Introductions: **Peter Carson**

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- blog.petercarson.ca
- envisionit.com
- extranetusermanager.com
- President, Toronto Microsoft 365 User Group

Agenda

- Enhancing people search within your municipality
- Providing an AI chatbot experience for citizens
- Entra ID Guest Management at County of Simcoe
- Sharing and Data Rooms in Microsoft 365
- Summary, Q&A and Closing

People as Sources of an Organization’s Intellectual Property

- **Untapped Potential:** Employees possess vast amounts of knowledge and skills often unknown to the organization
  - Job roles don't often encapsulate the full range of an individual's abilities
- **Remote Challenges:** Distance and lack of in-person interactions make it harder to discover or leverage colleague's expertise
- **Silos of Knowledge:** Without centralized platforms, knowledge remains isolated and underutilized

How much of your IP lives in the minds of the staff?

"If only HP knew what HP knows, we would be three times more productive."

Lew Platt, Former CEO of HP

- **Tacit** knowledge is in someone's head, and the challenge is to make that knowledge **explicit**, or codified in recorded form so that it can be shared
- It's generally accepted that about 20% of a corporation's knowledge is well documented, indexed and archived and can be easily accessed through Knowledge Management (KM) tools.
- Tacit Knowledge Vs. Explicit Knowledge (aiim.org)
- The 80/20 rule of corporate knowledge | LinkedIn

Challenges of the Current State

Where is your people data? HRIS, ERP or payroll systems, IT (Active Directory, Entra ID, LinkedIn, Excel?

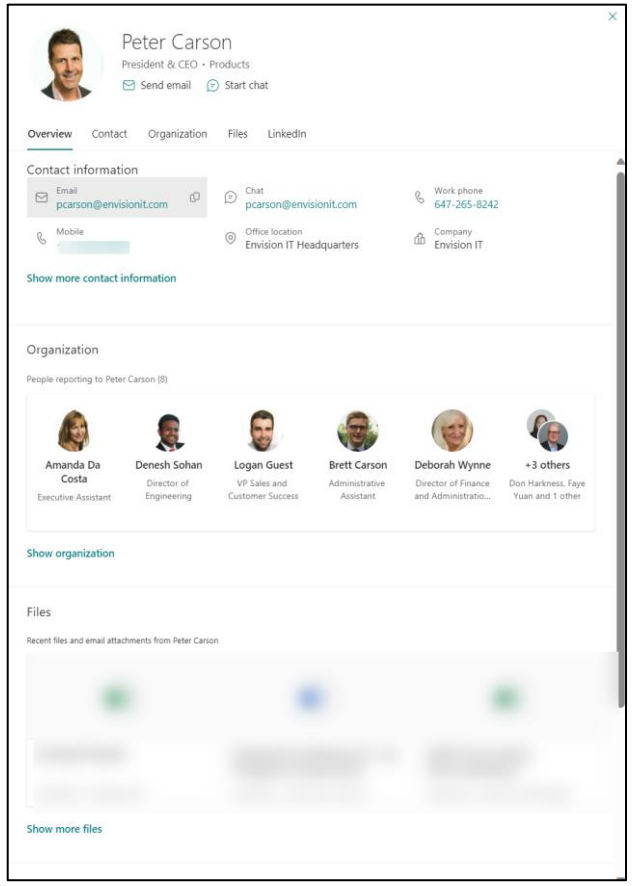
How connected are your systems? Is there a system of record?

How are your onboarding, offboarding, and role change processes defined?

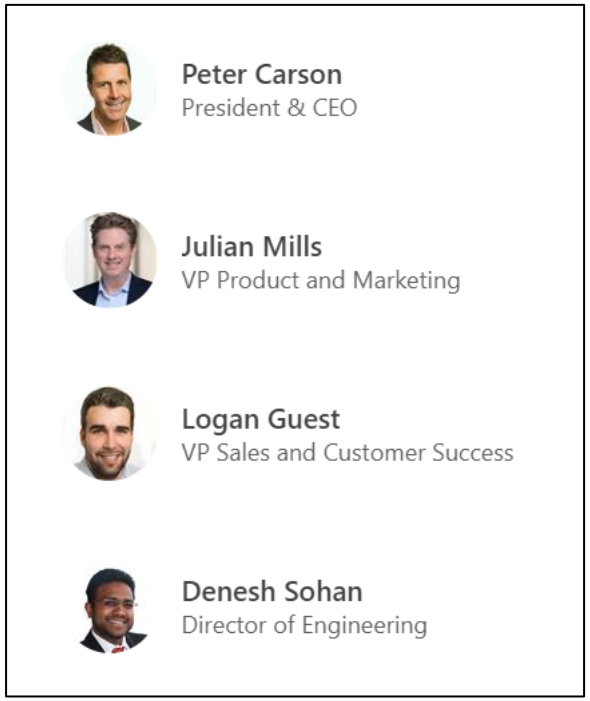
What about profile pictures, expertise, and skills?

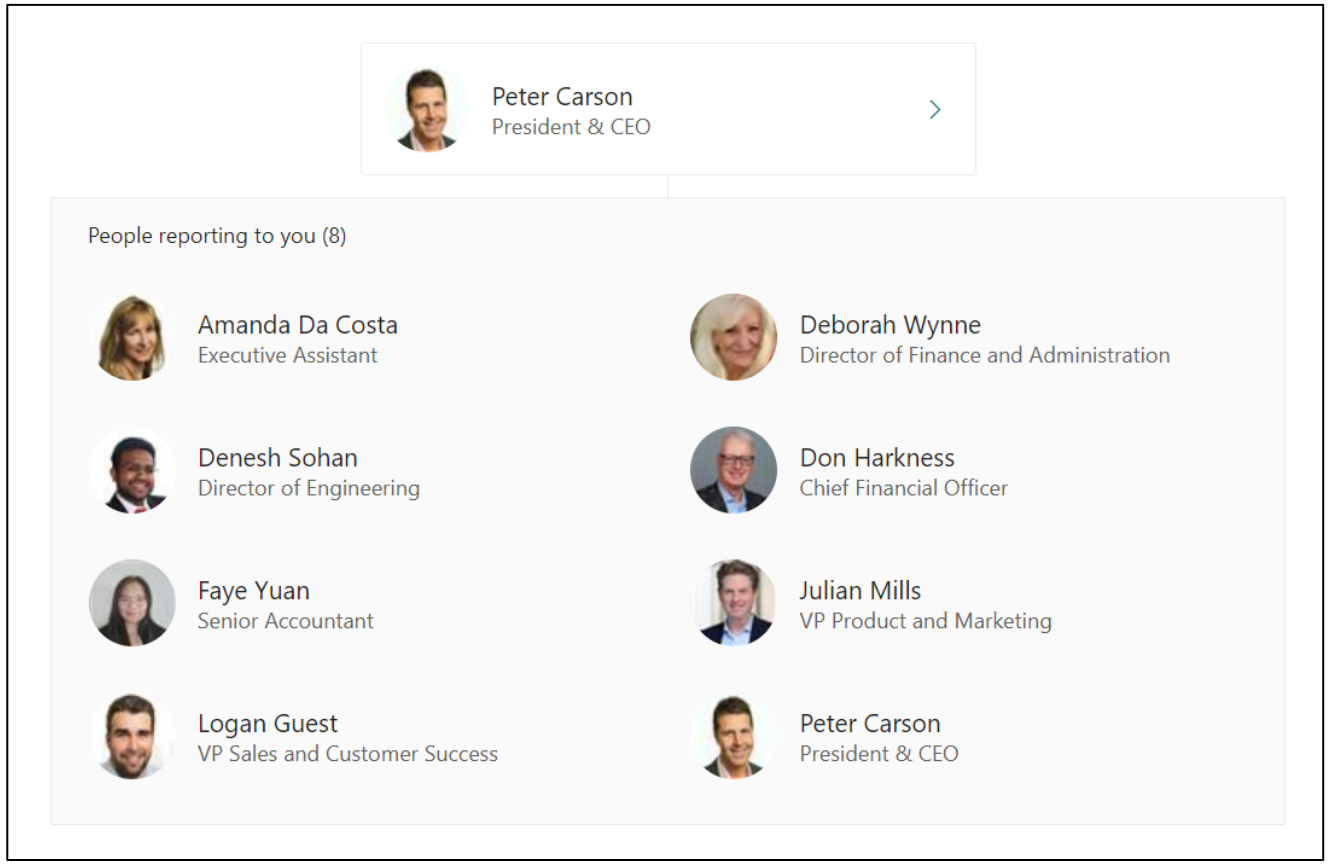
Leveraging People Cards to Highlight People's Expertise

- Microsoft has standardized People Cards across all applications
- Can customize information on People Cards via Microsoft Graph
- Organizational chart
- Surface in Teams, Outlook, SharePoint …



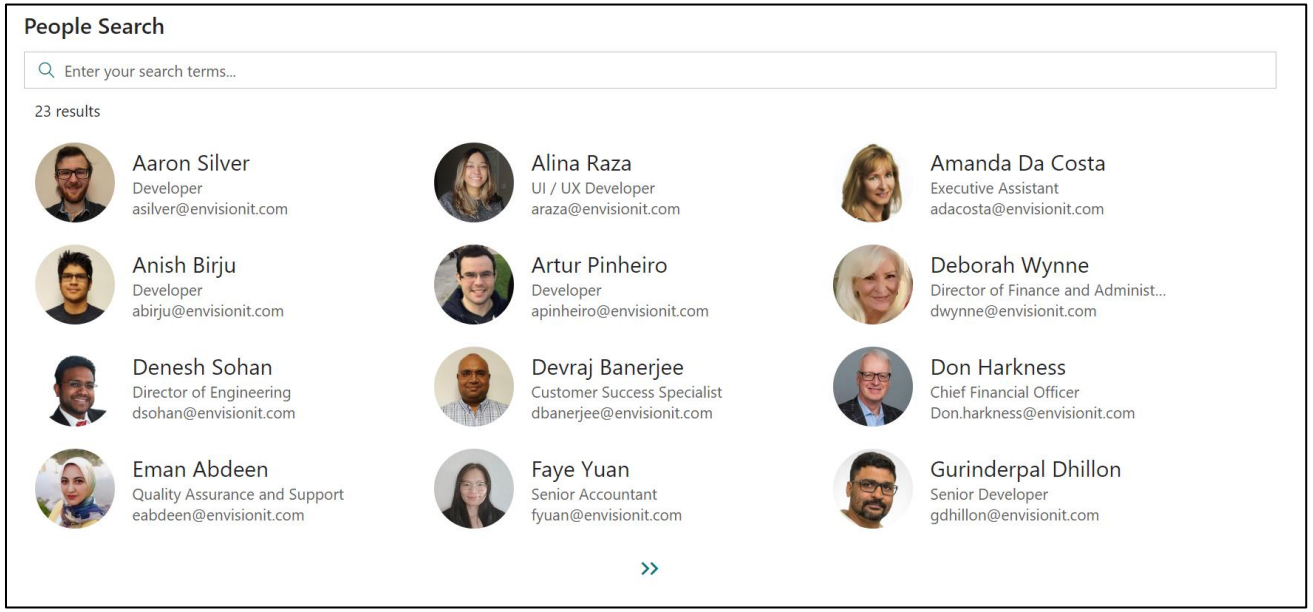
People and Organization Chart Web Parts





Microsoft Graph People Search Web Part

- Open source
- Based on Microsoft Graph and deployed within SharePoint Online
- Addresses the following requirements:
  - Show person cards
  - Free text search
  - Configurable search query
  - Customizable
  - Render the out-of-the-box Live Person card (LPC) on hover



https://github.com/YannickRe/spfx-msgraph-peoplesearch

Municipal Benchmarking Network Canada

Réseau d'étalonnage municipal du Canada

Who is MBNCanada?

Not-for-profit association that supports municipal performance management through the provision of data collection, reporting and networking programs across Canada

Collects 700 performance measures across 36 service areas on an annual basis

Creates reports and data for municipalities, its board, and the general public

Mission: To enhance municipal service delivery though collaboration, networking and implementation of performance measurement, benchmarking and other municipal continuous improvement programs and initiatives

Members

My Groups

Sudbury

View Sudbury

By-Law Enforcement Expert Panel

View By-Law Enforcement Expert Panel

Fire and Rescue Services Expert Panel

View Fire and Rescue Services Expert Panel

Roads Expert Panel

View Roads Expert Panel

Transit Expert Panel

View Transit Expert Panel

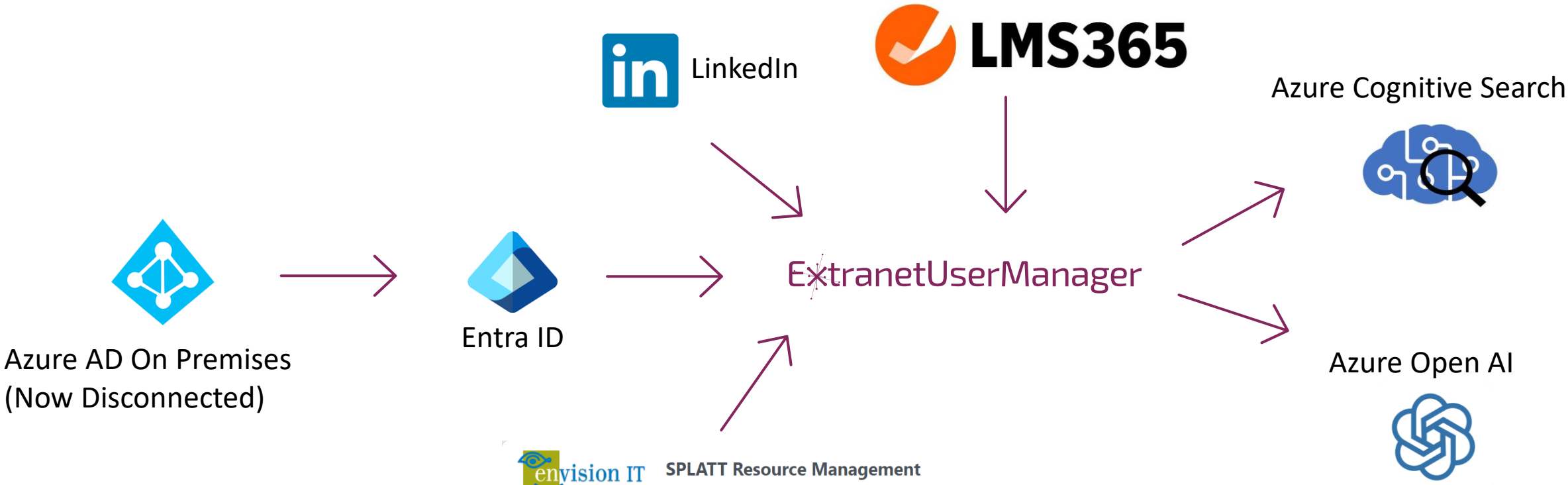
Board of Directors

View Board of Directors

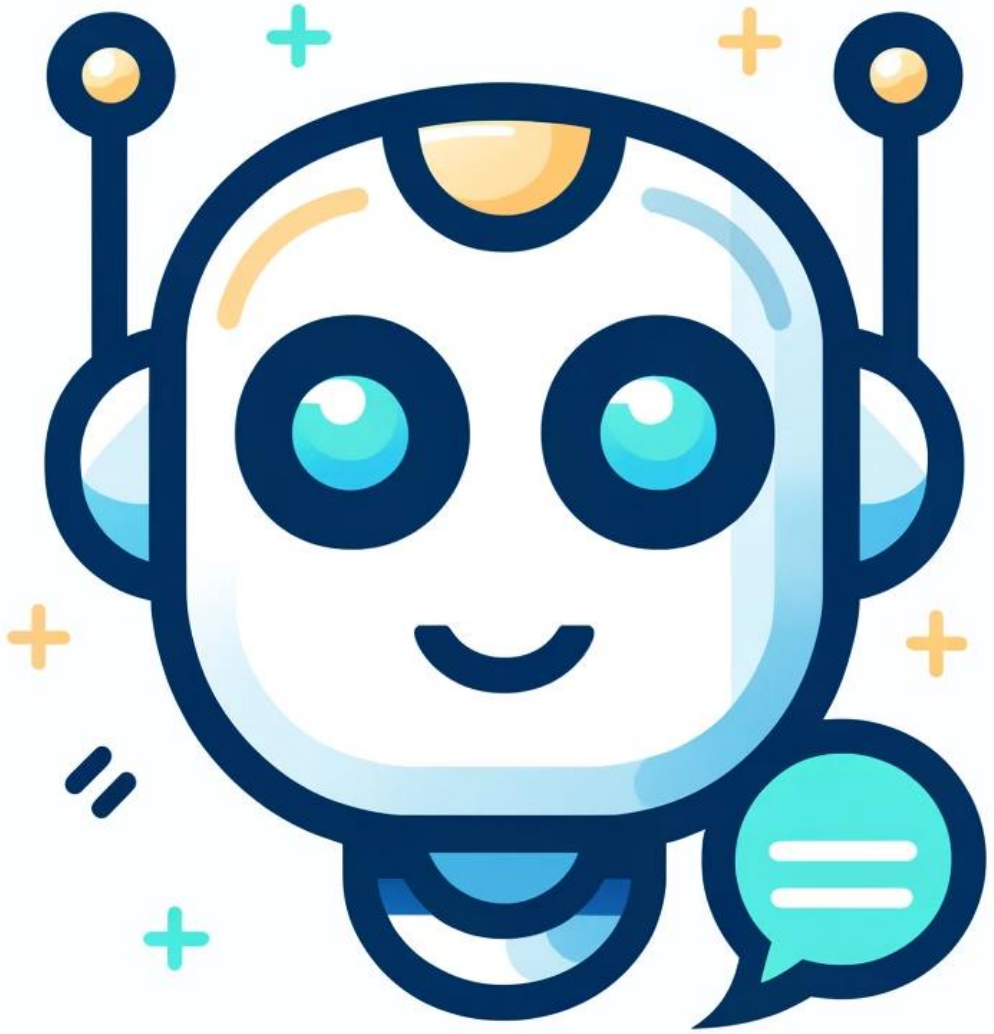
Municipal Leads

View

Envision IT People Data

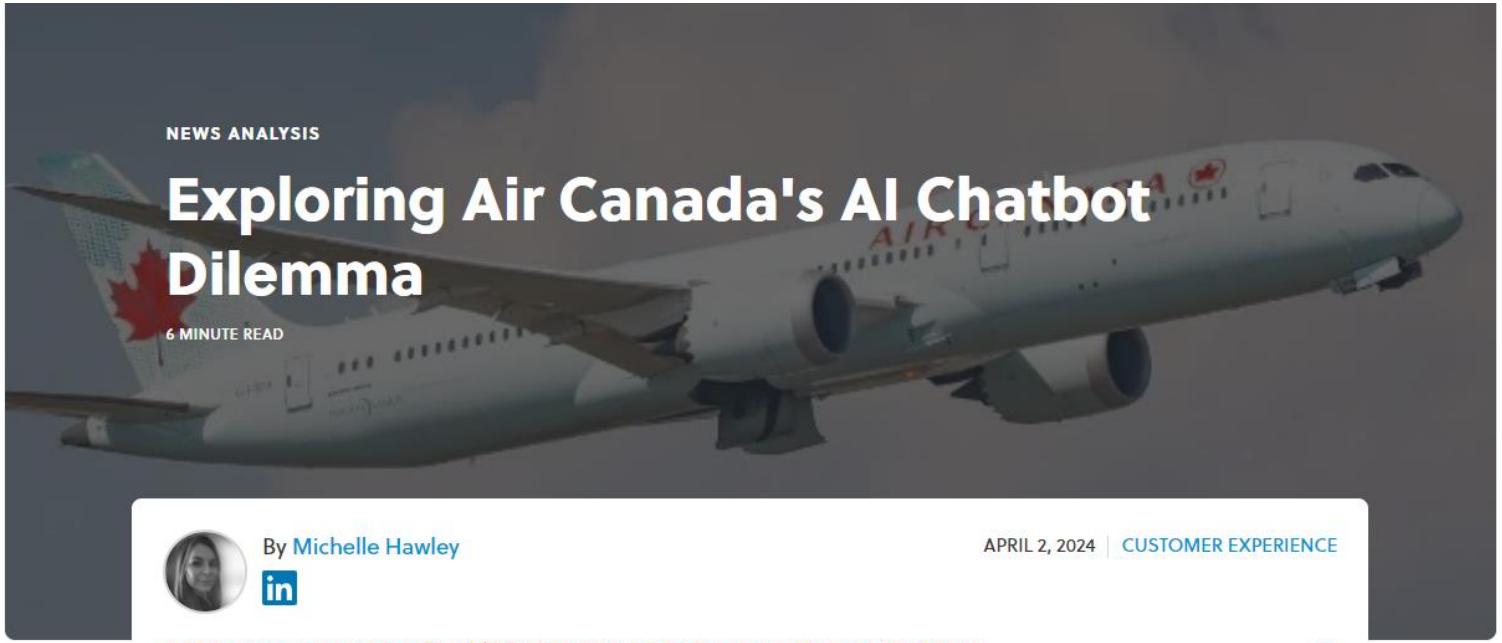


SPLATT:
216K Unique Notes



Providing an AI chatbot experience for citizens

Why Risk is on our Minds



NEWS ANALYSIS

Exploring Air Canada's AI Chatbot Dilemma

6 MINUTE READ

By Michelle Hawley

APRIL 2, 2024 | CUSTOMER EXPERIENCE

Achieve average annual benefits of $3.8 million with Adobe Experience Manager (Read Now)

SHARE

SAVE

Discover the implications of Air Canada's AI chatbot mishap and learn essential strategies for deploying AI in customer experience the right way.

The Gist

- **AI hallucinations.** *AI chatbots can hallucinate 3% to 27% of the time, leading to incorrect or misleading responses.*
- **Air Canada's legal battle.** *A Canadian tribunal ruled Air Canada must honor a discount promised by its AI chatbot, highlighting the legal implications of AI errors.*
- **Deploying AI wisely.** *Companies should implement guardrails, fine-tuning, action models, and hallucination prevention to minimize risks in AI-driven customer experiences.*

Augmented, Assisted, and Autonomous Systems

Augmented

- Enhances human decision-making
- AI and humans work together
- Improves human capabilities

Assisted

- Automates simple tasks
- Supports human actions and decisions

Autonomous

- Operates without human oversight
- Self-learning and adaptive
- Used in robotics, self-driving cars

Microsoft AI Tools

Copilot

End user tool

AI-powered conversational assistant

Provides information and answers

Can analyze or summarize content

Azure Open AI

Azure AI Search

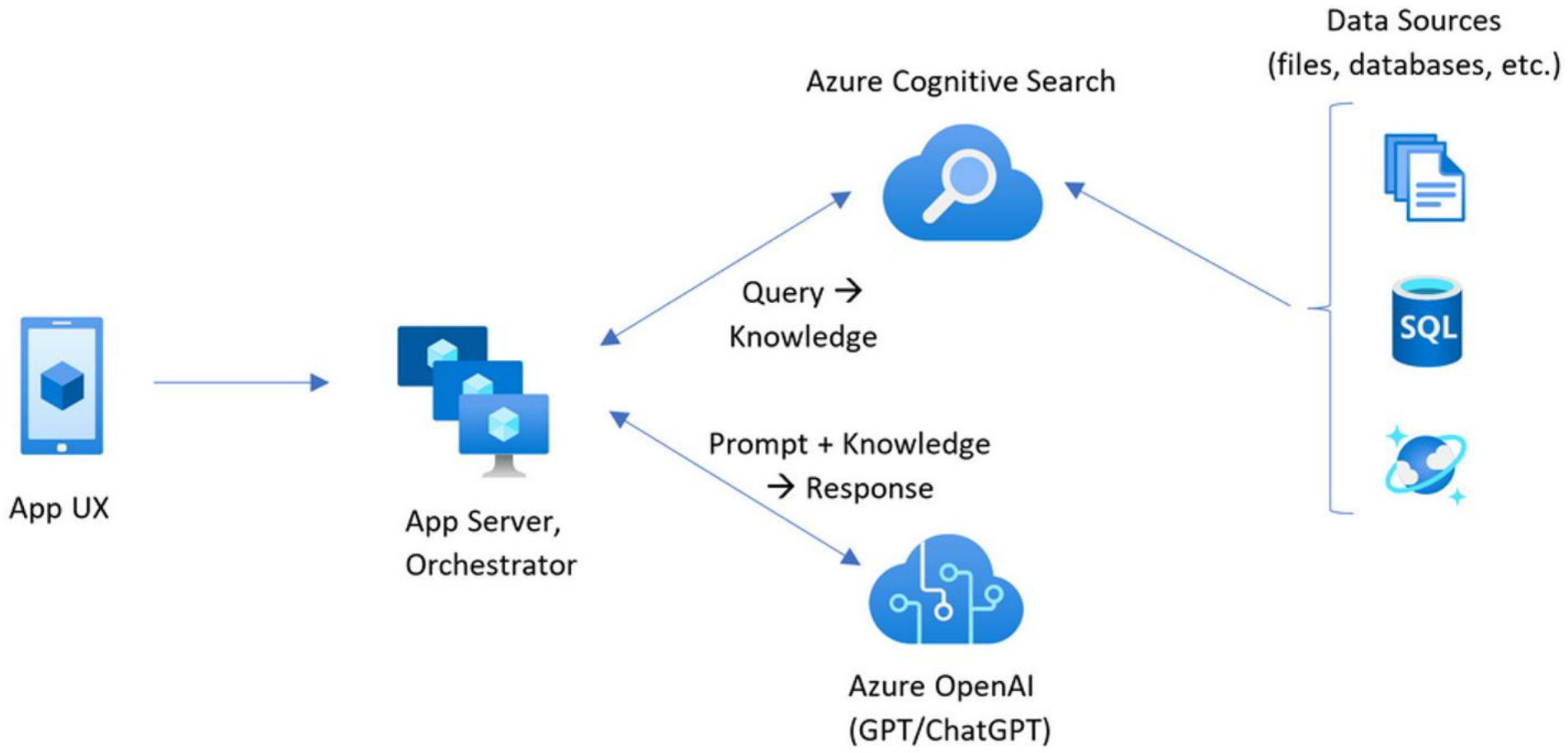
Developer tools

Build your own Search and AI experiences

Prebuilt and curated models from OpenAI, Meta, and beyond

Run on your own data, private to you and your organization

Create a Personalized ChatGPT with Azure AI Search and OpenAI Integrations



County of Simcoe ArcGIS Sharing

- 15 lower tier municipalities
- 1,500 users need access to ArcGIS Enterprise
- Microsoft 365 Single Sign On
- Guest access
- Simplify administration
- Maintain security
- Eliminate IT tickets

Extranet User Manager

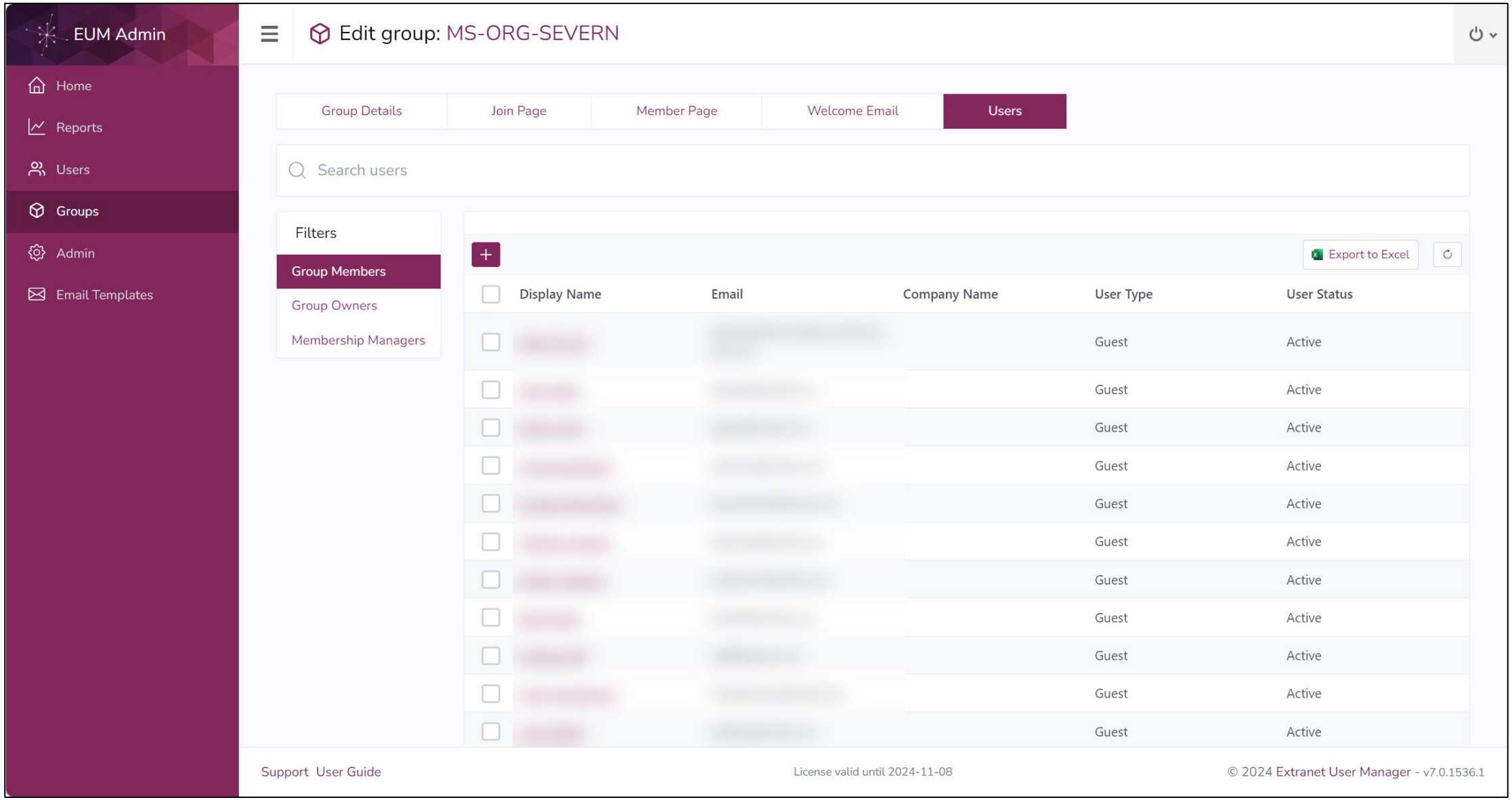
ArcGIS Enterprise

Entra ID

Extranet
User
Manager

Entra ID

ArcGIS Enterprise


EUM Admin
Edit group: MS-ORG-SEVERN
Home
Reports
Users
Groups
Admin
Email Templates
Group Details
Join Page
Member Page
Welcome Email
Users
Search users
Filters
Group Members
Group Owners
Membership Managers
Export to Excel
Display Name
Email
Company Name
User Type
User Status
Guest
Active
Support
User Guide
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COUNTY OF SIMCOE

Extranet User Manager

ArcGIS Enterprise

Benefits

- County of Simcoe IT not responsible for managing ~1,500 external users
- Lower tier municipalities self-manage
- Whitelists enforce email domains
- Dynamic groups manage ArcGIS Enterprise access
- Leverages Entra ID and Microsoft 365
- Accounts, passwords, and MFA are also managed in the lower tier municipalities

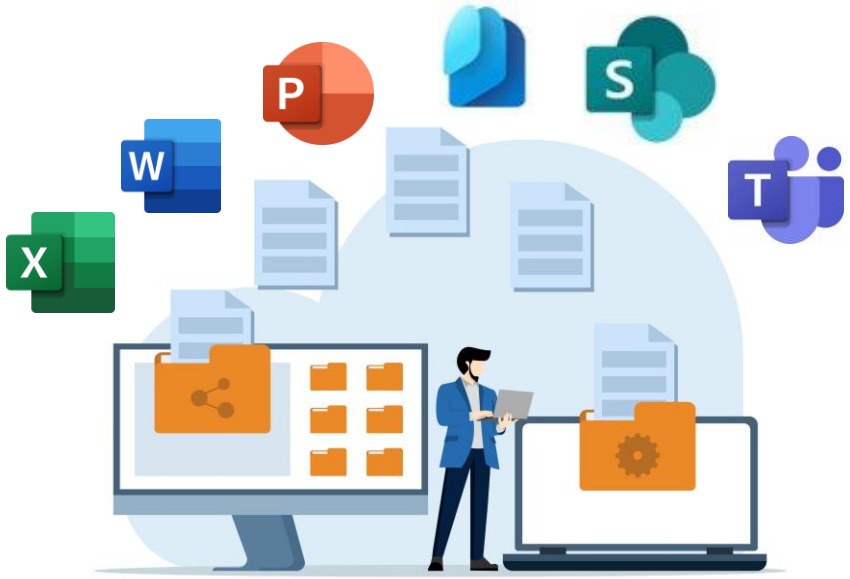
EUM Data Room: Simple, Secure Document Exchange

EUM Data Room

Secure Document Sharing

Fully leverages Microsoft 365

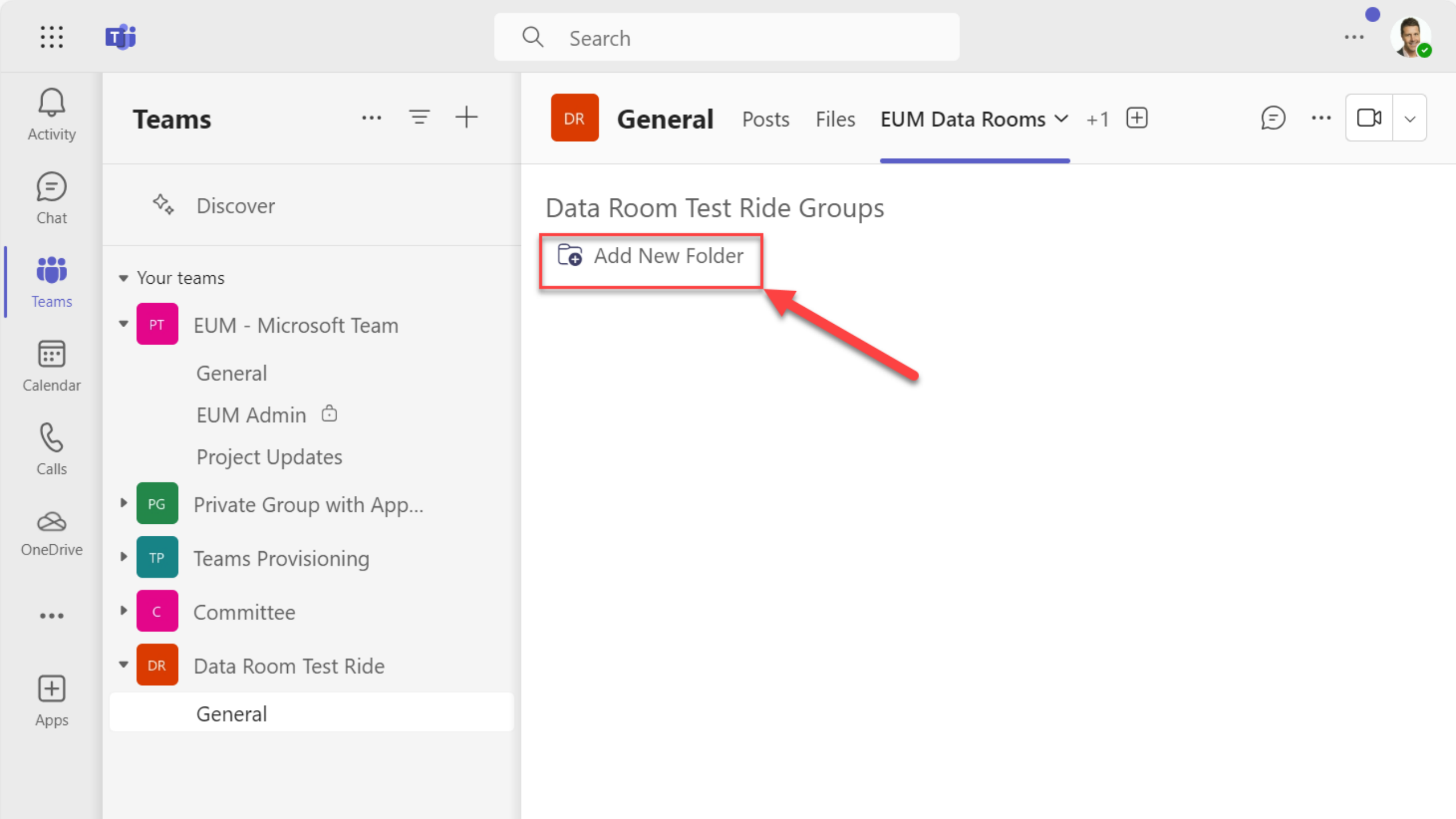
★★★ Simple and Sophisticated



What Did We Set Out To Achieve?

1. Streamlining Collaboration
2. Improving Efficiency
3. Enhancing File Security
4. Eliminating Dark IT
5. Ensuring Compliance

Make Microsoft Simple


Search
Activity
Chat
Teams
Calendar
Calls
OneDrive
Apps
Teams
Discover
Your teams
PT
EUM - Microsoft Team
General
EUM Admin
Project Updates
PG
Private Group with App...
TP
Teams Provisioning
C
Committee
DR
Data Room Test Ride
General
DR
General
Posts
Files
EUM Data Rooms
+1
Data Room Test Ride Groups
Add New Folder

Create New Folder

Save

Request a folder connected to a new EUM Group in the provided SharePoint site collection.

Folder / Group Name *

Data Room Loan Application

Permission *

Contribute No Delete

Group Type

Data Room

Site Title

Data Room Test Ride

Site URL

https://eumdemo.sharepoint.com/sites/DataRoomTestRide

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Data Room Loan Application

Project Status	In Progress
Status	Initial Application
Loan Amount	$75,000

Requested Documents

Document Type	Required	Instructions
Trial Balance		Latest monthly

Documents

Document Type	Document	Modified
Financial Statement	Change Requests.docx	2024-02-20, 11:18:15 a.m.
P&L	Closing Report.docx	2024-02-20, 11:18:12 a.m.
P&L	Communications Plan.docx	2024-02-20, 11:18:12 a.m.

Members

Peter Carson Demo
President
Envision IT

Debbie Ireland

Peter Carson EIT

Unique Integration with Microsoft 365

- Documents are stored and available in Teams and SharePoint
- Purview can assign retention and sensitivity labels
- Entra ID can enforce Multi-Factor Authentication
- Purview can encrypt and control what happens with documents

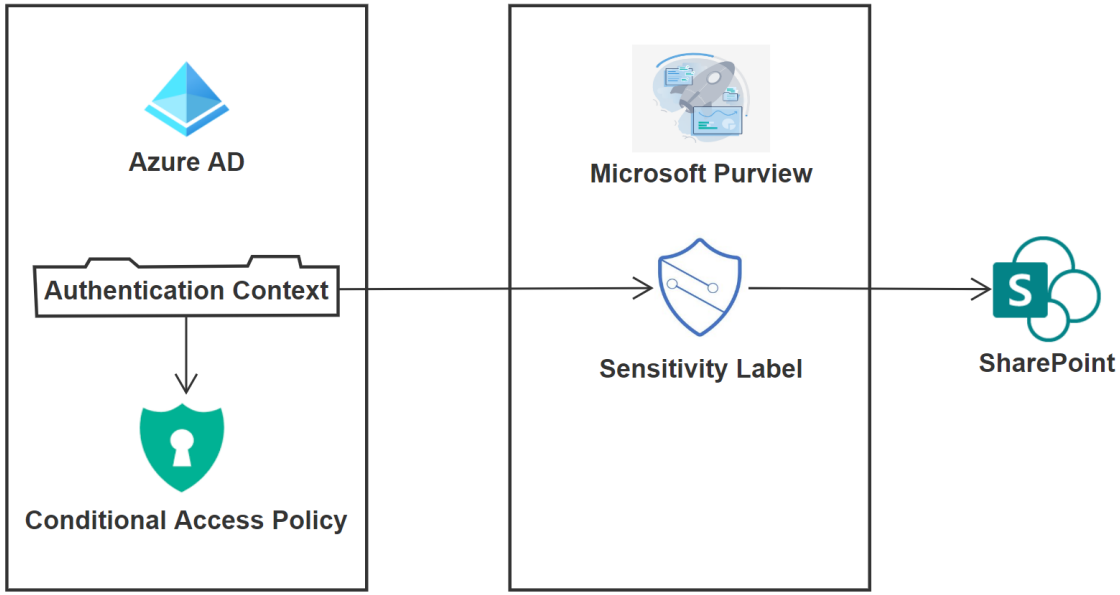
This can all be automated

Microsoft Purview

- Unified Data Governance
- Data Security
- Data Governance
- Risk and Compliance
- Privacy Risk Management

Sensitivity Labels

- Labels can be applied to content in Microsoft 365
  - Emails
  - SharePoint sites and content
- Can be manually or automatically applied
- Can be leveraged in conditional access policies
- Can also enforce rights management and encryption
- Travels with the content regardless of location
- Can be applied to sharing rules



Traffic Light Protocol

TLP	External Access	Guests Require MFA	Document Encryption	M365 Member Licensing
Red+Strict	No	N/A	Yes	E5
Red	Yes	Yes	Yes	E5
Amber+Strict	No	N/A	No	E3
Amber	Yes	Yes	No	E3
Green	Yes	No	No	E3
Clear	Yes	No	No	

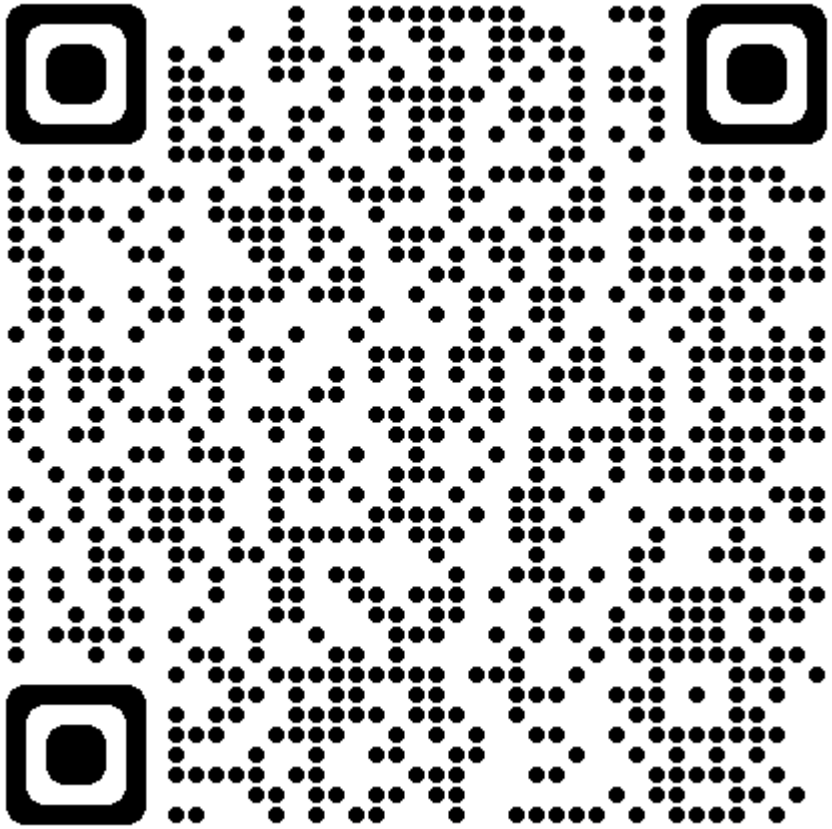
envision IT Webinar

Teams First Information Architecture & Governance

February 14th 2023 | 2-3PM EST

Points to Consider

- Tacit knowledge in your people's head is a huge resource
- AI chatbots are a hot topic, make sure you understand how to do it well
- If you're in Microsoft 365 there are some interesting ways to leverage it outside your organization

Thank you!

Questions?