Building an AI Agent using Microsoft SharePoint

## 1.) Define the purpose of the agent

- ***Who is it for:***
  - Identify your target audience, such as Human Resources (HR), Information Technology (IT), Maintenance Workers (MW), etc.

- ***What is the goal:***
  - Enable automation, provide internal support, and assist users in retrieving or summarizing SharePoint content.

- ***What should it do:***
  - Summarize documents
  - Perform document lookups
  - Provide accurate and informative responses to user prompts

2.) Tools and Technologies

- **Microsoft SharePoint Online**
  - Secure place to store, organize, share, and access information from any device.
  - This platform will be used as the knowledge base of the AI agent.
- **Copilot Studio integration (Currently Not Available)**
 - Integration with SharePoint agent for extended functionality once available

3.) Build your Chatbot

- **Step 1: Create a SharePoint Document Library**
  - Create a dedicated SharePoint library for the chatbot

- **Step 2: Upload Content Files**
  - Upload relevant files (.pdf, .docx, .xlsx) for the chatbot to use as a knowledge base
  - This could include FAQs, policy documents, user manuals, or training materials.

- **Step 3: Create and configure your SharePoint Copilot Agent**
  - On your SharePoint Library, click "Create an agent" on the top bar of the page
  - You are now provided an agent on the right-hand side. Click the ellipses and click edit to configure your agent.
  - In the overview tab, provide a name for your agent and a brief description of the agent's objective.
  - In the sources tab, provide the SharePoint library that you made in step 1
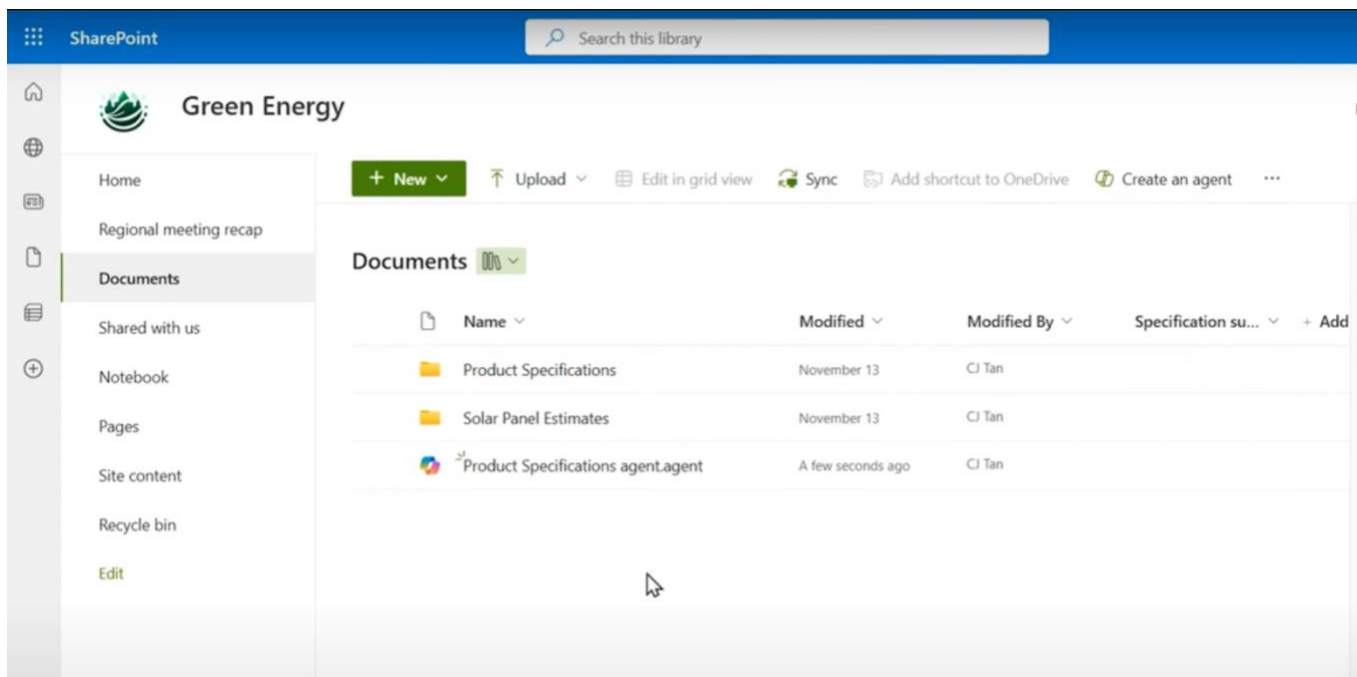
- **Step 4: Instruct the SharePoint Agent**
  - While in the "Edit agent" page, go to the behavior tab to tell the agent exactly how you want it to behave.
  - You can create a welcome message to help users understand the use of your agent.
  - Include three starter prompts to help users get started with the agent
  - Define the agent's role, tone, and limitations
  - Be as descriptive as possible
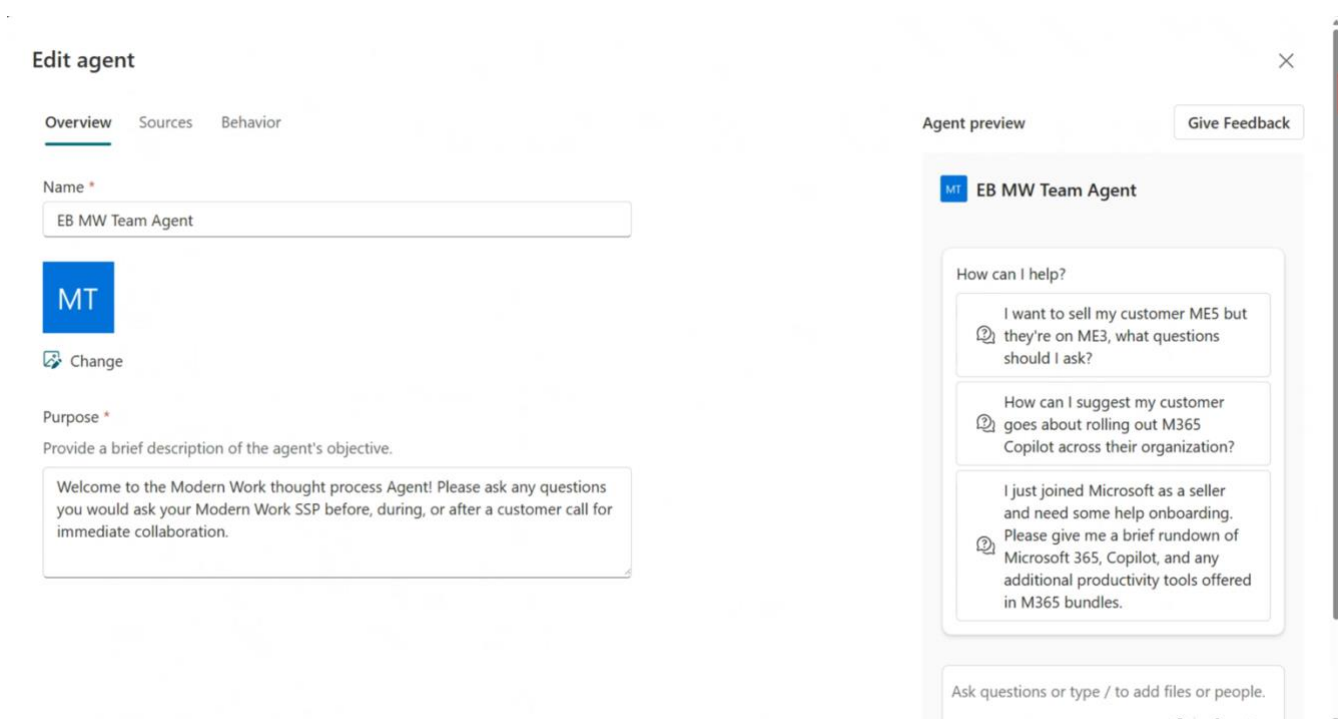
- **Step 5: Test your agent**
  - Once your agent is created and connected to the correct SharePoint library, you can test the agent on the Agent Preview Panel (Right side of the webpage) .
  - Test your start prompts that you created and be sure that it is pulling from the sources from the SharePoint library.

  If answers seem incomplete or off-topic:

  - Reword or expand your agent's purpose statement in the Overview tab.
  - Double-check that all needed documents are in the linked SharePoint library.
  - Continue refining until the chatbot responds with clear, relevant information.

- **Step 6: Approve and share your agent in Microsoft Teams**

  - **Navigate to the Agent Preview Panel**
  - Navigate to the preview panel of your SharePoint Copilot agent where you can test or manage your agent.

  - **Approve your Agent**
  - click the ellipses and click "set as approved".
  - This action will ensure your agent is officially available for other users to access.

  - **Share your agent for Microsoft Teams**
  - Once your agent is approved, you can go back to the ellipses and click "Copy link for Teams."
  - This copies a direct link to your agent, which can then be shared and used in Microsoft Teams.

Frequently Asked Questions (FAQ)

- **"*What kind of questions can I ask the agent?*"**
- You can ask for document summaries, policy details, or lookup specific topics within your document library.
- **"*Why isn't the agent providing the correct answer?*"**
- Ensure that the agent is connected to the correct SharePoint library and the right documents are being uploaded.
- **"*How do I get the agent to respond differently?*"**
- Go to the Agent's behavior settings and ensure the agent's instructions are clear and specific to the responses you'd like.