

- 27 -

Manage agents
in SharePoint



MONTHLY MASTERY

FEATURE-A-DAY

with Copilot Studio



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Katerina Chernevskaya



SharePoint agent Manage

Managing agents in SharePoint involves **granting** permissions, **approving** agents to operate at the site level, and **assigning** access to users who do not have permissions to a particular library.

By effectively managing these permissions, you ensure a secure and organized environment where agents function efficiently within their designated scope.



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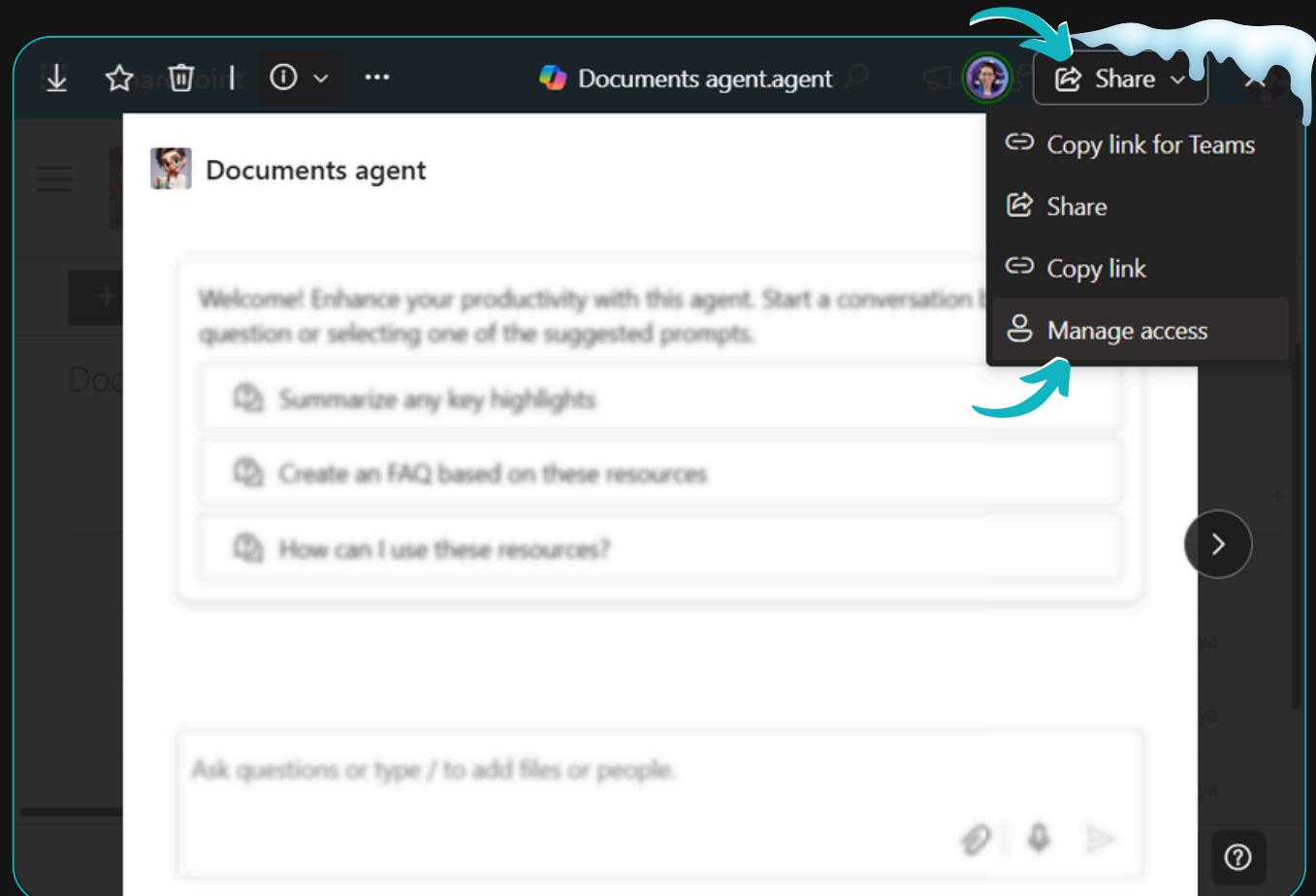


SharePoint agent

Open Manage access

Go to the page where your agent is **hosted** and open it.

Open **Share** dropdown and select **Manage access**.



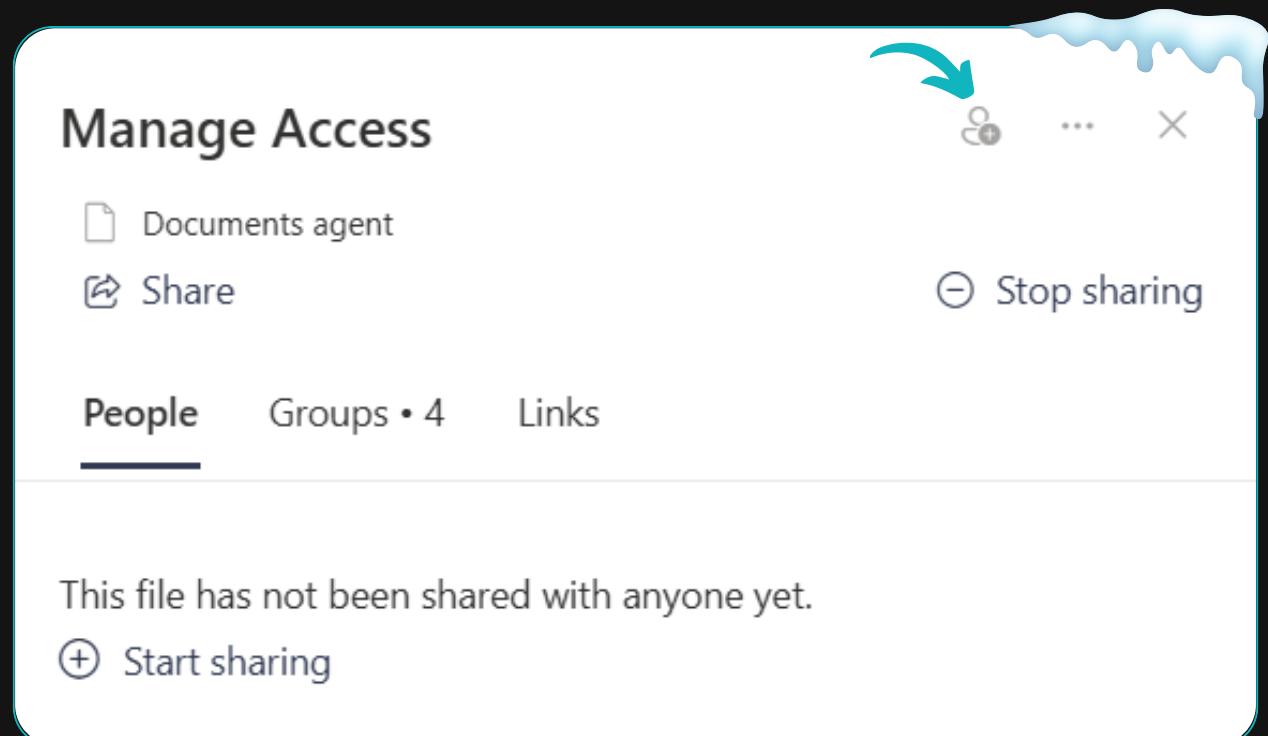
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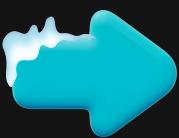
SharePoint agent Grant access

In the Manage Access pop-up window,
select the **Grant Access** icon.

This method enables you to grant access to users
who do not have permissions for the entire SharePoint site.



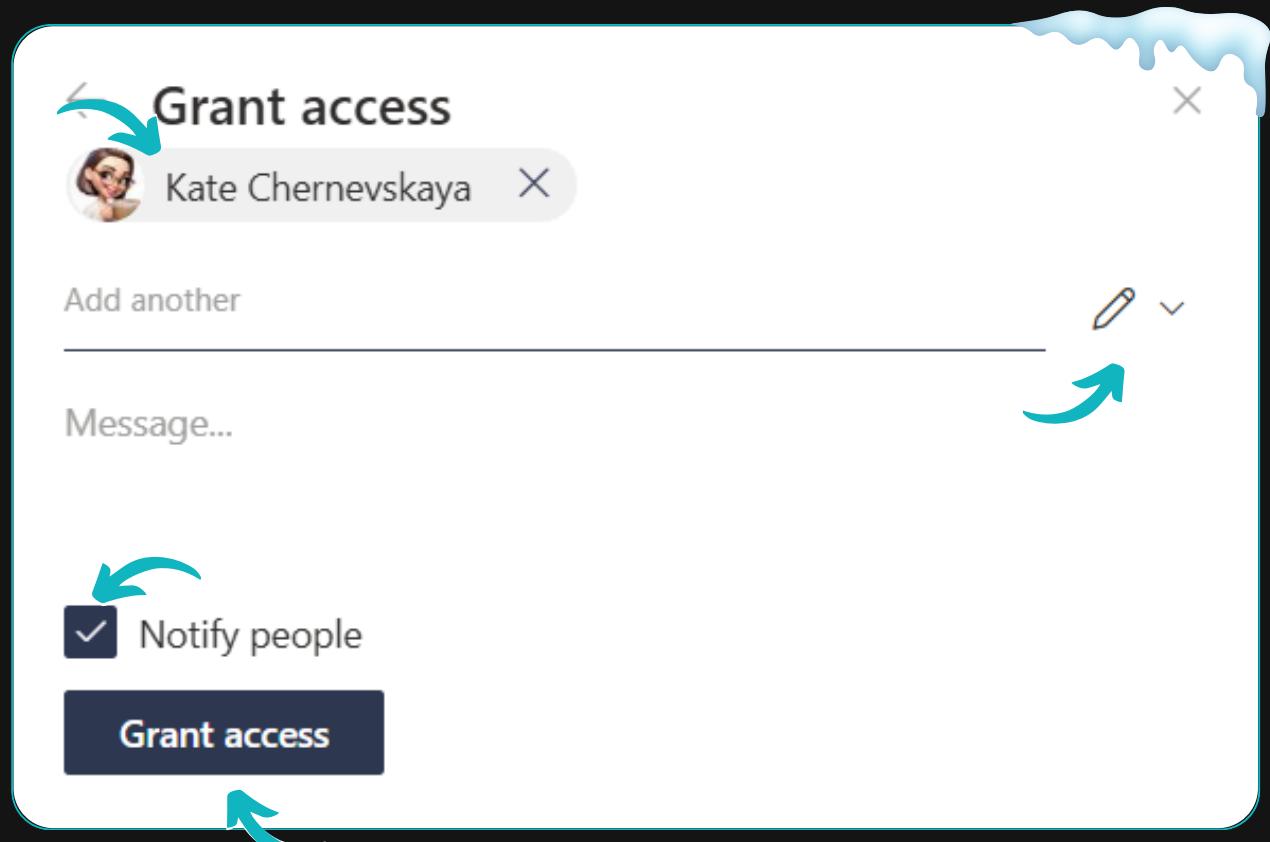
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SharePoint agent

Grant access

Select the **members** you want to grant access to and specify the **access type** (either Can Edit or Can View). Decide whether to send a **notification** to the added members. Once all settings are configured, click the **Grant access** button.



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SharePoint agent

Grant access

The image shows two side-by-side screenshots of a SharePoint document library interface. Both screenshots feature a dark theme with snowflake decorations at the top.

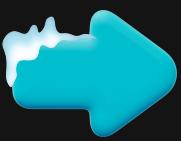
Screenshot 1: A user asks, "What is the 'Time Stretch' magic used for, and when can it be activated?" The AI response is: "I couldn't find specific information about the 'Time Stretch' magic in the available documents. However, if you provide more context or details about where you encountered this term, I might be able to assist you better. Alternatively, you could check any relevant manuals, guides, or resources that might contain this information. If you have any other questions or need assistance with something else, feel free to ask!" Below the response, there's a "Copy" button and a note: "AI-generated content may be incorrect".

Screenshot 2: The same user asks the same question again. The AI response is: "The 'Time Stretch' magic is used in emergency situations to handle last-minute gift additions. This magic ensures that even unexpected requests can be accommodated without disrupting the overall schedule ①." Below the response, there's a "Copy" button, a note: "AI-generated content may be incorrect", and a "Reference" section with a link to "Guidelines for Using Christmas Magic in Operations".

Note: A large callout bubble on the left side of the image contains handwritten-style text: "Ensure that users are granted access to the source (e.g., the Document Library) as well. Without this access, the agent will not be able to retrieve the information needed to generate responses." A small reindeer icon is positioned next to the end of the callout bubble.



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SharePoint agent

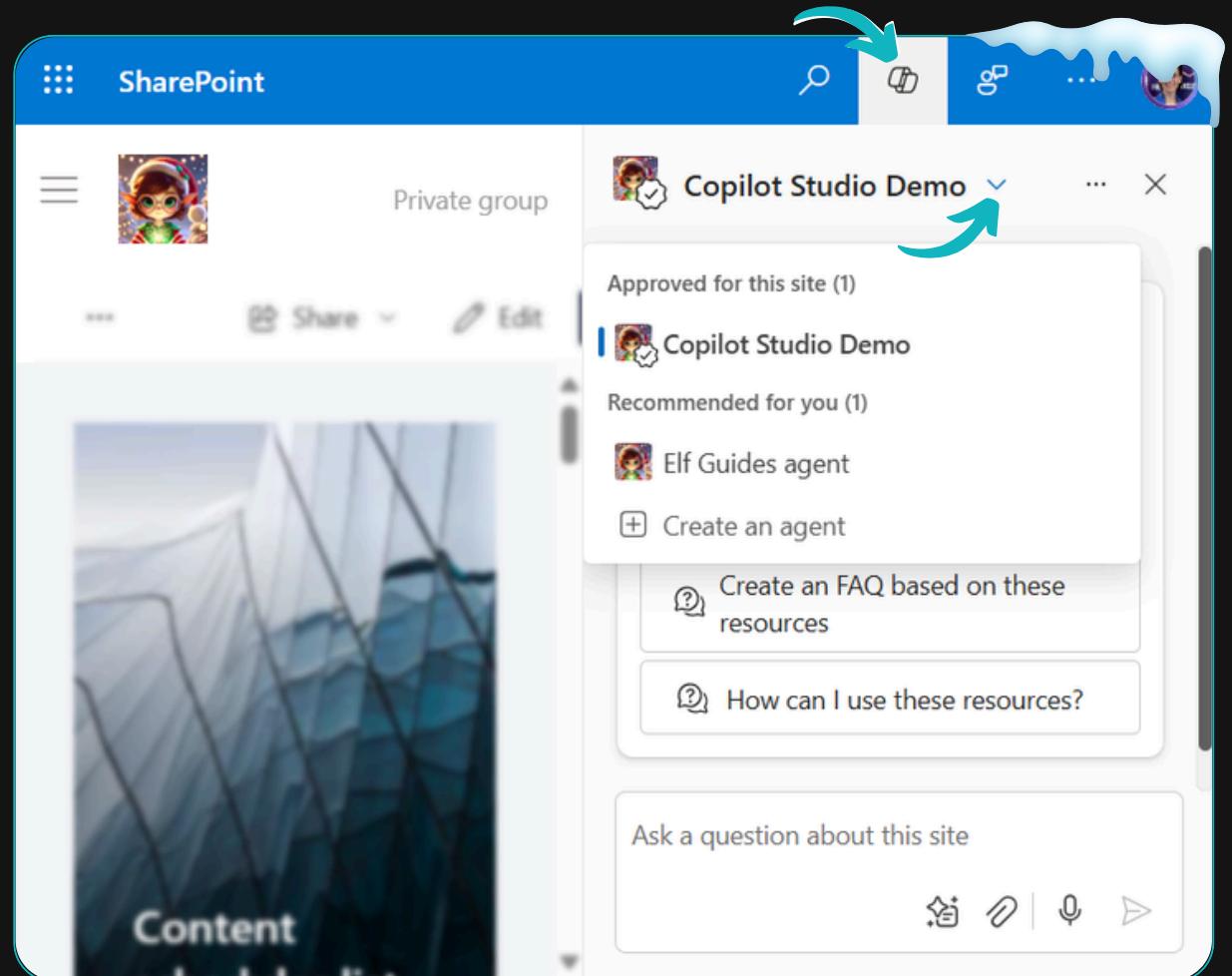
Approve agent

Open the SharePoint site and select **Copilot** from the top menu.

The **pre-approved** Copilot for the site will open automatically.

Users can also view **recommended** Copilots tailored to their needs.

Follow the steps below to **approve your own agent** for the site.



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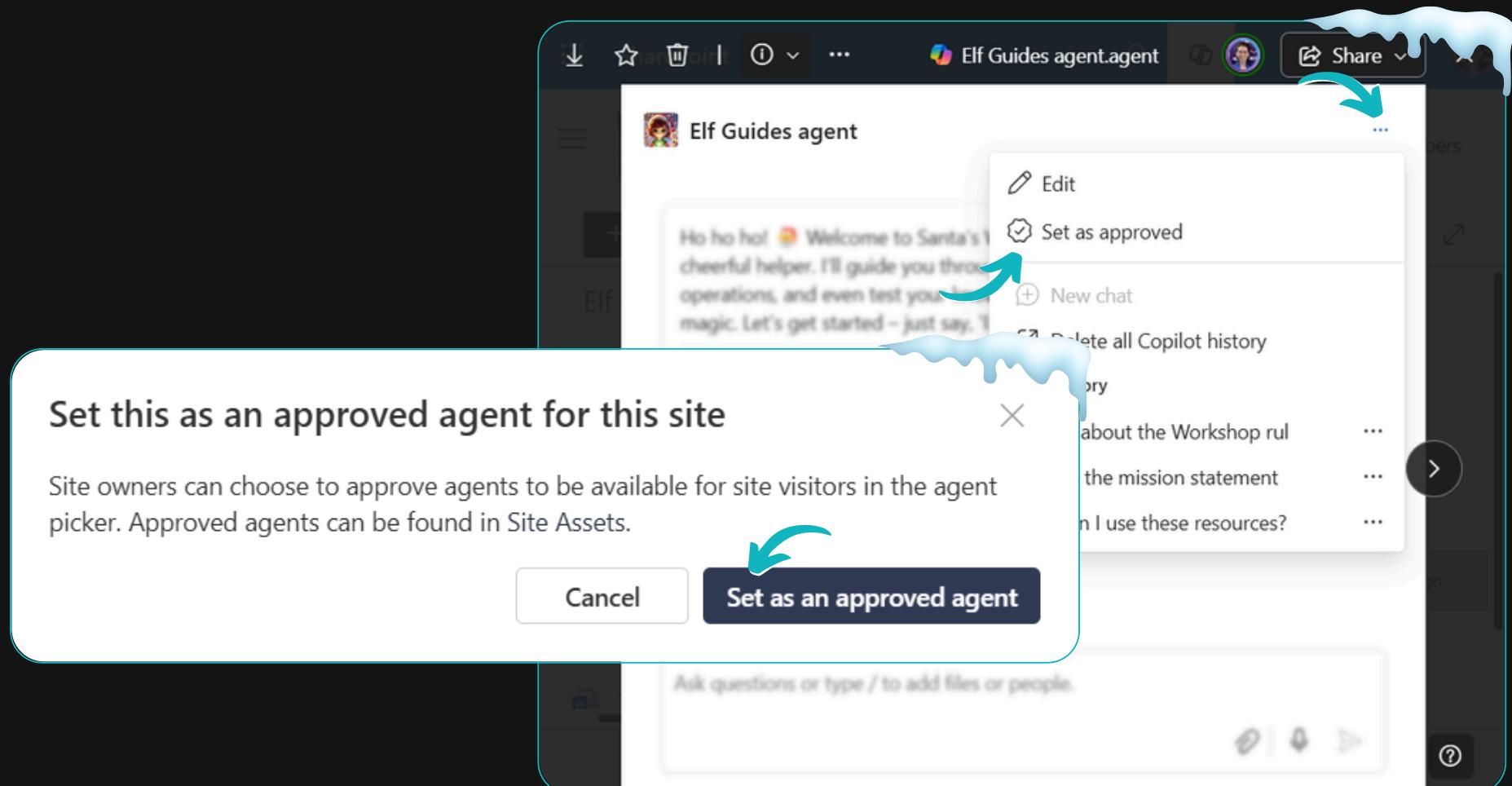


SharePoint agent

Approve agent

Open the **agent** you wish to approve, click the **three dots**, and select **Set as approved**.

In the confirmation pop-up, click **Set as an approved agent** to finalize your selection.



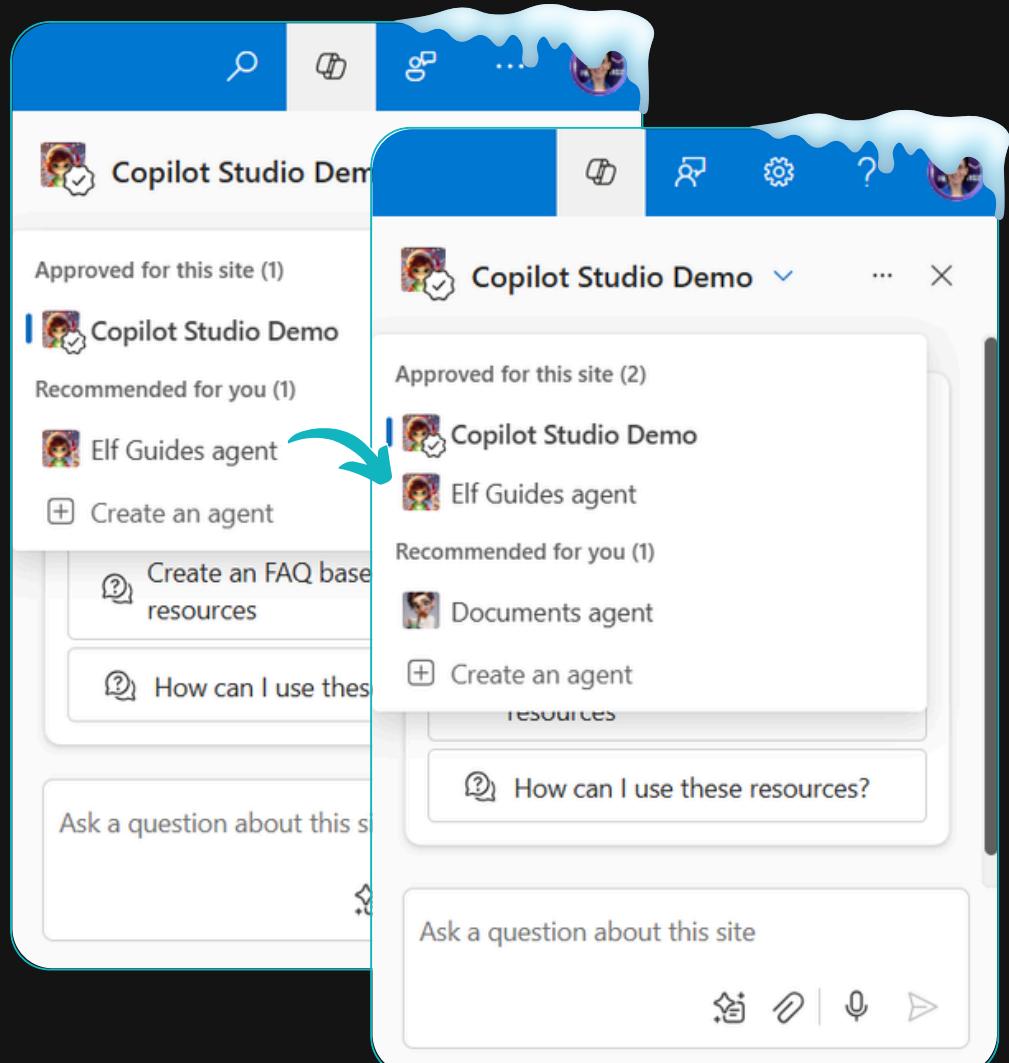
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SharePoint agent

Approve agent

Approved agents are **always accessible** from the agent picker for site visitors and can be easily **distinguished** from user-recommended agents.



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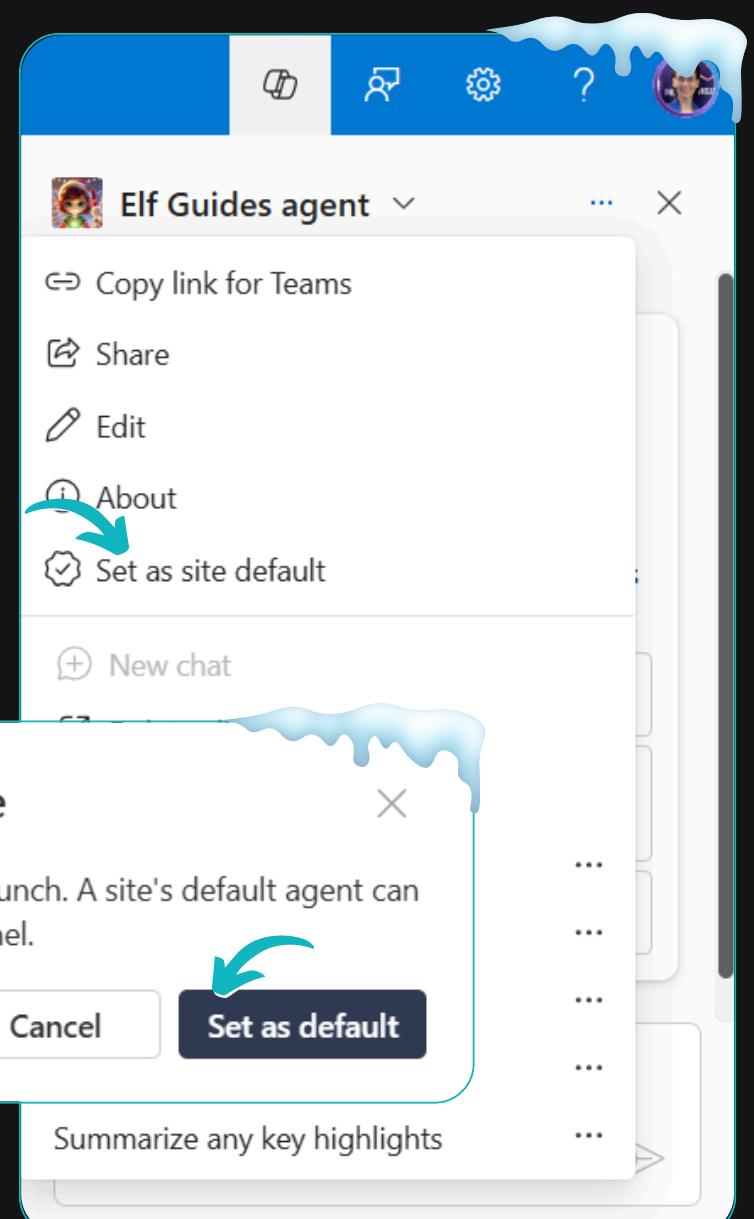


SharePoint agent

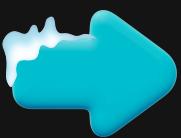
Set as default

You can set your approved custom agent as the **default**, so it opens automatically instead of the prebuilt one.

To do this, open your approved agent, click the **three dots menu**, and select **Set as site default**. Confirm your selection in the pop-up window.



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SharePoint agent

Why manage agents?

Secure collaboration

Proper permission management ensures that only authorized users have access to specific libraries and tools.

Enhanced productivity

Approving agents at the site level streamlines operations and reduces delays.

Organized environment

Clear permission structures prevent unauthorized access and duplication.

Compliance assurance

Regular permission reviews help maintain alignment with organizational policies.



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Today's Task: Manage your SharePoint agent



1. Share your agent with colleagues

Follow the instructions to share the agent you've created with someone who doesn't have access to the SharePoint library it is based on.

2. Approve your agent

Make your agent approved for the site.

3. Set your agent as default

Configure your agent as default for the SharePoint site.



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