



# Creating and Managing SharePoint Agents

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June 2025



# Topics

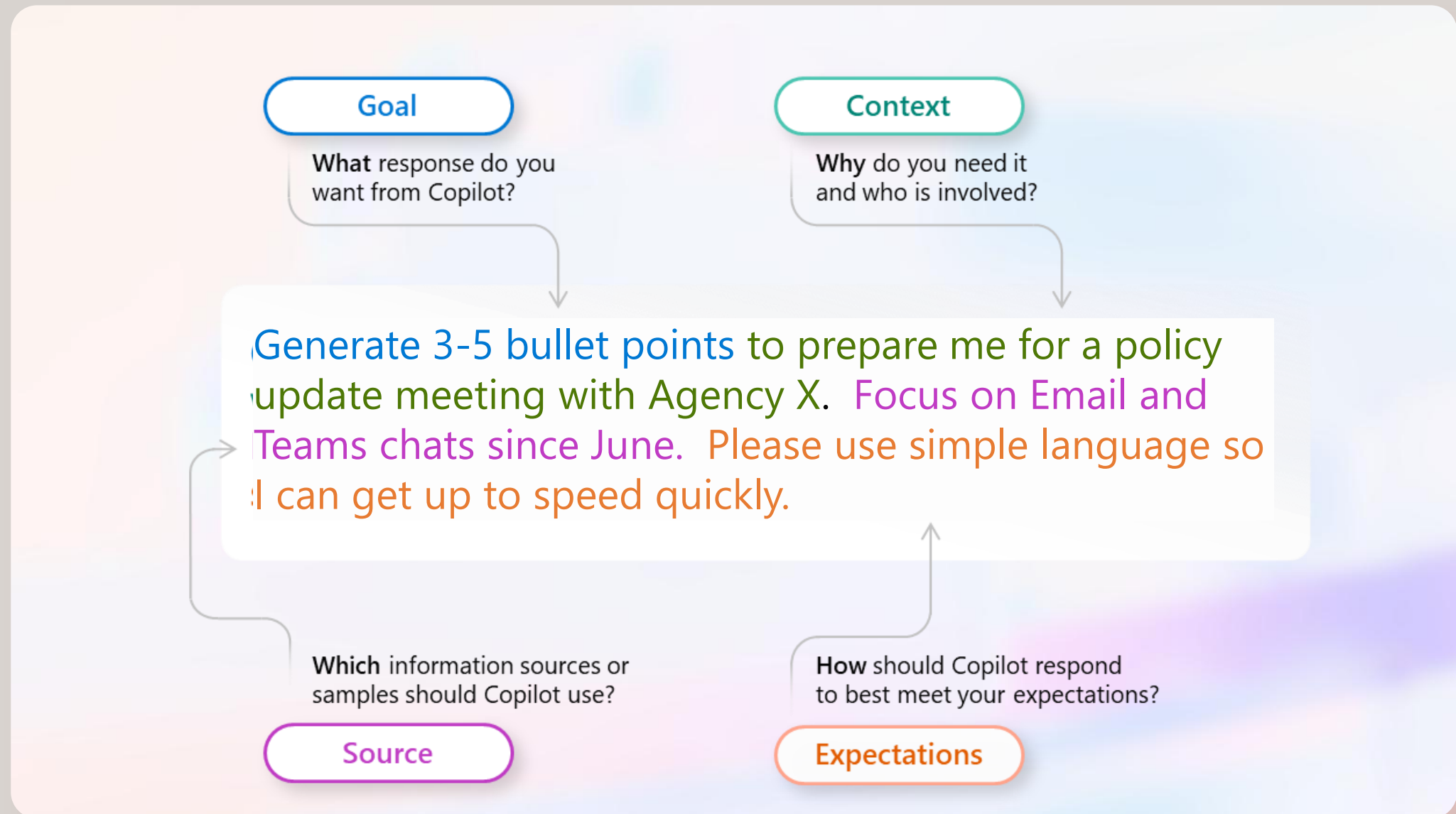
- Prompting Recap
- Agents Overview
- SharePoint Agent Walkthrough
- SharePoint Agent in Action
- Features coming to GCC
- Questions

# Art of Prompting

## Elements of a Great Prompt

|                        |  |
|------------------------|--|
| Instruction            | Tell me about this or do that  |
| Role                   | an identity that the AI is expected to emulate, act like, or duplicate in it's reply – “act like a...”   |
| Context                | show the AI more info about where/what it is – could be data, examples, previous articles, etc. “What are video codecs?” vs. “Can you create an outline for a 20 minute tutorial to teach support engineers about video codecs?” |
| Tone/Style Information | tone of writing – serious, academic, empathetic, inspiring, can be “write like this examples”  |
| Formatting Information | table, markup language, code, etc.   |
| An Example or Examples | give it data to show what you want – the more the better – above 20 not helpful  |

# Art of Prompting - Key Elements





# What in an Agent...







An agent is a “scoped-down” version of Copilot that has specifically defined knowledge or specifically defined capabilities and actions.

*Think of **Copilot as your smartphone** and **agents as its apps**. **Your smartphone is where you interact with the apps**. And there are apps to do all kinds of things, from booking a ride to the airport to managing your finances to helping you learn a new language. Just like apps, agents will be able to do a wide variety of things. **In essence, agents are the new apps for an AI-powered world.***

*- Jared Spataro, Chief Marketing Officer, AI at Work @ Microsoft*



## Agents offer a tailored Copilot experience

Agents look and function like Copilot, but:

- **Tailor** the experience **to a specific use case**
- **Focus on the data** (inside or outside of M365) that's applicable for your specific business needs





*Example agents*



## Two types of agents

|                      | Declarative agents                             | Custom-engine agents       |
|----------------------|--|----------------------------|
| Foundation           | Built upon Microsoft 365 Copilot's foundations | Bring your own foundation  |
| Advantage            | Easier to build                                | More open to customization |
| Skill level to build | Options to build: no-code, low-code, pro-code  | Built by developers        |

# Tools for building agents

|                                    | <br><b>SharePoint Agents</b> | <br><b>Copilot Studio</b> | <br><b>Copilot Studio<br/>Agent Builder<br/>in BizChat</b> | <br><b>Visual Studio<br/>Code/Teams Toolkit</b> |
|------------------------------------|---|--|---|--|
| <b>What you can build0</b>         | Custom knowledge-only declarative agents tailored for your SharePoint site visitors                           | Create Knowledge only, action based or fully agentic, on-behalf-of experiences                               | Create knowledge-only declarative agents right from BizChat   | Declarative agents (with knowledge and/or actions)   |
| <b>Skill level needed to build</b> | Everyone can build an agent in SharePoint - you just need site edit rights                                    | Currently requires low-pro code skills   | Currently requires low-code skills  | Pro-code: developers only  |
| <b>Availability</b>                | Globally Available  | Globally Available   | Globally Available  | Globally Available   |
| <b>Publishing</b>                  | Share your agent internally with site owner approval or share in Teams Group chats                            | Share your agent internally or publish across MS in the App Catalog  | Share your agent internally through shareable links   | Publish across Microsoft in the Microsoft 365 App Catalog  |
| <b>Learn how</b>                   | <a href="https://aka.ms/AgentsinSharePointGuide">aka.ms/AgentsinSharePointGuide</a>                           | <a href="https://aka.ms/CopilotStudioBuild">aka.ms/CopilotStudioBuild</a>                                    | <a href="https://aka.ms/CopilotStudioAgentBuilderGuide">aka.ms/CopilotStudioAgentBuilderGuide</a>   | <a href="https://aka.ms/M365Builders">aka.ms/M365Builders</a>  |





## Your content

Your files, data, news, and resources stored on SharePoint



## Your agents

Powerful, large language models to help apply retrieval, reasoning, and intelligence to your selected site or content



## Your collaboration

Add your agent to a conversation to instantly enable users to interact with it to gain key information



## Business transformation

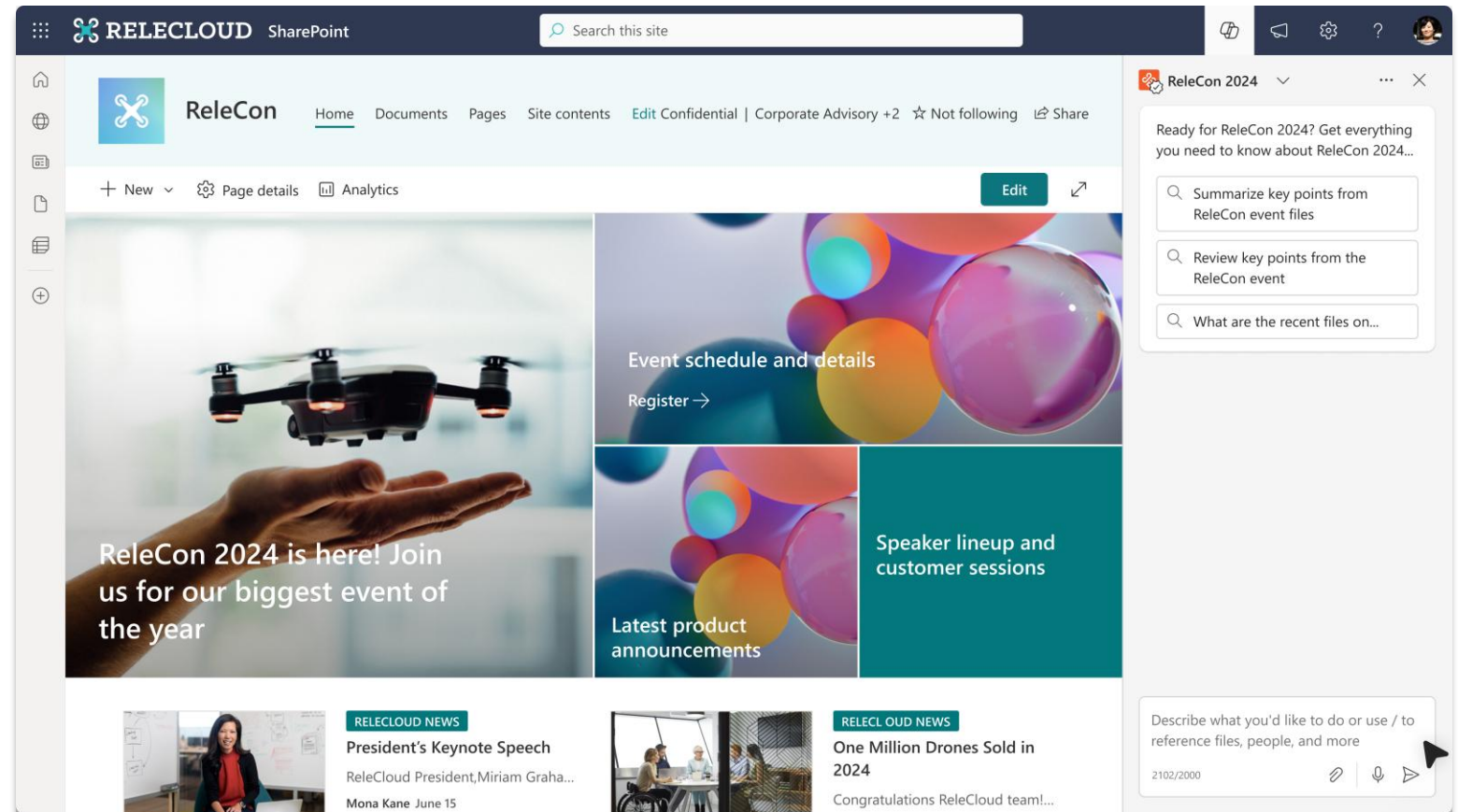
AI-infused insights and actionability to make better business decisions, transform your organization, and drive real business results

# Using an agent in SharePoint

While users can create their own, custom SharePoint agents, each SharePoint site automatically gets its own agent grounded in the site content.

Clicking on the Copilot icon at the upper right opens the side pane with the site agent selected.

The user asks the agent a question...



# Using an agent in SharePoint Document Repositories

After you have created SharePoint Agents grounded to a document library

Clicking on the Copilot icon at the upper right opens the side pane select the agent that you just published.

The user asks the agent a question...

or

Public group Not following

+ New

Upload

...

All Documents

Details

Prisons Policy and Procedures

|  | Name                 | Modified          | Modified By       |
|--|----------------------|-------------------|-------------------|
|  | A-.0900_11_03_20.pdf | 31 minutes ago    | MOD Administrator |
|  | Article_16.pdf       | 42 minutes ago    | MOD Administrator |
|  | E.1300_05_19_22.pdf  | About an hour ago | MOD Administrator |
|  | F.2300_04_01_22.pdf  | 34 minutes ago    | MOD Administrator |
|  | G .0200_04_04_22.pdf | 34 minutes ago    | MOD Administrator |
|  | G .0400_05_19_22.pdf | 32 minutes ago    | MOD Administrator |

DN DPS Navigator agent

...

×

Copy

Can you help me find resources Offenders maternity Leave Policies

Copilot

AI-generated content may be incorrect

Certainly! I found a document titled **F.2300\_04\_01\_22** which outlines the policies and procedures for the **Offender Maternity Leave Program** from the State of North Carolina Department of Public Safety, Prisons <sup>1</sup>.

This document provides detailed guidelines on granting temporary leave to selected minimum custody offenders who give birth while in custody. It includes information on eligibility criteria, application procedures,

Ask DPS Navigator agent a question

Show hidden icons

# Guiding principles for SharePoint agents



## **Easy to create**

I can create and share a SharePoint agent in 90 seconds.

I can find and edit my SharePoint agent in 90 seconds.

## **Simple to use**

I can use my SharePoint agent in every Microsoft product.

I can use a SharePoint agent immediately, without configuration.

## **Saves you time**

I can get the right help fast from my SharePoint agent.

## **Safe for everyone**

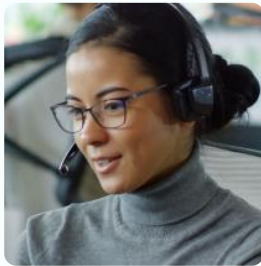
SharePoint agents respect permissions and keep information secure.



# Common business scenarios for agents



Accelerate how teams take action and make business impact



## Customer Service

### KPI Example

Lower average resolution time (ART)

### How Agents can assist

Generate answers based on specific deployments and processes



## Sales

Increase sales conversion rate

Collate relevant materials for customized proposals



## Finance

Lower analysis cycle time

Get cost savings recommendations by analyzing years of financial reports



## Marketing

Decrease time to market

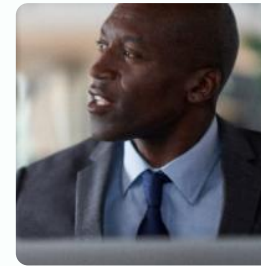
Provide a 24/7 go-to for product updates and questions



## HR

Reduce onboarding time

Streamline learning and information consumption with role specific onboarding agents



## Legal

Decrease IP documentation review time

Accelerate researching, summarizing, analyzing documentation



## IT

Increase user satisfaction score

Analyze customer feedback for trends and opportunities to inform product roadmap



# SharePoint Agent Walkthrough







# SharePoint Agents in Action



# Questions





Thank you!

Please fill out the survey  
<https://aka.ms/NCDIT>

# NC DIT Innovation Summit Follow-Up

