

Get started with agents in SharePoint

Agents within SharePoint are natural language AI assistants tailored to specific tasks and topics, providing precise, trusted answers and insights to support informed decision-making.

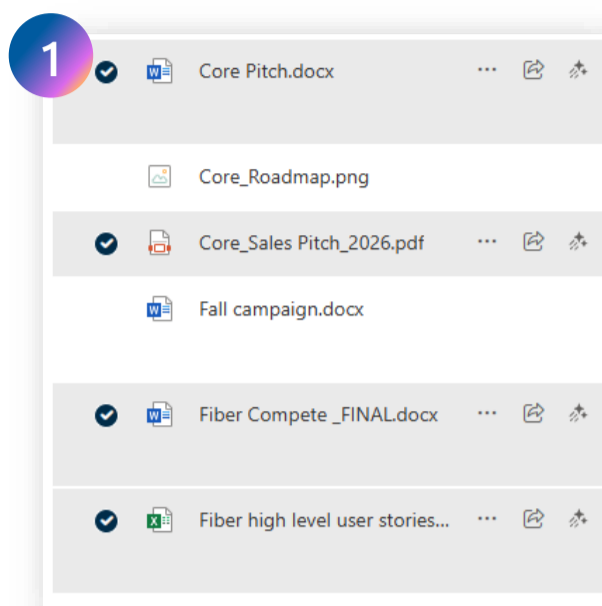
An agent is available for immediate use with every SharePoint site.

Accelerate content discovery and promote knowledge sharing with a single click of an agent inside SharePoint.

Become an indispensable knowledge source for your team by adding your agent to a Microsoft Teams chat.

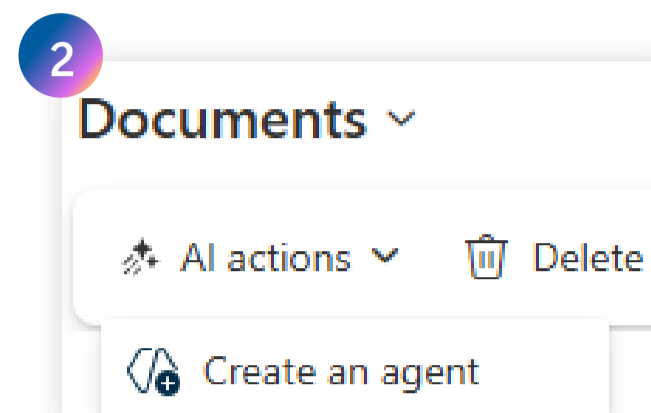
How to create agents in SharePoint

Users need a Microsoft 365 Copilot license, or their tenant licensed for Microsoft Copilot Studio, to begin interacting with agents in SharePoint.



Select grounding files

Navigate to SharePoint and select files you'd like to ground your agent on.



Create your own agent

Click "AI actions" and then "Create an agent" to customize name, branding, and instructions of your agent.

How can agents in SharePoint help you?

Here are a few examples of how you can accelerate content discoverability, surface insights, and promote collaboration with an agent.

Discover

Explore a SharePoint site

"Summarize the key points on this page?"

Connect with teammates

"Who are the points of contact for this site?"

Locate content

"List the latest product documentation updates."

Scale expertise

Accelerate issue resolution

"Give me the latest IT user manual for product DXM-001."

Support onboarding

"Provide a 2-month onboarding timeline with necessary resources for each week."

Manage projects

"What was the final decision on the product launch date?"

Inform decisions

Spot patterns and trends

"Provide a recommendation for feature prioritization."

Identify resource needs

"Based on the project plan, what key staffing needs will we need to source?"

Analyze complex information

"Analyze our sales wins and losses to identify three best practices for next year."

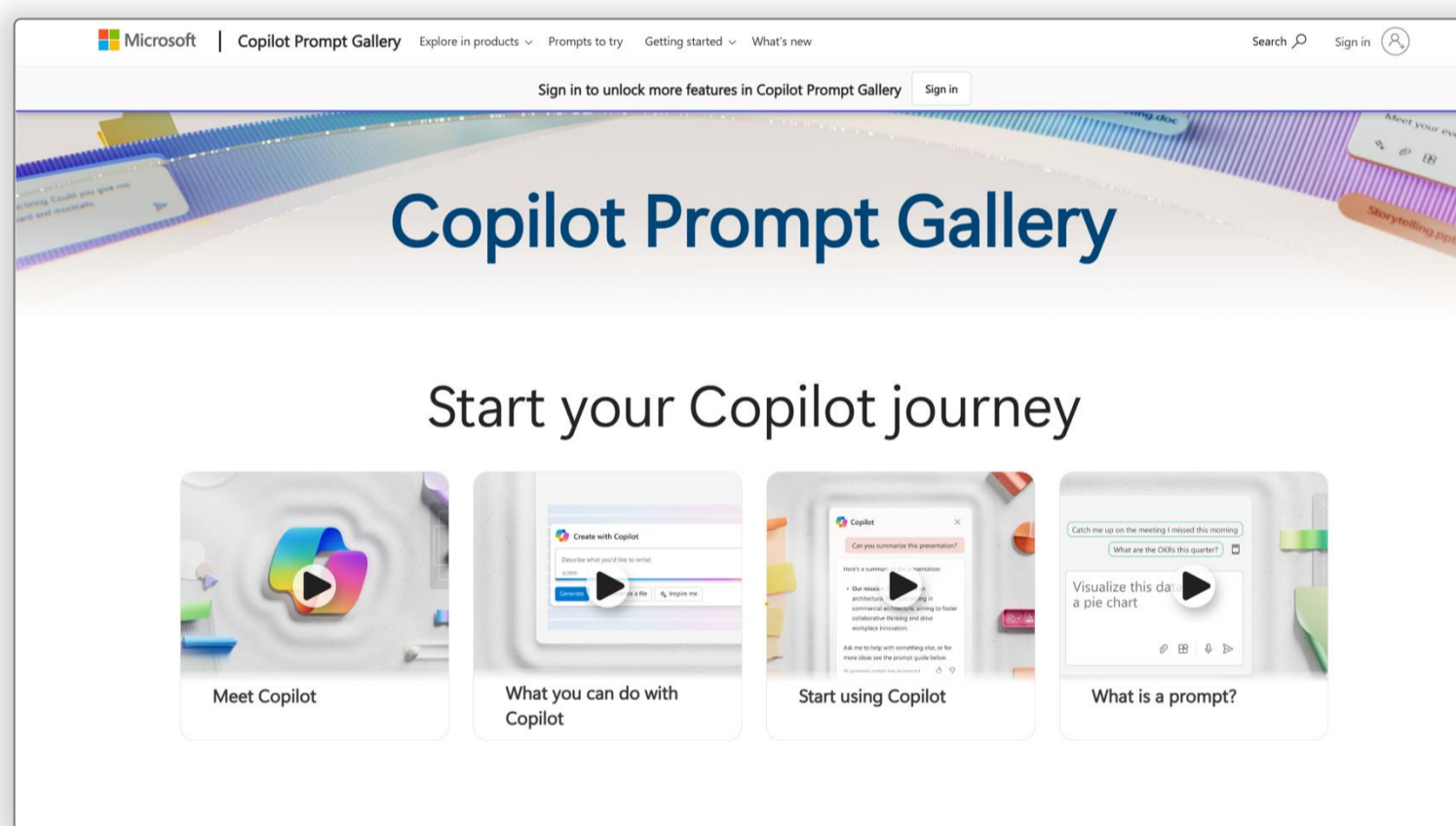
Create and share an agent in a few clicks

Any SharePoint site owner or member can create an agent. This agent follows your existing SharePoint permissions and keeps your data within your Microsoft 365 trust boundary.

1 **Select** the content to which your agent is scoped

2 **Customize** your agent's brand and behavior

3 **Share** your agent via a link or add to a Teams chat



Prompt guidance

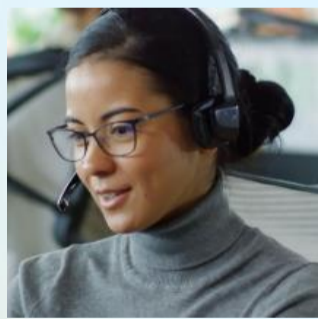
Customize your agent's identity, grounded sources, and behavior. Include suggested prompts you would like users to start with.

Copilot Prompt Gallery is a helpful resource for using prompts and tips and tricks for building your Copilot skills.

aka.ms/prompts

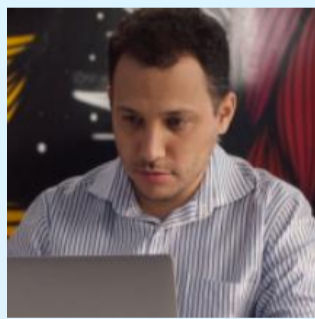
Empower yourself, your team, or your organization

Agents inside SharePoint is like having subject matter experts ready to help.



Customer Rep

Accelerate triage steps



Sales

Replicate best practices



Finance

Analyze large datasets



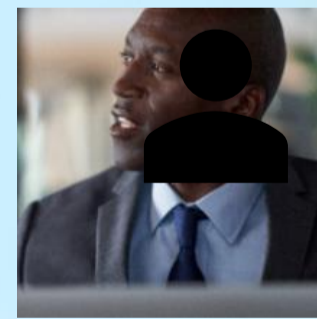
Marketing

Optimize marketing efforts



HR

Scale information



Legal

Analyze high value content



IT

Identify technology risks

Promote knowledge sharing without oversharing



Agents **automatically inherit** the permissions and policies you have set up in SharePoint.



You need **create and edit permissions** to the document library and site to create and edit agents.



Agents are **governed like existing SharePoint files** including sensitivity labels, delete, copy, and archive functionality.

Tips and reminders

Quality - Ensure agents inside SharePoint are grounded on highly curated, accurate, complete, and unique content. This helps the agents provide more accurate and relevant responses.

Organization - Organize content into smaller, manageable sets to improve response accuracy. For example, using smaller document libraries with fewer files and minimal graphics.

Feedback - Encourage users to provide feedback on agent responses. This feedback can be used to continuously improve content and enhance response accuracy over time.

Helpful resources

- [Video overview](#)
- [Product data sheet](#)
- [Click-through Demo](#)
- [Microsoft Support](#)
- [Adoption](#)