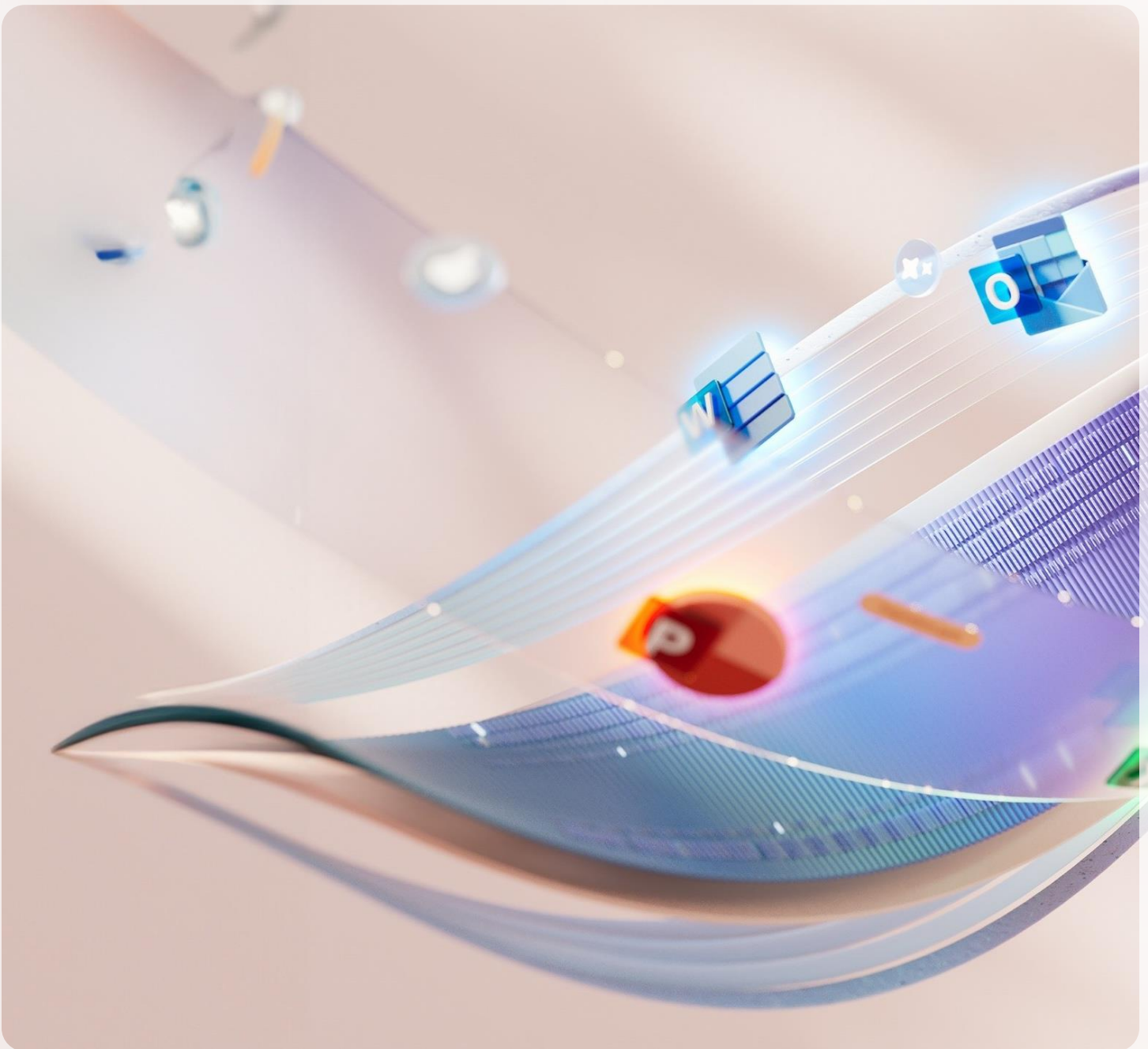




Agents in SharePoint

Frequently asked questions



For all users

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For all users

What are agents in SharePoint?

Agents in SharePoint are AI-powered assistants that you interact with using natural language. These agents support you and your team with your workflows, projects, content discovery and knowledge sharing, grounded on the content in SharePoint sites, pages, and selected files. With edit permissions to the site, SharePoint users can create agents grounded on select files or folders to get more specific answers tailored to your specific purpose, project, or task. All SharePoint sites come with a ready-to-use agent based on that site's content.

How do I get access to agents in SharePoint?

You can get access to agents in SharePoint with a Microsoft 365 Copilot license.

Who can create agents in SharePoint?

Anyone with edit permissions on a SharePoint site can create agents. This includes site owners, editors, members, or admins, depending on the permissions set within SharePoint.

How do I create a new agent?

In SharePoint, select the sites, folders and files you would like your agent scoped to, and then select the "Create an agent" button. From here, you can start using the agent right away or refine the agent's brand and behaviors further in the builder tool. If you'd like to add data sources outside SharePoint, you can switch over to Microsoft Copilot Studio from SharePoint.

Where can I find agents in SharePoint?

After you've created an agent, it will appear in the drop-down menu from the Copilot icon, or you can also find it in your document library alongside your other files.

You can also find agents on SharePoint sites and folders. From SharePoint, click the Copilot icon from the ribbon, and the ready-to-use agent will appear in the sidecar pane of the page. To switch to another agent, select it from the drop-down menu.

Where can I use agents created in SharePoint?

You can access an agent from a SharePoint site, page, or document library. You can also use it in Teams if added. We plan to make it available across Microsoft 365, including Microsoft Copilot.

When using agents in SharePoint, what information do I have access to?

When you use a SharePoint agent, you have access to sites, pages and documents that are included in the agent's sources and to which you already have permissions, as well as Microsoft Graph data such as your work emails, calendar, and Teams chats. If you do not have permission to specific content, even if this content is included in the agent's sources, you will not see information from this content in your chat with the agent.

What files are supported by agents in SharePoint?

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

Support for the following file formats is coming soon:

- Images
- Meeting recordings and other videos
- OneNote notebooks

When I choose a hub site as a knowledge source for the custom agent, will it be able to search and give responses about all sites associated with the hub site?

When you select a hub site as a knowledge source, the agent automatically includes the hub site's associated sites as knowledge sources of the agent, so you will get responses based on information from both the hub site and its associated sites.

Can agents pull information from multiple sources?

Yes, agents in SharePoint can be configured to pull information from multiple sources they have permissions to within SharePoint, not just the site they are associated with. This allows for a broader scope of information retrieval.

What is the difference between an agent in SharePoint and an agent made with Microsoft Copilot Studio?

Agents in SharePoint allow site editors to quickly define an agent tailored to their specific team or projects directly within SharePoint. In comparison, creating an agent in Copilot Studio enables you to use content from SharePoint or OneDrive as sources, as well as other sources. We are working on directly integrating SharePoint with Microsoft Copilot Studio to customize your agent created in SharePoint with data sources beyond SharePoint.

How do I share an agent created in SharePoint?

As a site member or above, you can find the agent you want to share from the agent list. Select the ellipses and then select **Add to Teams**. You can also click **Copy Link** to send via email

How do I delete an agent?

As a SharePoint site owner or member, you can delete any agents just as you would other files in SharePoint. To delete an agent, select it from the folder. Then select the ellipses > **Delete**.

Who can see my agent chat history?

No one except you can see your chat history.

Can I delete my agent chat history?

Yes, from the chat pane, you can choose to delete chat history for a specific conversation, or you can delete all chat history.

In addition, you can delete all your agent interaction history. Navigate to myaccount.microsoft.com, then go to **Settings & Privacy**. Select the **Privacy** tab, and then **Copilot interaction history**. There will be a button to clear your history. For details on this feature, go to [Delete your Microsoft Copilot interaction history](#). Agent in SharePoint data will also be removed along with Copilot data in other Microsoft 365 applications.

For IT administrators

What can each user role do with agents in SharePoint?

Role	Chat with an agent in SharePoint	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	●	●	●	●	●	●	●

How do agents adhere to security, privacy, and governance controls?

Agents, Copilot and Microsoft 365 are built on Microsoft's comprehensive approach to security, compliance, and privacy.

For more information about privacy, see the following information:

- If you're using Microsoft 365 Copilot in your organization (with your work or school account), see [Data, Privacy, and Security for Microsoft 365 Copilot](#).
- If you're using Copilot in Microsoft 365 apps at home as part of Copilot Pro (with your personal Microsoft account), see [Copilot Pro: Microsoft 365 apps and your privacy](#).

Do agents respect user permissions?

Yes, agents honor the permissions set within SharePoint, ensuring that users only access content they are authorized to view. Only the site owner, admins, or those with edit permissions on a site (such as a site member) can create an agent for the site.

an agent in SharePoint are JSON files – they can be managed the same way as other files in SharePoint.

As an admin, can I turn off the "Create an agent" functionality for users?

No, admins are not able to this feature off

What languages do agents support?

Agents in SharePoint support a growing set of languages. The quality is expected to be highest in English, while in other languages the quality is being improved over time. Find more information at [Microsoft Copilot supported languages](#).

I want to provide feedback; how do I send feedback?

We value your feedback and would like to hear about your experience. You can use the thumbs up and down icons located at the bottom of the rewrite text pane while using the agent's rich text editor.

Learn more at: [Aka.ms/SharePoint/AgentsAdoption](https://aka.ms/SharePoint/AgentsAdoption)

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