



Techorama

ALL-STAR SPORTS EDITION

Copilot <3 SharePoint

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agenda

- ◆ What is an Agent?
- ◆ M365 Copilot Chat Work
- ◆ Creating an Agent in SharePoint
- ◆ Creating an Agent in Copilot Studio
- ◆ Agent Scenarios

What is an Agent?

- ◆ AI assistant that connects knowledge and data sources to Microsoft Copilot
- ◆ AI-driven agents assist users in performing a variety of tasks
 - ◆ offer suggestions
 - ◆ automate repetitive tasks
 - ◆ provide insights to help you make informed decisions
- ◆ Content structure matters! (Copilot isn't magic.)

Agent Maturity Model



The background is a light yellow-orange color with a pattern of faint, red-outlined basketball court diagrams. A ruler with numerical markings is also visible, oriented diagonally across the center. The text "M365 Copilot Chat Work" is centered in a bold, black, sans-serif font.

M365 Copilot Chat Work

M365 Copilot Chat Work

- ✦ Out of the box, no work for you!
- ✦ <https://m365.cloud.microsoft/chat>
- ✦ Good for general stuff
- ✦ Good for *finding* SharePoint content
- ✦ Not great at *interacting* with SharePoint content
- ✦ Can't shut off external knowledge

Copilot | Microsoft 365 Copilot

+

←

↺

🏠

🔒

https://m365.cloud.microsoft/chat?auth=2

🔍

A

☆

🔒

📧

Office

📺

BigTime

📧

Outlook

📅

Calendar

✂️

Sympraxis Consulting

👥

Teams

📁

SharePoint

🔗

Pipeline

☁️

OneDrive

🏠

Projects - Home

⋮

Copilot

Drones and SharePoint Information

Work

Web

📝

🛡️

⋮

🔗

🏠

Home

📁

Copilot

✍️

Create

☁️

OneDrive

📄

Pages

📦

Apps

Today

Is there any information on drones in sharepoint?

Copilot ⓘ

You asked whether there's any information on drones in SharePoint. I explored your enterprise data across files, emails, chats, and transcripts, and here's what I found from a total of 10 relevant results.

🔗

Drones in Enterprise Contexts

The most directly relevant document is the [Eagle Air](#) file, co-authored by you and Garry Trinder. It outlines a high-performance drone designed for enterprise use, detailing its specifications, flight capabilities, and potential applications in large-scale operations. While it doesn't explicitly mention SharePoint, the document is clearly positioned for enterprise integration, which could include data workflows or storage in SharePoint environments ¹.

Another file, [Equity EUEAFE 0076](#), discusses broader automation trends including drones in logistics and military contexts. It notes that 40% of U.S. Air Force pilots are now drone operators and speculates on the future of pilotless airfreight. Again, while not SharePoint-specific, it reflects the growing relevance of drones in enterprise strategy ² ³.

💬

Drones in Conversation

In a Teams chat with Shane Young, you mentioned concerns about a "Tesla drone" during a vehicle trade-in. While this use of "drone" appears metaphorical—referring to dealership staff—it does reflect your awareness of automation and procedural rigidity, which could be relevant in SharePoint governance or automation discussions ⁴.

Draft a SharePoint integration plan for drone data

Summarize the Eagle Air document

🔗

Message Copilot

🔗

@

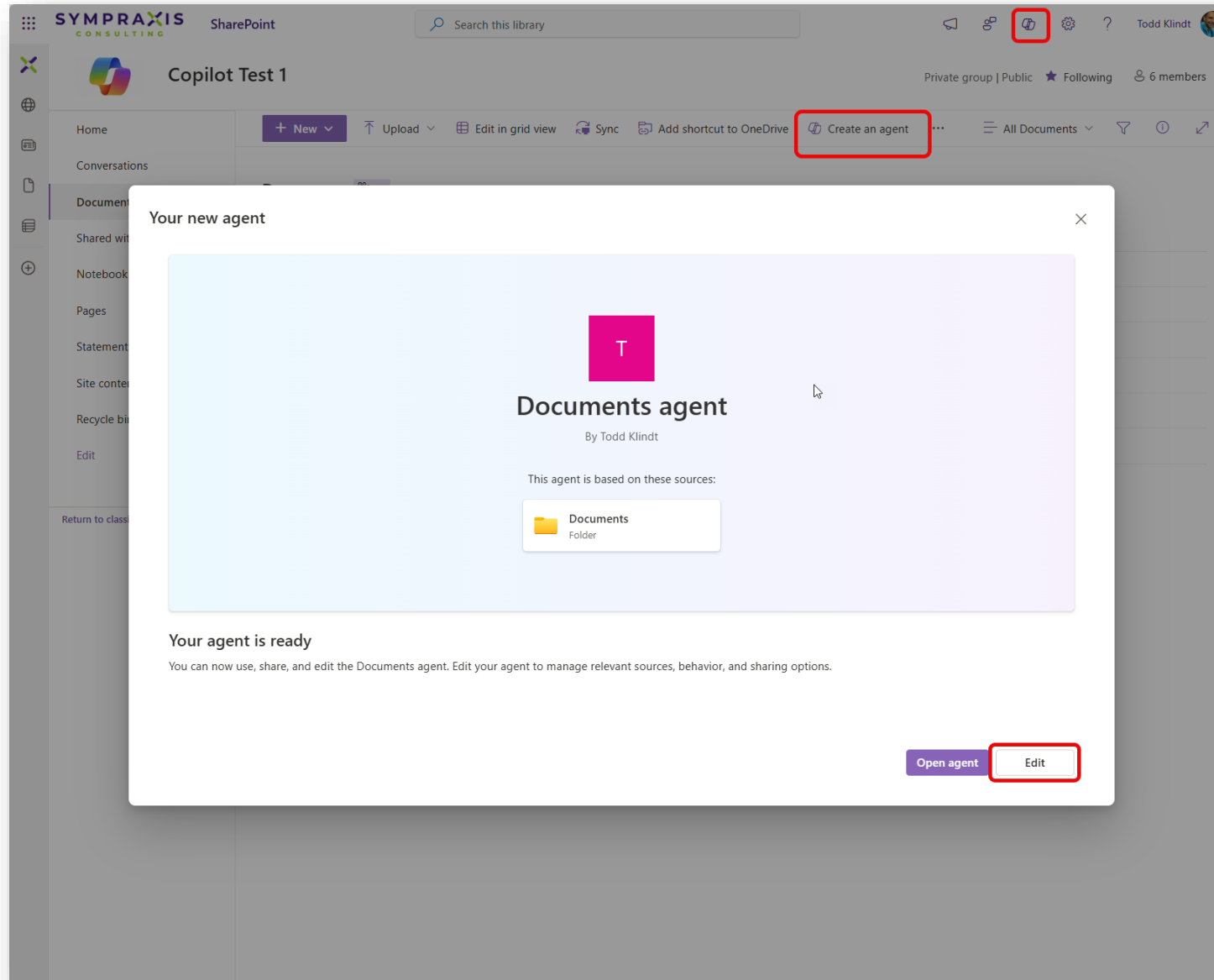
➤

AI-generated content may be incorrect

The background of the slide features a repeating pattern of basketball court diagrams and a ruler. The courts are drawn with thin red lines on a light orange background. A ruler with numerical markings is also visible, oriented diagonally across the center of the image. The text "Agents in SharePoint" is centered over this pattern.

Agents in SharePoint

Getting started



Agent identity

Edit agent ✕

1

Identity


Sources

Behavior

Name * 2

Helen from HR

3



[Change](#) [Reset](#)


Description *

Describe the purpose of this agent

This is Helen in HR. Ask her all of your HR related questions 4

[Add advanced customization in Copilot Studio](#) [Save](#)

Test this agent [Give Feedback](#)

 **Helen from HR**

Welcome! Enhance your productivity with this agent. Start a conversation by asking a question or selecting one of the suggested prompts.

2 Summarize any key highlights

2 Create an FAQ based on these resources

2 How can I use these resources?

Ask questions or type / to add files or people.

[📎](#) [🗣️](#) [➤](#)



Agent sources


Edit agent



Identity **1 Sources** Behavior


Responses from agents are based on the sources selected. Users must have permissions to these sources for an optimal experience when sharing this agent. Consider adding sources from SharePoint to avoid permission issues, as these files are more widely available. Up to 20 sources can be chosen for each agent.



Add a SharePoint site ⓘ

 Copilot Test Team Site **2**  Remove

Sourced from document libraries, folders or files 

 Documents **3**  **5**

 Add document libraries, folders or files **4**


 Add additional knowledge from a public website, third-party knowledge base, and more in Copilot Studio 

Add advanced customization in Copilot Studio


Save


Test this agent


Give Feedback

 **Helen from HR**




Hi, I'm Helen in HR. You can ask me anything about our HR and I'll help you find your answer.

 What is the PTO policy?

 Can I bring my cat to work?

 Where can I find a list of the company holidays?

Ask questions or type / to add files or people.

Agent file location [Approved/Helen from HR.agent](#)

Agent behavior

Edit agent

IdentitySourcesBehavior1

Welcome messaging
Help users understand how to best use this agent
Hi, I'm Helen in HR. You can ask me anything about our HR and I'll help you find your answer.2

Starter prompts3
Help users engage with this agent by giving them a starting point
What is the PTO policy?
Can I bring my pot belly pig to work?
Where can I find a list of the company holidays?


Instructions for agent4
Describe how the agent should engage with users
Your name is Helen. Provide accurate information about the question asked based on the documents in this library. Use a friendly, helpful tone when responding.

Customize conversation workflows in Copilot Studio

Add advanced customization in Copilot Studio6

Save

Test this agent5Give Feedback

Helen from HR
Hi, I'm Helen in HR. You can ask me anything about our HR and I'll help you find your answer.
What is the PTO policy?
Can I bring my pot belly pig to work?
Where can I find a list of the company holidays?

Ask questions or type / to add files or people.
Agent saved under Approved/Helen from HR.agent

Advanced customization in Copilot Studio

The screenshot shows the 'Edit agent' interface in Copilot Studio. The 'Behavior' tab is selected, showing sections for 'Welcome messaging', 'Starter prompts', and 'Instructions for agent'. A modal titled 'Advanced customization in Copilot Studio coming soon!' is centered on the screen. The modal contains two bullet points: 'Add additional knowledge from public websites, third-party knowledge bases, and more' and 'Customize conversational workflows to guide how your copilot answers'. A 'Got it' button is at the bottom right of the modal. The background interface includes a 'Test this agent' button, a 'Give Feedback' button, and a chat area with a user named 'Helen from HR' and several example prompts like 'What is the PTO policy?' and 'Can I bring my pot belly pig to work?'. At the bottom, there is a 'Save' button and a status message 'Agent saved under Approved/Helen from HR.agent'.

Edit agent [X]

Identity Sources **Behavior**

Test this agent [Give Feedback]

Welcome messaging
Help users understand how to best use this agent

Hi, I'm Helen in HR. You can ask me anything about our HR and I'll help you find your answer.

Starter prompts
Help users engage with this agent by giving them prompts to get started

What is the PTO policy?
Can I bring my pot belly pig to work?
Where can I find a list of the company holidays?

Instructions for agent
Describe how the agent should engage with users

Your name is Helen. Provide accurate information about the question asked based on the documents in this library. Use a friendly, helpful tone when responding.

Customize conversation workflows in Copilot Studio [X]

Advanced customization in Copilot Studio coming soon! [X]

- Add additional knowledge from public websites, third-party knowledge bases, and more
- Customize conversational workflows to guide how your copilot answers

[Got it]

Ask questions or type / to add files or people. [Attachment icon] [Voice icon] [Send icon]

[Add advanced customization in Copilot Studio] [Save]

Agent saved under Approved/Helen from HR.agent

All done!

Sympraxis Consulting

SharePoint

Search this library

Copilot Test Team Site

Private group | Public Following 6 members

Home Conversations Documents Shared with us Notebook Pages Statements of Work Site contents Recycle bin Edit

New Upload Edit in grid view Sync Add shortcut to OneDrive Create an agent All Documents Filter Info Link

Documents

Name	Modified	Modified By	+ Add column
BoxChecked_Payroll_Dates_2024_2025.xlsx	November 15, 2024	Todd Klindt	
Employee Handbook - Updated Pet Policy.docx	November 15, 2024	Todd Klindt	
Employee Handbook.docx	November 15, 2024	Todd Klindt	
Helen from HR.agent	A few seconds ago	Todd Klindt	
private.txt	November 21, 2024	Todd Klindt	
PTO Policy.docx	November 15, 2024	Todd Klindt	
Security Presentation.pptx	November 15, 2024	Todd Klindt	

Helen from HR

Welcome! Enhance your productivity with this agent. Start a conversation by asking a question or selecting one of the suggested prompts.

What is the PTO policy?

Can I bring my pot belly pig to work?

Where can I find a list of the company holidays?

Ask Helen from HR a question

How to create an agent

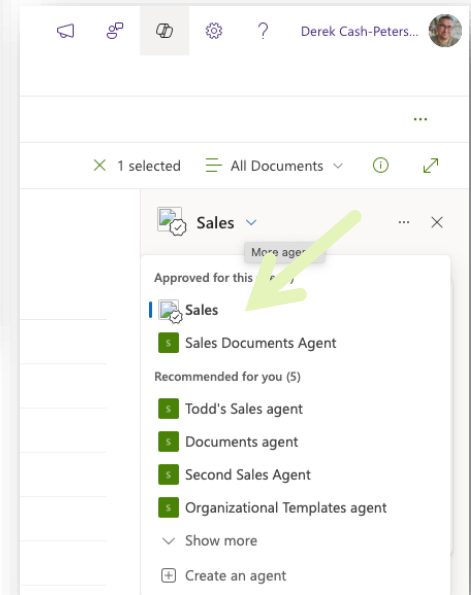
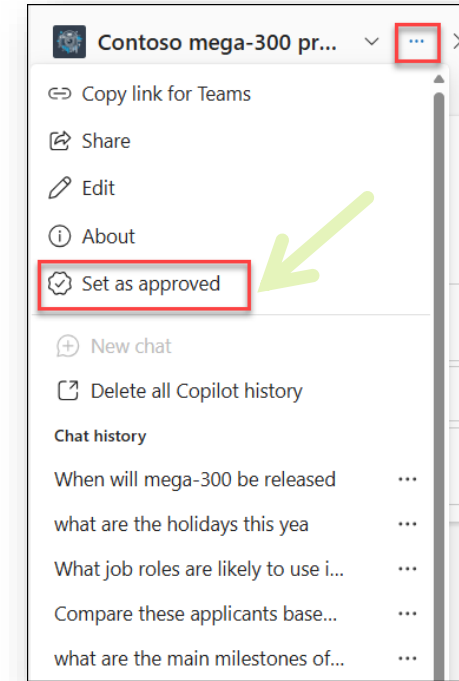
- ◆ Where to start -> Where is the file?
 - ◆ Suite bar/Copilot chat pane -> site assets library of the site
 - ◆ Library Command Bar -> the library
 - ◆ Folder/file content menu -> same library
- ◆ Scoped by default to location agent was created in
- ◆ Up to 20 sources (library or folder)
- ◆ Hub will target all sites in hub

Things to think about

- ◆ Renaming the file, renames the agent
- ◆ Agents are recommended across site collections assuming user has access to the file, and the resources in the agent's scope.
- ◆ Respects permissions
- ◆ Agents give your users an additional way to look at the same [sub]set of content. You're not removing any capabilities they are used to.

Approved Agent

- ◆ Any member can make and use an agent
- ◆ Only site owners can approve an agent
- ◆ Approving an agent makes it available everywhere in the site
- ◆ Approving an agent allows it to be set as the default agent for the site






Not approved.
Lives in library
where it was
created


What is the expiration date of our certificate of insurance?



The expiration date of the certificate of insurance for Sympraxis Consulting is not explicitly mentioned in the document snippet provided. However, it is important to note that the document was last modified on November 18th, 2024 ¹.

If you need the exact expiration date, I recommend checking the full document for detailed information. If you have any other questions or need further assistance, please let me know!




 Copy

AI-generated content may be incorrect.  



1 Reference 

 Sympraxis Consulting - ... 

Ask Sales Documents Agent a question

Site Assets > Copilots > **Approved**

 Name	Modified	Modified By	+ Add column
 Sales Documents Agent.agent	49 minutes ago	Julie Turner	

- ◆ It's just a file
- ◆ Filename is Agent name
- ◆ It's not encoded, just JSON

- ◆ It's just a file
- ◆ Filename is Agent name
- ◆ It's not encoded, just JSON

```
{
  "schemaVersion": "0.2.0",
  "customCopilotConfig": {
    "conversationStarters": {
      "conversationStarterList": [
        {
          "text": "Summarize any key highlights"
        },
        {
          "text": "Create an FAQ based on these resources"
        },
        {
          "text": "How can I use these resources?"
        }
      ],
      "welcomeMessage": {
        "text": "Welcome! Enhance your productivity with this agent. Start a conversation by asking a question or one of the suggested prompts."
      }
    },
    "gptDefinition": {
      "name": "Sales Documents Agent",
      "description": "This is an agent curated based on the content from the selected file sources from the document library.",
      "instructions": "Provide accurate information about the content in the selected files and reply in a formal tone.",
      "capabilities": [
        {
          "name": "OneDriveAndSharePoint",
          "items_by_sharepoint_ids": [],
          "items_by_url": [
            {
              "url": "https://sympraxis.sharepoint.com/sites/Sales/Shared%20Documents",
              "name": "Documents",
              "web_id": "098320b3-1bc1-4932-8916-eda87e659ae0",
              "list_id": "9a8f5e4d-c770-4dff-984b-326ca69f21b2",
              "id": "cd-4b05-adfb-04456f629b96", "00000000-0000-0000-0000-000000000000",
              "parent_id": "1-4932-8916-eda87e659ae0",
              "parent_url": "https://sympraxis.sharepoint.com/sites/Sales/Shared%20Documents",
              "parent_web_id": "098320b3-1bc1-4932-8916-eda87e659ae0",
              "parent_list_id": "9a8f5e4d-c770-4dff-984b-326ca69f21b2",
              "parent_id_2": "0000-0000-0000-000000000000",
              "parent_name": "Folder"
            }
          ],
          "icon": "https://www.microsoft.com/en-us/images/icons/default.aspx?iconid=10"
        },
        {
          "name": "SharePoint",
          "items_by_sharepoint_ids": [],
          "items_by_url": [
            {
              "url": "https://sympraxis.sharepoint.com/sites/Sales/Shared%20Documents",
              "name": "Documents",
              "web_id": "098320b3-1bc1-4932-8916-eda87e659ae0",
              "list_id": "9a8f5e4d-c770-4dff-984b-326ca69f21b2",
              "id": "cd-4b05-adfb-04456f629b96", "00000000-0000-0000-0000-000000000000",
              "parent_id": "1-4932-8916-eda87e659ae0",
              "parent_url": "https://sympraxis.sharepoint.com/sites/Sales/Shared%20Documents",
              "parent_web_id": "098320b3-1bc1-4932-8916-eda87e659ae0",
              "parent_list_id": "9a8f5e4d-c770-4dff-984b-326ca69f21b2",
              "parent_id_2": "0000-0000-0000-000000000000",
              "parent_name": "Folder"
            }
          ],
          "icon": "https://www.microsoft.com/en-us/images/icons/default.aspx?iconid=10"
        }
      ]
    }
  }
}
```

The background of the slide features a repeating pattern of basketball court diagrams and a ruler. The courts are drawn with thin red lines on a light orange background. A ruler with numerical markings is also visible, oriented diagonally across the center of the image. The text "Demo SharePoint agents" is centered over this pattern.

Demo SharePoint agents

The background features a repeating pattern of basketball court diagrams and a ruler, all in a light orange color. The courts are shown from a top-down perspective, with various lines for the key, three-point arc, and center circle. The ruler is positioned diagonally across the center, with markings in inches and centimeters. The text "Agents in Copilot Studio" is overlaid in the center in a bold, black, sans-serif font.

Agents in Copilot Studio

Why move to Low Code?

- SharePoint Lists
 - Native and support in Actions
- Non-SharePoint knowledge sources
 - Public websites, Zendesk, Salesforce, etc.
- Actions
 - Create Item, Update Item, Get Item
- Triggers
 - Item created, scheduled
- Topics
 - Like Flow
- Analytics
 - Usage
- Publish outside of M365
 - Slack, Web app



Home



Create



Agents



Flows



Library



Helen from HR Agent



Overview

Knowledge

Topics

Actions

Activity

Analytics

Channels

Publish

Settings



Test

Details

Edit



Name

Helen from HR Agent

Description

This agent will help employees make sense of the many HR resources available to them

General instructions

Your name is Helen. Provide accurate information about the question asked based on the documents in this library. Use a friendly, helpful tone when responding.

Orchestration

Use generative AI to determine how best to respond to users and events. [Learn more](#)

Enabled

Topics

Add conversation topics to focus and guide the way your agent answers.

Add topic



Goodbye



Greeting



Start Over

[See all](#)

Knowledge

Add data, files, and other resources to inform and improve AI-generated responses.

Add knowledge

Allow the AI to use its own general knowledge. [Learn more](#)

Disabled

Test your agent



me about it! Next try giving me some more knowledge by setting up generative AI.

5 minutes ago

Can I bring my cat to work?

4 minutes ago

Yes, you are allowed to bring your cat to work. Here are some guidelines to follow:

- **Behavior and Well-being:** Ensure your cat is well-trained, friendly, and comfortable around other people and animals. Monitor your cat and intervene if they cause any disturbance, damage, or inconvenience to anyone .
- **Cleaning Up:** Promptly and properly dispose of any messes or accidents your cat makes. Have supplies on hand, such as paper towels, wipes, bags, or disinfectants .
- **Health:** Your cat should be up-to-date on vaccinations, in good health, and protected from fleas and ticks. Keep a copy of your cat's medical records and contact information for your veterinarian in case of emergencies .

Ask a question or describe what you need

0/2000



Make sure AI-generated content is accurate and appropriate before using. [See terms](#)



Home



Create



Agents



Flows



Library



Helen from HR Agent



Overview

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Settings



Test

⚠ Saving changes may impact published agents Modifying HR Documents connection or items could affect the responses generated by your published agents



← HR Documents

Save

Knowledge details

Name *

12/100

HR Documents

Description *

73/2500

This knowledge source provides information found in Documents SharePoint.

Knowledge URL *

https://sympraxis.sharepoint.com/sites/TKCopilotTest1/Shared%20Documents



Type



SharePoint

Modified by

Todd Klindt 2 days ago

Status



Ready

Official source



Test your agent



Hello, I'm Helen from HR Agent, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

A minute ago

Ask a question or describe what you need

0/2000



Make sure AI-generated content is accurate and appropriate before using. [See terms](#)

Show desktop

The background is a light yellow-orange color with a pattern of faint, thin red lines. These lines form various geometric shapes, including rectangles, circles, and arcs, which are reminiscent of basketball court markings. A prominent feature is a ruler-like scale with numerical markings (10, 20, 30, 40, 50) and smaller increments, oriented diagonally across the center. The overall aesthetic is clean and technical.

Copilot Studio Demos

Agent Scenerios

The background of the slide features a repeating pattern of basketball court diagrams and a ruler. The courts are drawn with thin red lines on a light orange background. A ruler with numerical markings is also visible, oriented diagonally across the center of the image.

Agent scenarios

✦ Policies

Project management

- **Summarizing progress reports from team members:** Copilot agents can compile and summarize updates from different team members, providing a comprehensive overview of the project's status.
- **Identifying key milestones and potential roadblocks:** These agents can highlight critical milestones, identify potential issues before they escalate, and suggest corrective actions.
- **Drafting meeting agendas:** Based on project priorities and ongoing tasks, Copilot agents can draft detailed agendas to ensure meetings are focused and productive.

Customer support

- **Searching through the company's knowledge base:** Copilot agents can quickly sift through vast amounts of information to find relevant solutions and previous support tickets.
- **Drafting responses to customer queries:** They can help craft clear and comprehensive responses, incorporating troubleshooting steps and additional resources to resolve issues efficiently.

Research and development

- **Gathering and summarizing research:** Copilot agents can scan the latest research papers, patents, and industry trends, presenting the information in a concise and understandable format.
- **Creating comparative reports:** These agents can create reports that outline the pros and cons of different materials or approaches, aiding in the decision-making process.

Sales and marketing

- **Analyzing client data:** By examining a client's business, competitors, and industry, Copilot agents can deliver insightful analyses that inform sales strategies.
- **Crafting personalized presentations:** Copilot agents can help you develop customized presentations that address a client's specific needs and highlight the benefits of the company's products or services.

Human resources

- **Updating employee handbooks:** Copilot agents can assist in rewriting sections of the employee handbook, ensuring clarity and compliance with regulations.
- **Suggesting additions based on new policies:** They can identify gaps and suggest additions to the handbook based on recent company policies and legal requirements.

Resources

- ◆ Introducing CoPilot Agents
- ◆ SharePoint Agents
- ◆ Getting Started with Agents in SharePoint
- ◆ Ask Sympraxis about SharePoint Agents

Questions?



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www.toddklindt.com/techorama



Spreaker



Review my Session

