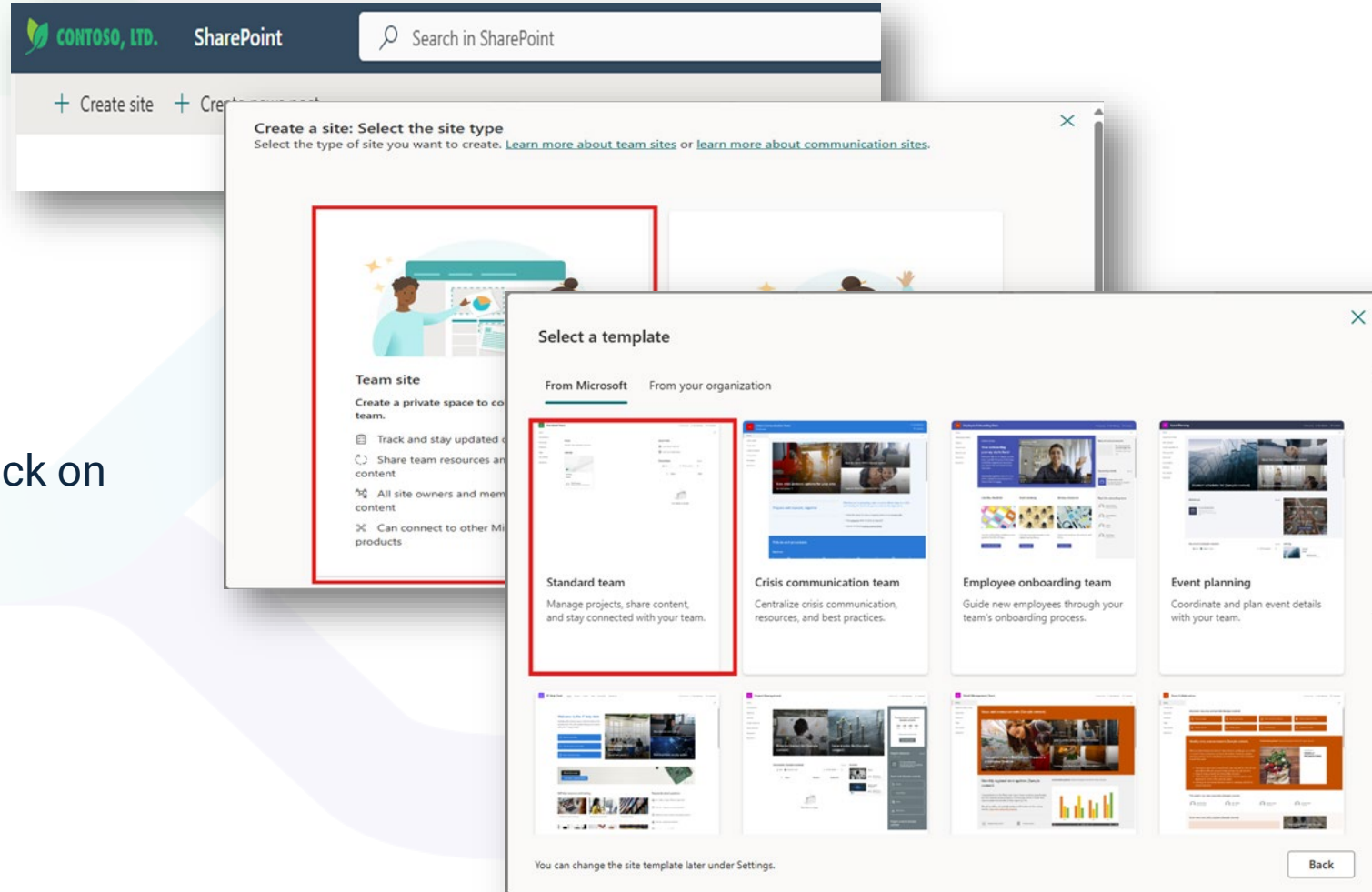# Getting Started
Preparing the knowledge

Create a SharePoint Site

1. Go to your SharePoint environment, click on '+Create Site'

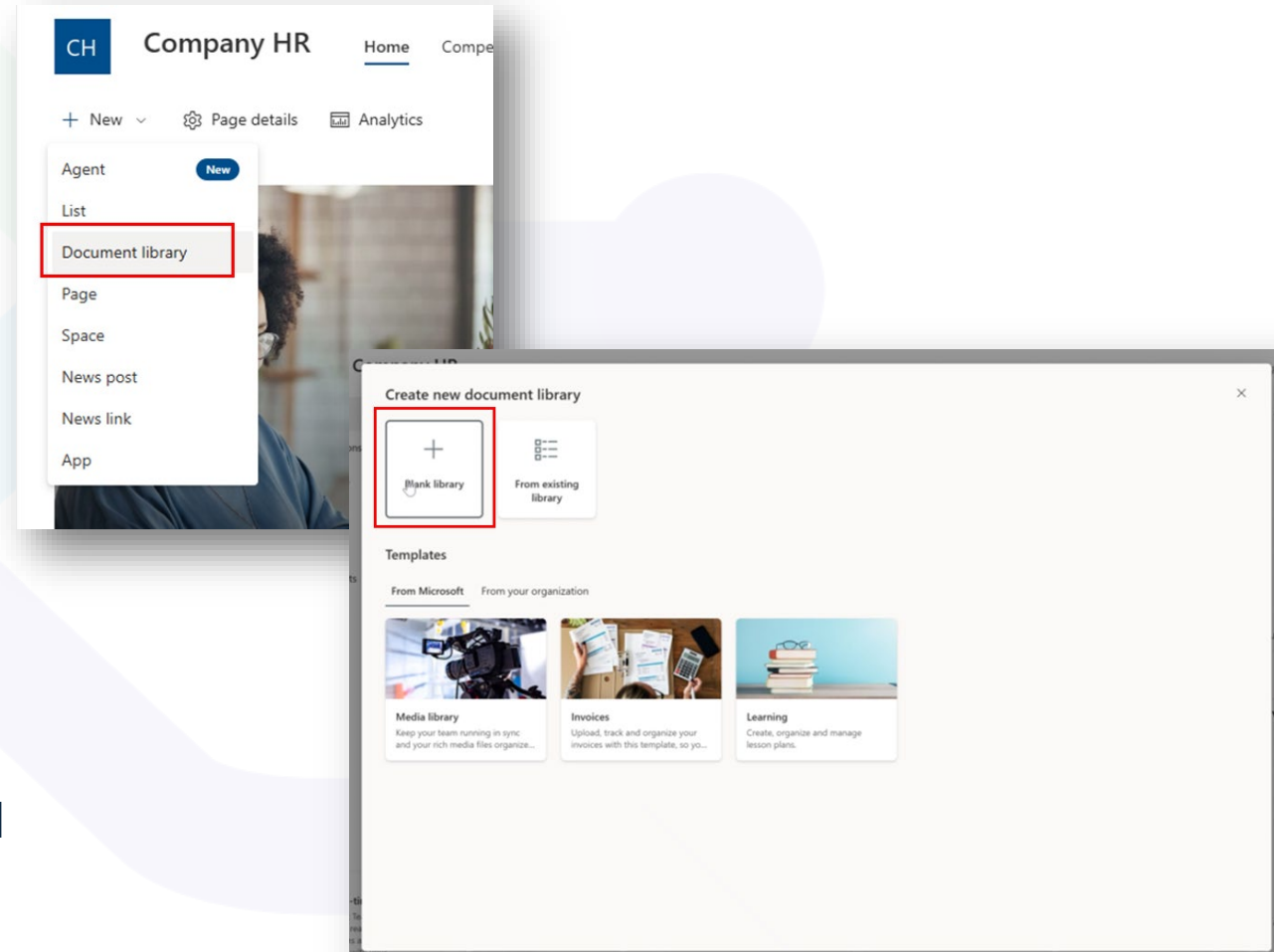2. Select a site type: Team Site

3. Select a Standard Team template

GET AUTOMATING

Getting Started

Create a Document Library

1. Create a new document library

2. Select Blank library

3. In the description, provide a name "HR Policy Docs"

Note: This repository will be used to store the documentation of specific topics that the agent must answer. The agent will be able to access these documents and satisfy the questions that the user will ask.
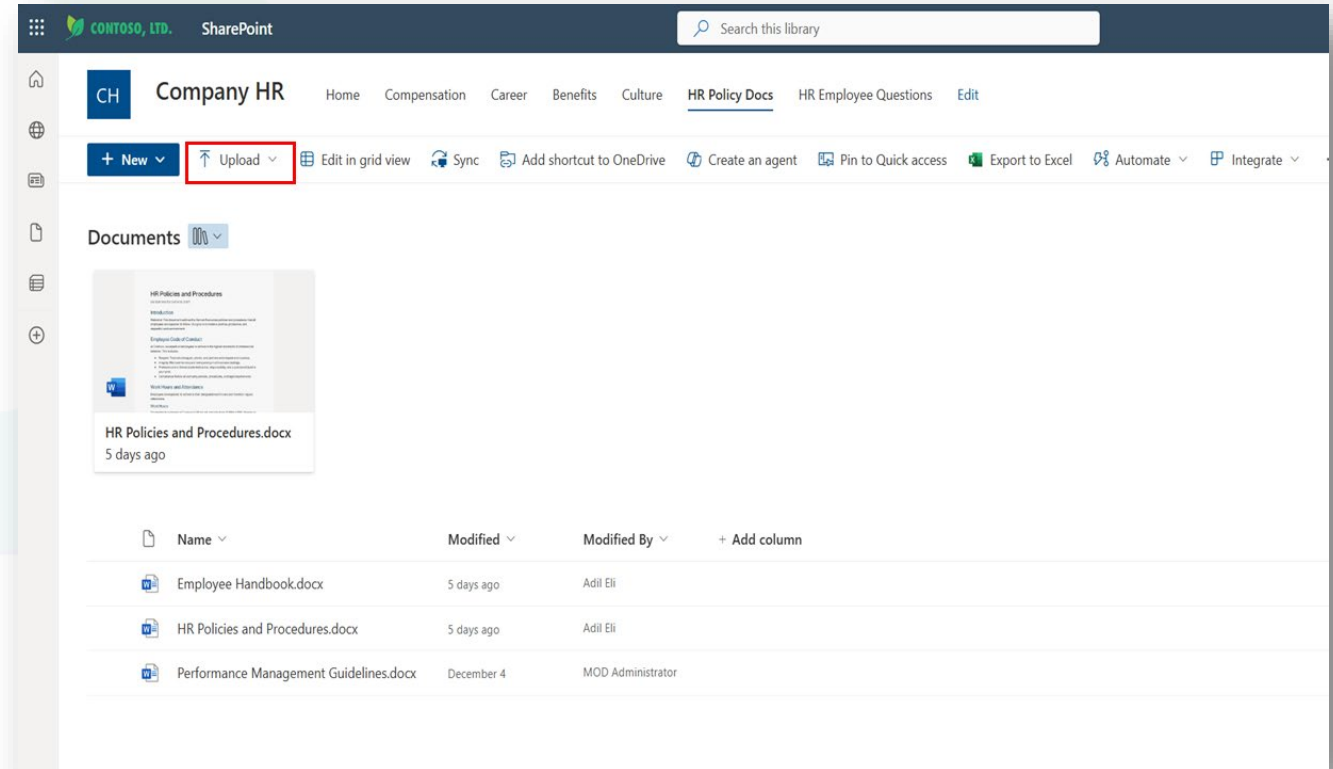

GET AUTOMATING

Getting Started
Preparing the knowledge (Cont.)

Upload Documents to HR Policy Docs library

1. Find the 3 documents for this exercise in HR Scenario Sample Documentation > Step 1 – Upload HR Policies documents.

2. Upload the following documents to the "HR Policy Docs" library:

   - Employee Handbook.docx

   - HR Policies and Procedures.docx

   - Performance Management Guidelines.docx

GET AUTOMATING

Getting Started
Preparing the knowledge (Cont.)

Upload Documents to HR Policy Docs library

1. Find the 3 documents for this exercise in HR Scenario Sample Documentation > Step 1 – Upload HR Policies documents.

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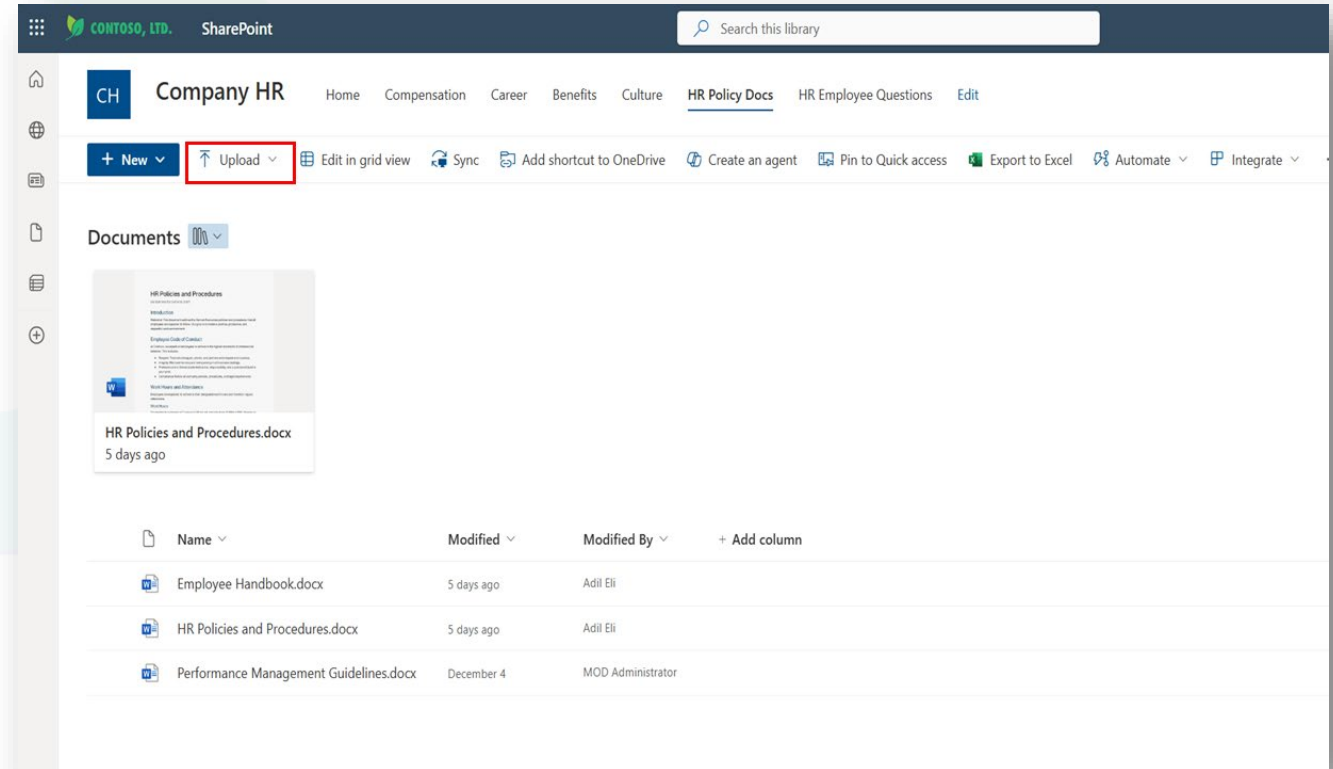
   - Performance Management Guidelines.docx

GET AUTOMATING

Getting Started
Creating a Question Repo.

Create a list

1. Select to create a list from CSV.

2. Locate the pre-filled HR Employee Questions_schema.csv in the Onboard and Engage > HR Scenario Sample Documentation > Step 2 - Create a SP list from this csv - HR Employee Questions_schema V25.01.csv.

3. Rename the list with: HR Employee Questions

4. After importing is complete, please remove the dummy record.

5. Go the Title Column and modify "Additional Column Settings":
    1. Select No in "Require that this column contains information"

Create a list

+	☰	📊	📄
Blank list	From existing list	From Excel	From CSV

Customize

Check the column types below and choose a new type if the current selection is incorrect.

Title	Single line of text	Single line of text	Multiple lines of text	Multiple lines of text
Title	**Employee Name**	**Employee Email**	**Issue Description**	**Resolution**
Dummy		Dummy@dds.com	Dummy Dummy Dummy	Dummy Dummy Dummy

HR Employee Questions ☆

ID: 149 ✕

☑	Title ⌄		ployee Email ⌄	☰ Issue Des... ⌄	☰ Resolution ⌄	☰ Action Re... ⌄
☑	Dummy	···	@dds.com	Dummy Dummy Dummy	Dummy Dummy Dummy	Dummy Dummy Dummy

GET AUTOMATING