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Who am I?

- Principal Information Systems Engineer at SAS (joined in 2000)
- Part of the team that is the service owner for M365
- Experience with supporting SharePoint, Teams, Power Platform, Exchange, MS Search, Copilot, Active Directory, Windows Server
- Contact: bonnie.springer@sas.com

Agenda

- Understanding the benefits of M365 search for enterprise use
- Strategies for extending M365 search for enterprise needs
- Adding external data to M365 Search and M365 Copilot using Microsoft Graph connectors

SAS

Company overview
Enterprise Search needs

What is SAS?

- Software company founded in 1976
- Global leader in data analytics and AI
- 13,000+ employees globally
- Headquarters in Cary, NC
- Microsoft partner since 2020

[SAS](#) has accumulated a lot of data in multiple repositories in its nearly 50 year history

Search Experience at SAS and Our Enterprise Needs

- Primary intranet search experience has been Lucidworks Fusion/SOLR search – selected prior to M365 deployment
- Lucidworks/SOLR infrastructure outdated and ineffective
- Churn with intranet search support team
- Business Need: Improve overall employee search experience in a cost-effective manner by February 2025

The direction for Employee Search at SAS

- Modernize internal search experience with M365 search and updated SOLR search (for specific internal applications)
- Why M365 Search?
 - Reduced IT overhead: No need to build out and maintain a separate search infrastructure
 - Widespread use of M365 among SAS employees
 - M365 Search is extensible: Not all company content lives in M365 (Files shares, WordPress, Confluence, LMS systems, other applications including home grown)

The direction for Employee Search at SAS (cont.)

- Why M365 Search?
 - Cost effective: Already paid for with our M365 and Copilot licenses
 - **M365 Copilot users benefit**
 - Deploying M365 Copilot has increased requests for graph connectors at SAS to enrich the search experience

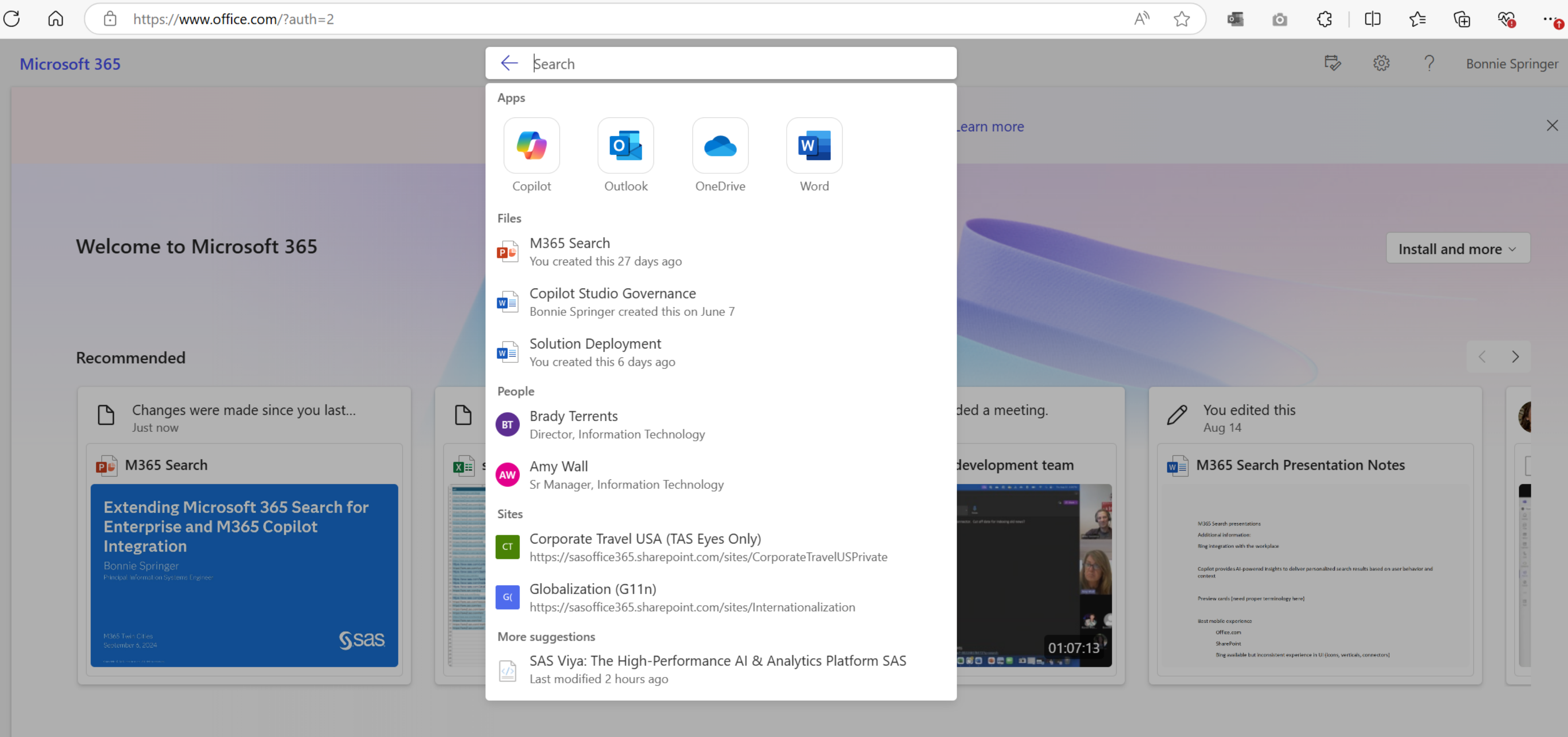
Extending M365 Search for Enterprise Needs

Introduction to M365 Search

What is M365 Search?

- Microsoft built-in search engine in M365 that indexes by default content stored in M365 to provide a unified search experience across the platform
- Can search for people, files, or sites
- It's personal – it uses insights from MS Graph to show results that are relevant to each user, each user may see different results
- Security trimmed – users see results to content that they have access to see

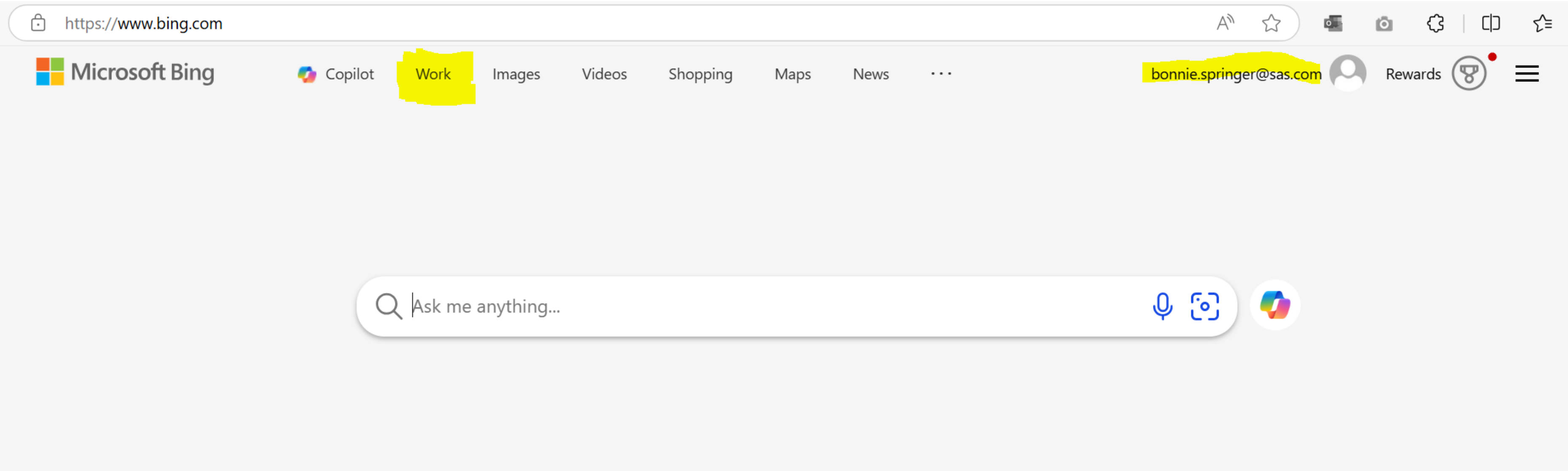
M365 Search Example



Where to Search

- Office.com
- Within apps like SharePoint, OneDrive, Teams, etc.
- Windows search bar
- Mobile apps like Outlook, Bing, etc.
- Bing.com integration (work search) on by default
 - Configured in Search & intelligence -> Configurations -> "Microsoft Search in Bing"
 - Up to 24 hours for change to take effect

Bing at Work – Example



Bing at Work – Work tab example

←

↺

🏠

🔒 https://www.bing.com/work?FORM=HPTMSB

A

☆

🖨

📷

⚙

Microsoft Bing

COPILOT

bonnie.springer@sas.com



Search work

🔍

Welcome, Bonnie

It just got easier to find things at SAS.

Search files, people, and more

Suggested searches

🔍 my profile

🔍 my calendar

🔍 my files

🔍 my groups

Search images across your organization

Try it now



📈 Popular SAS bookmarks

🔍 █████ Customer Project Content

🔍 █████ (LTC) Program

🔍 Kamakura ASPAC Teams

🔍 PSD Sales

Recent files

All

 Word

 Excel

 PowerPoint

 PDF

More ▾

Search files

Name	Opened	Owner	Activity
 M365 Search Bonnie Springer	7 minutes ago	Bonnie Springer	 You edited this



M365 Search: Search Scope Matters

Microsoft Search is always context-sensitive — depending on where the user runs the query from, the results might vary.

- On the SharePoint Home and Microsoft 365 Home, the scope is the whole tenant (cannot be changed).
- On a SharePoint site, the default scope is that particular site (can be changed).
- On a SharePoint hub site, the default scope is that particular hub and the associated sites (can be changed).
- In a list or SharePoint document library, the scope is that particular list/document library (cannot be changed).

Search Scope Matters (cont.)

- In OneDrive, the scope is all documents in OneDrive and SharePoint that the current user has access to (SharePoint libraries, his/her own OneDrive files, other users' shared OneDrive files).
- The default search scopes can be confusing to end users when it's not clear what results they can expect where. It's not enough to enter the query in the (otherwise unified) search box. The user also needs to know where they are and what to expect in that specific context so **training is important**.

Security and Compliance

- Search results security trimmed
- Microsoft meets various security and compliance standards – see Microsoft compliance documentation for specific info
- User's search history is personal and private – it isn't shared with your organization or with Microsoft, search history does help with suggestions in the search box
 - Users can review their search history by downloading it (from "[My Account portal](#)" -> Settings and Privacy -> Microsoft Search History)
 - Users can clear their search history at any time

Security and Compliance – Search History

<https://myaccount.microsoft.com/>

ssas

My Account

Overview

Security info

Devices

Password

Organizations

Settings & Privacy

My sign-ins

My Apps

My Groups

My Access

Give feedback

Bonnie Springer

bonnie.springer@sas.com

Settings & Privacy

Language & Region

Privacy

Data options

Microsoft Search History

Manage history

Clear history

Download history

Microsoft Search uses your previous searches to improve search results. You can clear or download your search history per application.
[Learn more about your search history](#)

Manage Contact Search

Copilot interaction history

Manage Copilot interaction history

Delete history

When you select 'Delete history', we'll start deleting your Copilot interaction history. It might take some time before everything is fully deleted, but your history will be cleared the next time you open the app.
[Learn more about Copilot interaction history](#)

Extending M365 Search for Enterprise Needs

No code out-of-box features

Administering M365 Search

- Search is managed in the Search Admin Center (via M365 Admin Center -> Settings -> Search & intelligence)
- Need Search admin role (or global admin)
- M365 search is ON by default and any administration you do applies to M365 Search in all the apps

Administering M365 Search – Search Admin

←

→

↺

🏠

admin.microsoft.com/Adminportal/Home?#/MicrosoftSearch

★

🔍

📁

👤

Privileged Identity...

PP Compliance Cen...

PP Dashboard

PP admin center

PP Default environ...

SPO Admin

Teams admin

Exchange Admin

Compliance Admin

M365 admin center

Search Admin

Fabric Admin

☰

sas

Microsoft 365 admin center

🔍

Search

📄

📁

🔔

⚙️

?

Bonnie Springer - ...

☰

Home

Users

Teams & groups

Roles

Billing

Copilot

Support

Settings

Domains

Search & intelligence

Org settings

Directory sync errors

Partner relationships

Health

Admin centers

Home > Search & intelligence

Enable Dark mode

Search & intelligence

Overview

Insights

Answers

Data sources

Customizations

Configurations

Insights

Connectors

Feedback

Search user analytics

28-day period ending 8/23/2024 (updated daily)

Key metrics

Users who searched

15.4K

▲ 0.5%

Users who searched weekly

12.8K

▼ 0%

Users not searching

1.9K

▼ 9.8%

User engagement

4 connections need attention

2 paused error

2 in draft

2 Graph connectors need description for Copilot

1 Unresolved feedback to review

1 feedback has been received in the last 31 days

Manage search feedback



Extending M365 Search for Enterprise Needs

- "No Code" customizations for tailoring search results to specific organizational needs
 - Bookmarks
 - Acronyms
 - Floor plans (retired September 30, 2024 – use Microsoft Places)
 - Locations
 - Q&A

Extending M365 Search: Bookmarks

- Think of bookmarks as “authoritative results” to search queries based on defined keywords
- Helps people quickly find important sites and tools
- Can import bookmarks from csv file (and export to csv)
- Can add bookmarks for content outside of M365
- Tenant limit of 5,000 bookmarks

Extending M365 Search: Adding a Bookmark

Home > Search & intelligence > Bookmarks

Search & intelligence

Overview Insights **Answers** Data sources Customizations Configurations

Acronyms

Bookmarks

Floor plans

Locations

Q&A

Applied Filter: Status: Published

+ Add bookmark Exclude a URL Import Export Manage settings

☐	Bookmarktitle ↓	URL	Modified
☐	証券AMLチーム	https://sasoffice365.sharepoint.com/sites/A	5/20/2024, 2:57 AM
☐	人事関連: カフェテリアプラン	https://sasoffice365.sharepoint.com/sites/ji	12/15/2022, 10:24 AM

Extending M365 Search: Adding a Bookmark

Add bookmark

Title * Characters: 0 / 60

Enter a title for this bookmark

URL *

Enter a URL to an internal website or page

Description Characters: 0 / 300

Enter a brief description of the website or page

Keywords * ⓘ

Enter search terms commonly used to find this page

☒ Automatically match similar keywords

Reserved keywords ⓘ

Enter search terms commonly used to find this page

Categories: ⓘ

Enter categories to filter and organize bookmarks

Bookmark settings

Choose when and where this result should be published

✓ Dates

✓ Country or region

✓ Groups

Extending M365 Search: Bookmarks Example

← cafe menu

AllFilesSitesPeopleKnowledgeRequest FormsTrainingInsideSAS

All sourcesFile typeLast modified

Links from your organization

Cafe, menus (Cary)

<https://sww.sas.com/cafe/menus/>

Check out the menus for the cafes on SAS Campus in Cary HQ.

Published by SAS

Cafe, home (Cary)

<https://sasoffice365.sharepoint.com/sites/foodservices/SitePages/Home.aspx>

Cafe site for special orders deli orders, catering, personal bakery items, Executive dining reservations, and cafe table reservations.

Published by SAS



Food Services

<https://sasoffice365.sharepoint.com/sites/FoodServices>

...Café Happenings Conversations Lunch **Menu** | 1130am - 115pm Lunch **Menu** | 1130am - 115pm... **Menu** | 730am - 900am Coffee Shop | 800am - 300pm Lunch **Menu** | 1130am -...

Extending M365 Search: Acronyms

- Often used for acronyms specific to an organization
- Can add acronyms individually or do a bulk import via csv file
- Can take up to 24 hours for added acronyms to be available in search
- Acronym queries not case sensitive
- Acronyms can't contain spaces

Extending M365 Search: Acronym Example

←

define uda



All

Files

Sites

People

Knowledge

Request Forms

Training

InsideSAS

All sources

File type

Last modified

UDA

Acronym • 1 result

Universal Deployment Automation

Published by SAS • View source

Was this answer useful?  

Extending M365 Search for Enterprise Needs

Adding External Data

Use Cases at SAS for Adding External Data to M365 Search Index

- **ServiceNow:** Added the ServiceNow KB connector to include content from specific knowledge bases
- **Intranet WordPress:** Added internal content (inside the firewall) from WordPress pages to index HR policies, company news, and other content
- **SABA:** Created custom connector to index learning content available in cloud based LMS system
- **M365 Copilot:** Users want more data available to improve M365 Copilot results

Connecting External Data Sources to M365 Search

- SharePoint on-premises
 - Configure hybrid search to include that content
 - SharePoint Admin Center -> More Features -> [Hybrid Picker](#)
- Custom Graph Connectors: Use MS Graph connectors API to create a custom connector to add your own data into Graph
- Federated Connectors: Dataverse and Dynamics 365
- Out-of-the-box Microsoft Graph Connectors

Using Microsoft Graph Connectors

- MS Graph Connectors index third-party data so that it appears in M365 search results
- External data can be on-premises (requires graph connector agent) or in the cloud
- Graph connectors honor source permissions as configured in content source
- Configured in the M365 Search admin center under Data Sources
- Over 100 graph connectors currently available
- Microsoft created connectors are free, third party often at additional cost
- External data indexed by MS Graph Connectors also available to M365 Copilot users

Limitations and Boundaries

- Each tenant can create up to 30 connections.
- Each connection allows up to 5 million items.
- Overall tenant limits are up to 50 million items (If you need higher capacity on your tenant, you can contact Microsoft and request higher capacity for Graph connectors.)

Licensing M365 Search for External Data

- Microsoft 365 E5 licenses and M365 Copilot licenses include an entitlement of 500 items of index quota per licensed user.
- Definition of "item" depends on the content source
- Can purchase more index quota if needed
- Index quota found at Search & intelligence -> Data sources

Licensing M365 Search

Search & intelligence

- Overview
- Insights
- Answers
- Data sources**
- Customizations
- Configurations

Connections

You can build and customize connections managed by your organization. These can index data from apps such as Salesforce, Oracle SQL and Azure DevOps. Connections listed as Search under Connected experiences count toward your search connection quota utilization. [Learn more about connections.](#)

Search connection quota utilization (1.25%)



102,322 items indexed out of 8,166,500. ⓘ

Content Curation and Evaluation Before Indexing

- How integral is the data to employees' jobs and daily tasks?
- Do we want to filter content based on last modified date? Can we exclude the obsolete/low value data from the search index and move to less expensive storage?
- What is the schema of the source content? What properties do we need to ingest into the search index?
- Are permissions on the source content set correctly?
- What kind of authentication is used on the source content?
- Is there enough M365 index quota for the data?
- Is there an existing graph connector that we can use, or will we need to create a custom connector?

Extending M365 Search for Enterprise Needs

Configuring a MS Graph Connector

Configuring a MS Graph Connector

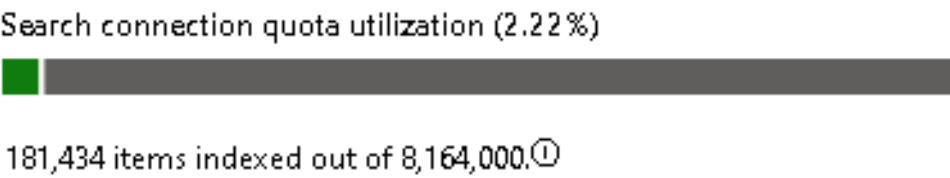
Home > Search & intelligence > Data sources

Search & intelligence

- Overview
- Insights
- Answers
- Data sources**
- Customizations
- Configurations

Connections

You can build and customize connections managed by your organization. These can index data from apps such as Salesforce, Oracle SQL and Azure DevOps. Connections listed as Search under Connected experiences count toward your search connection quota utilization. [Learn more about connections.](#)



 **Add description for Copilot** Specify your content source’s use in the description field to help Copilot enhance connection results for users.

[Display all connections \(17\)](#)

[+ Add Connection](#) [Refresh](#)

Name	Required actions	Staged Rollout	Connection ID	Publisher	Connection state
 SAS External Site Test		Staged Edit	IntranetSites5	Microsoft	 Syncing
 Saba	-	Add staging	Saba1	Microsoft	 Ready
 Intranet Sites - Staging environment	-	Staged Edit	IntranetSites8	Microsoft	 Syncing
 ServiceNow Knowledge	-	Add staging	ServiceNowKB6	Microsoft	 Ready



Configuring a MS Graph Connector

● Connect to data source

Connect to data source

Choose a data source to create a connection for your organization. [Learn more about connectors.](#)

Find More Connectors.

Data sources with quick setup and sample data available.



Enterprise websites

Connect to your Enterprise website



ServiceNow Knowledge

Connect to articles about ServiceNow..

Other data sources



Azure DevOps

Connect to Azure DevOps service



Custom connector

Create a custom connector



Jira

Connect to Atlassian Jira



ServiceNow tickets

Connect to ServiceNow tickets



ADLS Gen2

Connect to ADLS Gen2



Oracle SQL database

Connect to Oracle SQL database



File share

Connect to a file share found in an..



CSV

Connect to your CSV file



Microsoft SQL server(New)

Connect to Microsoft SQL 200...



MediaWiki

Connect your organization's wiki



Salesforce



Confluence



ServiceNow Catalog



Azure SQL

Connector Gallery

Filter by title

[Overview of Microsoft Search](#)

[Set up](#)

[Manage access to files and sites](#)

[US government environments](#)

[Frequently asked questions](#)

> [Get insights](#)

> [Provide answers](#)

> [Data sources](#)

> [Microsoft Graph connectors](#)

[Overview](#)

Connectors gallery

> [Set up Microsoft built connectors](#)

> [Manage connections](#)

[Licensing](#)

[Terms of use](#)

> [Federated Search connectors](#)

> [Semantic Index](#)

> [Customize and configure](#)

The Graph connectors in this gallery are broken down into the following categories:

- Collaboration & Communications
- Content Management Systems
- Databases
- Enterprise Resource Planning (ERP), Customer Relationship Management (CRM), Sales, and Support
- File Systems
- IT Service Management Tools (ITSM)
- Learning
- Social Networks
- Website (HTTP)
- Other

Collaboration & Communications

Aderant

Publisher: BA Insight

BA Insight's Aderant connector honors the security of the source system and provides both full and incremental crawls so the users have the latest information available to them all the time.

[Deploy this Graph connector](#)

Configuring a MS Graph Connector

Enterprise websites

① Select **advanced settings** if you want to configure more options for indexing data from this connection. ✕

Connection ID * ①

IntranetSites12

Display name *

Other Sites

Connection icon *

Enhance the experience of connector results for users



Edit

Enter your own enterprise website URL or use the sample website with pre-filled data.

Website URL *

https://www.microsoft.com/microsoft-search

☐ Use sitemap to crawl ①

Select who can search this data source *

☒ Everyone

Everyone in your organization will see search results from this data source.

Manage Connector Results *

☒ Include Connector results in search

☐ Don't Include Connector results in Search

Notice *

☐ Notice: This connector uses Microsoft Graph API to access data from Microsoft

Publish

Advanced settings

Configuring a MS Graph Connector

Search & intelligence > Data sources > Add New 'Enterprise websites' Connector

- Name & ID**
- Data source settings
- Access permissions
- Advanced settings (Optional)
- Review & publish

Fill out some basic information about the connection you're creating.

Connection ID* ⓘ

TestContent

Name *

Test

Description

Test content

Display name *

Test content

Connection icon *

Enhance the experience of connector results for users



Edit

Experiences powered by this connection ⓘ

This connection will enhance your **Microsoft Search** experience.
With this, your organizations users will be able to search for indexed content from any Microsoft Search endpoint like Bing@Work, Sharepoint online, Union apps, etc.

Save and Proceed

Configuring a MS Graph Connector

Search & intelligence > Data sources > Add New 'Enterprise websites' Connector

☒ Name & ID

☒ **Data source settings**

☐ Access permissions

☐ Advanced settings (Optional)

☐ Review & publish

Enter the URL and authentication details for this enterprise connection.

URLs *

https://testcontent.sas.com

☒ Crawl only websites listed in the sitemap for this URL ⓘ

Dynamic site configuration

☐ Enable crawl for dynamic sites ⓘ

Choose crawl mode

☐ Cloud

☒ Agent

On-Premises Agents ⓘ

MSGraphAgentConnector01

Authentication type

Basic

Username *

Password *

Back

Save and Proceed

Test connection

Cancel

Back

Save and Proceed

Configuring a MS Graph Connector

Search & intelligence > Data sources > Add New 'Enterprise websites' Connector

- ✓ Name & ID
- ✓ Data source settings
- Access permissions**
- Advanced settings (Optional)
- Review & publish

Manage search permissions

On this screen you can select who can see the data source content in the search page.

- ☐ **Everyone**
Everyone in your organization will see search results from this data source.

Quick Publish

You may choose to publish this connector at this step. This will accept the Microsoft generated defaults for the advanced steps.

Dismiss

Back

Save and Proceed

Quick Publish

Configuring a MS Graph Connector

Search & intelligence > Data sources > Add New 'Enterprise websites' Connector

- ✓ Name & ID
- ✓ Data source settings
- ✓ Access permissions
- Advanced settings (Optional)**
- Meta tags settings**
- Custom property setup
- Add URLs to exclude
- Assign property labels
- Manage schema
- Refresh settings
- Review & publish

Meta tags settings

Select all meta tags found in sites

ⓘ There are no meta tags detected in root URL, click next to move forward.

Configuring a MS Graph Connector – Staged Rollout

Microsoft 365 admin center

Search



Bonnie Springer - ...

 Add

 Refresh

Name	Required actions	Staged Rollout
 InsideSAS	-	Add staging
 swv2 New	Create Result type	Staged Edit
 InsideSAS/News/Menus New	Create Result type	Staged Edit
 Menus2 New	Create Result type	Staged Edit
 Video New	-	-

Microsoft apps and services

Enable search and search-related features and experiences for these apps and services. Connections to these data sources do not count toward your index quota limits. [Learn more about data sources.](#)

Staged Rollout [limited audience deployment]

 End Staging

The feature lets you publish the connector to a limited set of users and groups within your organization. This is applicable only in search experience. please select the users and groups below.

 The connection will be available to limited audience selected below

Select users and user groups

Enter a name or email address

MG

Mike Gemma

×

AW

Amy Wall

×

BS

Bonnie Springer

×

KH

Kevin Henion

×

EA

Elizabeth Anthony

×

Save

Cancel



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Extending M365 Search: Search Verticals

- Search verticals are tabs on search result page that show results from select content sources
- Get a default set of search verticals: All, Files, Sites, People, News, Conversations
- Can customize verticals by disabling existing and creating more
- Search verticals are managed in Customizations

Extending M365 Search: Search Verticals

Search & intelligence

Overview Insights Answers Data sources **Customizations** Configurations

Result types Verticals Schema Relevance tuning	+ Add ↺ Refresh						
	Name		Last modified	Last modified by	Status	Type	Content source
	☐ All	:	August 16, 2024 at 2:37 PM	System	Enabled	Default	All
	☐ Files	:	September 10, 2022 at 4:04 PM	Bonnie Springer	Enabled	Default	SharePointOneDriveBusiness
	☐ Sites	:		System	Enabled	Default	SharePoint
	☐ People	:		System	Enabled	Default	SharePoint
	☐ Knowledge	:	June 18, 2024 at 12:37 PM	kevin henion	Enabled	Custom	ServiceNow Knowledge
	☐ Request Forms	:	June 18, 2024 at 12:37 PM	kevin henion	Enabled	Custom	ServiceNow Requests
	☐ Training	:	June 18, 2024 at 12:37 PM	kevin henion	Enabled	Custom	Saba
	☐ InsideSAS	:	August 15, 2024 at 1:13 PM	Bonnie Springer	Enabled	Custom	InsideSAS

Extending M365 Search: Search Verticals

Search & intelligence > Verticals > **New vertical**

- ☒ Vertical name
- ☒ **Content source**
- ☐ Query
- ☐ Filters
- ☐ Review

☐ **SharePoint**
You can choose from all available data in SharePoint.

☒ **Connectors** ▼
Use your connected data sources
Available: 5 | Selected: 0

i A connection can only be used in one vertical at a time. If you want to use an already used connection for this vertical, first deselect the connection from the vertical where it is being used.

- ☐ SAS External Site Test
- ☐ Saba
- ☐ Intranet Sites - Staging environment
- ☐ ServiceNow Knowledge
- ☐ ServiceNow Requests
- ☐ InsideSAS
- ☐ swrv2
- ☐ InsideSAS/News/Menus

Extending M365 Search: Search Verticals

← atrium cafe menu

AllFilesSitesPeopleKnowledgeRequest FormsTrainingInsideSAS

FeedbackSearch tips

All sourcesFile typeLast modified

Sort by Relevance (default)

Cafe, menus (Cary)

https://www.sas.com/cafe/menus/

Check out the menus for the cafes on SAS Campus in Cary HQ.

Published by SAS

Atrium Daily Menu

SharePoint • Data Engineering (previously SAS Programming Clients) > ... > Lunch

Grant Miller modified on October 18, 2022

...Atrium Daily Menu

www.sas.com/cafe/menus/DailyMenus/Atrium.php 1/4 SWW | Foo...

Food Services

https://sasoffice365.sharepoint.com/sites/FoodServices

...Café Happenings Conversations Lunch Menu | 1130am - 115pm Lunch Menu | 1130am - 115pm... Menu | 730am - 900am Coffee Shop | 800am - 300pm Lunch Menu | 1130am -...

Extending M365 Search: Search Verticals

← atrium cafe menu

AllFilesSitesPeopleKnowledgeRequest FormsTrainingInsideSAS

All sourcesFile typeLast modified

SharePoint - OneDrive

Power BI

Viva Learning

InsideSAS

InsideSAS/News/Menus

Intranet Sites - Staging

Menus2

us/

SAS Campus in Cary HQ.

... previously SAS Programming Clients) > ... > Lunch

ber 18, 2022

yMenus/Atrium.php 1/4 SWW | Foo...

Food Services

https://sasoffice365.sharepoint.com/sites/FoodServices

...Café Happenings Conversations Lunch Menu | 1130am - 115pm Lunch Menu | 1130am - 115pm... Menu | 730am - 900am Coffee Shop | 800am - 300pm Lunch Menu | 1130am -...

Extending M365 Search: Search Verticals

← atrium cafe menu

AllFilesSitesPeopleKnowledgeRequest FormsTrainingInsideSAS

InsideSAS/News/Menus

File type

Last modified

Atrium

https://www2.sas.com/cafe/menus/dailymenus/atrium.php

Modified 20 hours ago

<ddd/> Wednesday Thursday Friday R-**Atrium** Weekly Today Monday Tuesday
Wednesday Thursday <ddd/> Charges Hours Comments & Suggestions **Atrium Caf...**

AtriumWeekly

https://www2.sas.com/cafe/menus/dailymenus/atriumweekly.php

Modified 20 hours ago

Menus for the coming week are posted after 2:00 pm each Friday. **Menus** may
change daily <ddd/> on food availability. Final **menus** are posted each day by 10:0...

T Overlook Cafe Menu for Friday, August 23, 2024

https://www2.sas.com/cafe/menus/dailymenus/overlookwebfri20240823.php

Modified 20 hours ago

<ddd/> Wednesday Thursday Friday R-**Atrium** Weekly Today Monday Tuesday
Wednesday Thursday <ddd/> Hours Comments & Suggestions Overlook **Cafe** (Bld...

Extending M365 Search: Result Types

- Microsoft provides a default search result layout for different types of content in search results
- Can customize search result layouts for some content (files and people content can't be modified for search results)
- Title label is most important and should always have a property assigned to this label
- See [Manage search result layouts | Microsoft Learn](#) for more info

Extending M365 Search: Result Types

Home > Search & intelligence > Result types

Search & intelligence

Overview Insights Answers Data sources Customizations Configurations

Result types

Verticals

Schema

Relevance tuning

Result types let you create your own search result layouts which are seen by your users on the search result page. [Learn more](#)

+ Add

↺ Refresh

	Name		Priority	Last modified	Last modified by	Content source
☐	InsideSAS	:	1	August 11, 2024 at 1:11 PM	kevin henion	InsideSAS
☐	ServiceNow Knowledge	:	2	August 11, 2024 at 1:11 PM	kevin henion	ServiceNowKB6
☐	ServiceNow Requests	:	3	August 15, 2024 at 1:13 PM	kevin henion	ServiceNowCatalog1
☐	Saba	:	4	August 11, 2024 at 1:11 PM	mike gemma	Saba
☐	InsideSAS Staging	:	5	August 11, 2024 at 1:11 PM	Bonnie Springer	Intranet Sites - Staging environment
☐	InsideSAS Keheni	:	6	August 29, 2024 at 4:44 PM	kevin henion	InsideSAS Keheni



Improving Search Results

- Add descriptions for connectors to [improve Copilot discoverability](#)
ServiceNow Tickets: This connection is used to manage and track customer requests and IT incidents. Businesses use this tool to enhance their service delivery and ensure issues are resolved on time.
- Add bookmarks for key sites
- Consider implementing M365 retention policies to trim stale, obsolete data
- Can exclude SP doc libraries/sites from search index if needed
- Consider archiving inactive SharePoint sites
- Review search usage reports to see what users are searching for
- Relevance tuning options in search admin center

Relevance Tuning

Home > Search & intelligence > Relevance tuning > Connectors

Search & intelligence

Overview Insights Answers Data sources Customizations Configurations

Result types

Verticals

Schema

Relevance tuning

Relevance tuning

Select a connection where you want to tune the search results by ranking the importance of different connection properties.

 Refresh  Configure rank hints

	Connections	Last modified at	Crawl status
☐	IntranetSites5	-	Ready
☒	Saba1	5/23/2024, 9:48 AM	Ready
☐	IntranetSites8	-	Ready

Relevance Tuning

Manage relevance tuning for Saba1

Tune the search results for this connection by ranking the importance of each source property. Some properties are not searchable or have semantic labels and therefore can't be ranked.

Source properties	Type	Importance
CourseID	String	Default
ClassID	String	Default
CourseDescription	String	Very high
CourseKeywords	StringCollec...	Medium
ClassInstructors	String	Default
CourseTitle	String	
CourseVersion	String	
CourseAvailableFrom	DateTime	

Search Usage Reports/Analytics

- Search usage reports include graphs and tables generated from searches that are executed from the SharePoint Start Page, SharePoint Sites, Microsoft 365 app (formerly known as the Office app) at office.com, and Bing.
- Data from the last 28 days or for the previous year.
- Some reports can be filtered by country, occupation, department, or division. To protect privacy, if any filters show data for five or less individuals, those results won't be included in the search usage reports.
- Search usage reports found in Search & Intelligence -> Insights

Search Usage Reports/Analytics

Home > Search & intelligence > Summary

Search & intelligence

Overview **Insights** Answers Data sources Customizations Configurations

Summary

User analytics

Query analytics

Connection analytics

Answer analytics

Feedback

Microsoft Search usage summary

This search usage report shows how people in your organization are using Microsoft Search through the applications in Microsoft 365. Report data becomes available within 48 hours. [Learn more about search usage reports for Microsoft Search](#)

Filters: Search application: **All** Date range: **Last 28 days (07/27/2024 - 08/23/2024)**  Reset all

 New usage analytic reports available only from 07/27/2024. To access your old reports, click the toggle button on top of this page.

User analytics

This section shows a snapshot of search adoption in your organization. Compare user engagement and adoption across the search applications and use the user analytics detail page to identify adoption gaps. [Learn more about user analytics](#)

Key metrics



Lessons Learned and Gotchas with M365 Search

- Can't edit most connector properties after it has been created – if you need to update some of the configuration properties, you'll have to recreate the connector, good practice to document configuration for the connector during the creation process
- Managing user expectations: people expect an experience like Google or Bing
- M365 search favors M365 content because of the rich metadata
- Limited control over relevance tuning
- Open search support cases under SharePoint (no category for search)
- No reporting on health of search service
- No access to search logs which can make troubleshooting challenging

Lessons Learned and Gotchas (cont.)

- MS search doesn't search across tenants or show results from content that's shared by other organizations
- MS Groups haven't worked in the staged rollout connector configuration
- Formatting/presentation in the mobile client is a bit different, external search results show up at the bottom in a separate area
- Can't change the order of verticals

Additional Resources

- [Overview of Microsoft Search](#) (Microsoft documentation)
- [Microsoft Graph connectors gallery](#)
- [The Benefits and Limitations of Modern Microsoft Search \(Agnes Molnar\)](#)
- [Microsoft Search for US government environments](#)
- [Enhancing Microsoft Copilot Discovery with Graph Connector Content | Microsoft Learn](#)
- [Semantic Index for Copilot](#)
- [Create and Configure Retention Policies](#)

Q&A

Submit session feedback



