Video Transcript: Microsoft SharePoint Unstructured (Documents) Demo

[Link to video]

Hi, everyone. This is Vasanthi, and I'm a senior product Manager on the Data 360 Connectivity Team. Today, I'll be walking you through the end-to-end setup of the Microsoft SharePoint Unstructured Documents Connector. This is a critical connector for enterprise customers as SharePoint is where a large portion of organizational knowledge lives. By bringing these unstructured documents into Data 360, you can ground your AI agents with the enterprise context and unlock more accurate, relevant, AI-driven experiences. The foundation for all of this is the SharePoint connector. Uh, this is the high-level, uh, setup flow. You can think of this as a three-step process. The first one is configuration in the Azure portal, the second one is connection setup in Data 360, and the third step is creating the unstructured data lake object in Data 360.

As I said, the first step is in the Azure portal. Um, this is what, uh, your Azure portal homepage looks i- looks like. So to create a connection, first, uh, we need to register a connected app. So from the search bar, look for app registrations and click on that. So if you have to create a new app, this is where you would start. So you click on New registration, you give it a name, and for the supported account types, choose Accounts in this organizational directory only, and then Register. I already have one that I created, so I'll show that to you guys.

The one I created is called Data Cloud. Um, this is how it looks like. You need to make a note of client ID, tenant ID, because you'll need these both when creating the connection between Data 360 and SharePoint. Um, this is how it looks once the app is registered. Now we need to go into Certificates & Secrets and click on a new client secret. So give it a name, give it an expiry date, and make a note of the client secret value, not the client secret ID. The si- the client secret value can only be viewed once just right after the creation. If you miss it, you will need to create a new secret. When confirming the connection later, you must use the client secret value, not the client secret ID. So make a note of the client secret value. I just created two client secrets because I forgot to make a note of the first value.

And then the next step is to add permissions. Now let's add permissions to the app. So you need to go to API permissions, click on Add permission, and then Microsoft Graph. Click on Application permissions and type in files.read.all. Uh, as you can see, I already have it added, so it's- it shows as enabled, and similarly, sites.read.all. So these are the two permissions that are needed to make the connection between Data 360 and Microsoft SharePoint. Once these are added, you need to grant admin consent for MSFT. So th- it's this option right here. Um, because I already have granted access, it's just telling me, um, you know, to do either replace or remove. And once the admin consent is done, you will see that- you'll see this green tick mark, "Granted for Microsoft" under Status. That means, um, all the required permissions have been added and we did grant admin content for Microsoft. You may see an additional SharePoint permission here on my screen. For example, sites.read.all under SharePoint. That permission is used for site pages and assets and is not required for the documents connector, so you can ignore the last one. At this point, step one in Azure portal is complete, and now we are ready to create the connection.

So this is my Data 360 homepage. From here, I go to Data Cloud Setup. Other connectors, click on New connector, look for Microsoft SharePoint Unstructured Documents Connector, click Next, give it a name, and then client ID is what we got from here. So this is my client ID. This is what I'll be entering here. And then, uh, client secret, I've already noted it. And then, um, this is the token endpoint. So for token endpoint, we need the tenant ID. S- so the format for token endpoint is https://login.microsoftonline.com and then we give the tenant ID /OAuth2/v2.0/token. And for, um, client secret, I just want to make sure I'm using the right one. I think I'm using the wrong one. It's this one. And then, as you can see, if I tested the connection, it came out as correct. I already have a connection established. I used the exact same credentials, client ID, client secret, token endpoint. And, um, as you can see, my connection is active. So that completes the step two. Our connection is now successfully established.

The next step is creating the unstructured data lake object. So for that, we go back to the home screen, uh, click on Data Lake Objects, New, From External Files, choose the Microsoft SharePoint Unstructured Documents Connector, and then, uh, select the connection we just established, and now you'll be prompted to enter the site ID. To retrieve the site ID, we need to go back to the SharePoint site, and that's what we'll cover next. So this is basically my SharePoint site. So if I click on the homepage, this is how the URL looks like. So copy this URL and then append API, uh, site, append this, this last piece, API Site Select ID portion, and paste it into a browser. Uh, this is how the response looks like. The portion that comes out after edm.guide, that's your site ID. So this is my site ID.

So I go back to my Data 360 homepage, click Next, and then I need to give UDLO, which is Unstructured Data Lake Object, a name. Um, so I will give it SharePoint Documents Demo, give the name of your choice. Similarly, the unstructured data lake object will be mapped to an unstructured data model object, so give that a name as well. And then here there is an option to enable semantic search with system defaults. This basically creates a search index behind the scenes, uh, without having to do it manually, and then click Save. I've already created a data

lake objects. As you can see, SharePoint Document Demo, it is active, and it also created a data stream, um, behind the scenes. You don't have to manually create data streams. And also, as you can see, uh, it- it processed two records. And in my site, I have just two documents. So basically an entry for each document in your SharePoint documents library is what- what Data360 will process and will show as records processed here. As you can see, my DLO is active, the data stream shows two records, and, um, those are the same two documents that we saw in my documents library. The connector was able to fetch and ingest. So this conforms that the SharePoint unstructured document connector is working as expected and successfully pulling documents from SharePoint into Data 360.

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