

- 25 -

Power of
SharePoint agents



MONTHLY MASTERY

FEATURE-A-DAY

with Copilot Studio



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Katerina Chernevskaya



SharePoint agent

What is it?

A SharePoint agent is an AI-driven assistant **embedded** in your SharePoint environment.

It is designed to:

- **Answer** user queries based on documents stored in SharePoint libraries.
- **Automate** repetitive document-related tasks.
- **Improve search** efficiency with AI-generated recommendations.
- Enable seamless **collaboration** by retrieving and summarizing document content.



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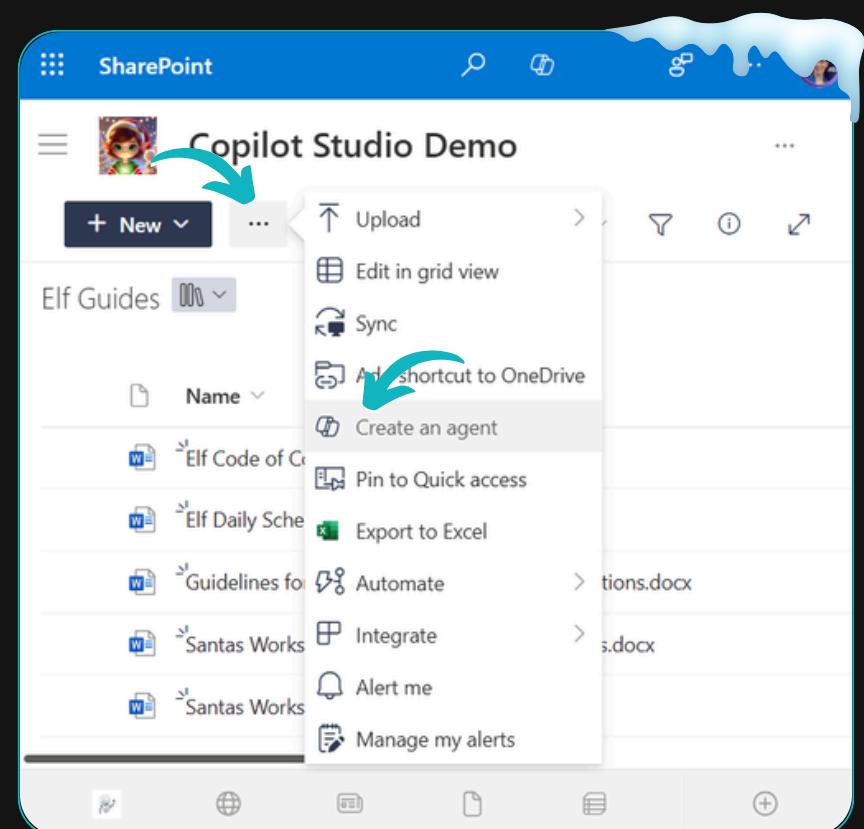


SharePoint agent

Create in document library

Open your **SharePoint site** and navigate to the **Document library** where all required for agent documents are located.

In the top menu select **Create an agent**.



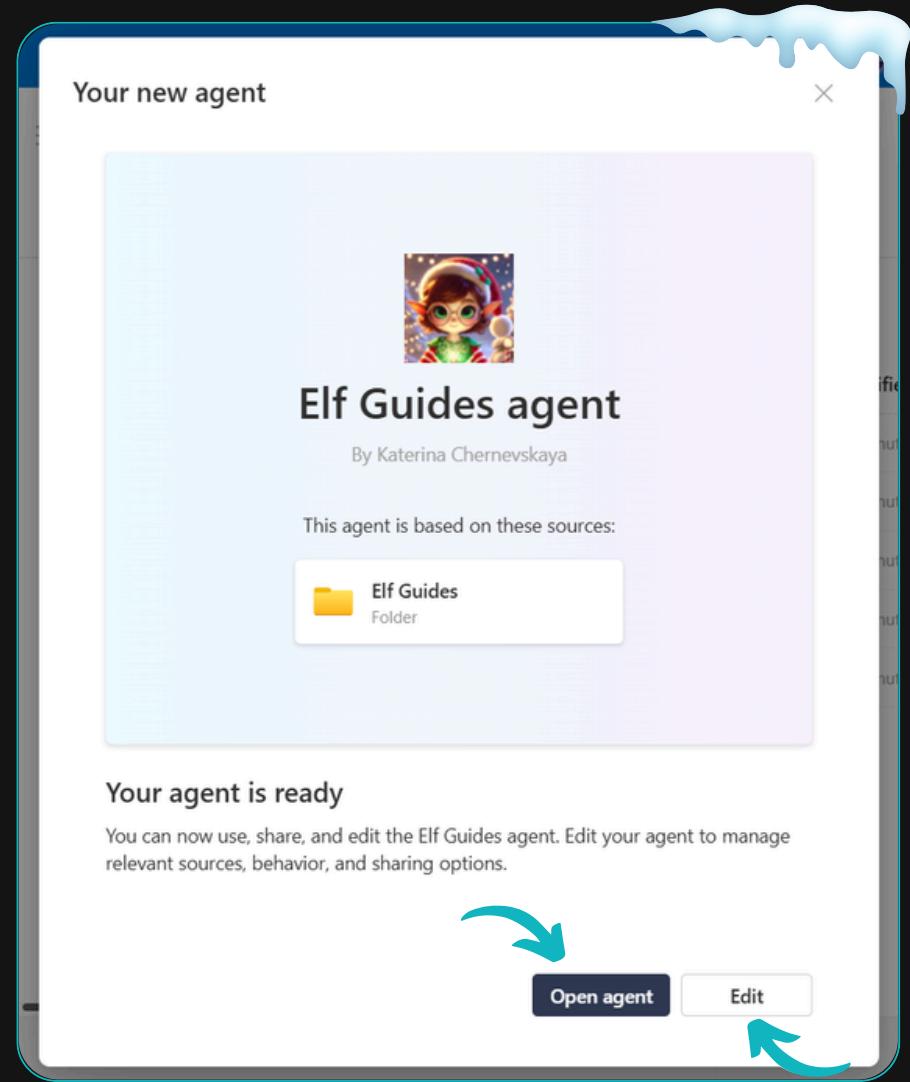
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SharePoint agent

Create in document library

The new agent will be created within seconds. The SharePoint site icon will automatically be used as the agent's icon. You can choose to either [Open agent](#) to test it or [Edit](#) to customize it further.



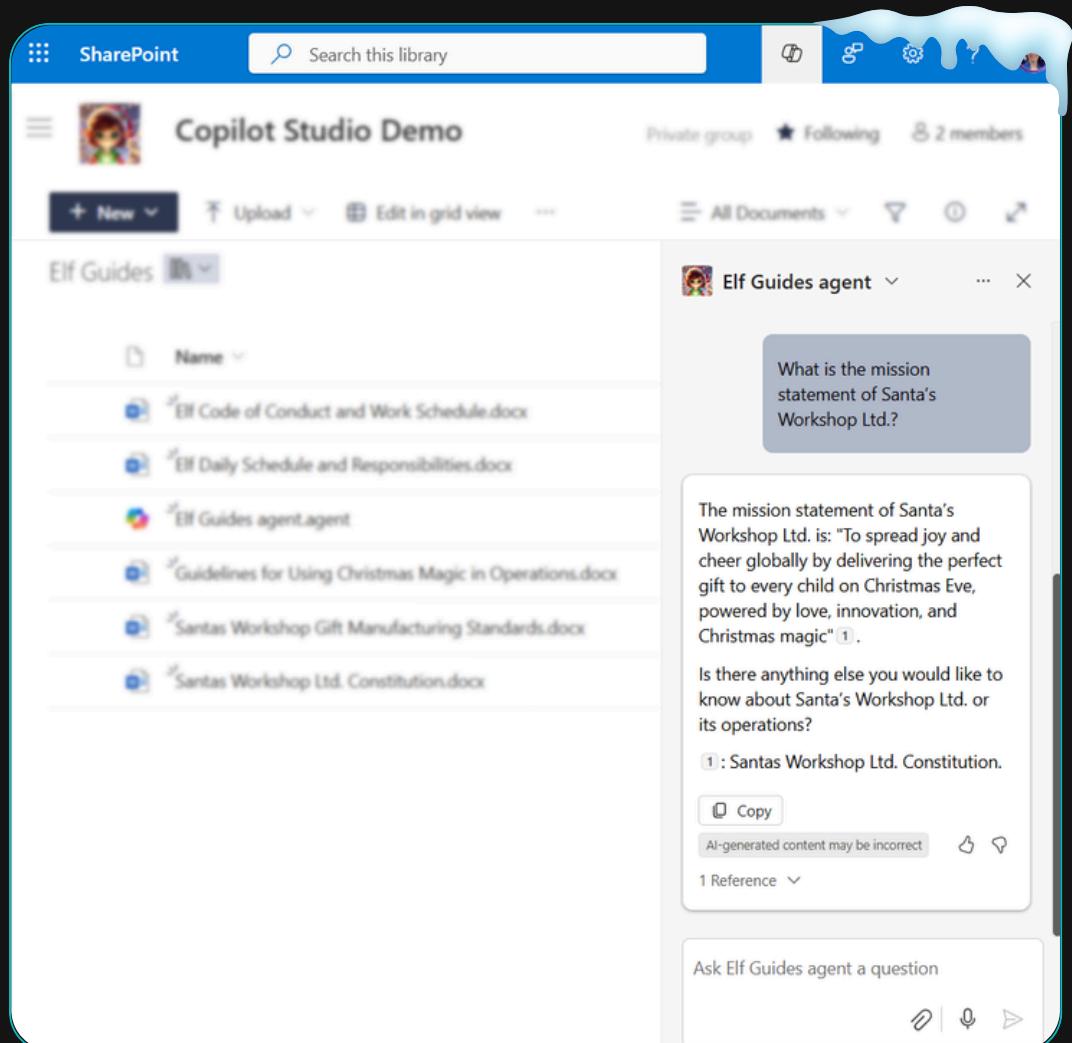
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SharePoint agent

First test

When you open the agent, **test** it by asking questions based on the information contained in the connected documents. The agent will respond with an answer and include a link to the reference document.



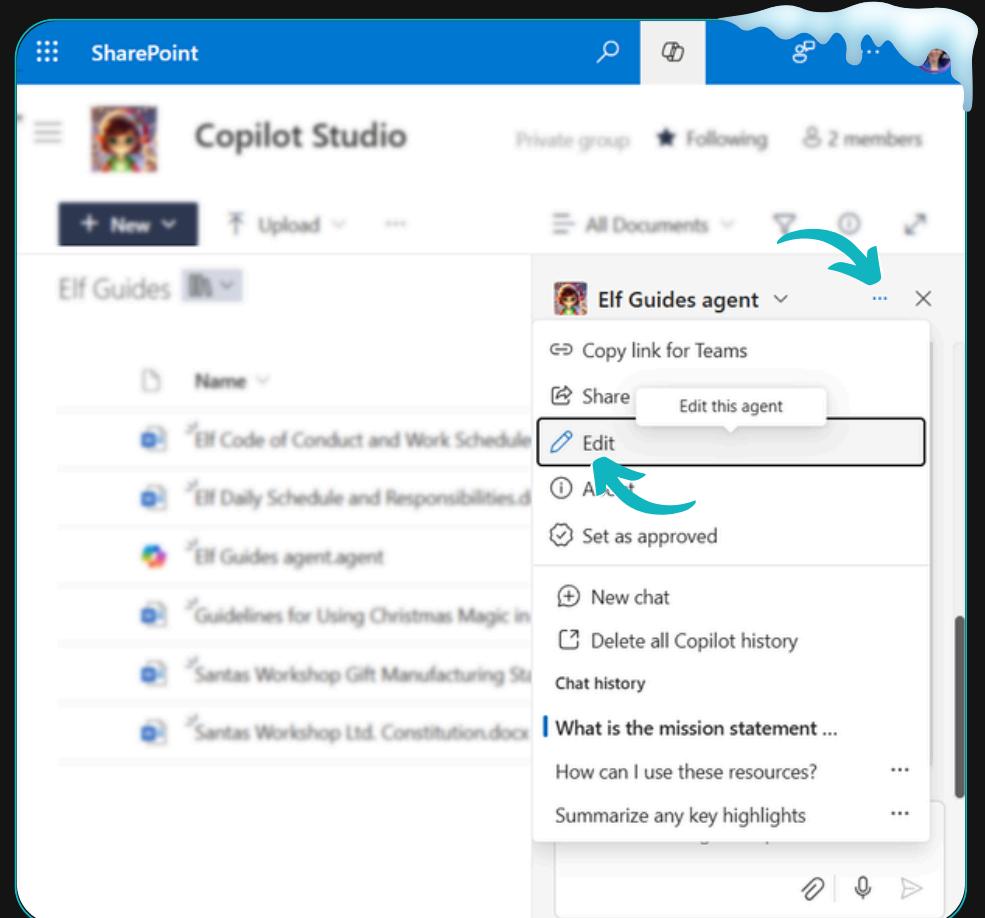
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SharePoint agent

Customize

To customize the agent, open **three dots menu** and select **Edit**.

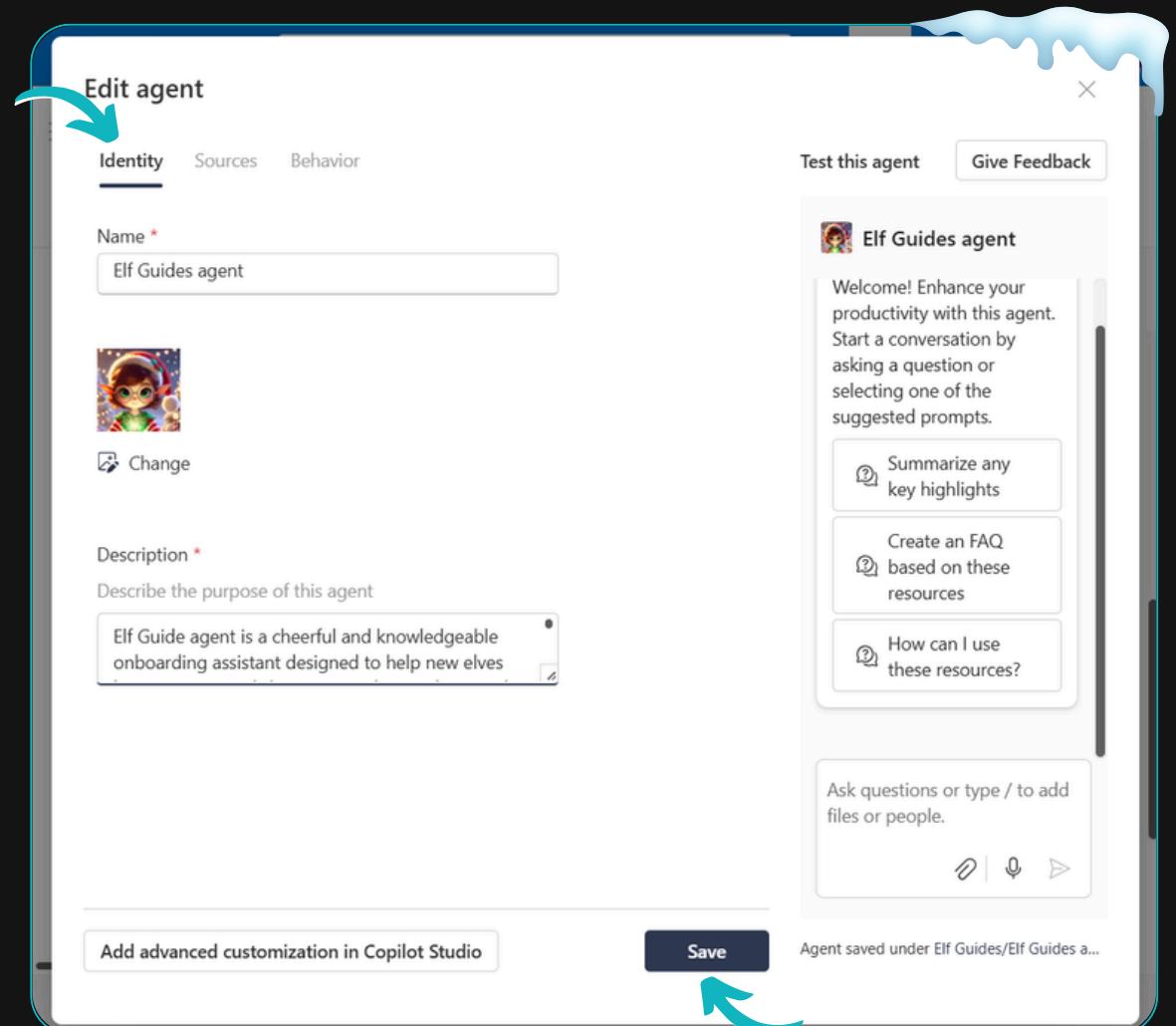


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SharePoint agent Customize - Identity

On the **Identity** tab customize the agent **name** and **description**.
You can also change the agent **icon**.
Click **Save** button when your are ready with changes.

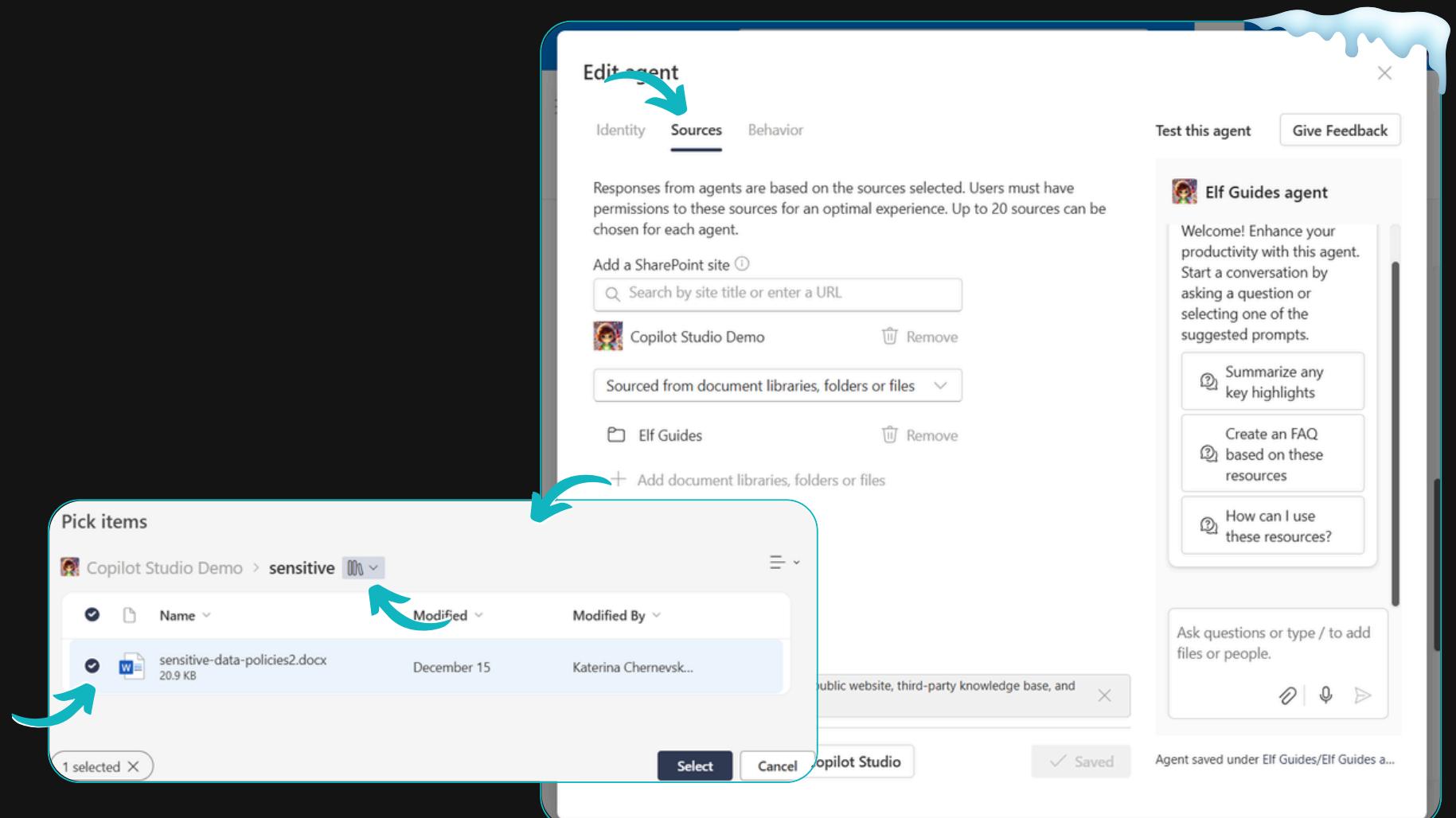


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SharePoint agent Customize - Sources

On the **Source** tab you can add additional SharePoint sites and documents, libraries or files.

When picking items you can **switch** to another document library.



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SharePoint agent Customize - Behavior

On the **Behavior** tab customize the **Welcome message**, **starter prompts** and **instructions**.

Starter prompts will appear at the beginning of the chat to guide users on what they can ask.



Instructions act as the agent's playbook, enabling it to handle complex queries confidently and consistently.

Edit agent

Identity Sources **Behavior** Test this agent Give Feedback

Welcome messaging
Help users understand how to best use this agent

Ho ho ho! 🎅 Welcome to Santa's Workshop! I'm ElfGuide Copilot, your cheerful helper. I'll guide you through our rules, daily schedule, and magical operations, and even test your knowledge to get you ready for Christmas magic. Let's get started – just say, 'I'm ready!' 🎄 🎅

Starter prompts
Help users engage with this agent by giving them a starting point

What's my daily schedule?
Tell me about the Workshop rules.
Test my elf knowledge!

Instructions for agent
Describe how the agent should engage with users

onboarding process engaging.
End with a Cheerful Note: Conclude each session with a festive touch like "Happy Toy crafting!" or "Keep the magic alive!"

Add advanced customization in Copilot Studio Save

Agent saved under Elf Guides/Elf Guides a...

The screenshot shows the 'Edit agent' interface with the 'Behavior' tab selected. It includes sections for 'Welcome messaging', 'Starter prompts', and 'Instructions for agent'. Each section contains sample text and input fields for customization. A preview window on the right shows the agent's responses to user inputs like 'What's my daily schedule?' and 'Tell me about the Workshop rules.'

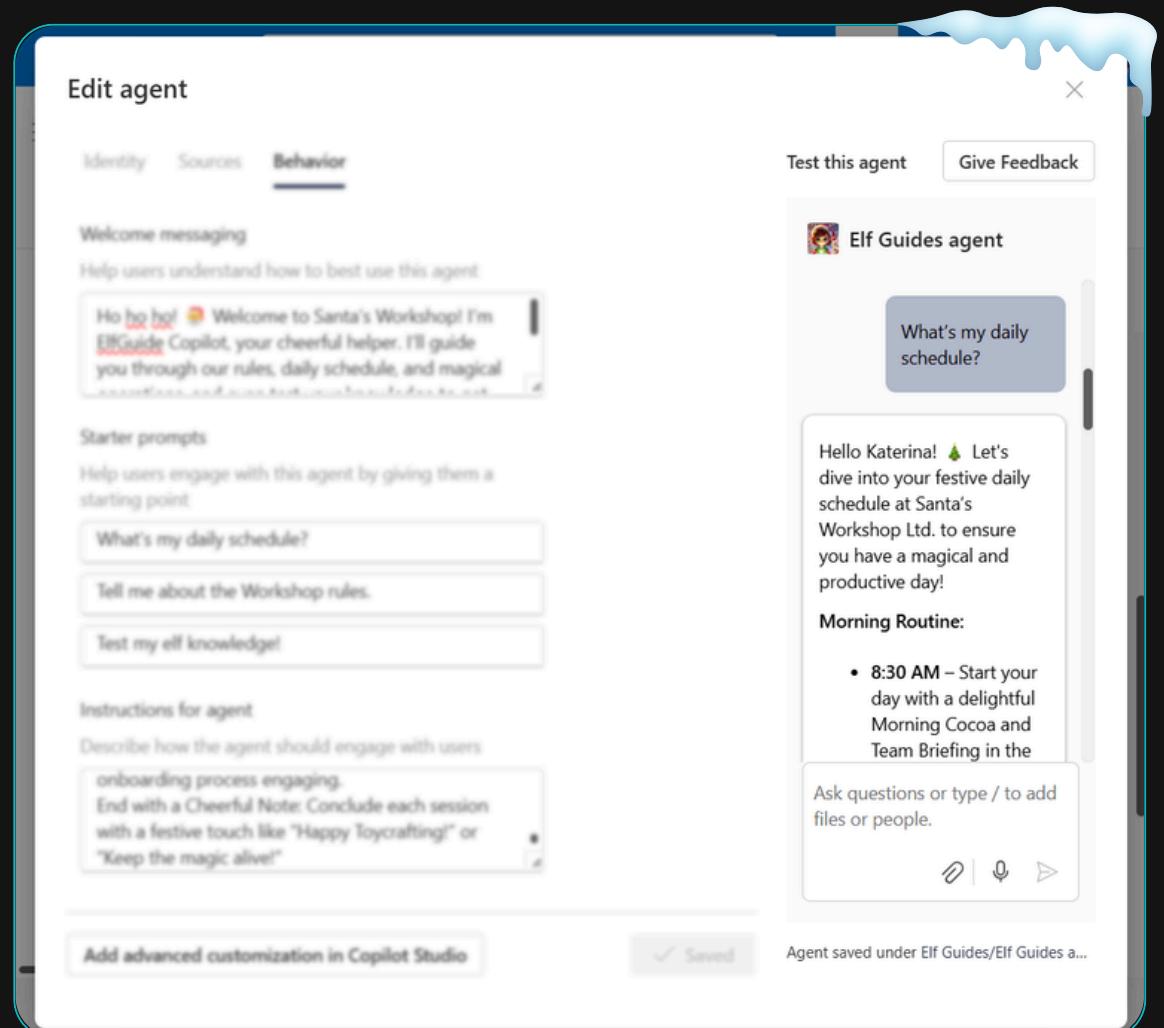


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SharePoint agent Test in the edit mode

Everything you change in the edit mode, **reflects** in the test pane.
You can also **test** the updated agent
to be sure it performs as expected.

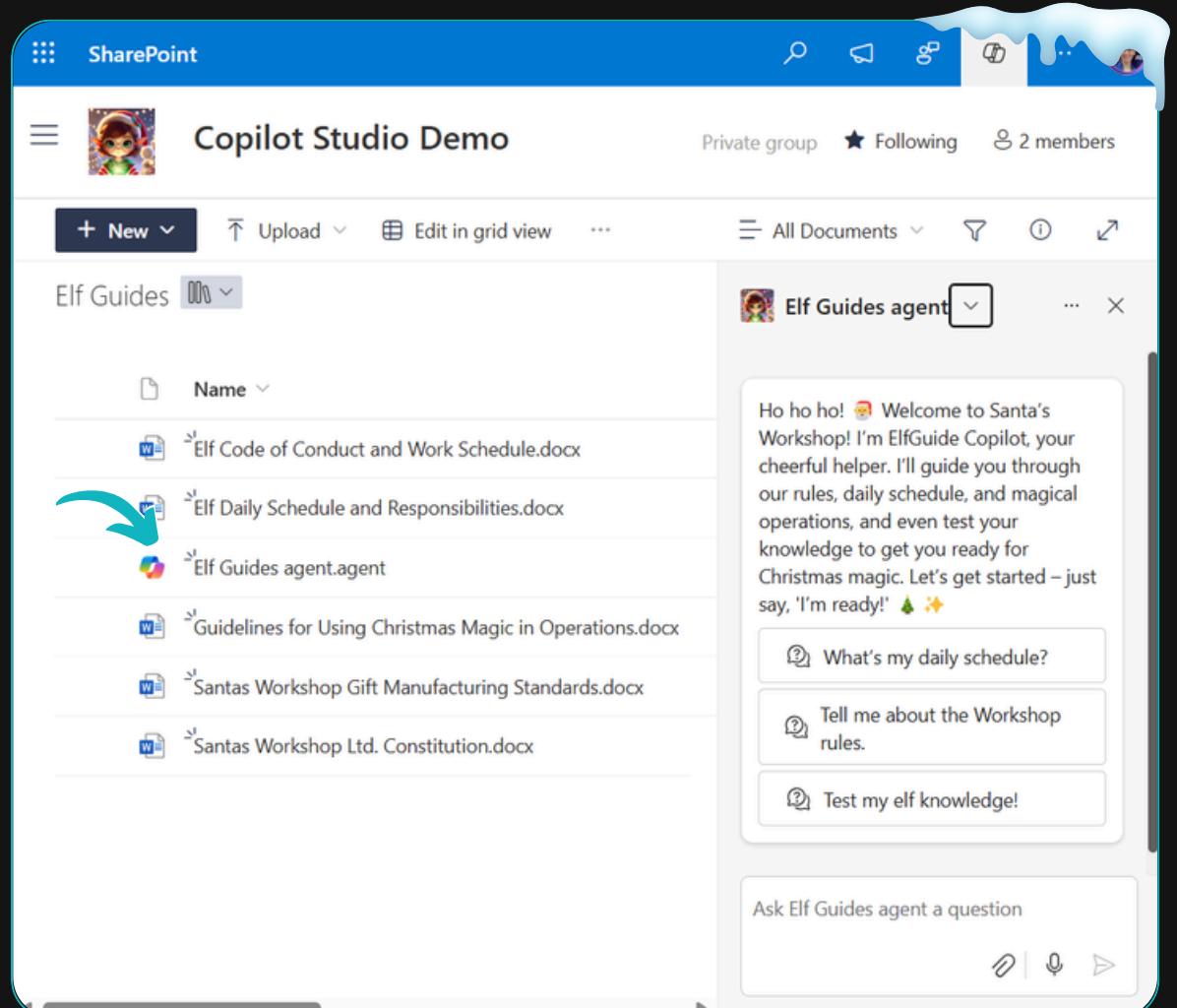


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SharePoint agent

Find your agent

All agents created in Document Libraries
are stored within the same library.
Agent files use the **.agent** extension.



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SharePoint agent Benefits

Increased productivity

Saves time by instantly retrieving relevant documents.

Improved collaboration

Enhances teamwork with quick access to shared information.

Error reduction

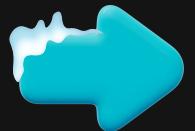
Minimizes the risk of retrieving outdated or incorrect documents.

Scalability

Handles large document libraries with ease, ensuring accessibility.



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Today's Task: Create your first SharePoint agent



1. Explore your Document library

Identify use cases where a SharePoint agent could add value.

2. Configure a sample agent

Use the steps provided to set up a basic agent.

3. Customize the agent and test it

Customize instructions and prompts in your agent.

Test the agent by open it from the Document library.



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