agenda

✦ What is an Agent?

✦ M365 Copilot Chat Work

✦ Creating an Agent in SharePoint

✦ Creating an Agent in Copilot Studio

✦ Agent Scenarios

Techorama

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

Out of the box
- M365 Copilot Chat Work

No code
- SharePoint Agent

Low Code
- Copilot Studio

Full Code
Microsoft 365 Agents Toolkit
- Azure AI Foundry

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

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

Office   BigTime   Outlook   Calendar   Sympraxis Consulting   Teams   SharePoint   Pipeline   OneDrive   Projects - Home

Copilot
Drones and SharePoint Information

Work   Web

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
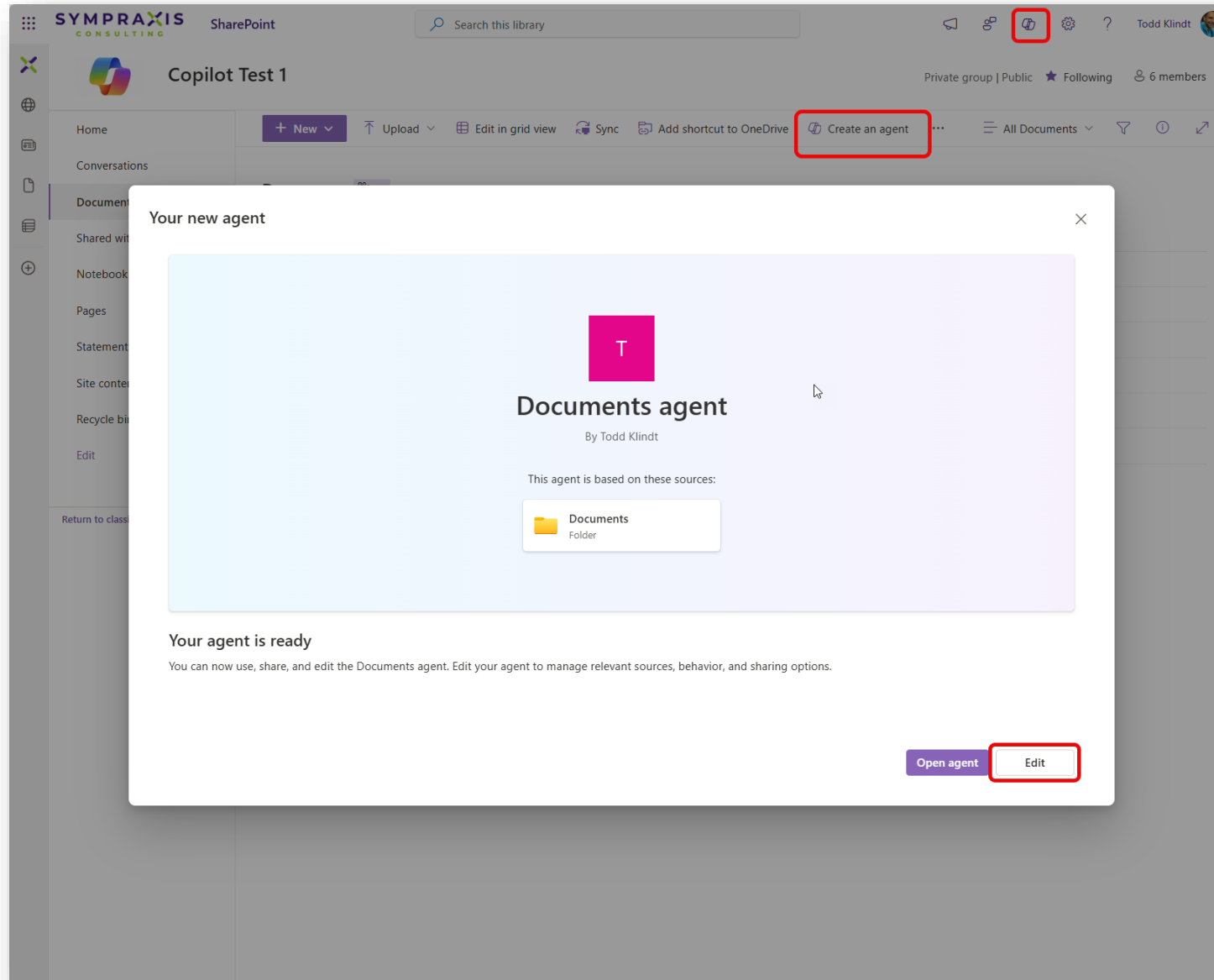
Message Copilot

@

AI-generated content may be incorrect

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.

⌕ Summarize any key highlights

⌕ Create an FAQ based on these resources

⌕ How can I use these resources?

Ask questions or type / to add files or people.

🔗   🎤   ➤

Agent sources

Agent behavior

Edit agent   ✕

Identity   Sources   **Behavior** ①   Test this agent ⑤   **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. ②

Starter prompts ③
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 agent ④
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 Studio ⑥   **Save**

👩 **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.

> ② What is the PTO policy?

> ② Can I bring my pot belly pig to work?

> ② 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

All done!

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

Agent file location
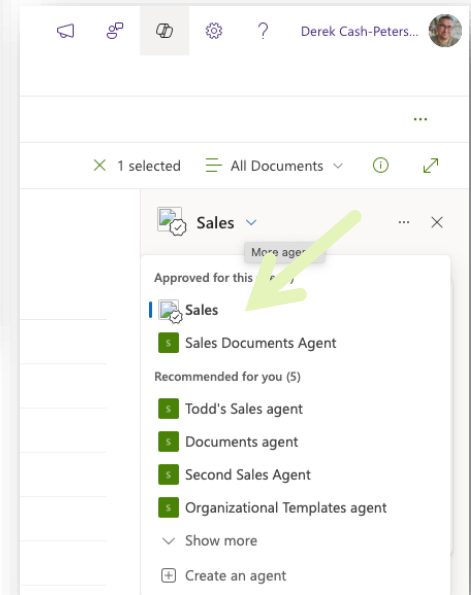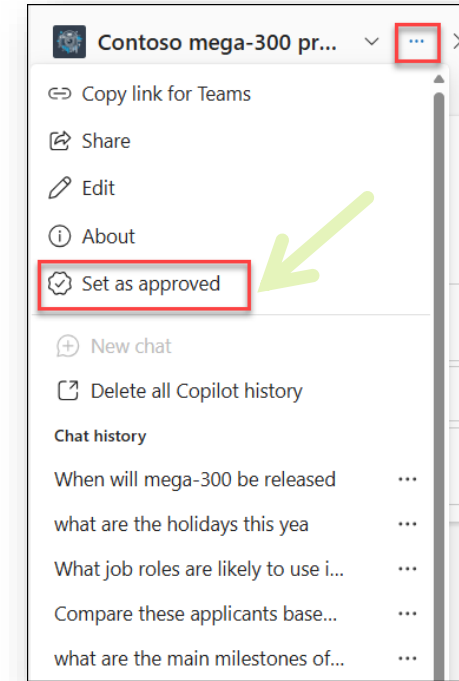
Not approved. Lives in library where it was created

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

1 Sympraxis Consulting -...

Ask Sales Documents Agent a question

Approved. Moves to Site Assets/Copilots/Approved

Site Assets > Copilots > **Approved**

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

Provisioning Agents

- ✦ It's just a file
  - ✦ Download, upload, copy, edit, versions

- ✦ 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 questi
suggested prompts."
            }
        },
        "gptDefinition": {
            "name": "Sales Documents Agent",
            "description": "This is an agent curated based on the content from the selected file sources from the do
            "instructions": "Provide accurate information about the content in the selected files and reply in a for
            "capabilities": [
                {
                    "name": "OneDriveAndSharePoint",
                    "items_by_sharepoint_ids": [],
                    "items_by_url": [
                        {
                            "url": "https://sympraxis.sharepoint.com/sites/Sales/Shared%20Documents",
                            "name": "Documents",
                            "web_id": "098520b5-1bc1-4932-8916-eda87e659ae0",
                            "list_id": "9a8f5e4d-c770-4dff-984b-326ca69f21b2",
                            "00000000-0000-0000-0000-000000000000",
                            "type": "Folder"
                        }
                    ]
                }
            ]
        }
    }
}
```

```
"capabilities": [
    {
        "name": "OneDriveAndSharePoint",
        "items_by_sharepoint_ids": [],
        "items_by_url": [
            {
                "url": "https://sympraxis.sharepoint.com/sites/Sales/Shared%20Documents",
                "name": "Documents",
                "site_id": "8a7c7c9c-41cd-4b05-adfb-04456f629b96",
                "web_id": "098520b5-1bc1-4932-8916-eda87e659ae0",
                "list_id": "9a8f5e4d-c770-4dff-984b-326ca69f21b2",
                "unique_id": "00000000-0000-0000-0000-000000000000",
                "type": "Folder"
            }
        ]
    }
]
```

Demo SharePoint agents

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

Environment
Sympraxis Consulting L...

Todd Klindt   TK

Helen from HR Agent   Overview   Knowledge   Topics   Actions   Activity   Analytics   Channels

Publish   Settings   ...   Test

Home
Create
Agents
Flows
Library

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

💬 Goodbye   ...

💬 Greeting   ...

💬 Start Over   ...

See all

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

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 1↗ 2↗ .
- **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 1↗ 2↗ .
- **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 1↗ 2↗ .

Ask a question or describe what you need

0/2000   📎   ➤

Make sure AI-generated content is accurate and appropriate before using. See terms

Document Library

SharePoint Lists

| | | Add new item | | Edit in grid view | | Undo | | Share | | Copy link | | Export ∨ | | Forms New | | Automate ∨ | | Integrate ∨ | ⋯ |

Design Ideas ☆

○	🔤 Title	🔤 User	☰ Teams Content	📅 Teams Date ⓘ	🔤 Approval Status	☰ Approver Com...	+ Add
	Improved Flash Performance	Johanna Lorenz	I've been researching new LEDs from Fabrikam. We can increase luminosity and color spectrum while increasing battery life. Win/win!	May 13	Yes	Great idea, Johanna. People will love this!	
	Waterproof Model	Irvin Sayers	We should make a waterproof model for the active/outdoorsy types.	May 13	No	This is a good idea, Irvin. We will explore feasibility and viability before approving.	
	Vibrant Body Colors	Grady Archie	We may appeal more to a wider user demographic if we add a line with vibrant body colors.	May 13	Yes	Great thinking, Grady. Can you produce some product mock-ups illustrating your ideas?	
	Add some AI	Alex Winters	Let's add some AI to this baby!	May 20	No		
	Needs more cowbell!	Adele Vance	This thing needs more cowbell to really rock!	May 20	No		

Home

Create

Agents

Flows

Library

...

Design Ideas Agent

Overview   Knowledge   **Tools**   Topics   Activity   Analytics   Channels

← Get items ⌄   Enabled ⬤   ...

34/1024

Details

Inputs

Completion

Tool
▦ SharePoint Get items

Available to
⟨/⟩ Design Ideas Agent

› **Additional details**

▭ **Inputs**   + Add input

What the tool accepts in order to run. Inputs will be filled in the order shown.

Input name	Fill using ⓘ	Value	↻
Site Address *	Custom value ⌄	https://sympraxis.sharepoint.com/sites/TKCo... ... ⠿
List Name *	Custom value ⌄	Design Ideas ... ⠿

▭ **Completion**

Specify what your agent does when it finishes using this tool.

After running:

Write the response with generative AI ⌄

› **Advanced**

SYMPRA✕IS
CONSULTING

Copilot Studio

Environment
Sympraxis Consulting L...

Todd Klindt TK

Design Ideas Agent

Overview   Knowledge   Tools   Topics   Activity   Analytics   Channels

Publish   Settings   •••   Test

Activity map

Track between topics   ✕

Get items
Connector Action

Get items
Connector Action

Get items
Connector Action

Get items
Connector Action

Get items
Connector Action

Get items
Connector Action

Get items
Connector Action

✓ Complete

Get items Complete
Connector Action

Description
Gets items from a SharePoint list.

Inputs
Site Address (String)

https://sympraxis.sharepoint.com/sites/TKCopilotTest1

List Name (String)

Design Ideas

Outputs
value (Table)

```
1  ∨ [
2  ∨   {
3  ∨     "{ContentType}": {
4          "@odata.type": "#Microsoft.Azure.
           Connectors.SharePoint.
           SPListExpandedContentType",
5          "Id":
           "0x01001B188A6A7BCCD841B107D96D4A88186400C
           F7C53378E318D4EBB42AE467D345A01",
6          "Name": "Item"
```

✎ Edit tool

▸ Test your agent   •••   🗺 ∨   ⟳

Give me a list of the approved ideas.
3 minutes ago

1. **Title:** Improved Flash Performance
   Approval Status: Yes
   Approver Comments: Great idea, Johanna. People will love this!
   Author: Todd Klindt
   Link: View Idea ⧉
2. **Title:** Vibrant Body Colors
   Approval Status: Yes
   Approver Comments: Great thinking, Grady. Can you produce some product mock-ups illustrating your ideas?
   Author: Todd Klindt
   Link: View Idea ⧉

3 minutes ago

Were any of the ideas submitted by Adele Vance?
A minute ago

Yes, one of the ideas submitted by Adele Vance is titled "Needs more cowbell!".
A minute ago

Show me the details.

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

Copilot Studio Demos

Agent Scenerios

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.

Source: Introducing Copilot agents

Resources

- [Introducing CoPilot Agents](#)

- [SharePoint Agents](#)

- [Getting Started with Agents in SharePoint](#)

- [Ask Sympraxis about SharePoint Agents](#)

- [Use SharePoint list as knowledge source](#)

Questions?

SpreaView

Review my Session

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