



# Microsoft Copilot in SharePoint

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**STREAMLINE YOUR WORKFLOWS**



ALDRIDGE



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# Introduction to SharePoint Copilot

SharePoint Copilot is an AI-powered assistant integrated into Microsoft 365 that helps users create, manage, and collaborate on content within SharePoint more efficiently. By leveraging advanced language models and organizational data, Copilot can generate pages, summarize information, and assist with content editing—all through natural language prompts. This tool is designed to streamline workflows, reduce manual effort, and enhance the quality of communication across teams.

## Where to Find Copilot in SharePoint

### 1. **Copilot Icon Location**

If your organization has the correct licensing, the **Copilot icon** should appear in the **top-right corner** of your SharePoint site homepage. This icon gives you access to Copilot features like page creation, content editing, and agent interaction.

### 2. **Copilot in Page Authoring**

When creating or editing a SharePoint page, you'll see Copilot integrated into the **rich text editor**. You can use it to rewrite text, adjust tone, summarize content, or elaborate on ideas.

### 3. **Copilot Agents**

SharePoint also supports **Copilot Agents**, which are AI-powered assistants embedded into your site. These agents can be accessed from the site settings or agent panel and are used to automate tasks, answer questions, and interact with site content.



## If You Don't See Copilot

If the Copilot icon isn't visible:

- **Verify Licensing:** Ensure your Microsoft 365 subscription includes Copilot for SharePoint.
- **Check Permissions:** You must have appropriate permissions to use Copilot features.
- **Refresh or Recreate Site:** Sometimes creating a new site or refreshing the homepage helps.
- **Contact Admin:** If issues persist, your IT admin may need to open a support ticket with Microsoft to resolve backend deployment issues.<sup>[1]</sup>

### References

[1] [Not seeing Copilot in SharePoint office 365 - Microsoft Q&A](#)

[2] [Microsoft 365 Copilot in SharePoint help & learning](#)

## Creating Content with Copilot

One of the most powerful features of SharePoint Copilot is its ability to assist in page creation. Users can simply describe what they want—a project update, a team announcement, or a resource hub—and Copilot will generate a structured SharePoint page with relevant sections, headings, and placeholder content. This dramatically reduces the time spent formatting and organizing information, allowing users to focus on the message rather than the mechanics.



## Editing and Enhancing Text

Copilot also supports rich text editing within SharePoint. Whether you're drafting a new announcement or updating an existing page, Copilot can help refine your writing. It can adjust tone, summarize long paragraphs, expand brief notes, or even rewrite content to improve clarity. This feature is especially useful for ensuring consistent communication across departments and making content more accessible to diverse audiences.

## Using SharePoint Agents

SharePoint Agents are customizable AI assistants that can be tailored to specific team or project needs. These agents can answer questions, retrieve data, and perform tasks based on the context of your SharePoint site. Site owners can manage agents by approving their use, setting defaults, and sharing them across Teams channels. This adds a layer of intelligent automation to your collaboration environment, making it easier to find information and complete tasks.

## Security and Permissions

SharePoint Copilot respects existing security and permission settings within your organization. It only accesses data that users are authorized to view, ensuring that sensitive information remains protected. This makes Copilot a safe and compliant tool for enterprise use, even when working with confidential or regulated content.

## Examples of SharePoint CoPilot

Here are several **realistic examples** of how SharePoint Copilot can be used to create content, which you can include in your training manual or use during hands-on demonstrations:



## Example 1: Project Status Update Page

### Prompt to Copilot:

*"Create a SharePoint page summarizing the current status of the Q3 Marketing Campaign, including milestones achieved, pending tasks, and team members involved."*

### Copilot Output:

- Title: *Q3 Marketing Campaign Status Update*
- Sections:
  - **Overview:** Brief summary of campaign goals.
  - **Milestones Achieved:** Automatically pulled from Planner or Teams.
  - **Pending Tasks:** Listed with due dates.
  - **Team Members:** Names and roles pulled from Outlook or Teams.

## Example 2: New Employee Onboarding Guide

### Prompt to Copilot:

*"Generate an onboarding page for new hires in the IT department, including links to training resources, key contacts, and first-week tasks."*

### Copilot Output:

- Title: *Welcome to the IT Team!*
- Sections:
  - **Getting Started:** Checklist for Day 1.
  - **Training Resources:** Embedded links to SharePoint documents and Stream videos.



- **Meet the Team:** Photos and bios pulled from Delve or Teams.
- **FAQs:** Auto-generated based on previous onboarding documents.

### **Example 3: Monthly Department Newsletter**

#### **Prompt to Copilot:**

*"Create a newsletter for the HR department summarizing August highlights, upcoming events, and employee spotlights."*

#### **Copilot Output:**

- Title: *HR Highlights – August Edition*
- Sections:
  - **Department Updates:** Summarized from recent emails and meetings.
  - **Upcoming Events:** Pulled from Outlook calendar.
  - **Employee Spotlight:** Auto-filled from nominations or Yammer posts.
  - **Quick Links:** To policies, forms, and benefits.

### **Example 4: IT Help Desk Resource Hub**

#### **Prompt to Copilot:**

*"Build a SharePoint page that serves as a central hub for IT support, including troubleshooting guides, ticket submission links, and contact info."*



## Copilot Output:

- Title: *IT Help Desk Portal*
- Sections:
  - **Troubleshooting Guides:** Linked documents and videos.
  - **Submit a Ticket:** Embedded Microsoft Forms or Power Automate flow.
  - **Live Support:** Teams chat link or contact card.
  - **System Status:** Embedded Power BI dashboard.

## How to Create a Project Status Update Page

1. **Open SharePoint and start a new page.**
2. **Activate Copilot** by clicking the Copilot icon or using the prompt bar.
3. **Enter a prompt**, such as:  
*"Create a SharePoint page summarizing the current status of the Q3 Marketing Campaign, including milestones achieved, pending tasks, and team members involved."*
4. **Review the generated content**, which may include:
  - Overview section
  - Milestones pulled from Planner or Teams
  - Task list with due dates
  - Team member roles from Outlook or Teams
5. **Customize the layout** by adding visuals, charts, or links to related documents.
6. **Edit text** using Copilot to adjust tone or expand details.



7. **Publish or save as a draft** for team review.

## **How to Build a New Employee Onboarding Guide**

1. **Start a new SharePoint page** for onboarding.
2. **Use a prompt like:**  
*"Generate an onboarding page for new hires in the IT department, including links to training resources, key contacts, and first-week tasks."*
3. **Copilot will generate sections** such as:
  - Welcome message
  - Training resources (linked from SharePoint or Stream)
  - Meet the team (bios from Delve or Teams)
  - FAQs
4. **Add interactive elements** like Microsoft Forms for feedback or checklists.
5. **Save the page as a template** for future onboarding use.

## **How to Create a Monthly Department Newsletter**

1. **Open a new page in your department's SharePoint site.**
2. **Prompt Copilot with:**  
*"Create a newsletter for the HR department summarizing August highlights, upcoming events, and employee spotlights."*
3. **Copilot will include:**
  - Department updates from recent emails or meetings
  - Calendar events from Outlook
  - Employee spotlight pulled from Yammer or nominations



4. **Customize the layout** with images, links, and branded headers.
5. **Schedule publishing** or share via Teams.

### **How to Build an IT Help Desk Resource Hub**

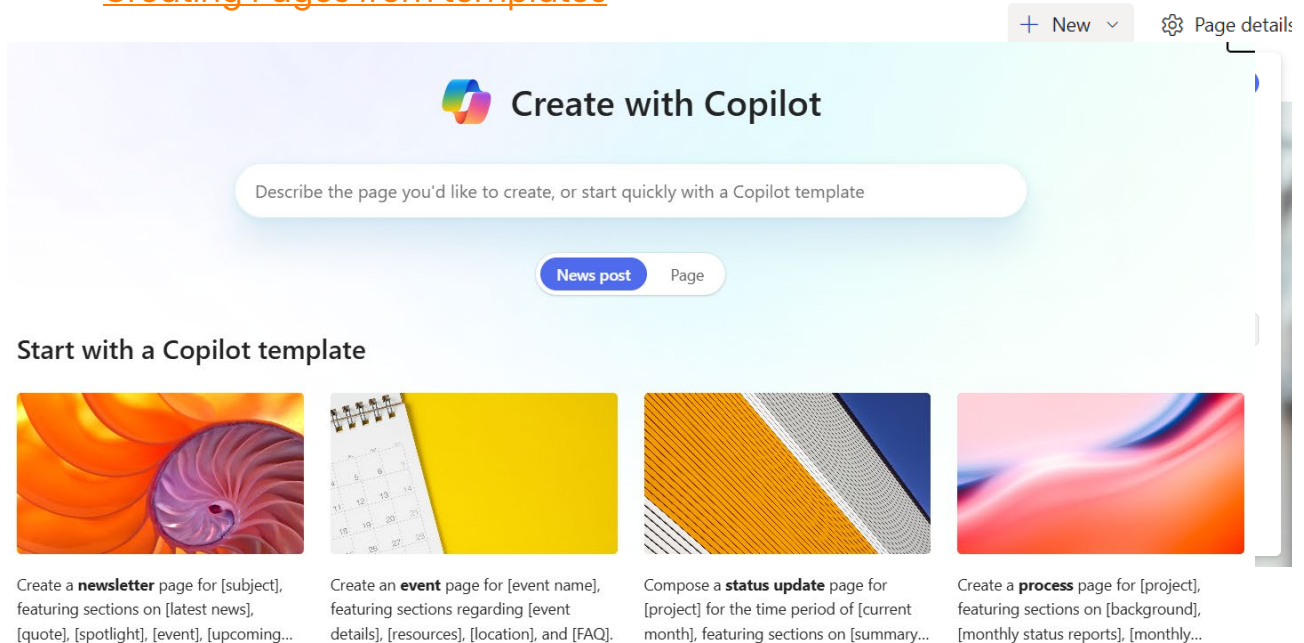
1. **Create a new SharePoint page titled “IT Help Desk Portal.”**
2. **Use a prompt like:**  
*“Build a SharePoint page that serves as a central hub for IT support, including troubleshooting guides, ticket submission links, and contact info.”*
3. **Copilot will generate:**
  - Troubleshooting guides (linked from document libraries)
  - Ticket submission form (via Microsoft Forms or Power Automate)
  - Contact info and live support links
  - System status dashboard (embedded Power BI)
4. **Add quick links** to common tools and policies.
5. **Test interactive elements** before publishing.



## Two Approaches to create pages with Copilot

When creating pages with Copilot, you have two main approaches:

- [Creating Pages from templates](#)



This method allows you to choose from a variety of ready-made templates, such as Newsletter, Event, Status Update, and Process. Templates provide a structured starting point, helping you quickly craft pages with a consistent look and feel. This approach is ideal for users who prefer a guided experience or need to adhere to organization-specific designs.

- [Creating Pages with Open Prompts](#)

For those who enjoy a more flexible and creative approach, the open prompts and design ideas integration offer a dynamic way to generate page content. You can start by typing an open prompt at the top of your page, and the Copilot will use AI to suggest visually appealing layout and content ideas. This method is perfect for users who want to experiment with different designs and personalize their pages.

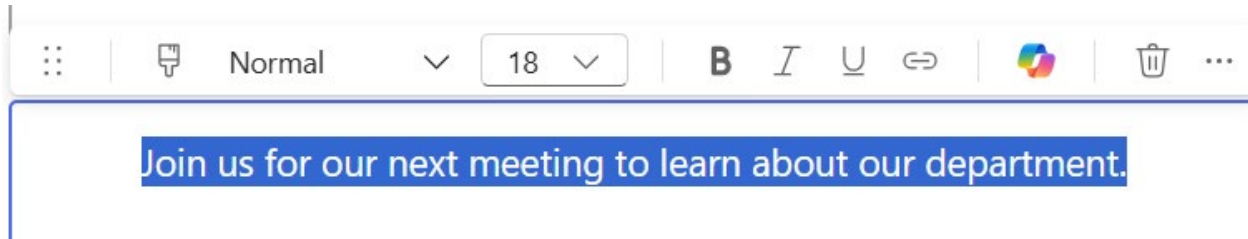
### Refine your pages with Copilot



After creating your SharePoint page, you can continue [refining the layout, design, and content](#) of your page using Copilot. You can use Design ideas for inspiration on page layouts and design. You can adjust colors, fonts, and images using the Toolbar, Properties, and Toolbox. Additionally, you can rewrite with Copilot in the rich text editor to polish content, change its length, or alter its tone. Remember, always preview the entire page to ensure everything looks perfect before publishing.

## Refine Your SharePoint Pages with Copilot

SharePoint Copilot isn't just for creating pages, it's a powerful tool for refining and enhancing existing content. Whether you're updating a project summary, polishing a newsletter, or improving an onboarding guide, Copilot can help you make your pages more engaging, clear, and professional.



## How to Refine Content Using Copilot

### 1. Edit for Clarity and Tone

- Highlight any section of text on your SharePoint page.
- Click the **Copilot icon** in the rich text editor.
- Choose options like:
  - *Make it more concise*
  - *Add more detail*
  - *Change tone to formal/casual*
- Review the suggested edits and accept or modify them.

### 2. Summarize Long Sections

- Select a lengthy paragraph or list.



- Use Copilot to generate a summary or bullet points.
- This is ideal for meeting notes, reports, or policy documents.

### 3. Expand Brief Notes

- If a section feels too short or vague, ask Copilot to elaborate.
- Example prompt: *"Expand this section to include examples and context."*

### 4. Reorganize Page Layout

- Use Copilot to suggest a new structure for your page.
- Example prompt: *"Reorganize this page to highlight key updates first."*
- You can then manually adjust sections or use suggested templates.

### 5. Add Visuals and Links

- Ask Copilot to recommend relevant visuals or documents.
- Example: *"Add a chart showing Q3 performance"* or *"Link to the onboarding checklist."*

### 6. Translate or Localize Content

- For multilingual teams, Copilot can help translate sections.
- Example: *"Translate this announcement into Spanish."*

### Pro Tips

- **Use specific prompts:** The more detail you give, the better Copilot's suggestions.
- **Review before publishing:** Always check Copilot's edits for accuracy and tone.
- **Save refined pages as templates:** This helps maintain consistency across your organization.



## Which Approach Should You Choose?

Both approaches have their unique advantages, and the choice ultimately depends on your needs and preferences. If you value structure and consistency, templates are the way to go. On the other hand, if you want to have more creativity and customization, open prompts and design ideas will give you the freedom to explore and innovate.

No matter which method you choose, Copilot in SharePoint is here to support you in creating exceptional pages with ease. Happy creating!

Get started now

1. To begin, select **+New** from the command bar of any of your SharePoint site.
2. Select **Page with Copilot**. Explore the main features it offers. Whether you are creating pages from pre-built templates, or personalizing the content with open prompts, now is your chance to experience how Copilot can enhance your content creation processes.
3. Please share your **feedback** using thumbs up/down buttons.



# GPT-5 support in Microsoft 365 Copilot

Here's a detailed overview of **GPT-5 support in Microsoft 365 Copilot**, including how it enhances SharePoint Copilot and other Microsoft 365 tools:

## What GPT-5 Brings to Microsoft 365 Copilot

### Dual-Engine Architecture

GPT-5 introduces a **“two-brain” system**:

- **High-throughput model:** Handles routine tasks quickly with short, fluent responses.
- **Deep-reasoning model:** Engages for complex tasks, taking time to plan, analyze, and verify before responding.

Copilot automatically selects the right model based on the complexity of your prompt—mirroring how humans switch between quick intuition and deep thinking.

### Smart Mode

Copilot now uses **Smart Mode** to:

- Analyze your prompt.
- Decide whether to respond quickly or apply deeper reasoning.
- Switch modes dynamically within the same conversation.

This means you don't need to manually choose a model—Copilot adapts in real time.



## Expanded Capabilities

GPT-5 enables Copilot to:

- Handle up to **100,000 tokens** of input (e.g., entire project folders, long documents).
- Perform **multi-step reasoning** and **context-aware analysis**.
- Support **multimodal inputs** (text, image, audio), though output remains text-based.

## Use in SharePoint Copilot

In SharePoint, GPT-5 enhances:

- Page creation with deeper contextual understanding.
- Content refinement with smarter tone and structure suggestions.
- Copilot Agents that can handle more complex workflows like compliance audits or financial modeling.

## Access and Activation

- **Licensed Microsoft 365 Copilot users** get priority access.
- A **“Try GPT-5” button** appears in Copilot Chat once available.
- **Copilot Studio** users can select GPT-5 as the engine for custom agents.



## Advanced Prompts for SharePoint Copilot (GPT-5)

### Project Analysis & Reporting

*"Create a SharePoint page summarizing the last three months of project activity across the marketing and sales teams. Include key milestones, blockers, budget usage, and team performance insights. Use data from Planner, Teams, and Excel files in the shared folder."*

### Strategic Planning

*"Draft a strategic roadmap page for our 2026 product launch. Include goals, dependencies, risk factors, and a timeline. Pull relevant insights from previous launch documents and meeting notes."*

### Policy Comparison

*"Generate a SharePoint page comparing our current remote work policy with the proposed hybrid model. Highlight pros and cons, employee feedback trends, and legal considerations."*

### Knowledge Base Creation

*"Build a knowledge base page for IT support that categorizes common issues by department, links to troubleshooting guides, and includes escalation procedures. Use historical ticket data and internal documentation."*

## Prompts for Copilot Agents (GPT-5)

### Contextual Q&A Agent

*"Create an agent that can answer questions about our Q4 financial performance using data from Excel reports, Power BI dashboards, and meeting transcripts."*

### Workflow Automation Agent

*"Build an agent that helps new employees complete onboarding tasks by guiding them through forms, training modules, and scheduling meetings with HR."*



## Prompts for Deep Reasoning Tasks in Copilot Chat

### Trend Analysis

*"Analyze employee engagement trends over the past year using survey data, meeting attendance, and Yammer activity. Summarize key drivers and suggest three actionable improvements."*

### Scenario Planning

*"Simulate the impact of a 10% budget cut across all departments. Identify which projects would be affected, potential delays, and mitigation strategies."*

## SharePoint Agents

Agents in SharePoint support you and your team with your workflows, projects, content discovery and knowledge sharing, based on the content in SharePoint sites, pages, and selected files. All SharePoint sites and document libraries come with a ready-made agent. With edit permissions to the site, you can create agents to get more specific answers tailored to your specific purpose.

**SharePoint Agents** are AI-powered assistants built into SharePoint as part of Microsoft 365 Copilot. They help users interact with site content, automate workflows, and retrieve insights from documents and data stored across SharePoint libraries. Here's a breakdown of what they are and how they work:

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### What Are SharePoint Agents?

SharePoint Agents are intelligent tools that:

- **Answer questions** about site content.
- **Summarize documents** and pages.
- **Automate tasks** like generating reports or comparing products.



- **Support collaboration** by being accessible in Teams chats and Copilot Chat.

They use Microsoft Graph to access organizational data and respect existing permissions, ensuring secure and context-aware responses.[\[1\]](#)[\[2\]](#)

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## Types of SharePoint Agents

### 1. Ready-Made Agents

- Automatically available on every SharePoint site.
- Scoped to the content of that specific site.
- No setup required.
- Cannot be edited or shared.
- Example use: *“Summarize the technical features and timeline of the Digital Mega-300 camera.”*[\[2\]](#)

### 2. Custom-Built Agents

- Created by users with site editing permissions.
  - Can be scoped to multiple sites, files, and topics.
  - Editable and shareable.
  - Support branding, custom prompts, and tailored behaviors.
  - Example use: *“Create a pitch comparing Mega-300 and Mega-200, highlighting R&D insights.”*[\[2\]](#)
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## How to Use SharePoint Agents

- **Interact via SharePoint or Copilot Chat:** Ask questions, request summaries, or get help with tasks.
  - **Pin frequently used agents** in the Copilot Chat sidebar.
  - **Edit and share custom agents** using the “...” menu in the agent list.
  - **Access agents from Teams:** Mention them in chats to retrieve project-specific insights.[\[3\]](#)
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## Requirements

- A **Microsoft 365 Copilot license** or pay-as-you-go access.
  - **Edit permissions** on the SharePoint site to create or modify agents.
- 

Would you like help creating a custom agent for a specific workflow or training scenario? I can also draft sample prompts or a walkthrough for building one in Copilot Studio.

## References

[1] [Microsoft 365 Copilot: Agents in SharePoint – MS Cloud Explorers](#)

[2] [Get started with SharePoint agents – Microsoft Support](#)

[3] [Use SharePoint agents in Microsoft 365 Copilot Chat](#)

Here are **sample prompts** you can use with **SharePoint Agents** to automate tasks, retrieve insights, and interact with site content more intelligently. These are grouped by use case to help you tailor them to different teams or workflows.



## **General Knowledge Retrieval**

- *"Summarize the key points from the last five documents uploaded to this site."*
- *"What are the main differences between our current and previous remote work policies?"*
- *"List all documents related to the Q4 budget review and highlight any changes."*

## **Project Management**

- *"Create a status report for the CRM migration project using updates from the last two weeks."*
- *"Compare the timelines and deliverables of the Mega-300 and Mega-200 product launches."*
- *"Summarize blockers and risks mentioned in recent project meetings."*

## **HR and Onboarding**

- *"Generate a checklist for new hires in the IT department based on our onboarding guide."*
- *"Summarize employee feedback from the last engagement survey."*
- *"List training resources available for remote work setup."*

## **IT and Support**

- *"Identify the most common support issues reported in the last 30 days."*
- *"Summarize troubleshooting steps for VPN connectivity from our help desk documents."*
- *"Create a quick guide for submitting a support ticket."*



## Custom Agent Prompts (for tailored workflows)

If you've built a custom agent, you can use more specific prompts like:

- *"Draft a pitch comparing Mega-300 and Mega-200, using R&D insights and customer feedback."*
- *"Generate a compliance checklist for our new data retention policy."*
- *"Create a summary of all vendor contracts expiring this quarter."*

## Custom Agent: Training Coordinator Assistant

Let's design a **custom SharePoint Agent** tailored to your site. Since you're a **Director of Learning** and have led Microsoft 365 training sessions, I'll create an agent that supports **training coordination and content management**.

### Purpose

To assist with organizing, summarizing, and retrieving training materials, session feedback, and participant data across your SharePoint site.

### Agent Capabilities

#### 1. Summarize Training Sessions

- Prompt: *"Summarize the key takeaways from the August 5th Microsoft 365 training session."*
- Pulls from meeting notes, uploaded slide decks, and feedback forms.

#### 2. Retrieve Participant Info

- Prompt: *"List all attendees from the IT staff training and their feedback scores."*
- Pulls from Forms, Excel sheets, or SharePoint lists.



### 3. **Generate Follow-Up Materials**

- Prompt: *"Create a follow-up email with links to resources and next steps for advanced users."*
- Uses templates and links stored in your site.

### 4. **Compare Training Effectiveness**

- Prompt: *"Compare engagement levels between the July and August sessions."*
- Analyzes feedback, attendance, and post-training activity.

### 5. **Prepare Future Session Outlines**

- Prompt: *"Draft an outline for a 2-hour training on transitioning from Slack to Teams."*
- Uses previous outlines and Copilot suggestions.

## **Setup Recommendations**

- **Scope:** Include your training site, document libraries, feedback forms, and session recordings.
- **Permissions:** Ensure the agent has access to training folders and participant data.
- **Branding:** Name it something like *"Learning Copilot"* or *"Training Assistant"*.
- **Integration:** Pin it in Copilot Chat and Teams for quick access.

Let's walk through how to build your **Training Coordinator Assistant** agent in **Copilot Studio** step by step:

## **Step-by-Step: Build a Custom SharePoint Agent in Copilot Studio**



### ✅ Step 1: Open Copilot Studio

- Go to Copilot Studio and sign in with your Microsoft 365 account.
- Click **“Create a new Copilot”**.

### Step 2: Define Your Agent

- **Name:** Training Coordinator Assistant
- **Description:** “Helps organize, summarize, and retrieve training materials, feedback, and participant data.”
- **Audience:** Internal staff involved in training and learning coordination.

### Step 3: Set Data Scope

- Choose **SharePoint** as a data source.
- Connect to your **training site** and relevant libraries:
  - Training materials
  - Feedback forms
  - Attendance sheets
  - Session recordings

### Step 4: Add Capabilities (Topics)

Create topics for each task your agent will handle. Examples:

#### ◆ Topic: Summarize Training Sessions

- Trigger phrase: *“Summarize the August 5th training session.”*
- Action: Pulls from uploaded slides, notes, and feedback.

#### ◆ Topic: Retrieve Participant Info



- Trigger phrase: *"List attendees and feedback from the IT training."*
- Action: Queries Excel or SharePoint lists.

#### ◆ **Topic: Generate Follow-Up Materials**

- Trigger phrase: *"Create a follow-up email for advanced users."*
- Action: Uses templates and links.

#### ◆ **Topic: Compare Training Effectiveness**

- Trigger phrase: *"Compare July and August session engagement."*
- Action: Analyzes feedback and attendance.

### **Step 5: Customize Responses**

- Use **Copilot Studio's authoring canvas** to define how the agent responds.
- Include dynamic content, links, and summaries.
- Add fallback responses for unclear prompts.

### **Step 6: Set Permissions**

- Ensure the agent only accesses content users are authorized to view.
- Use role-based access if needed.

### **Step 7: Deploy and Share**

- Publish the agent.
- Pin it in **Copilot Chat** and **Teams**.
- Share with your training team or embed in your SharePoint site.