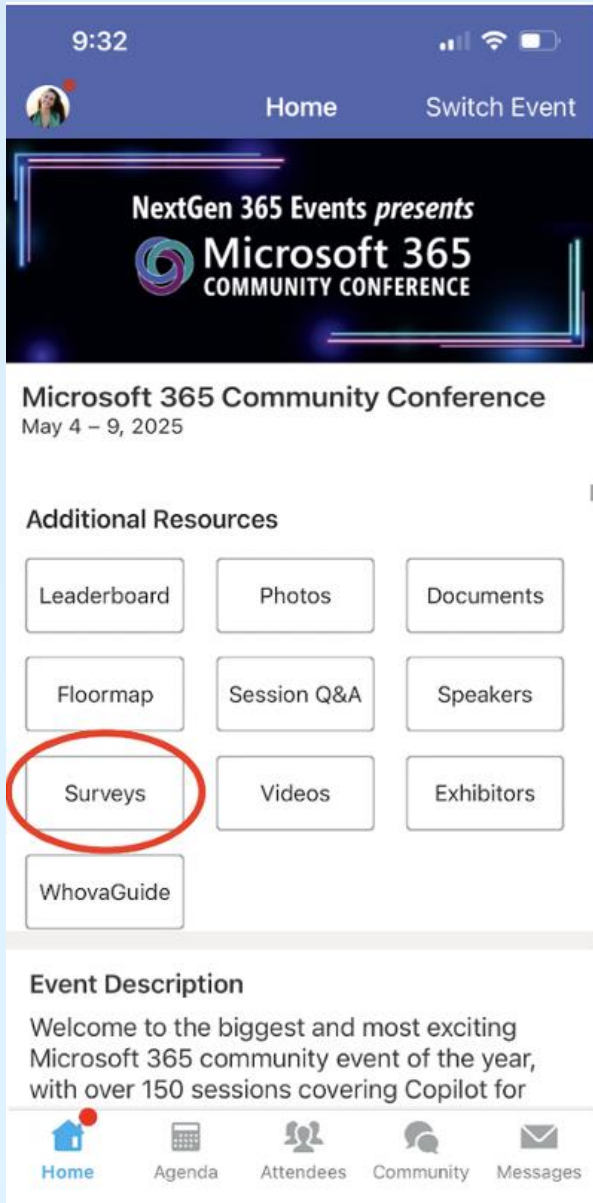
- Exclusive access to Microsoft Engineering through bi-monthly sessions
- Accelerate adoption with a 2-week sprint
- Influence product direction with your feedback



Go to

[aka.ms/JoinSharePointAI](https://aka.ms/JoinSharePointAI)

or scan the **QR code**



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- Simply go to the Whova App on your smartphone.
- Scroll down on the M365 Community Conference Homepage to 'Additional Resources' to click "Surveys".
- Click Session Feedback.
- Scroll down to find this session title.
- Complete the session feedback survey.
- Finally, click 'Submit'.

It's just that easy!

# Uhova

The official event app for the  
**Microsoft 365 Community Conference**

**Event invitation code: Orlando2026**



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- ➔ Personalized agenda, session details
- ➔ Speaker & attendee profiles
- ➔ Networking, meet-ups, messages
- ➔ Event documents

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our FastTrack partners

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on our Adoption Hub

[adoption.microsoft.com](https://adoption.microsoft.com)



Events and real-world  
knowledge in our  
community

[aka.ms/TechCommunity](https://aka.ms/TechCommunity)

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Watch live or on-demand & share our blog.

Home / Microsoft 365 Copilot

### Microsoft 365 Copilot

Deliver value and employee satisfaction with our tools for Microsoft 365 Copilot deployment and adoption. This powerful technology combines the power of large language models (LLMs) with your organization's data – all in the flow of work – to turn your words into one of the most powerful productivity tools on the planet.

Microsoft 365 Copilot Chat and in-app experiences provide real-time intelligent assistance, enabling users to enhance their creativity, productivity, and skills.

[Looking for Copilot resources for Small and Medium Businesses? >](#)

#### Copilot Success Kit

Our Success Kit empowers you to achieve rapid value with Copilot while enabling your progressive skilling journey with AI tools.

[Download here >](#)

#### Copilot Chat and agent starter kit

This new kit includes guidance on IT controls, setup, and resources to help prepare your tenant and enable your users to create and use agents.

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#### Join the Copilot community

The Microsoft 365 Copilot community is your hub for the official blog, latest news, and discussions.

[Join now >](#)

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