



# Transform your SharePoint with Content AI and Agents Workshop

Chirag Patel MVP MCT

Kevin McDonnell MVP

Leon Armston MVP



# THANK YOU TO OUR SPONSORS



climber



#SCS2025



# Where have you travelled from?

- ⓘ The Slido app must be installed on every computer you're presenting from



# Meet your Community Rockstars!



**Chirag Patel**

Consultant & Trainer



**Kevin McDonnell**

Copilot and Agents Lead

Avanade



**Leon Armston**

Head of Content AI





**Without using the title of your job,  
tell us what you do!**

- ⓘ The Slido app must be installed on every computer you're presenting from



# Agenda





# Powering a Digital Workplace

- Knowledge
- Communication
- Collaboration





## Building on the shoulders of giants

- The power of AI and Agents
- Supported by governance
- Provided by content and metadata



# Understanding the AI stack: Copilot, SharePoint Agents, and Content AI



SharePoint Sites

Modern pages, news, lists

Microsoft 365

Teams, Outlook, Word, etc.

Viva Connections

Employee experience



### Microsoft 365 Copilot

#### Capabilities

- Content generation
- Page creation
- Document summarization
- Q&A across content
- Search enhancement

#### Use Cases

- Draft site pages
- Summarize documents
- Answer questions
- Find information



### SharePoint Agents

#### Capabilities

- Custom knowledge bases
- Scoped to specific sites/libraries
- Configurable instructions
- Conversation starters
- Domain-specific expertise

#### Use Cases

- Project assistants
- Policy helpers
- Onboarding guides
- Department experts



### Content AI (Syntex)

#### Capabilities

- Document understanding
- Auto-classification
- Metadata extraction
- Content assembly
- Image & form processing

#### Use Cases

- Contract processing
- Invoice extraction
- Auto-tagging documents
- Content organization



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# How will you learn about SharePoint with AI and Agents today?



The story



The demos



Self paced  
learning



Celebrating  
creativity

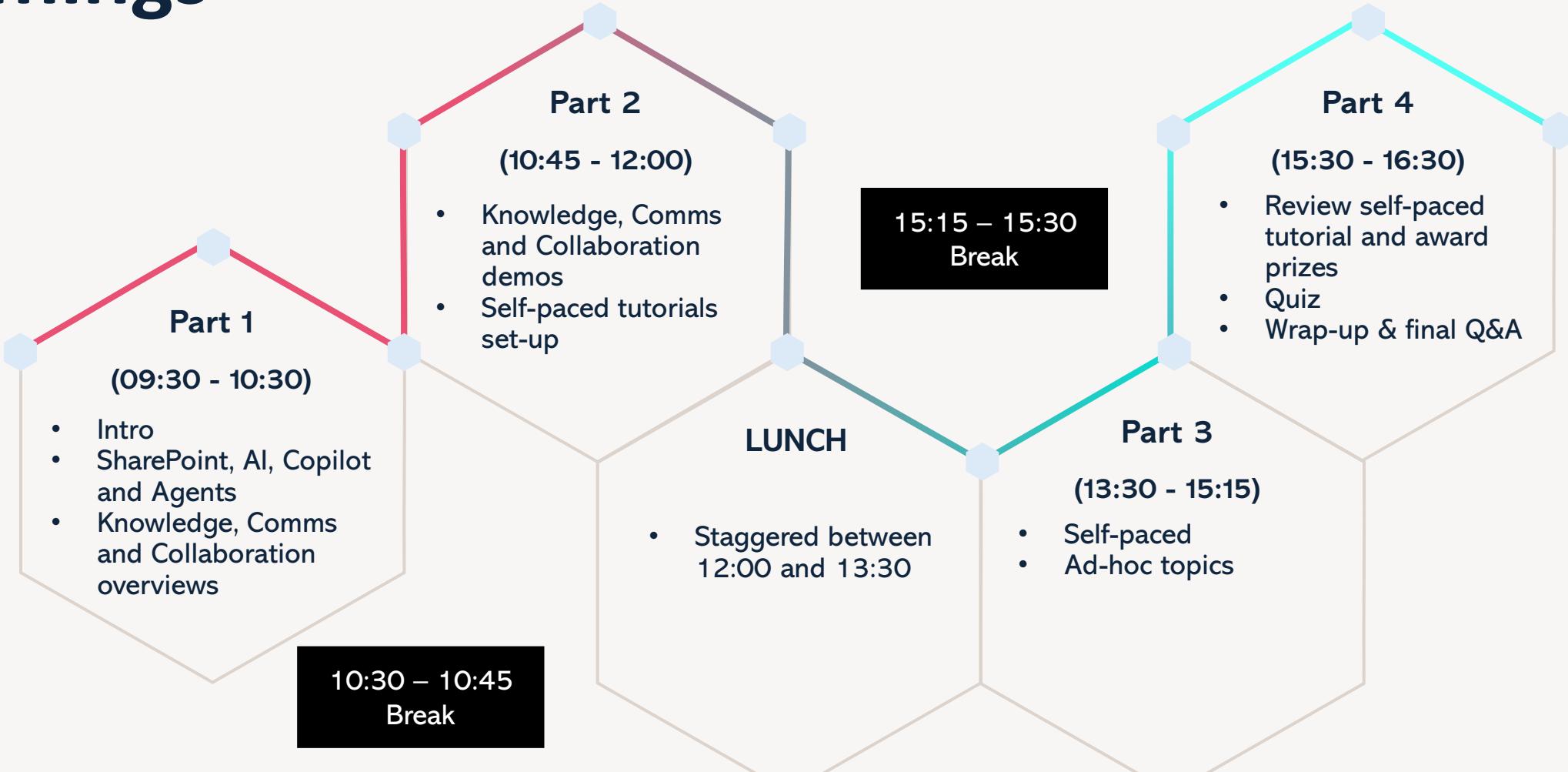


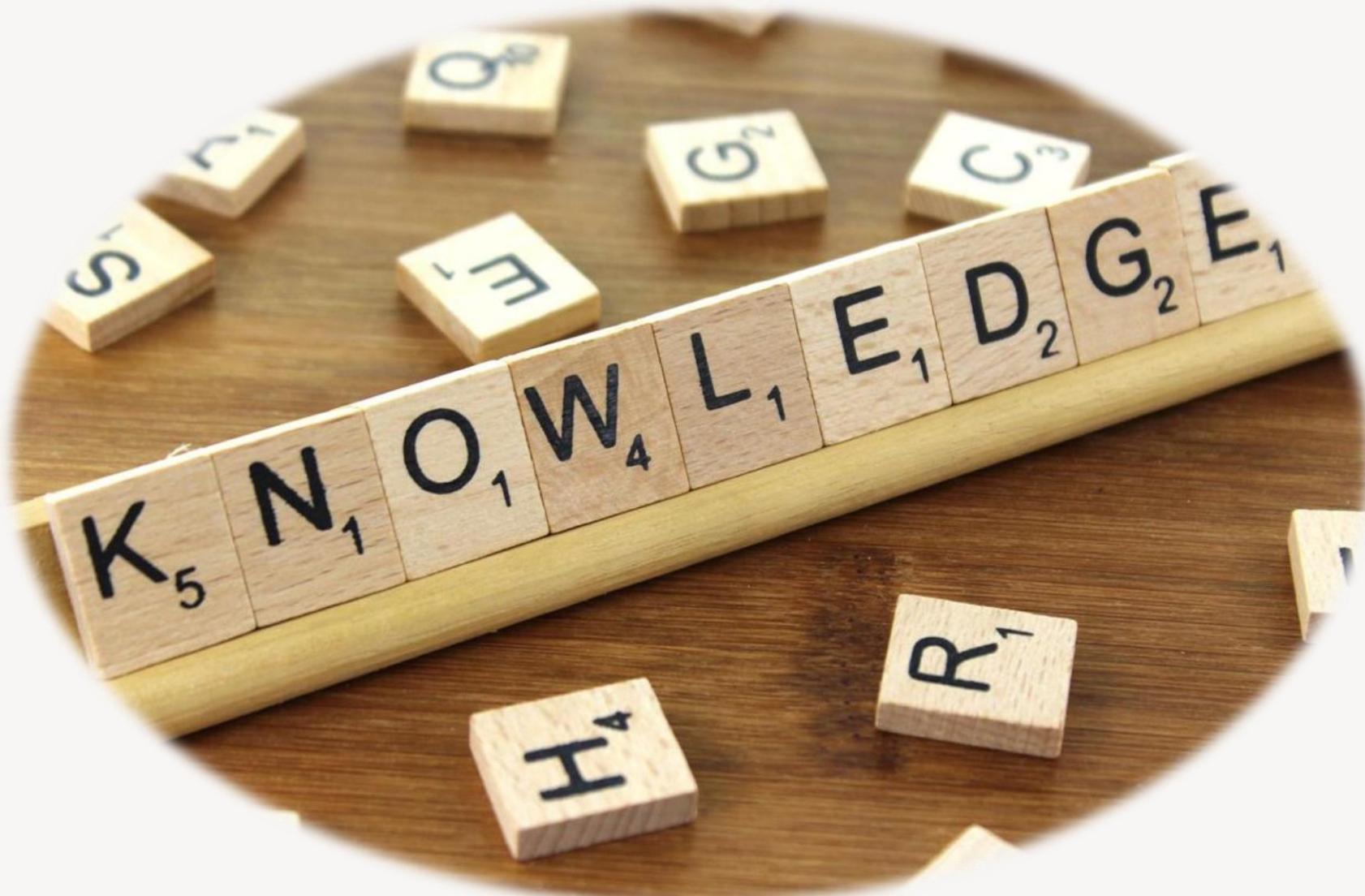
# What do you expect to get out of today's workshop?

- ⓘ The Slido app must be installed on every computer you're presenting from



# Timings







**AI transforms how we  
scale, share, and act  
on our most crucial  
asset—knowledge**



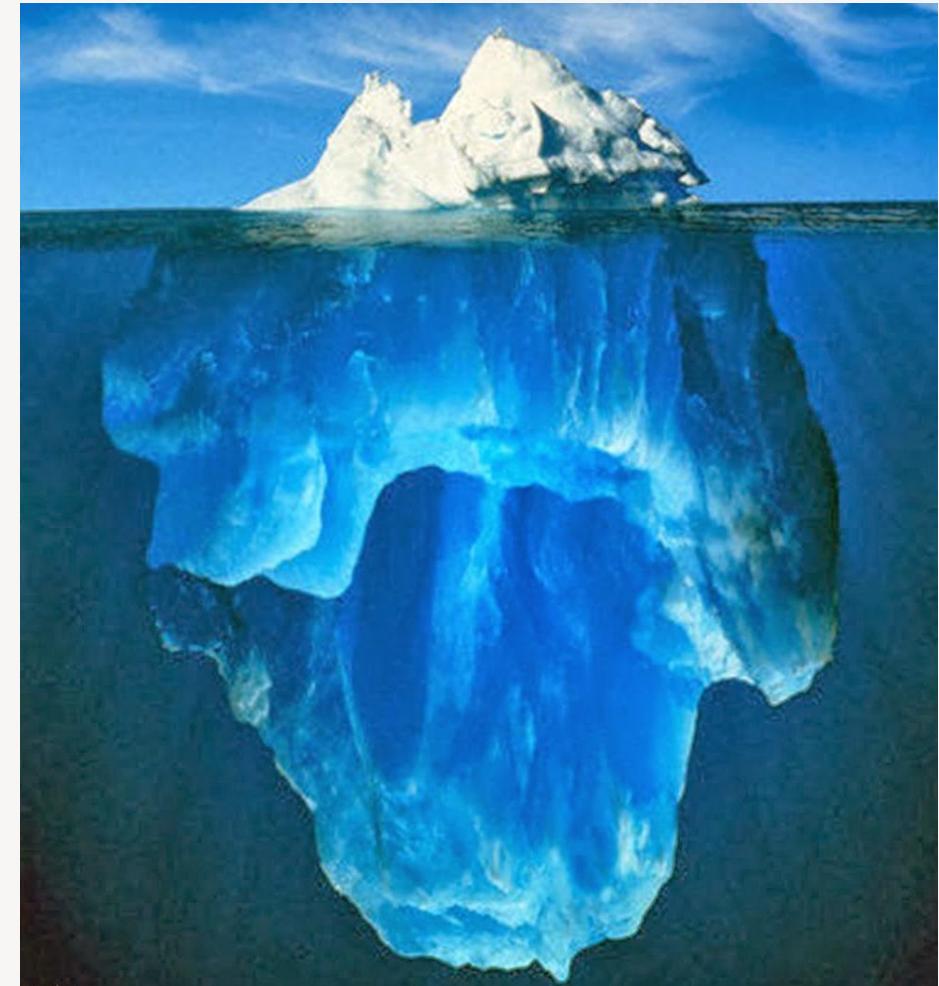
# Types of Knowledge

- **Explicit knowledge** – formal knowledge that **can be easily documented, codified, and shared**.
- **Tacit Knowledge** - personal knowledge embedded in experience, insight, and intuition, which is **hard to formalise or communicate**.
- **Embedded Knowledge** - Knowledge that is built into processes, products, culture, or routines.
- **Organisational Knowledge** - The sum of all knowledge within the organisation, including what is stored in systems and what resides in people



# Explicit vs. Tacit – The Iceberg of Knowledge

- Explicit knowledge is just the **tip of the iceberg** – documented and visible – while tacit knowledge lies beneath the surface.
- Studies estimate ~80% of an organisation's knowledge is tacit, hidden in employees' experiences, yet it holds immense value for innovation and expertise.





# Knowledge Sharing Fuels Collaboration

- When people share their know-how, it **fosters collaboration** and builds community. Tacit knowledge exchange (through mentoring, storytelling, etc.) strengthens team bonds and helps everyone work smarter together.
- In fact, companies with strong knowledge-sharing cultures see significantly higher productivity (over 20% gains).





# Beyond Project-Specific Know-How

- Organisational knowledge is a **lasting asset** that spans across projects and teams.
- Unlike project-specific knowledge (which is often temporary and context-bound), organisational knowledge is curated and retained to benefit the entire company over time – enabling lessons from one project to inform many others.



# Why Knowledge Matters in Organisations

- Improve decision-making
- Enhances Innovation
- Boost Efficiency
- Supports Learning & Development
- Preserves Institutional Memory



# Syntex->SharePoint Premium-> Document Processing

- Knowledge Management Agent
- Autofill Columns
- Content Assembly
- eSignature
- Optical Character Recognition
- Document Translation
- Legacy Document Processing Services
  - Structured/Unstructured Document Processing Models
  - Pre-Built Models
  - Taxonomy Tagging
  - Image Tagging



## Entry point to intelligent actions

Use the Knowledge Agent by selecting the floating button in the lower right corner across SharePoint.

The screenshot shows a SharePoint library titled "Document Processing for Microsoft 365". The left sidebar lists various AI actions: Knowledge Agent, Autofill, Unstructured DPM, Structured DPM, Content Assembly, Pre-built Models, Image Tagging, Taxonomy Tagging, Search - Img/Tax, OCR, Translation, Videos, eSignature, and Return to classic SharePoint. The main content area displays a grid of documents related to aviation incidents. A floating button labeled "Knowledge Agent (preview)" is visible in the bottom right corner of the screen, with a green rounded rectangle highlighting it. The button has options: Ask a question, Organize this library, Set up rules, Create new view, and See more agents. The SharePoint ribbon at the top includes tabs for SharePoint Content AI, Leon Content Centre, Contracts Management, Syntex Lookbook Content Centre, Demo Content Centre, and Edit. The navigation bar shows the site name "Leon Armston" and the library title "Document Processing for Microsoft 365". The document grid includes columns for Name, Incident date, Aircraft type, and Delay duration.

| Name   | Incident date       | Aircraft type   | Delay duration |
|--|---------------------|-----------------|----------------|
| Aviation Incident Report - AA-1498-14062021.docx   | 14/06/2021 12:00 AM | Airbus A319-100 | 8              |
| Aviation Incident Report - BA-81 - 11062021.docx   | 11/06/2021 12:00 AM | Boeing 777-200  | 5              |
| Aviation Incident Report - ER-502 - 05042021.docx  | 05/04/2021 12:00 AM |                 |                |
| Aviation Incident Report - FX-251 - 22062021.docx  | 22/06/2021 12:00 AM |                 |                |
| Aviation Incident Report - K4-335 - 11062021.docx  | 11/06/2021 12:00 AM |                 |                |
| Aviation Incident Report - PS-712-20052021.docx    | 20/05/2021 12:00 AM |                 |                |
| Aviation Incident Report - S4-680 - 20062021.docx  | 20/06/2021 12:00 AM |                 |                |
| Aviation Incident Report - SK-4546 - 22062021.docx | 22/06/2021 12:00 AM |                 |                |
| Aviation Incident Report - U3-9785 - 23062021.docx | 23/06/2021 12:00 AM | Boeing 747-400  | 6              |



# Knowledge Agent capabilities

Delivers a unified agent experience of SharePoint's AI tools

1

## Content management skills:

- Organise files in a SharePoint document library with suggested columns and metadata
- Automate workflows in a library
- Create views in a library

2

## Site management skills:

- Fix broken links
- Find content gaps
- Retire inactive pages

3

## Content creation skills:

- Create pages from your files
- Create sections based on your content that fit naturally into your page
- Create an FAQ

4

## Content consumption skills:

- Context aware Q&A
- Summarisation
- File comparison
- Audio overview
- Generate FAQ
- Metadata query support (coming next month)

5

## Agent discoverability skills:

- Help users discover and access custom agents on the site

Works continuously in the background when content is added or modified



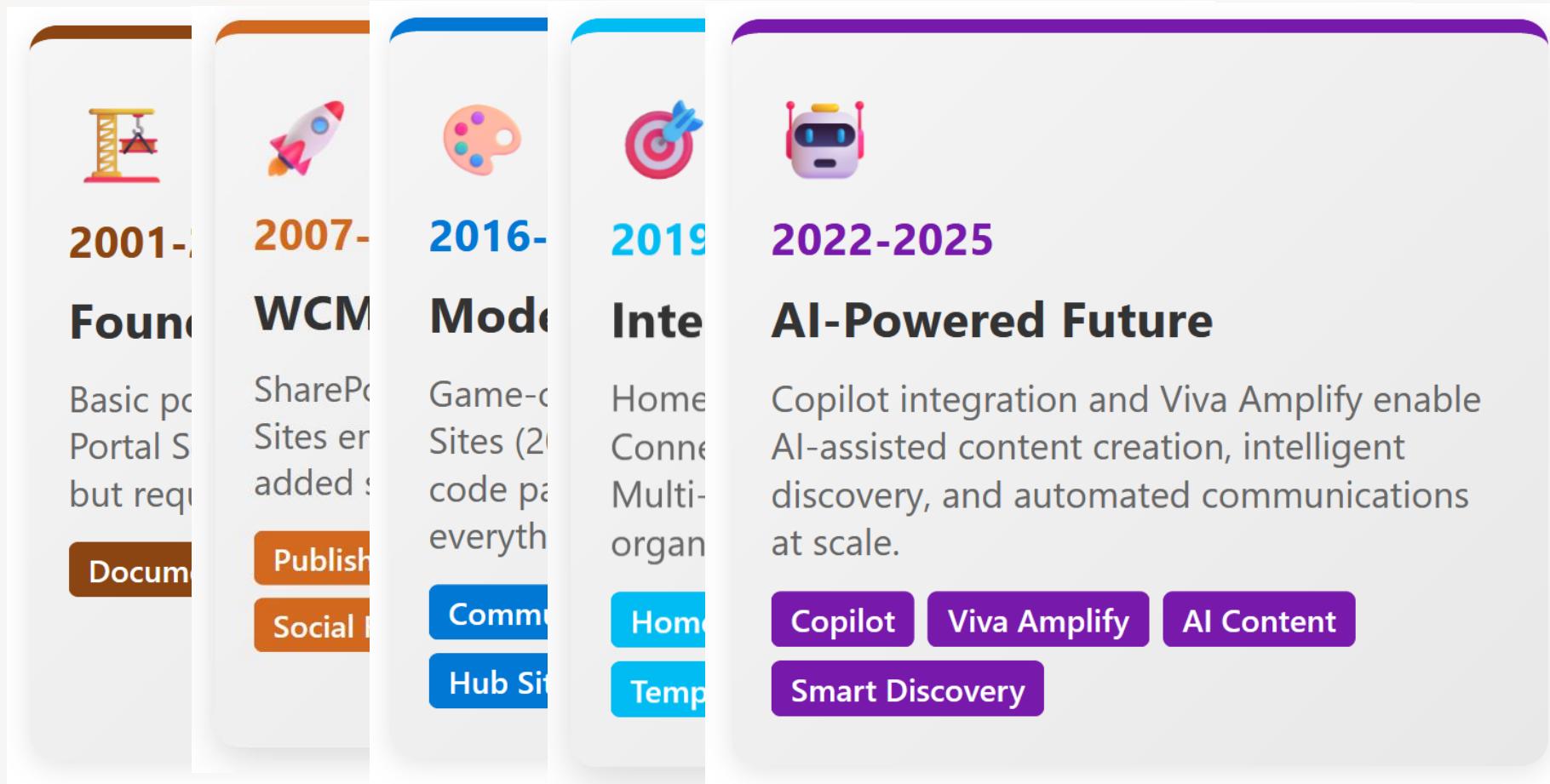
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# Communication



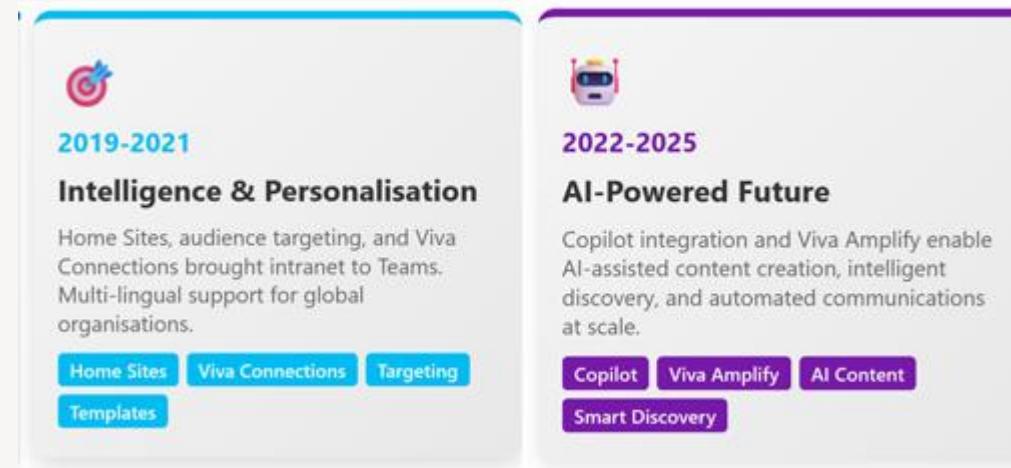


# Evolution of Communications in SharePoint





# Evolution of Communications in SharePoint





# Copilot in SharePoint?

## Authoring with AI in SharePoint

- Create pages with AI in SharePoint
- Create pages from page templates with prompts
- Create Pages with Open Prompts
- Refine SharePoint pages with AI
- Write with AI in SharePoint
- Auto rewrite with AI in SharePoint
- Make your text concise or longer with AI in SharePoint
- Adjust your text's tone with AI in SharePoint

## Knowledge Agent

- Ask a question about content
- Summarize file
- Compare files
- Audio overview of file
- Improve your site
- Create page with AI
- Create section with AI
- Create FAQ webpart
- Refine pages with design ideas
- Write and rewrite with AI



# Solve with Communications AI

- SharePoint Agents
- Page with AI templates
- News
- Personalisation
- Viva Connections





# Page Templates – Create page with AI

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**Customising** Pages and news posts

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**Templates** Meeting newsletter, topic, newsletter, training, process and message

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**Resources** For better results, such as files and meetings

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**Voice tones** Casual, Professional, Enthusiastic, Engaging, Creative

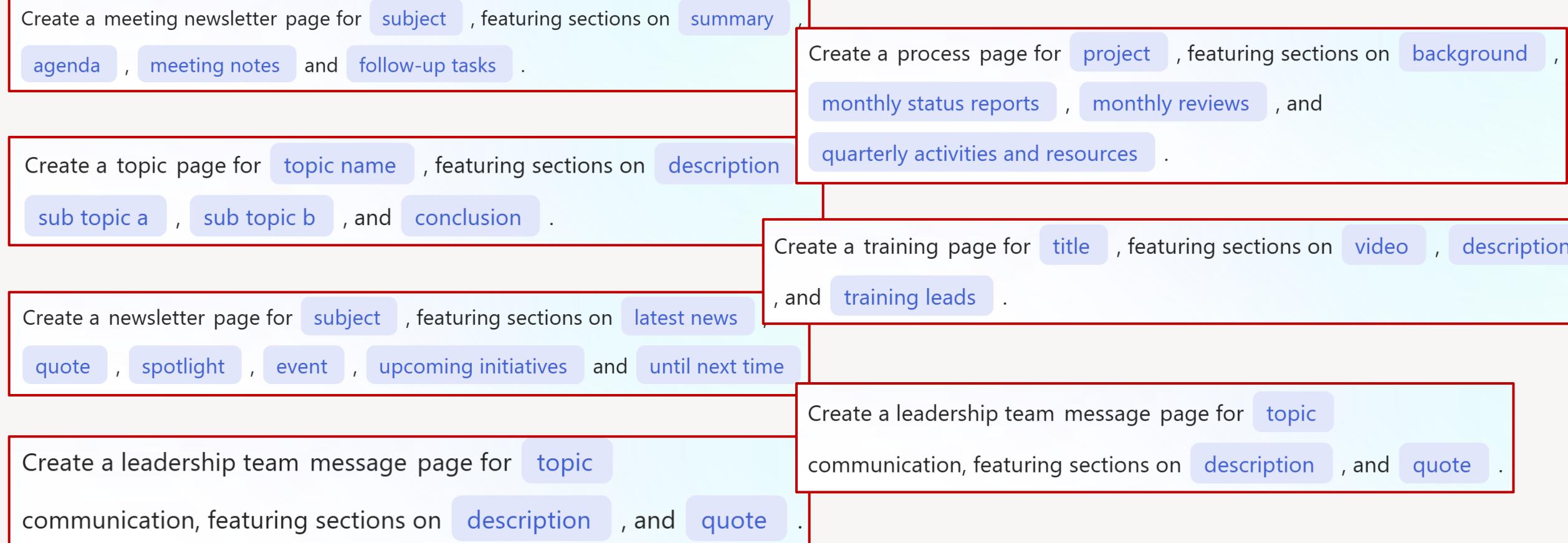
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**Length of article** Concise, Medium, Large

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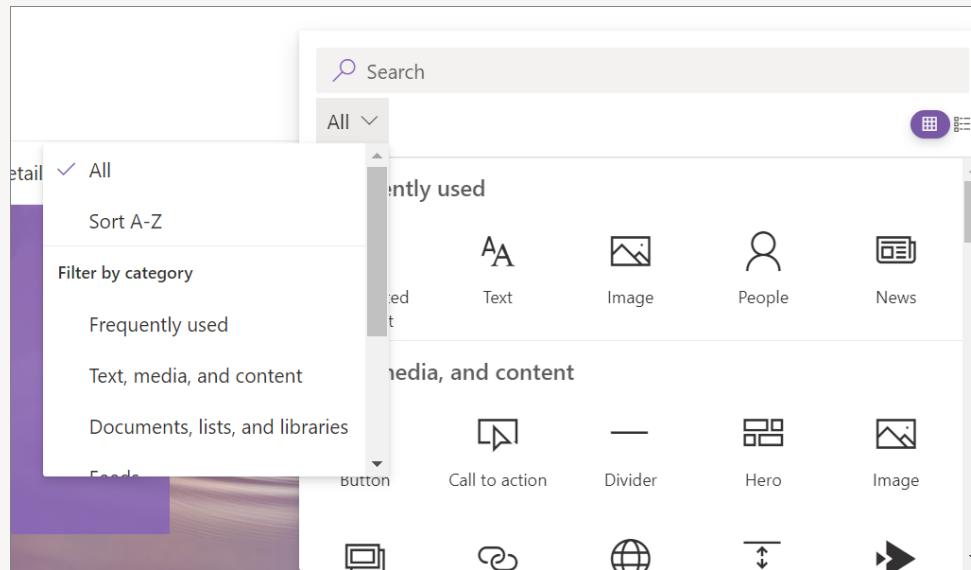


# Page Templates – Create page with AI





# Personalise pages with web parts



Assignments  
Agent Link  
Bing maps  
Button  
Call to Action  
Code snippet  
Connectors  
Conversations  
Countdown timer  
Divider  
Document library  
Embed  
Events  
Feed for Viva Connections  
File and Media  
Group calendar

Hero  
Highlighted content  
Highlights  
Image  
Image gallery  
Kindle Instant Preview  
Link  
List  
List properties  
Markdown  
Microsoft Forms  
Microsoft PowerApps  
My Feed  
News  
Office 365 Connectors

Organisation Chart  
Page properties  
People  
Planner  
Power BI report  
Quick chart  
Quick links  
Recent documents  
Saved for later  
Site activity  
Sites  
Spacer  
Stream (classic)  
Text  
Weather  
World clock  
YouTube



# What files are supported by SharePoint agents?

Currently, the following file types are supported:

- Office documents: DOC, DOCX, PPT, PPTX, XLSX
- New Microsoft 365 formats: FLUID, LOOP
- Universal formats: PDF, TXT, RTF
- Web files: ASPX, HTM, HTML
- OpenDocument formats: ODT, ODP
- Images

Support for the following file formats is coming soon:

- Meeting recordings and other videos
- OneNote notebooks



SharePoint Lists  
not supported

A large, solid red starburst or asterisk shape is positioned on the right side of the slide. Inside the starburst, the text "SharePoint Lists not supported" is written in a white, sans-serif font.



# Viva Connections

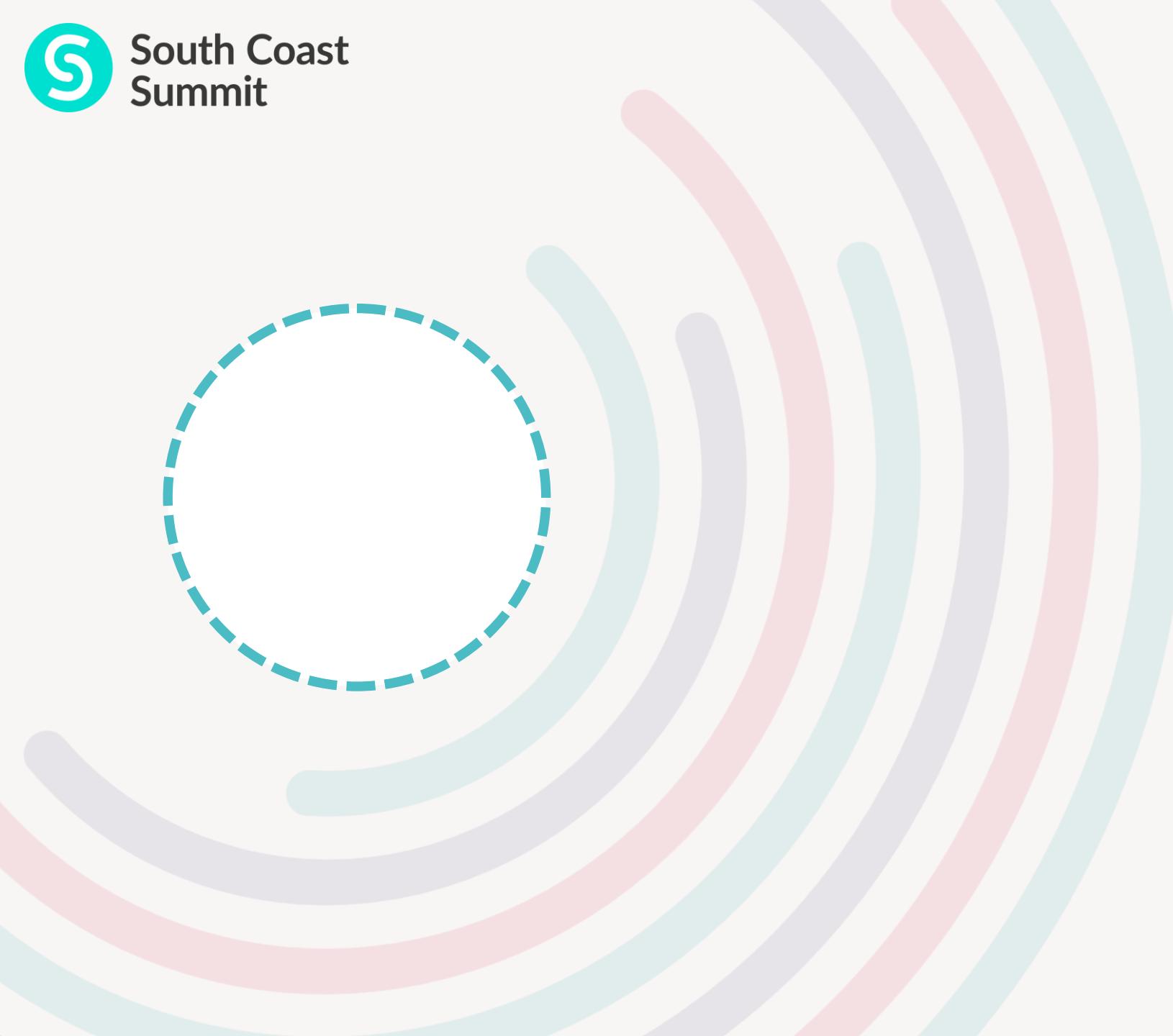
- Gateway to a modern user experience and is designed to keep everyone engaged and informed
- Customisable app that can be accessed through Microsoft Teams or the web from your desktop, mobile, or table device.
- Users can discover through different roles and personalised landing page:
  - Helpful tools to complete tasks
  - SharePoint news from organisational sites, boosted news, user followed sites, frequent sites, and from people the user works with
  - Resources in the form of links provided by the organisation
  - Other Viva apps your organisation is licensed for.



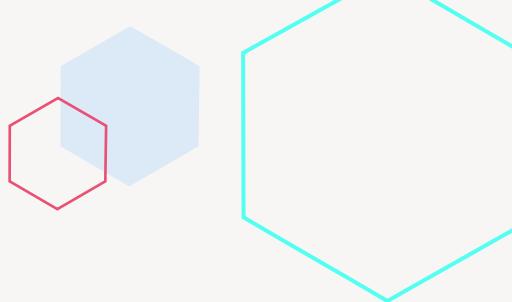


# What can each user role do with SharePoint agents?

| Role                               | Chat with SharePoint agents | Create a new agent | Share an agent | Edit an agent | Approve an agent for the site | Set an agent as default | Delete an agent |
|------------------------------------|-----------------------------|--------------------|----------------|---------------|-------------------------------|-------------------------|-----------------|
| Site visitors                      | ●                           |                    | ●              |               |                               |                         |                 |
| Site members with edit permissions | ●                           | ●                  | ●              | ●             |                               |                         | ●               |
| Site owners and above              | ●                           | ●                  | ●              | ●             | ●                             | ●                       | ●               |



**SharePoint – better  
with people working  
together**



# Understanding Collaboration

Working Towards  
Common Goals

Sharing Ideas and  
Resources



Collective Problem  
Solving

Fostering creativity and  
trust



**Clear Communication**

**Defined Roles**

**Leveraging Digital Tools**

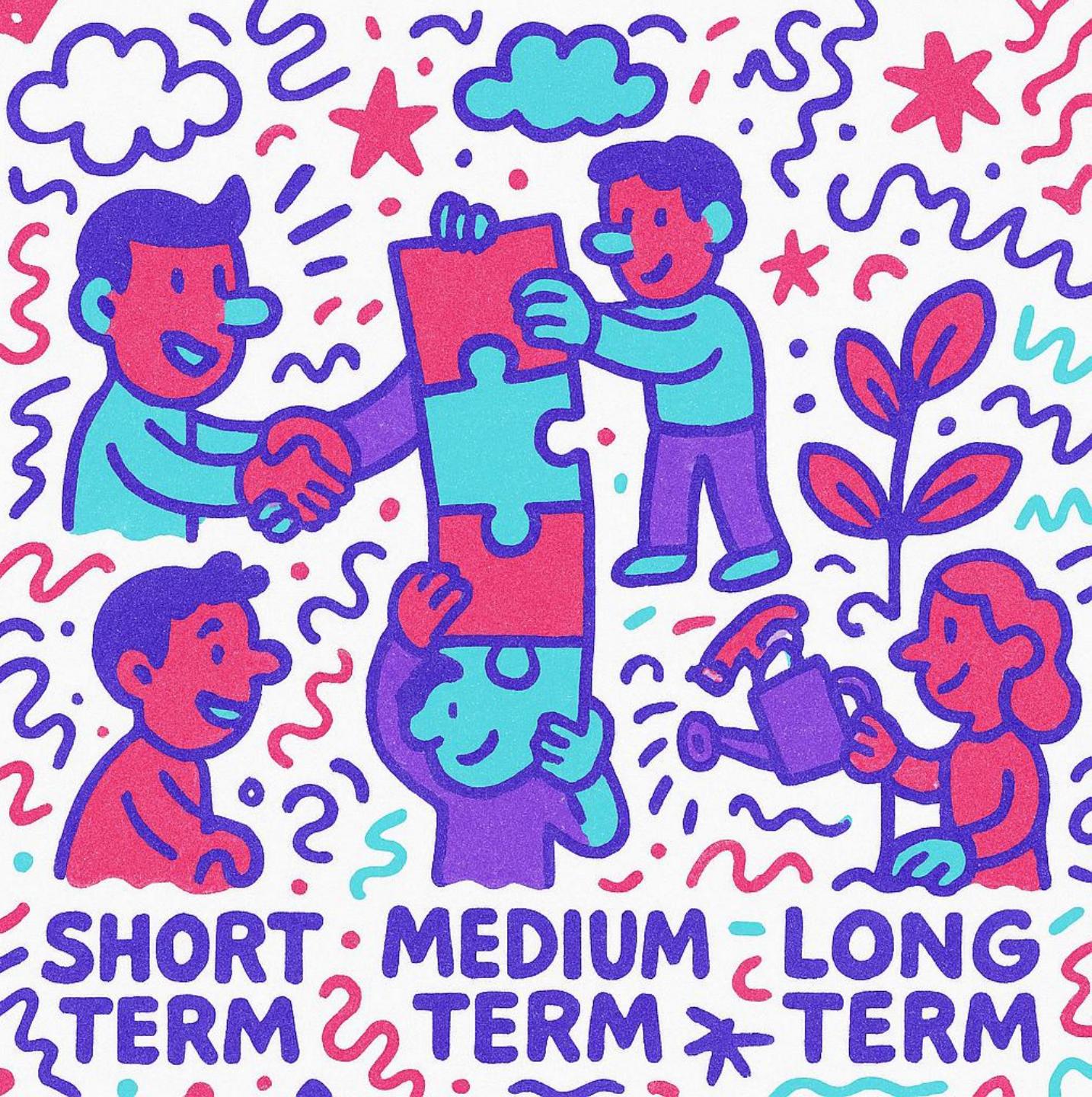
**Fostering Trust and Feedback**

# COLLABORATION + STRATEGIES



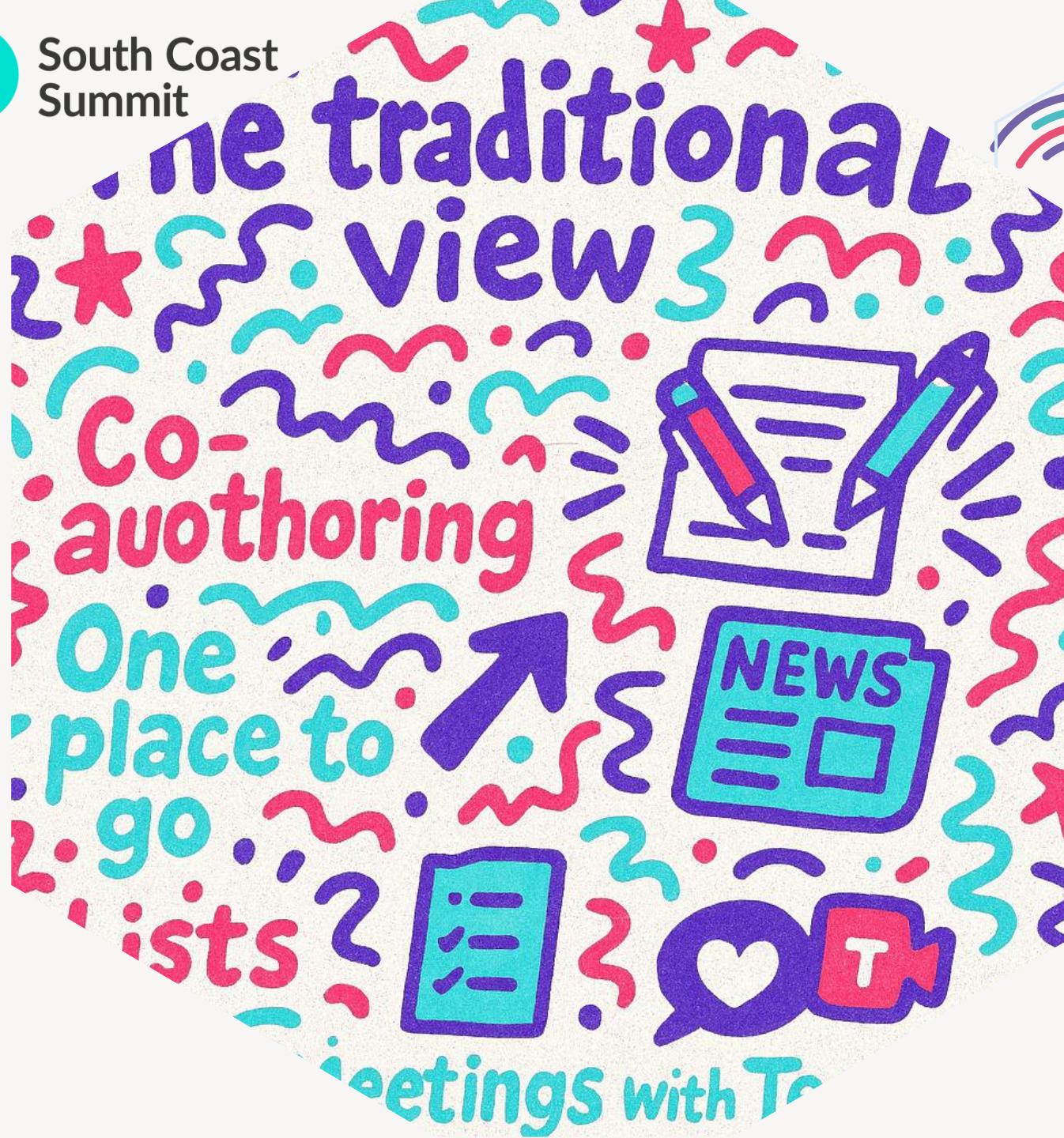


# Types of collaboration





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How can  
SharePoint  
help

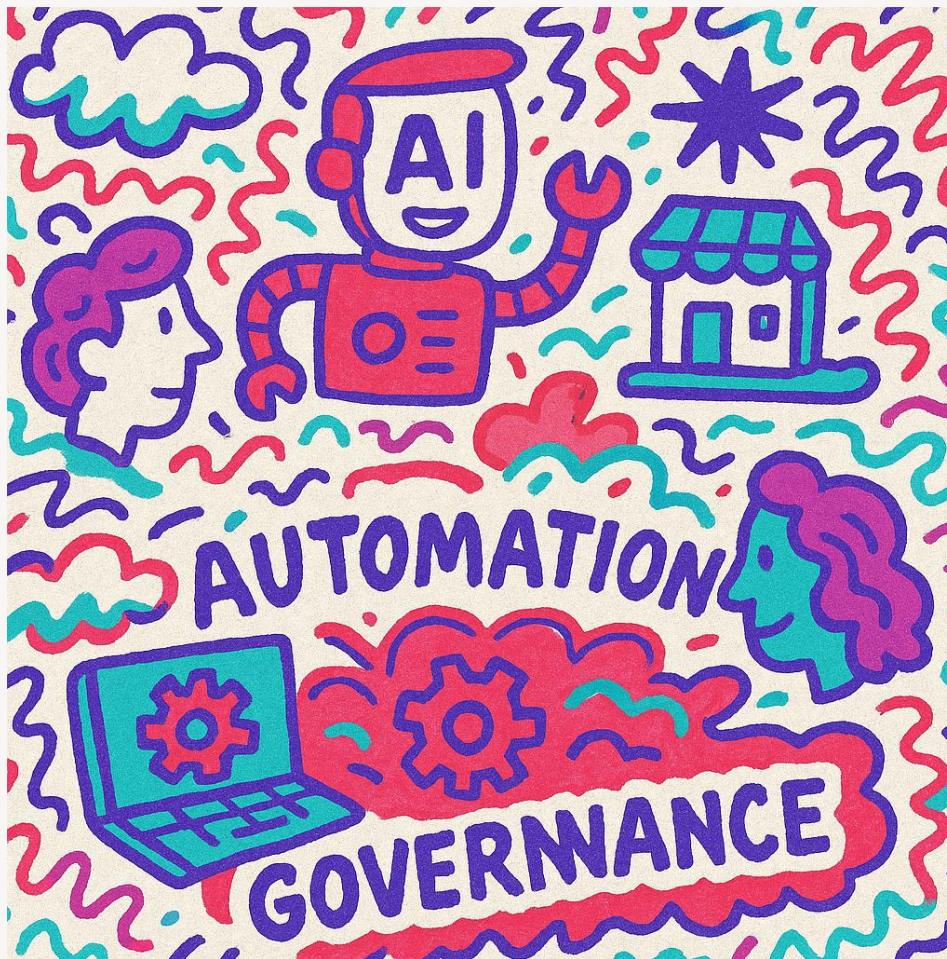


## The problems with the old view?





# SharePoint's Role in Modern Collaboration



**Site Automation**

**Document Automation**

**Finding content**

**External content**

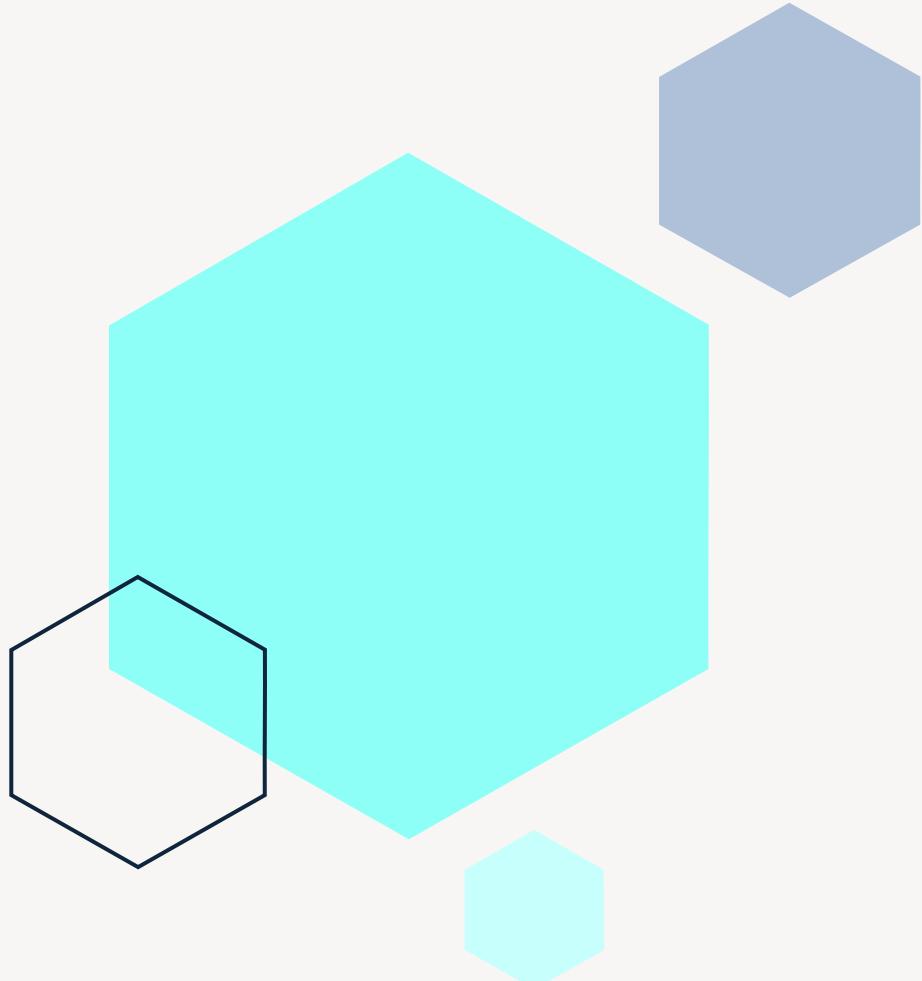
**Other tools**



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What will the  
future bring?





## Self-paced learning aka hackathon!

- We want to see your magic
- Follow the steps or go your own way
- We'll walk round to support you and hear your ideas
- Swag for our favourites!
- We want you to share and learn together
- Work in groups or on your own
- Details on next page



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# Knowledge Demo



# Technical comparison

|                   | <b>Knowledge Agent</b><br>1 <sup>st</sup> party intelligent content curator   | <b>Custom agents in SharePoint</b><br>Custom agents w/ subject matter expertise (SME)   |
|-------------------|---|---|
| Owner             | Microsoft   | Customer  |
| Purpose           | Intelligent Content Curator   | Q&A SME (Subject Matter Expert)   |
| Access Point      | On every site as default  | Can be built for targeted functions and invoked from SharePoint, Copilot, or Teams  |
| License           | Requires Microsoft 365 Copilot  | Requires Microsoft 365 Copilot or SP Agent PayG billing   |
| Availability      | Public Preview (Opt-in)   | General Availability  |
| Entry Point       | <ul style="list-style-type: none"><li>• Floating Button</li><li>• Suite nav entry for Chat panel</li></ul>                                  | <ul style="list-style-type: none"><li>• Suite nav entry for Chat panel<ul style="list-style-type: none"><li>– Available in agent picker menu</li></ul></li><li>• SharePoint Agent Webpart on Page</li></ul> |
| Q&A Scope         | Dynamic based on canvas   | Configured during creation  |
| Skills            | 15 targeted for public preview on Sep 18  | 1 Q&A   |
| Target User Roles | <ul style="list-style-type: none"><li>• Site Owner</li><li>• Content Manager</li><li>• Content Creator</li><li>• Content Consumer</li></ul> | <ul style="list-style-type: none"><li>• Content Consumer</li></ul>  |



Delivers a unified agent experience of SharePoint's AI tools

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# Knowledge Agent assets available



**Knowledge Agent Launch Blog**  
[aka.ms/KnowledgeAgent](http://aka.ms/KnowledgeAgent)



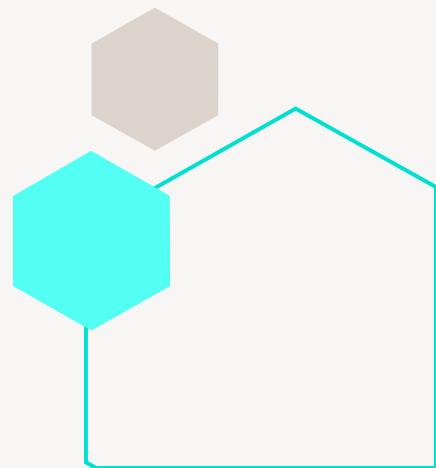
**Explainer video**  
[aka.ms/KAvideo](http://aka.ms/KAvideo)



**Click-through demo**  
[aka.ms/KAdemo](http://aka.ms/KAdemo)



**Opt-in Instructions – public preview**  
[aka.ms/KnowledgeAgentOptIn](http://aka.ms/KnowledgeAgentOptIn)





# Communication – Demo points

## (slide to be hidden)

- Show a "before/after" of a traditional SharePoint site vs. an AI-enhanced experience
- Use Copilot to create a news article from meeting notes
- Generate page content for a project site
- Embedding Copilot experiences in modern pages
  - Copilot web parts and extensions
  - Contextual AI assistance within page content
- Dynamic content experiences powered by AI
  - Personalised news and recommendations
  - Intelligent search web parts
  - Audience targeting enhanced with AI insights
- Viva Connections and SharePoint: Amplifying AI experiences



# Create page with AI

- **Step 1: Creating a page**

Select the +New button in the command bar of your SharePoint site and select **Page with AI**.

- **Step 2: Select a template**

Choose a template that suits your needs. You will find a variety of templates like newsletter, event, status update, and process.

- **Step 3: Use prompts to customise your page**

Once you select a template, you have the option to fill in keywords in the prompts that come with the template. Additionally, you can provide your own files as sources of the page for better results.

- **Step 4: Preview your page**

Preview your page to ensure everything looks good. Make any necessary adjustments to the content or layout.

- **Step 5: Publish**

Once satisfied, save and publish your page.



# Create section with AI

The screenshot shows a Microsoft 365 interface with a blue header bar featuring the name 'Chirag Patel' and 'Microsoft 365 Consultant'. Below the header is a search bar with the placeholder text 'Create a section about Product Overview.docx describing important topics as separate regions and rest of it in one region|'. Underneath the search bar is a preview of a document titled 'Product Overview.docx' with the status '122 / 2000'. A large 'Suggestions for you' section is displayed below, containing three items:

- Helpful resources and documentation links**: Create a section about helpful resources and documentation for the Contoso DG-2000. This section should provide links to manuals, guides, and additional materials that support users in learning more...
- What's next for DG-2000 owners**: Create a section about what's next for DG-2000 owners. This section should outline upcoming steps, activities, or follow-up actions, such as product updates, community events, or support opportunities.
- Prompt users to take action**: Create a section about prompting users to take a desired action related to the DG-2000. This could include registering the product, signing up for updates, or contacting support for more information.

At the bottom right of the suggestions section, there is a note: 'AI-generated content may be incorrect' with a thumbs up and thumbs down icon.

Section with AI looks at the context of your page to offer prompt suggestions for what content you need next as a starting point.

1. You either select one of those starting points or write your own and optionally ground in relevant files to give the AI more context.
2. After you select **Generate**, Sections with AI then leverages your sources, the knowledge and content already inside of your organisation, and the content already on your page to create rich sections that go beyond just image and text. This could mean including information from meeting transcripts, recent documents, or any other knowledge AI has access to. Toggle between options in the header and choose your favourite!
3. If the output section isn't quite right, you can then use AI refinement to make changes to both the content and layout of your section.
4. Some examples include **Change the background image**, **Add David Gower's contact information**, or **Make the text more professional**.
5. If you need different suggestions, select **Regenerate** and you will get more options.
6. After you have a section, select **Add to page** to add it to your canvas, and edit it as you would any other section.



# Sections with AI – refining content

A screenshot of a digital interface, likely a web-based tool or software. At the top left is a teal icon with three white stars. Next to it is a button labeled "Preview". To the right of the button is a text input field with the placeholder text "What do you want to change?". Below this input field are two options: "Make it shorter" and "Change the background to a gradient". Each option has an associated icon: a left-pointing arrow for the first and a camera with a plus sign for the second. A blue vertical bar is visible on the far left edge of the interface.

- Adjust text or tone to your requirements
- Change formatting of text fonts as an example
- Reference additional files if necessary



# Page – Web parts

The screenshot shows a SharePoint page editor interface. At the top, there's an 'AI' section with two 'New' buttons: one for 'Agent link' (with a list icon) and one for 'FAQ (Preview)' (with a question mark icon). Below this, the main content area contains a 'FAQ (Preview)' web part. The web part has a title bar with icons for settings, copy, and delete, followed by a 'Get started' button. The configuration dialog for 'FAQ (Preview)' is open, prompting the user to 'Let AI create a set of frequently asked questions based on source files you provide.' It includes fields for 'Source files' (with an '+ Add' button), 'Purpose' (set to 'Select'), and 'Other details for AI' (with a text input field 'Enter information that will help AI build this FAQ'). A 'Start' button is at the bottom.

1. Create a new page.
2. Select toolbox, and add a FAQ (Preview) web part.
3. Select Source Files: Files & Meetings
4. Choose Purpose: Event, Product, Policy, General
5. Other details for AI: Enter “create a FAQ for products and camera specifications”
6. Work through draft questions, answers that are generated by AI (see next slide).
7. Select “Keep It” to save the changes of FAQ web part.
8. Publish the page



# Page – FAQ (Preview) Web Part

The screenshot shows a SharePoint page with a navigation bar at the top. The left sidebar contains categories: Image Quality, Design, Support, Ease of Use, and Video Recording. A modal window titled "FAQ (Preview)" is open, prompting the user to let AI create frequently asked questions based on a provided source file. Below the modal, there are two sections of the FAQ list. The first section, under "Image Quality", includes questions about megapixel count, ISO range, sharp images, and image stabilization. The second section, under "Design", includes a question about compactness and weight. To the right of the questions, there is a summary of the megapixel count for the DG-2000 and a note about its ISO range.

Draft questions

Exit

FAQ (Preview)

Let AI create a set of frequently asked questions based on source file you provide.

+ Add a category

Draft answers

Keep it

AI-generated content may be incorrect

Image Quality

Design

Support

Ease of Use

Video Recording

Image Quality

What is the megapixel count of the DG-2000?

How does the ISO range affect image quality?

What features ensure sharp images every time?

How does image stabilization work in the DG-2000?

Design

What makes the DG-2000 compact and lightweight?

The DG-2000 features a 36.3 megapixel sensor, providing top-of-the-market capture resolution in its class. This high resolution allows you to crisply capture every detail, making it ideal for both casual photographers and professionals who need flexibility for zooming, cropping, and editing images.

- 36.3 megapixels

How does the ISO range affect image quality?

The DG-2000 offers an ISO range of 100–25600, which means you can shoot in a wide variety of lighting conditions. A lower ISO



# Adding Text Web Part

The screenshot shows a Microsoft Word ribbon interface. The top bar includes the 'File' tab, 'Home' tab, and a 'Draft with AI' button. Below the ribbon is a heading 'Top Product Highlights of the Contoso DG-2000'. Underneath the heading is a bulleted list. A callout bubble from the 'Draft with AI' button contains the text 'What do you want to draft?' and a 'Keep writing this' button.

- Professional Features for All: The DG-2000 is designed to bring professional photography capabilities to everyday users, making it suitable for both beginners and advanced photographers.
- Exceptional high resolution sensor and super fast processing.

What do you want to draft?

A ➔ Keep writing this

- Select **Draft with AI** icon
- Adjust text or tone to your requirements
- Change formatting of text fonts as an example
- Reference additional files if necessary

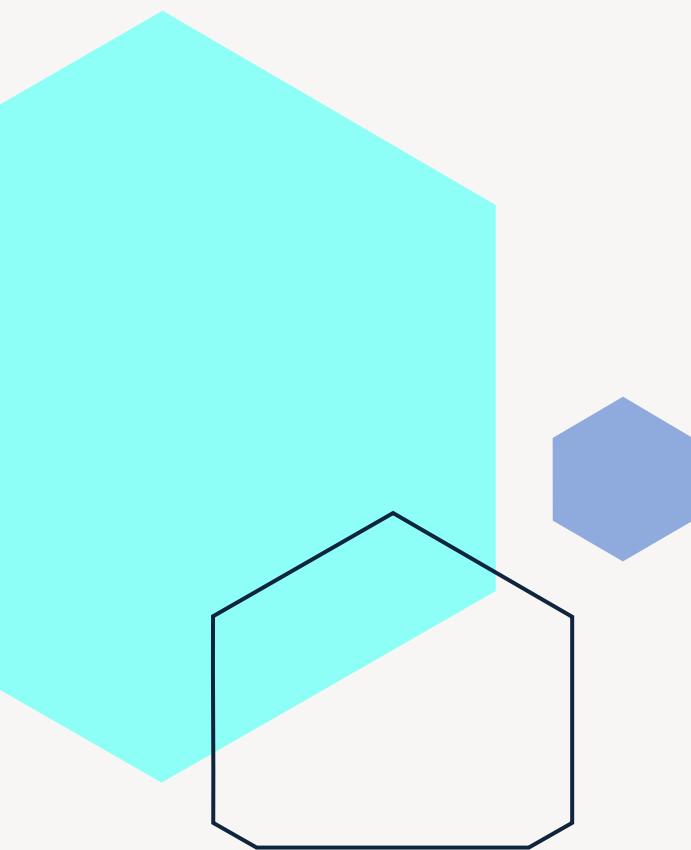


# Collaboration

- PMO Site
  - New project
  - Lifecycle creates a new project site
  - Doc assembly for project breakdown document
- Project Sites
  - Navigation and structure
    - Content types over folders
    - Autofill columns
  - SharePoint Agent
  - Copilot Studio agent in a Viva Connections block
  - Azure Dev Ops agent
  - Status assistant agent



# Building a Collaboration Site



## PMO



- Central site to look after all projects

## Project



- Site for each project

## Integration



- Connections to things like Azure Dev Ops



# Create a PMO Site



- Head to main SharePoint Page at [https://{{your-tenant}}.sharepoint.com/\\_layouts/15/sharepoint.aspx](https://{{your-tenant}}.sharepoint.com/_layouts/15/sharepoint.aspx)
- Create a communication site and call it PMO-{YOUR INITIALS}, choosing whichever template you like

Create a site: Select the site type

Select the type of site you want to create. [Learn more about team sites](#) or [learn more about communication sites](#).

X

**Team site**

Create a private space to collaborate with your team.

- Track and stay updated on project status
- Share team resources and co-author content
- All site owners and members publish site content
- Can connect to other Microsoft 365 products

**Communication site**

Share information that engages a broad audience.

- Create a portal or subject-focused site
- Engage dozens or thousands of viewers
- Few content authors and many site visitors



# Create a Project List



- On the home page, click on new and add a new List
- Select the blank list and call it projects
- Add some useful columns that must include SiteUrl and then can have others you see fit e.g. description, key initiative, project owner etc.

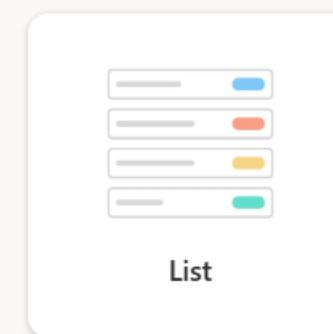
PK PMO-KM Home Documents

+ New Page details Preview Analy

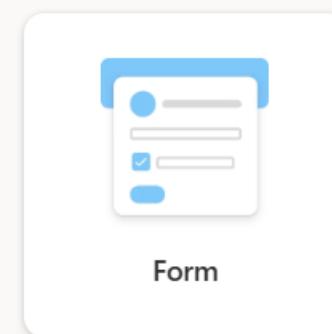
New Agent List Lists form Document library Page Page with AI Preview News post News link App

How would you like to start?

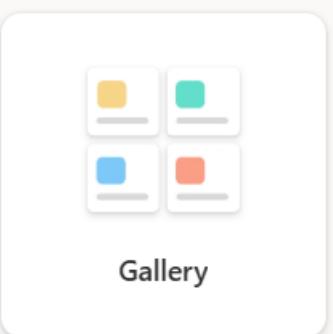
Create from blank



List



Form



Gallery



# Create an automation



- Click on the Integrate menu and select Power Automate then Create a flow
- Select Request approval in Teams (unless you want to be more inspired)

The screenshot shows the SharePoint ribbon with the 'Edit' tab selected. The 'Integrate' menu is open, showing options for 'Power Apps', 'Power Automate', and 'Power BI'. The 'Power Automate' option is highlighted, and a dropdown menu appears below it, showing 'Create a flow' as the top item.

**Create a flow**

Start with a template and create automated tasks between your SharePoint data and other apps. Choosing a template will open the Power Automate site where you'll finish creating your flow.

|  |  |
|--|--|
|  | Send a customized email when a new SharePoint list item is added |
|  | Send document created using Microsoft Syntex as email            |
|  | Request approval (everyone must approve) for a selected item     |
|  | Request approval in Microsoft Teams when a SharePoint item is    |



# Set up the flow



- Configure the “Create an approval (V2)” action and the “Send an email” action
- You will have to remove the optional fields in the approval action and potentially refresh the page.

Back Request approval in Microsoft Teams when a SharePoint item is created

Create an approval (V2)

Parameters ● Settings Code view Testing About

Approval type \*

Approve/Reject - First to respond

Title \*

New project request

Assigned to \*

Kevin

Details

There's a new project called Title X created. Would you approve it?

Item link

Add a link to the item to approve

Item link description

Describe the link to the item

Advanced parameters

Showing 12 of 16

WebhookApprovalCreationInput/title

Approval request: Name X

'WebhookApprovalCreationInput/title' is no longer present in the operation schema. It should be removed before the workflow is re-saved.

The screenshot shows the 'Create an approval (V2)' configuration screen on the left and the flow editor on the right. In the configuration screen, the 'Approval type' is set to 'Approve/Reject - First to respond', the title is 'New project request', and the assigned to field is 'Kevin'. The 'Details' section contains a message: 'There's a new project called Title X created. Would you approve it?'. In the flow editor, a workflow starts with 'When an item is created', followed by 'Get item', 'Get my profile (V2)', and 'Create an approval (V2)'. The 'Create an approval (V2)' step has a warning: 'Invalid parameters'. This leads to 'Apply to each' (1 Action) and finally 'Send an email'. The 'Send an email' step also has a warning: 'Invalid connection, please update your connection to load complete details'.



# Add create site action

- Add an action after the approval notification for “Send an HTTP request to SharePoint”
- Set the Site address to the root site
- Set the method to Post
- Set the Uri to \_api/SPSiteManager/create
- Add the two advanced parameters
- Add the Headers
  - Accept: application/json;odata=none
  - Content-Type: application/json
- Add the Body:
  - { "request": { "Title": "@{triggerBody()['Title']}", "Url": "https://yourtenant.sharepoint.com/sites/@{triggerBody()['SiteUrl']}", "Lcid": 1033, "ShareByEmailEnabled": false, "Description": "Site for project collaboration", "WebTemplate": "STS#3", "Owner": "@{outputs('Get\_my\_profile\_(V2)')['body/mail']}"} }

The screenshot shows the configuration interface for a Microsoft Flow action named 'Send an HTTP request to SharePoint'. The top navigation bar includes tabs for 'Parameters', 'Settings', 'Code view', 'Testing', and 'About'. The 'Parameters' tab is selected.

**Site Address \***: Website - https://mcdonnell.sharepoint.com

**Method \***: POST

**Uri \***: \_api/SPSiteManager/create

**Advanced parameters**: Showing 2 of 2

**Headers**: Enter key, Enter value

**Body**:

```
{  
  "request": {  
    "Title": "S C Title X",  
    "Url": "https://yourtenant.sharepoint.com/sites/S SiteUrl X",  
    "Lcid": 1033,  
    "ShareByEmailEnabled": false,  
    "Description": "Site for project collaboration",  
    "WebTemplate": "STS#3",  
    "Owner": "@{outputs('Get_my_profile_(V2)')['body/mail']}"  
  }  
}
```



# Create a Project Document



- Ask Copilot to create a sample Project Document – do this from a blank document as some of the templates do not work well with Content Assembly
- Follow these steps to automate it with Content Assembly in the PMO Site
  - [Create a modern template | Microsoft Learn](#)
- Potentially set up a flow on creation to copy to Project Site



# Create a project site



- Head to main SharePoint Page at [https://<your-tenant>.sharepoint.com/\\_layouts/15/sharepoint.aspx](https://<your-tenant>.sharepoint.com/_layouts/15/sharepoint.aspx)
- Create a team site and call it whatever you like to match a project name, choosing the Project Site template
- Head to the Documents section
- Click on new and select Word document
- Now is your chance to get creative – use SharePoint to make a prompt for a type of project document
  - Requirements specification
  - Design document
  - Change document
  - Status Report
- Running out of time? We have some sample content to copy at

## Example Prompt

Create a project design document for the project scoped below:  
The Enterprise Digital Transformation Initiative (EDTI) aims to modernize and streamline our organization's operations by leveraging advanced digital technologies. This project will enhance efficiency, improve customer experience, and drive innovation across all departments.

### Scope

Cloud Migration: Transitioning critical applications and data to cloud-based platforms to improve scalability, accessibility, and cost-efficiency.

ERP System Upgrade: Upgrading our Enterprise Resource Planning system to integrate new functionalities and support better decision-making processes.

CRM Enhancement: Enhancing our Customer Relationship Management system to provide a more personalized customer experience and improve customer retention.

Data Analytics and Business Intelligence: Implementing advanced data analytics and business intelligence tools to gain insights and drive data-driven strategies.

Cybersecurity Enhancement: Strengthening our cybersecurity measures to protect sensitive data and ensure compliance with industry standards.

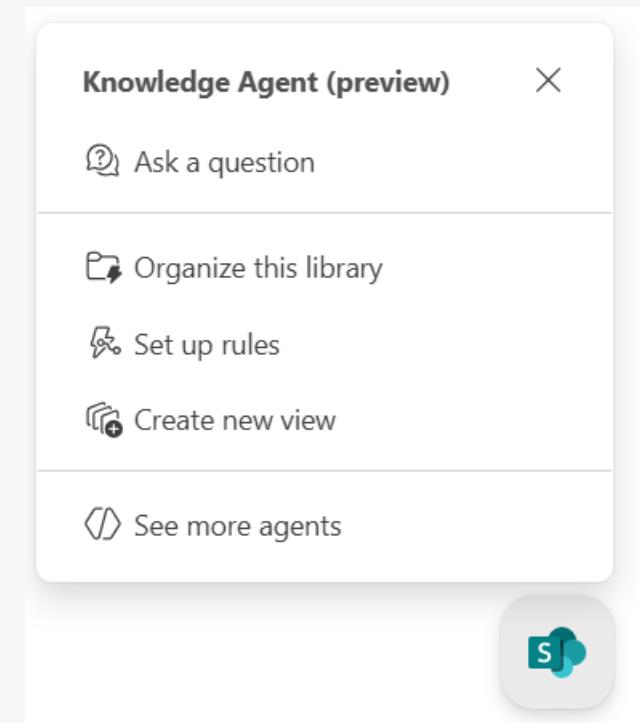
Digital Workplace Transformation: Creating a modern digital workplace that fosters collaboration, productivity, and employee satisfaction. .



# Add knowledge agent



- From the Documents library, click on the SharePoint icon on the bottom right and select “Organize this library”
- Note that if you have used folders, you will need to create a view with no folders
- Select Classify documents (or feel creative if you want to use other or your own prompts)
- See further details at [Organize files in a SharePoint document library - SharePoint in Microsoft 365 | Microsoft Learn](#)





# Show other agents



- Click on the agents icon on the top right
- Explore the available agents there
- Add an icon to the home page using the Agent Link web part

Private group ★ Following 1 member

Published 10/13/2025 Share Edit

Search All

Frequently used

Image List Text Document library

AI

New Agent link New FAQ (Preview)



# Show Copilot Studio Agents



- Head to <https://copilotstudio.Microsoft.com>, click on create and select the Weather agent template
- Scroll down to Connect your data and click on Set up connection
- Create the agent and then select channels and set up the SharePoint channel for one of your project sites

**Create**

**Start with an agent template**

**Website Q&A** Agent template  
Instantly answer user questions using the content of your website or other knowledge.  
AI + Machine Learning Customer Service

**Voice** Agent template  
An agent with voice capabilities.  
AI + Machine Learning

**Safe Travels** Agent template  
Provides answers to common travel questions and related health and safety guidelines.  
Government

**Financial Insights** Agent template  
Help financial services professionals get quick and concise info from their org's financial documents and other available resources.  
Finance Financial Services

**Benefits** Agent template  
Benefits Agent provides personalized information on various benefits offered by the employer that are tailored to employee's unique circumstances.  
Human Resources

**Citizen Services** Agent template  
Enable Public Sector organizations to build an agent with their publicly available websites to assist citizens navigate services and information.  
Customer Service Government

**IT Helpdesk** Agent template  
Empowers employees to resolve issues and effortlessly create/view support tickets.  
IT & Management Tools

**Weather** Agent template  
Your go-to assistant for getting weather forecast.  
Hospitality & Travel

**Connect your data**  
Set up the data source connections that will enable your copilot to complete tasks and access information

**MSN Weather** Set up connection ⚠ ⋮

The screenshot shows the Microsoft Copilot Studio 'Create' interface. On the left is a vertical toolbar with icons for Home, Create (selected), Agents, Flows, Tools, and a three-dot menu. The main area displays a grid of agent templates. Each template card includes a title, icon, brief description, and category tags at the bottom. A 'Connect your data' section on the right shows a 'MSN Weather' connection setup with a status of 'Set up connection' and a warning icon. The overall theme is light blue and white.



# Now it's time for you to play!

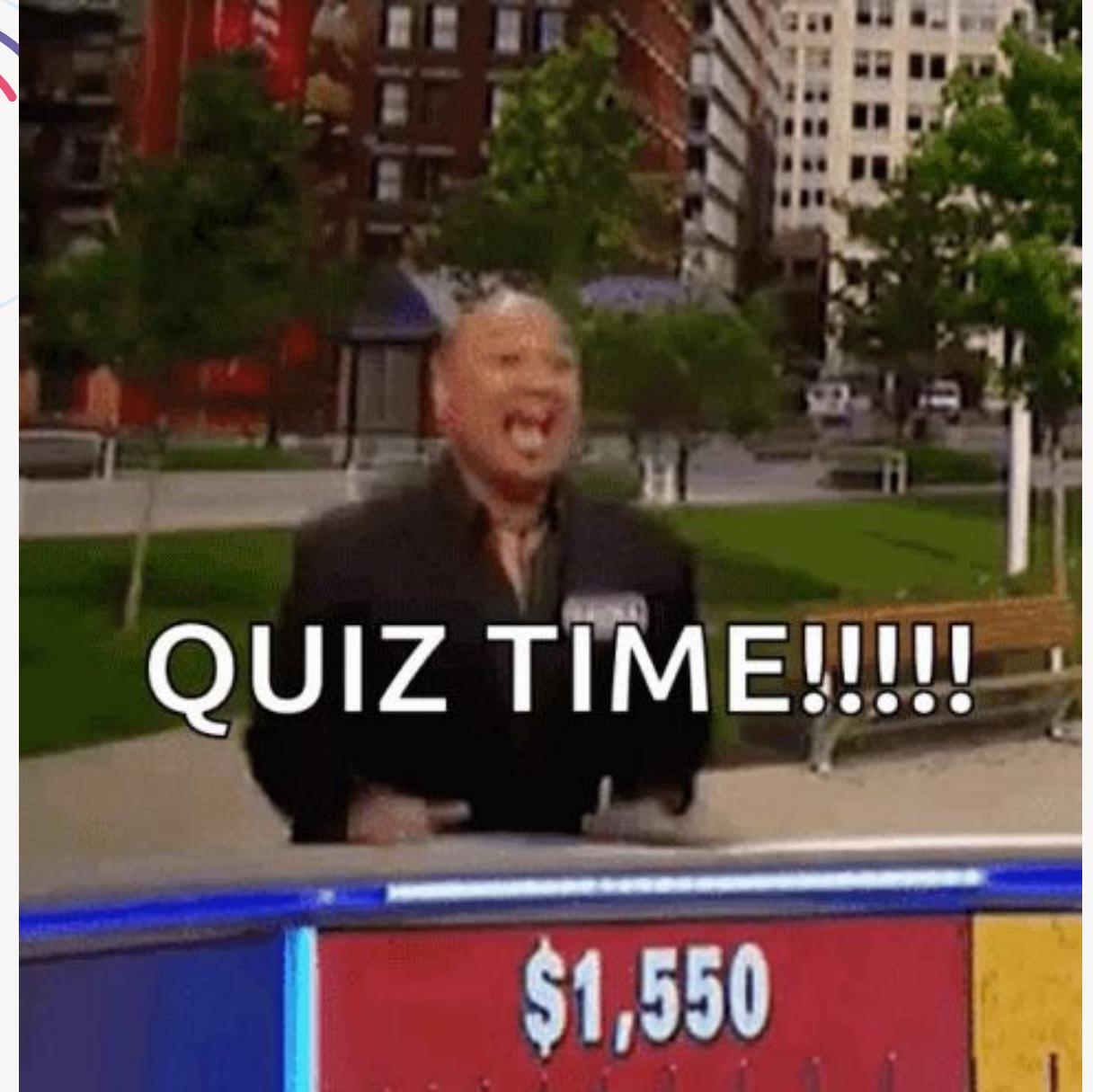




South Coast  
Summit



# Prizes!





# How do you organise a library to have AI generated columns?

- ⓘ The Slido app must be installed on every computer you're presenting from



**Which types of agent can you NOT show on a SharePoint site?**

- ① The Slido app must be installed on every computer you're presenting from



# What won't a Microsoft 365 license give me in SharePoint

- ① The Slido app must be installed on every computer you're presenting from



**What has previously been the name for AI-powered content services in the Microsoft 365 ecosystem?**

- ① The Slido app must be installed on every computer you're presenting from



# Which AI technology powers Autofill columns in SharePoint document libraries?

- ⓘ The Slido app must be installed on every computer you're presenting from



# How old is SharePoint?

- ⓘ The Slido app must be installed on every computer you're presenting from



**Which resources can you use  
customise your page with AI (Tick  
all that apply)**

- ① The Slido app must be installed on every computer you're presenting from



# Who can create SharePoint Agents?

- ① The Slido app must be installed on every computer you're presenting from



# Which of the following are AI web parts?

- ① The Slido app must be installed on every computer you're presenting from



# Is OneNote notebooks supported by SharePoint Agents?

- ⓘ The Slido app must be installed on every computer you're presenting from



# Useful links

- APQC for knowledge management - [Helping Organizations Work Smarter, Faster, and with Greater Confidence | APQC](#)



# Knowledge Agent assets available



**Knowledge Agent Launch Blog**  
[aka.ms/KnowledgeAgent](http://aka.ms/KnowledgeAgent)



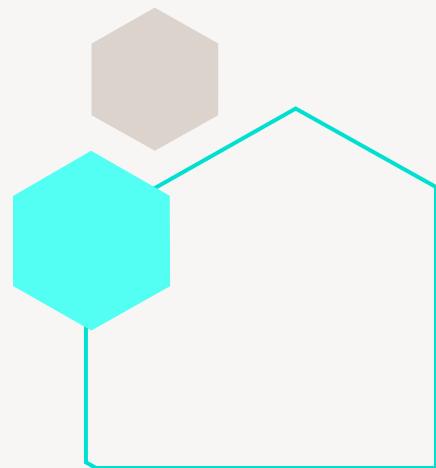
**Explainer video**  
[aka.ms/KAvideo](http://aka.ms/KAvideo)



**Click-through demo**  
[aka.ms/KAdemo](http://aka.ms/KAdemo)

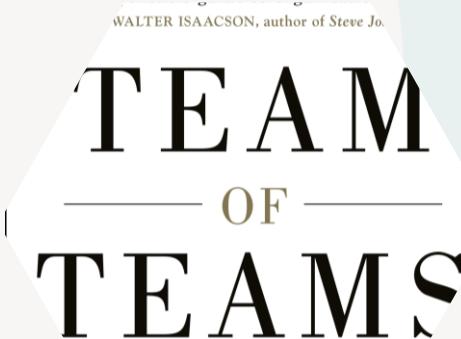
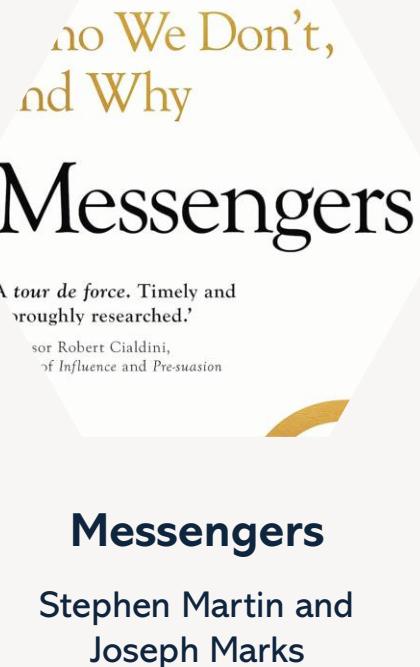
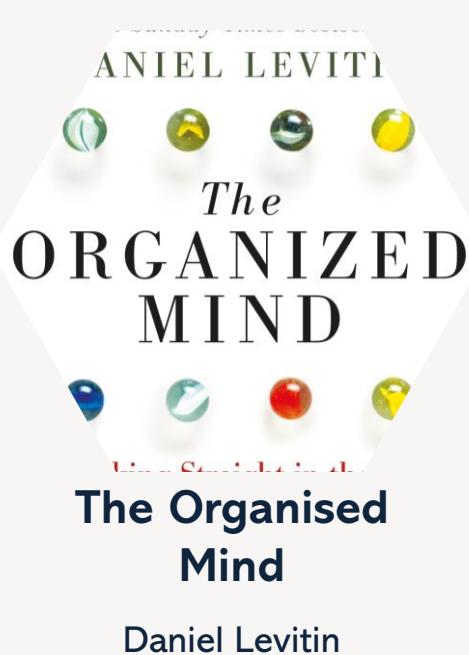


**Opt-in Instructions – public preview**  
[aka.ms/KnowledgeAgentOptIn](http://aka.ms/KnowledgeAgentOptIn)

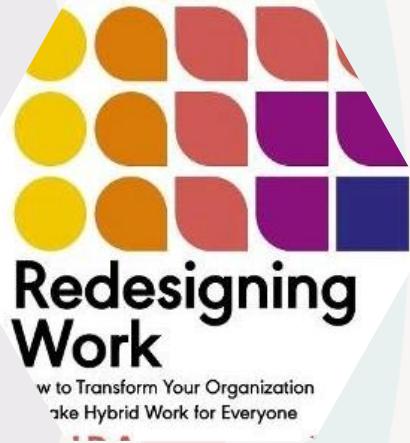




# Useful books



Team of Teams  
General McChrystal



Redesigning Work  
Lynda Gratton



# Thank you

Please provide feedback

