



TECHCON 365 | CHICAGO 2026

AI in SharePoint in Action

You set the intent. Copilot in SharePoint does the work.

Bryan Wofford

Principal Customer Experience PM | Microsoft

June 15–19, 2026 • McCormick Place, Chicago



PHOTOGRAPHY DURING THE SESSION

Feel free to capture the moment! Taking pictures of the presentation, during the session is perfectly fine.



SELFIES WITH THE SPEAKER

We encourage interaction! If you'd like to take a selfie with the speaker, don't hesitate to ask. Most speakers will be happy to oblige during appropriate breaks.



RECORDING AND LIVE STREAMING

Recording or live streaming the session, in part or in full, is strictly prohibited. Thank you for respecting our content and Speakers.

About me



Bryan Wofford

Principal Customer Experience PM • SCALE (ODSP) • Microsoft

- Lead content strategy and execution for flagship M365 community moments — MVP Summit, M365 Conference, ESPC, and the Microsoft AI Tour
- 10 years at Microsoft, 25+ years in IT; focused on community engagement, customer experience, and operationalizing Copilot end-to-end
- Find me online: LinkedIn /in/bryanwofford • Charlotte, NC

Copilot in SharePoint

You set the intent. Copilot in SharePoint does the work.



Meet Maya Patel

Program Manager at Zava Corp

“

My job is to keep projects moving, but most of my time goes into chasing content.”

Maya's *work* around the work

Content chaos

"Our content is unorganized, and when AI pulls from it, answers aren't reliable"

Manual upkeep

"Keeping content up to date takes constant effort, and it's all manual"



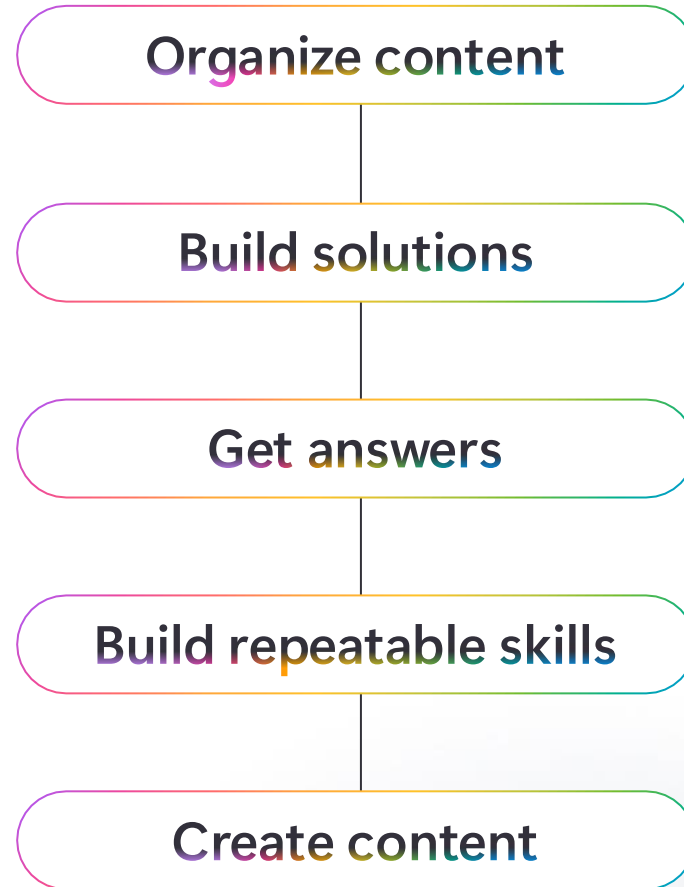
Sea of files

"The information is there, but I still have to connect the dots myself"

Doesn't scale

"The team doesn't have the time or expertise, so the work ends up sitting with me."

Go from content chaos to Copilot-ready



Better content in, better AI out

Organize content

Build solutions

Get answers

Build repeatable skills

Create content



Turn messy files into structured content
Copilot can use



"Help me organize this library"



Product Catalog

Copilot

Add shortcut to OneDrive

Forms

Edit in grid view

Pin to Quick access

Export to Excel

Create or upload

All Documents

Name	Available colors	Available sizes	SKU	In stock status	Modified	Modified By
ArmSleeves_v34_THIS ONE IS FINAL_June ...	Black/Red, Gray/Blue	S, M, L	ZCCAS-2025-BLK-RED	No	Tuesday at 7:25 ...	Carole Poland
Extreme Temp Luminous Wearable – Prod...	Neon Green, Electric Blue	S, M, L, XL	ETLW-2025-NEON-GRN	Yes	Tuesday at 6:58 ...	Carole Poland
Final_v3_NEW_Specs_ZavaCoreShorts_Upd...	Black/Orange, Gray/Blue	S, M, L, XL	ZCAS-2025-BLK-OR	Yes	Tuesday at 7:26 ...	Carole Poland
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stuff.docx	Black/Orange, White/Blue	6–13 (US)	ZCVR5-2025-BLK-ORG	Yes	Tuesday at 7:29 ...	Carole Poland
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tbh_idk.docx	Black/Blue, Silver/Green	One Size	ZCHB-2025-BLK-BLU	No	Tuesday at 7:30 ...	Carole Poland
USE THIS VERSION - ZAVAbackpack.docx	Black/Gray, Blue/White	One Size	ZCAB-2025-BLK-GRY	Yes	Tuesday at 7:32 ...	Carole Poland
ZavaCore Field Premium Shirt – Product S...	Black/Gray, White/Blue	S, M, L, XL, XXL	ZCFPS-2025-BLK-GR	No	Tuesday at 7:25 ...	Carole Poland
ZavaCore Hoodie FINAL FINAL (USE THIS ...	Gray/Black, Navy/White	S, M, L, XL, XXL	ZCPH-2025-GRY-BLK	Yes	Tuesday at 7:33 ...	Carole Poland
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ZavaCore_Enduro_Training_Shoes_FINAL-F...	Gray/Black, White/Red	6–13 (US)	ZCETS-2025-GRY-BLK	Yes	Tuesday at 7:35 ...	Carole Poland
ZavaCoreSmartFitnessTracker_Final_Versio...	Black/Silver, Blue/Gray	Not found	ZCSFT-2025-BLK-SLV	Yes	Tuesday at 7:34 ...	Carole Poland
ZCSH-2025-BLK-Tech-Gear.docx	Green, Black	One Size	ZCSH-2025-BLK-GRN	Yes	Tuesday at 7:28 ...	Carole P

Autofill prompt

Extract the SKU (Stock Keeping Unit) from... [Show more](#)

Keep

In stock status

Suggested column

Autofill prompt

Determine if the product is in stock... [Show more](#)

Keep

Review column suggestions

4 columns remaining

Keep all



Here are a few column suggestions. Keep the columns you want and remove the ones you don't. You can also edit a column's autofill prompt or adjust its settings to change how it works.

When you're finished, I can help you add more columns, set up automations, or create new views. Just let me know what you'd like to do next.

+10



Ask a question about Product Catalog

AI-generated content may be incorrect

Move from asking questions to **assigning work**

Organize content

Build solutions

Get answers

Build repeatable skills

Create content



Describe what you need. Copilot builds the sites, pages, lists, and libraries.



“Build a site for my project”



ZAVA

SharePoint

Search in SharePoint



WF



Zava



Discover



Publish



Build



OneDrive

What will you build today?

Preview feature

Describe what you would like to build



Start building



Site

Create a shared space to collaborate or communicate across your organization.



List

Track tasks, manage data and organize information with flexible views, collaboration, and automation.



Document library

Store, organize and collaborate on files with versioning, tagging, and secure sharing in one place.



Agent

Streamline workflows, boost productivity, and get content-aware answers across your SharePoint access.

Owned by you



All

Sites

Lists

Document libraries

Agents

Search by name

Name

Last activity by you

Analytics



Zava Product Team
Communication site



Opened • 1h ago

624 visits | 11 viewers



Zava Product Expert
Zava Product Team

Edited • 1h ago

Get answers **you can act on**

Organize content

Build solutions

Get answers

Build repeatable skills

Create content



Get grounded answers across your content



“What’s the latest on this project?”

Teach AI **how your team works**

Organize content

Build solutions

Get answers

Build repeatable skills

Create content



"Do it this way every time."



Capture how your team works once.
Apply it every where

Discover

Publish

Build

OneDrive

Zava Product Team - AgentAssets

+

https://m365x00104473.sharepoint.com/sites/ZavaProductTeam/Lists/Project%20Tracker/AllItems.aspx

SharePoint

Search this list

Zava Product Tea...

Home

About Zava

Product Portfolio

Zava Product Inventory

Top 10 Countries by GDP (2025)

Upcoming Sci-Fi Conferences

Edit navigation

Added to favorites

Site access

+ Add new item

Edit in grid view

Undo

Share

Copy link

Copilot

Export

Forms

Workflows

Details

Project Tracker

All Items

+ Add view

Project Name	Workstream	Status	Overall RAG	Owner	Start Date	End Date	+ Add column
Website Redesign	Design	In Progress	Green	Carole Poland	1/15/2026	4/30/2026	
API Migration	Engineering	In Progress	Amber	Carole Poland	2/1/2026	6/15/2026	
Q3 Campaign Launch	Marketing	Not Started	Green	Carole Poland	7/1/2026	9/30/2026	
CRM Integration	Engineering	Completed	Green	Carole Poland	10/1/2025	1/31/2026	
Budget Review FY27	Finance	Not Started	Amber	Carole Poland	6/1/2026	7/15/2026	
Sales Enablement Kit	Sales	In Progress	Green	Carole Poland	3/1/2026	5/31/2026	
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Brand Refresh	Design	Completed	Green	Carole Poland	9/1/2025	12/31/2025	
Partner Portal	Sales	Not Started	Amber	Carole Poland	8/1/2026	11/30/2026	
Data Warehouse Migration	Operations	In Progress	Amber	Carole Poland	3/15/2026	10/15/2026	

+

Ask a question about Project Tracker

AI-generated content may be incorrect

Hello Carole Poland!

Welcome! Enhance your productivity with this agent. Start a conversation by asking a question or selecting one of the suggested prompts.

Summarize list items

Summarize recent updates on this site

What information from this site is relevant to me?

Turn ideas **into** execution

Organize content

Build solutions

Get answers

Build repeatable skills

Create content



"Turn this into a dashboard"



Generate decks, docs, and dashboards from your existing content

Java Product Team - Project Boogie

https://m365x00104473.sharepoint.com/sites/JavaProductTeam/Lists/Project%20Boogie/AllItems.aspx

SharePoint

Search this list

Added to favoritesSite access

Discover

Publish

Build

OneDrive

Zava Product Team

HomeAbout ZavaProduct PortfolioZava Product InventoryTop 10 Countries by GDP (2025)Upcoming Sci-Fi ConferencesTeam FilesEdit navigation

+ Add new item

Edit in grid view

Undo

Share

Copy link

Copilot

Export

Forms

Workflows

Details

Project Boogie

All Items

+ Add view

Project Name	Workstream	Status	Overall RAG	Owner	Start Date	End Date	+ Add column
In-Store Pickup Lockers	Operations	In Progress	Green	Carole Poland	12/1/2026	5/29/2026	
Zava Mobile App Refresh	Engineering	In Progress	Amber	Carole Poland	2/2/2026	10/7/2026	
Spring DIY Campaign	Marketing	Not Started	Green	Carole Poland	6/15/2026	8/31/2026	
Loyalty Program Relaunch	Marketing	In Progress	Amber	Carole Poland	3/3/2026	9/18/2026	
Warehouse WMS Upgrade	Operations	On Hold	Red	Carole Poland	6/4/2026	11/20/2026	
Supplier Portal Rollout	Engineering	Completed	Green	Carole Poland	1/9/2025	2/13/2026	
FY27 Budget Planning	Finance	Not Started	Amber	Carole Poland	1/7/2026	8/14/2026	
Pro Contractor Desk Pilot	Sales	In Progress	Green	Carole Poland	2/16/2026	6/30/2026	
Store Layout Optimization	Design	In Progress	Amber	Lydia Bauer	1/20/2026	5/22/2026	
Self-Checkout Expansion	Engineering	In Progress	Red	Lydia Bauer	5/1/2026	7/8/2026	
Curbside Delivery Network	Operations	Not Started	Amber	Lydia Bauer	3/8/2026	12/18/2026	
Employee Safety Training	HR	Completed	Green	Lydia Bauer	6/10/2025	1/30/2026	
Product Data Cleanup	Engineering	In Progress	Amber	Lydia Bauer	9/3/2026	9/25/2026	

Hello Carole Poland!

What can I help with in Project Boogie?

Find recent items

Add items from file

Set due date reminders

Format the list for readability

Turn this list into a clean, interactive live HTML dashboard.

Include:

- KPI summary (total projects, % completed, in progress, and RAG counts)

- Interactive table with search, sorting, and expandable rows

- Filters for workstream, status, RAG, owner, and date range

- Charts: projects by workstream, status breakdown, and RAG distribution

- Timeline view showing project durations

+ AI-generated content may be incorrect

Product value

Teach AI how your team works

Set your standards once and let Copilot in SharePoint follow them every time

Define it once, done forever

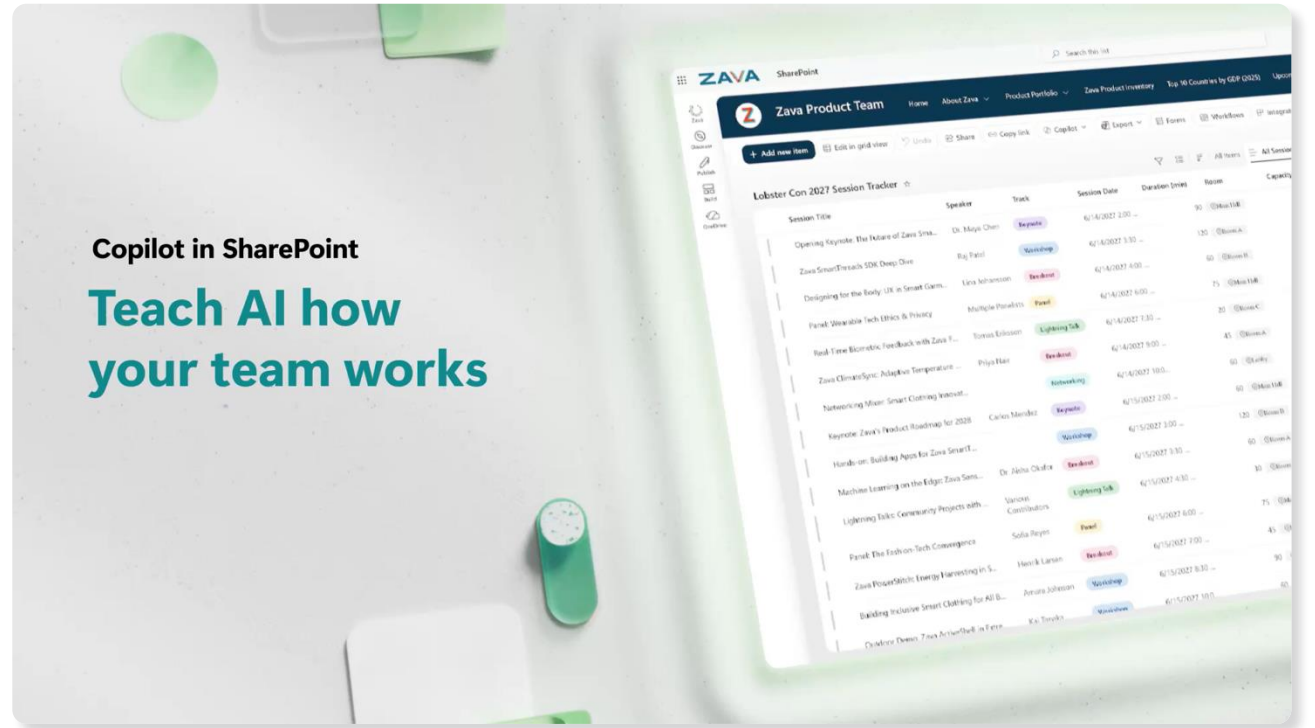
Capture your team's knowledge, processes, and preferences so Copilot applies them automatically – no repeated setup

Every response meets your standard

Whether it's a brand review or a proposal check, Copilot follows the same playbook every time, regardless of who asks

Your whole team works the same way

One person codifies the approach at the site level, and everyone benefits instantly – no re-explaining expectations



Define your standards once – Copilot then consistently across every request, for every person on your team

Turn ideas into execution

Use natural language to create and edit sites, libraries, lists, and pages

Anyone can be a creator

Removes the friction of building and editing, so you focus on intent while Copilot handles the rest

Multi-step content work

A single prompt triggers planning, execution, and refinement without manual intervention at each step

Edit directly on the canvas

Draft, reorganize, and update pages using natural language without navigating menus or knowing layout conventions



Say what you want to build – Copilot plans it, iterates with you, and does the heavy lifting in SharePoint

Better content in, better AI out

Enriching content with metadata to make it Copilot-ready

Stay organized without the effort

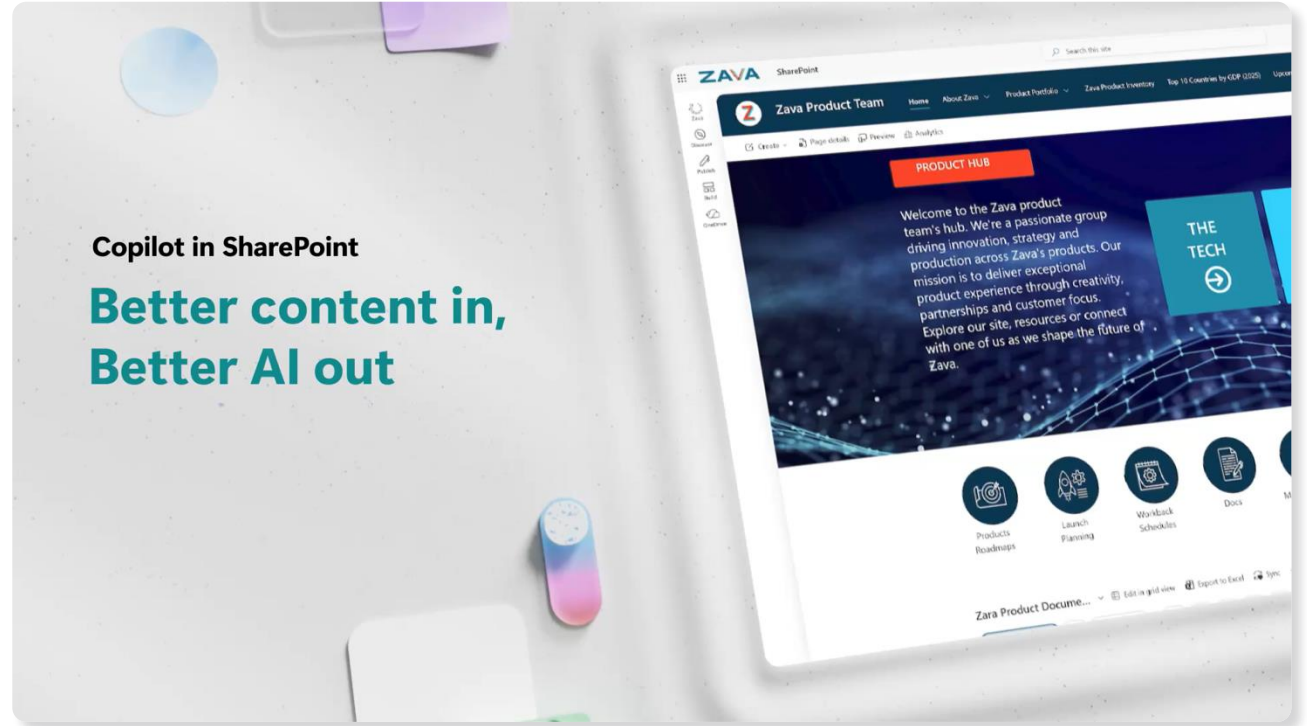
Copilot handles everything – from enriching libraries with metadata, moving files into folders, to finding broken links, content gaps, and stale pages

Gives AI the context it needs

Copilot in SharePoint suggests columns and metadata for files which Copilot and agents use to improve response quality across M365

Only Copilot speaks SharePoint fluently

Copilot and agents understand SharePoint end-to-end, including AI-applied metadata. Other AI tools miss key details



SharePoint creates metadata for files using AI, giving Copilot and agents richer signals to be more precise

Get started with Copilot in SharePoint
with a Microsoft 365 Copilot subscription

In public preview now!

Microsoft 365 Copilot license

\$30 user/month with
an annual subscription

Product capabilities

Copilot in SharePoint capabilities

1 Libraries and Documents

- Create libraries
- Move, rename, delete files (AI file actions)
- Create library columns with auto-filled metadata
- Automate workflows in a library
- Create views in a library
- Generate structured documents from forms

2 Sites and Pages

- Plan and create sites
- Create and edit pages
- Create sections
- Fix broken links
- Find content gaps
- Retire inactive pages

3 Lists

- Create lists
- Edit lists
- Ask questions

4 Chat

- Context aware chat over sites, libraries, lists and files
- Summarization
- Audio overview
- Generate FAQ
- File comparison

5 Skills:

- Create and invoke skills and context

6 Content generation:

- Create documents (Word, Excel, PPT)
- Create HTML pages

Describe your intent – wherever you are in SharePoint – and Copilot does the rest

Libraries and documents

Create libraries enriched with metadata from a single prompt

Create intelligent libraries

From natural language descriptions, with columns aligned to the type of information the library holds

Extracts and apply metadata

As files are added, using AI-powered autofill columns – No manual tagging required

Highlight what matters and drive action

Create views tailored to tasks and built for clarity and consumption. Create rules to notify teammate or drive business automations

Organize, analyze, and manage your library

Prompt to organize Flatten nested folders, rename files, sort loose files into folders, and copy or move content

The screenshot displays the 'Zava Product Team' SharePoint library. The main view is a table titled 'Product Catalog' with columns for Name, Available colors, Available sizes, SKU, In stock status, Modified, and Modified By. The table contains 15 rows of product data. On the right side, there are AI-powered autofill prompts for 'Autofill prompt' and 'In stock status', along with a 'Review column suggestions' section. The interface includes a search bar, navigation tabs, and a sidebar with icons for various SharePoint features.

Name	Available colors	Available sizes	SKU	In stock status	Modified	Modified By
ArmSleeves_v34_THIS ONE IS FINAL_June...	Black/Red, Gray/Blue	S, M, L	ZCCAS-2025-BLK-RED	No	Tuesday at 7:25 ...	Carole Poland
Extreme Temp Luminous Wearable - Prod...	Neon Green, Electric Blue	S, M, L, XL	ETLW-2025-NEON-GRN	Yes	Tuesday at 6:58 ...	Carole Poland
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NanoSensorSmartSocks_FINAL_REALLY_FL...	White/Gray, Black/Blue	S, M, L	NSSS-2025-WHT-GRY	Yes	Tuesday at 6:59 ...	Carole Poland
stuff.docx	Black/Orange, White/Blue	6-13 (US)	ZCVRS-2025-BLK-ORG	Yes	Tuesday at 7:29 ...	Carole Poland
Stuff_Copy.docx	Green/Blue, Purple/Gray	One Size	ZCCYM-2025-GRN-BLU	No	Tuesday at 7:29 ...	Carole Poland
tbh_idk.docx	Black/Blue, Silver/Green	One Size	ZCHB-2025-BLK-BLU	No	Tuesday at 7:30 ...	Carole Poland
USE THIS VERSION - ZAVABackpack.docx	Black/Gray, Blue/White	One Size	ZCAB-2025-BLK-GRY	Yes	Tuesday at 7:32 ...	Carole Poland
ZavaCore Field Premium Shirt - Product S...	Black/Gray, Blue/White	S, M, L, XL, XXL	ZCPFS-2025-BLK-GR	No	Tuesday at 7:25 ...	Carole Poland
ZavaCore Hoodie FINAL FINAL (USE THIS ...	Gray/Black, Navy/White	S, M, L, XL, XXL	ZCPH-2025-GRY-BLK	Yes	Tuesday at 7:33 ...	Carole Poland
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ZCSH-2025-BLK-Tech-Gear.docx	Green, Black	One Size	ZCSH-2025-BLK-GRN	Yes	Tuesday at 7:28 ...	Carole Poland

Content with metadata is more efficiently and accurately reasoned over by AI

Sites and pages

Create libraries enriched with metadata from a single prompt

AI-powered site builder

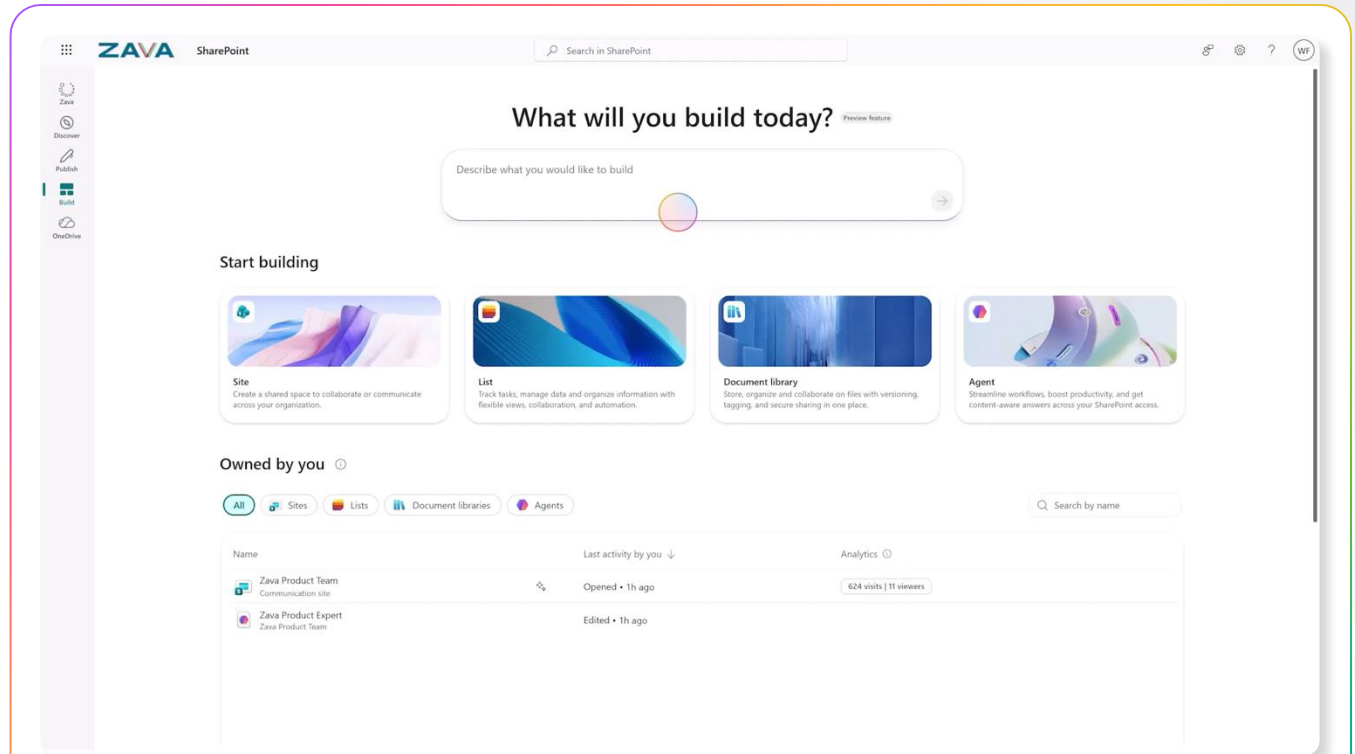
Describe the site you need, and Copilot proposes a structured plan with pages, libraries, lists, and starter content

Agentic page creation and editing

Already have a site built? Just ask Copilot in SharePoint to add pages or edit content. Link to reference material to include that.

Keep your intranet fresh

Improve your site with capabilities that help site owners maintain accuracy, relevance, and Copilot readiness with minimal effort. (retire low-activity pages, find content gaps for what users can't find, and fix broken links users encounter)



No site building expertise needed – just describe what you need and Copilot builds it

Lists

Create, edit, and manage lists using natural language

Create a list from a file (ex. Excel)

Upload a file and Copilot creates a structured list from its content

Create views based on data

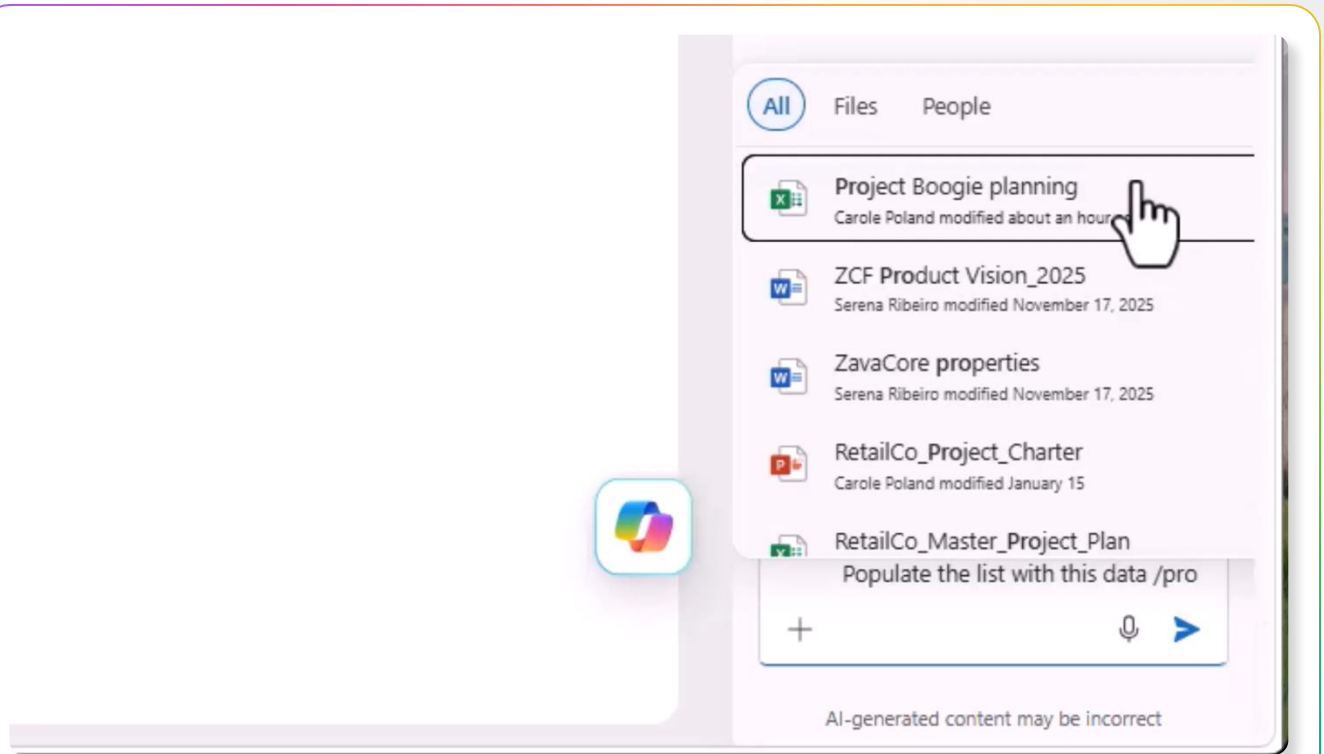
Ask for filtered views like “show only at-risk projects” and set them as default

Add automation and alerts

Set up email notifications for status changes or create rules based on list data

Apply conditional formatting

Color-code columns and rows for quick visual scanning of status and risk levels



Copilot builds lists based on existing files in moments, with you in the loop to approve any changes

Chat

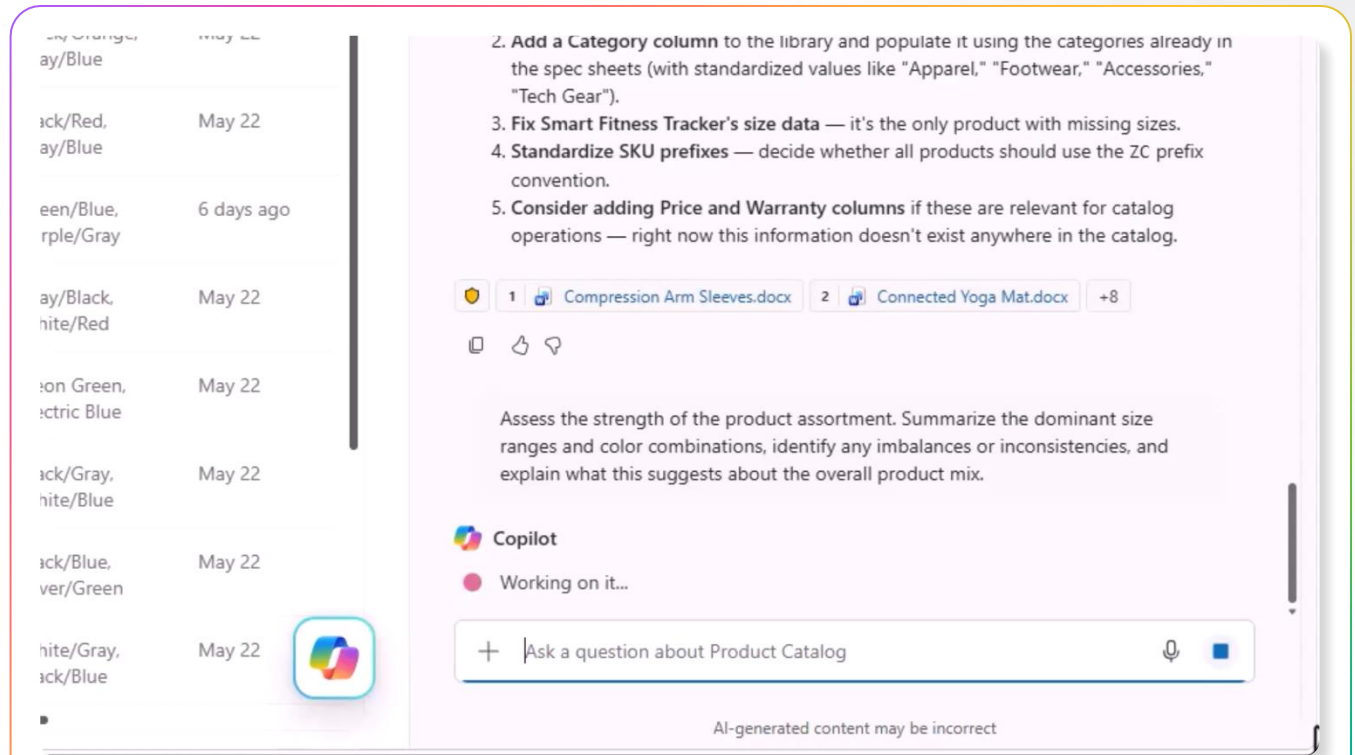
Get context-aware answers and actions on your content

Ask natural-language questions and get context-aware answers grounded in pages, files, lists and metadata Create views based on data

Summarize and compare documents instantly to extract key points or understand differences without opening files

Generate insights from your content – Surface details, explain concepts, or highlight what's important

Generate a concise spoken summary to quickly understand the key points without reading the full content



The screenshot displays the Microsoft Copilot interface within a SharePoint environment. On the left, a list of items is visible, including 'ay/Blue', 'ick/Red, ay/Blue', 'een/Blue, rple/Gray', 'ay/Black, hite/Red', 'on Green, ictic Blue', 'ick/Gray, hite/Blue', 'ick/Blue, ver/Green', and 'hite/Gray, ick/Blue'. The right pane shows a chat window with the Copilot icon and the text 'Working on it...'. Below this, a search bar contains the text 'Ask a question about Product Catalog'. A list of documents is shown above the chat window, including 'Compression Arm Sleeves.docx' and 'Connected Yoga Mat.docx'. A list of instructions is displayed at the top of the chat window:

2. Add a **Category** column to the library and populate it using the categories already in the spec sheets (with standardized values like "Apparel," "Footwear," "Accessories," "Tech Gear").
3. Fix **Smart Fitness Tracker's size data** — it's the only product with missing sizes.
4. **Standardize SKU prefixes** — decide whether all products should use the ZC prefix convention.
5. Consider adding **Price and Warranty columns** if these are relevant for catalog operations — right now this information doesn't exist anywhere in the catalog.

At the bottom of the chat window, a disclaimer reads: 'AI-generated content may be incorrect'.

No more information bottlenecks – Copilot in SharePoint serves as an expert grounded on your content

Skills

Codify your organization's guidelines and teach AI how your team works

What are AI Skills?

Skills are sets of instructions that teach SharePoint AI to perform your unique tasks reliably and consistently.

Tailored to your team, shared across it

Skills reflect how your team works and are shared at the site level – One person defines the approach and everyone benefits.

Example use cases

- Style, tone, and structure reviews based on documented guidelines
- Brand compliance reviews across presentations
- Proposal quality checks and RFP generation
- Financial disclosure validation

The screenshot displays a SharePoint site for the 'Zava Product Team'. The main content area features a 'Project Tracker' table with the following data:

Project Name	Workstream	Status	Overall RAG	Owner	Start Date	End Date
Website Redesign	Design	In Progress	Green	Carole Poland	1/15/2026	4/30/2026
API Migration	Engineering	In Progress	Amber	Carole Poland	2/1/2026	6/15/2026
Q3 Campaign Launch	Marketing	Not Started	Green	Carole Poland	7/1/2026	9/30/2026
CRM Integration	Engineering	Completed	Green	Carole Poland	10/1/2025	1/31/2026
Budget Review FY27	Finance	Not Started	Amber	Carole Poland	6/1/2026	7/15/2026
Sales Enablement Kit	Sales	In Progress	Green	Carole Poland	3/1/2026	5/31/2026
Office Relocation Plan	Operations	On Hold	Red	Carole Poland	4/1/2026	8/31/2026
Employee Onboarding Revamp	HR	In Progress	Amber	Carole Poland	2/15/2026	5/15/2026
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Partner Portal	Sales	Not Started	Amber	Carole Poland	8/1/2026	11/30/2026
Data Warehouse Migration	Operations	In Progress	Amber	Carole Poland	3/15/2026	10/15/2026

On the right side of the screenshot, there is a Copilot chat interface. It includes a greeting: 'Hello Carole Poland! Welcome! Enhance your productivity with this agent. Start a conversation by asking a question or selecting one of the suggested prompts.' Below the greeting are three suggested prompts: 'Summarize list items', 'Summarize recent updates on this site', and 'What information from this site is relevant to me?'. At the bottom of the chat interface, there is a text input field with the placeholder 'Ask a question about Project Tracker' and a microphone icon. A small disclaimer at the bottom right of the chat area states: 'AI-generated content may be incorrect.'

Don't recreate the wheel. Just save your processes as skills to teach Copilot how your team gets work done

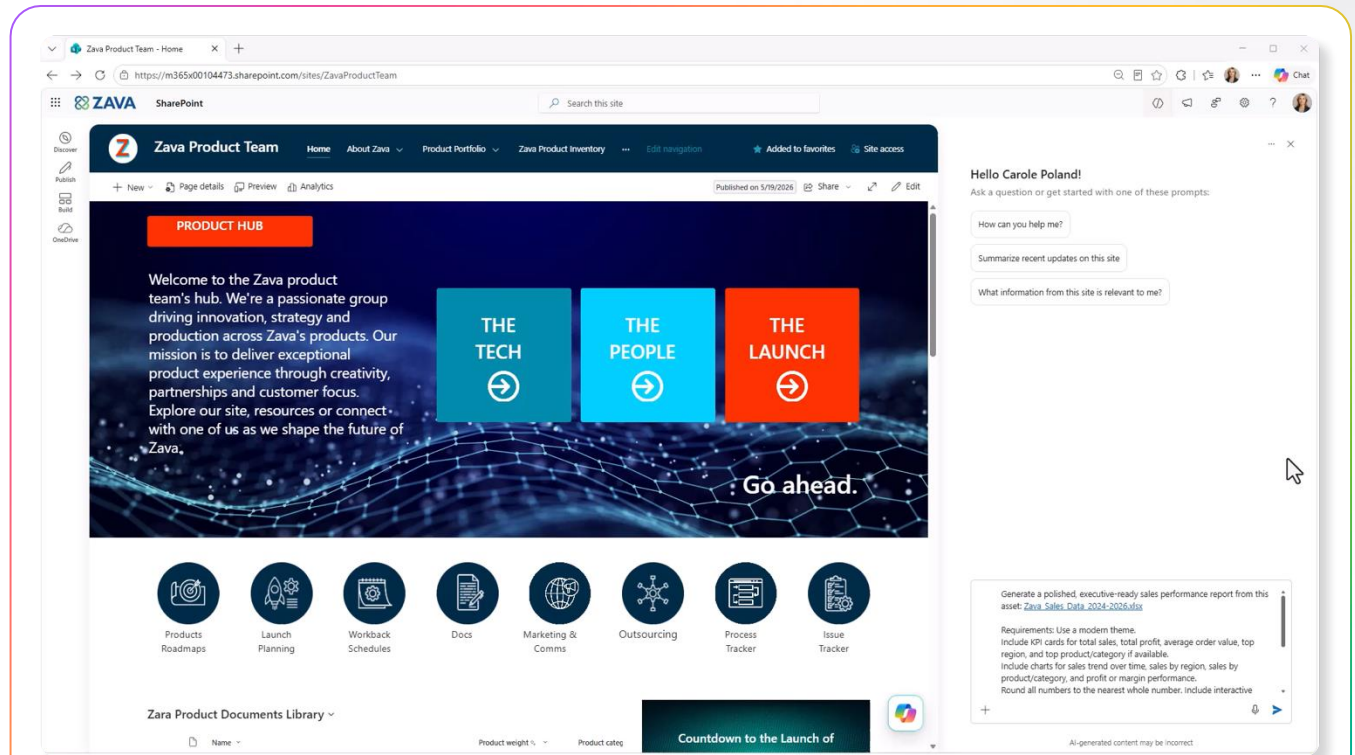
Content generation

Visuals and reports

Generate graphs, charts, and interactive reports to present data and insights

File creation

Generate Word, Excel, and PowerPoint files as part of content process flows



Copilot builds robust dashboards based on your existing content – no developer expertise needed

Getting started

Broad public preview timeline

Broad Public Preview: Mid-June 2026

- Moving from opt-in early access to opt-out broad public preview
- Will appear automatically for all users with an M365 Copilot license unless the tenant or site is opted out

Impact on Early Access Customers

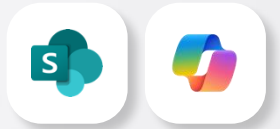
- No changes to current deployed tenants – Existing PowerShell controls remain in place
- Other tenants not currently in preview **will receive the preview automatically** – Proactively opt out if needed

GA Timeline Update

- General Availability pushed beyond June – Updated timeline to be shared as soon as available

Ref: Message Center post MC1311968

Co-build your **priority AI scenario** into a working solution — with the SharePoint product team.



What you get

- Co-built POC with our team
- Roadmap insights under NDA
- Direct feedback and issue triage
- Path-to-production review



What we need from you

1. A high-value AI use case on SharePoint
2. Business owners + IT in the room
3. M365 Copilot licenses in place
4. Production intent — not just a POC

A no-cost program where Microsoft's SharePoint product team co-builds your high-value Copilot in SharePoint scenario with you. Nominations reviewed within ~1 week and will follow with contact and scheduling of a kick-off scoping call!

Submit at

aka.ms/CopilotinSP/join

How to prompt

AI reasoning models are powerful → experiment with a spectrum of outcome driven prompts

01 Specific prompt

"This is an invoices library, extract a column with the Vendor Name, Region, Transaction Date, CY-Quarter, and Cost Center."

02 Abstract prompt

"Update the default view to be functional and beautiful. This library will be used by different cost centers, help me make the view easy for them to consume."

03 Outcome driven prompt

"Help me organize this library of invoices and make it easy for the different cost centers to see key details related to their invoices. I need to easily see when information is missing like Transaction Date, Vendor Name, and Cost Center so that I can follow up with the right people for corrections."

SharePoint

Here are a few column suggestions based on your invoices. Keep the columns you want and remove the ones you don't. You can also edit a column's autofill prompt or adjust its settings to change how it works.

The recommendations include the three you specifically called out — **Transaction date**, **Vendor name**, and **Cost center** — plus a few extras that should help with tracking and follow-ups. There's also a **Missing key details** column that will automatically flag which invoices are missing critical information, making it easy to spot gaps at a glance.

Once you've finalized the columns, I can help you:

- **Create a view grouped by Cost Center** so each team can easily find their invoices
- **Add column formatting** to visually highlight missing values (e.g., red/yellow indicators)
- **Set up notification rules** to alert people when new invoices are missing key details

Let me know what you'd like to adjust or what to tackle next!

...a few turns collaborating with AI

Here's the full setup summary for your library:

1. **6 autofill columns** extracting key invoice data automatically
2. **Visual formatting** — red "Missing" badges on Transaction date, Vendor name, and Cost center
3. **"By Cost Center" view** — grouped so each team sees their invoices
4. **Email alert** — notifies you when invoices are missing critical info

Prompts to try

Surface	Scenario	Prompt
Sites and Pages	Create a site	Create a SharePoint site for our product launch. Include pages for timeline, key stakeholders, marketing assets, and a document library for launch materials.
Sites and Pages	Create a page / edit a page	Update the homepage of this site to include a hero section with our Q2 goals from [PowerPoint file], a news section highlighting recent wins, and quick links to team resources
Sites and Pages	Create a section	Create a new section that outlines the project overview, goals, scope and key milestones.
Sites and Pages	Create a chart or infographic	Create a bar chart based on [Excel file]. Add a sorting capability to sort a-z or highest to lower, and vice versa.
Document Libraries	Organize, analyze and manage a library	Set up autofill columns in this document library for document type, project name, and review status.
Document Libraries	Classify documents	Analyze the files in this library and suggest metadata columns based on their content. Auto-tag each file with the appropriate values.
Document Libraries	Create a library view	Create a view in this document library that shows only documents with Review Status set to "Needs Review." Group the results by Document Type and sort by Last Modified, newest first. Apply conditional formatting.
Document Libraries	Organize files	Based on the contents of this folder, please suggest a folder structure to better organize my files. Show me a mapping structure, and once I approve, take action on it.
Document Libraries	Renaming files	File names in this site should use the following naming convention [insert naming convention]. Remember this as context. <i>Note: Later, add when you add new files to the library, just prompt "Clean up the file names".</i>
Document Libraries	Moving files	All [file subject, ie. contracts] in this library should be stored in the [folder name]. Remember this as context. <i>Note: Later, when you add new files on that subject, ask Copilot to move the files to the right folder.</i>

Prompts to try

Surface	Scenario	Prompt
Lists	Create a list	Create a list to track action items from our weekly meetings. Add columns for assignee, due date, priority, and status. Create a view filtered to items due this week. <i>(Note: If I do this regularly, prompt Copilot to save this as a skill.)</i>
Lists	Update items	Mark all action items assigned to Sarah as complete. Add a new item: 'Finalize Q3 budget' assigned to James, due next Friday, priority high.
Lists	Create a list from an Excel file	Build a list from this Excel file to track customer feedback. Use the existing columns for customer name, feedback type, priority, and owner, and turn each row into a list item. Assign contributors from my team. [/excel file]
Lists	Automate workflows	Create a rule that triggers when a new item is added, then send me an email and post a message in a Teams conversation.
Lists	Enhance readability	Format this list to make it easier to scan both rows and columns based on the importance and type of the information.
Content generation	Create an Excel file	Create an Excel file from the [List Name] list. Include all columns, format as a structured table, and add a summary sheet that shows counts by status and owner, plus a simple bar chart of items by category <i>(Note: If I do this regularly, prompt Copilot to save this as a skill.)</i>
Content generation	Create an interactive report	Create an interactive dashboard based on this quarter's sales performance data. Include total revenue, quota attainment, top and bottom performing regions, and trend over time. Add filters for region and product, and make it suitable for a leadership review <i>(Note: If I do this regularly, prompt Copilot to save this as a skill.)</i>
Content generation	Create a Word doc	Create a Word document press release based on the sales performance dashboard. Summarize key results, highlight top growth areas, call out trends, and frame it for an internal leadership audience. Keep it clear and factual. <i>(Note: If I do this regularly, prompt Copilot to save this as a skill.)</i>
Chat	Ask a question	Based on the documents in this library, what are the key deliverables for the Q3 product launch and who is responsible for each?
Chat	Summarize content	Summarize the strategy docs, meeting notes, and roadmap details on this site into a one-page executive brief. Keep it concise with clear sections.
Chat	Compare files	Compare the two most recent versions of the project proposal in this library. Highlight what changed, what was added, and any conflicting information.
Chat	Generate FAQ	Based on the HR policy documents in this library, create an FAQ covering the top 10 questions new employees typically ask.

Complex prompts

Create a project portfolio tracker

Create a new list for tracking Projects (Project Tracker-<alias> where you use my email alias). It needs columns to track Project Name, Status (On Track, At Risk, Delayed, Complete), Owner, Department, and Risk Level (Low, Medium, High). Use [SampleProjectData.xlsx] as the seed data for the list and assign me as the project owner for all projects.

Proceed with the following steps one at a time, after each step summarize the steps that remain, then proceed to the next step. Only stop if you need to ask me for information.

Step 1: Create views for audience consumption. Create a new view on this list called "Needs Attention" that shows only projects where status is At Risk. Create a new view called "Grouped by Dept".

Step 2: Add automation/alerts. Send me an email anytime a project status is changed to "Delayed".

Step 3: Add specialized formatting. Remove any previous row colors and highlight the whole row in light red hue if the risk level is high across all

Step 4: Create an interactive HTML report. Create an interactive html report in a dark theme, name it <name of this list>_Report and save it to the Reports library on this site. Open the report in the OneUp viewer.

Project Tracker-Carole Report

Interactive dark-theme report for the Project Tracker-Carole list

TOTAL PROJECTS
20

AT RISK
5

DELAYED
4

HIGH RISK
6

Search projects, owner, or department

All Statuses

All Departments

All Risk Levels

Reset

20 of 20 projects shown

Click a column header to sort

PROJECT NAME	STATUS	OWNER	DEPARTMENT	RISK LEVEL
Aerospace Partner Enablement	On Track	Carole Poland	Sales	Medium
Annual Innovation Summit	On Track	Carole Poland	Product Development	Medium
Auracore Fiber Scale-Up	At Risk	Carole Poland	Product Development	High
Auracore Government Patent Filing	At Risk	Carole Poland	Security	High
Automotive OEM Advisory Board	On Track	Carole Poland	Sales	Medium
Compliance Audit Automation	Complete	Carole Poland	Security	Low
Contoso Outdoors Renewal	Complete	Carole Poland	Sales	Low
Customer Data Platform Upgrade	On Track	Carole Poland	Technology	Medium
ERP Cloud Migration	Delayed	Carole Poland	Technology	Medium

Complex prompts

Create an expense processing portal

Complete all four steps in order as one continuous task. After each step, immediately start the next step — do not pause for my approval. Only stop if you need information you can't get from the files.

Step 1: Extract data: Extract a column with the Vendor Name, Vendor US Region, Transaction Date, CY-Quarter, and Cost Center. Keep all columns — tell me explicitly to keep them, and don't replace them later. Once every file has values (or a blank where data is genuinely missing), continue to Step 2.

Step 2: Make the default view functional and beautiful. Update the default view to be functional and beautiful using light colored hues. This library will be used by different cost centers, help me make the view easy for them to consume. Continue to Step 3.

Step 3: Add a dedicated Status column such as Data Quality and set it to values like Complete or Missing metadata, then color that column red.

Step 4: Analyze. Give me insights, not raw numbers: e.g., which cost center led CY25 Q3 transactions (with count) and how it compares across quarters; total and average Invoice Total by cost center and region; most-used vendors and any concentration; and a data-quality note on missing fields. Keep it short — a written summary, one or two tables, and the 2–3 most notable findings.

Name	Cost Center	Vendor Name	CY-Quarter	Vendor US	Transaction	Invoice Total	Data Quality
INV-2024-1114_Cascade-Lumber.pdf	CC-100 Store Operatio	Cascade Lumber Supply Co.	CY24 Q4	West	11/14/2024	\$3078.4	Complete
INV-2024-1203_Empire-Office.pdf	CC-300 IT & Technolo	Empire Office Solutions	CY24 Q4	Northeast	12/3/2024	\$12533.69	Complete
INV-2025-0130_Golden-Gate-Marketing.pdf	CC-200 Marketing	Golden Gate Marketing Group	CY25 Q1	West	1/30/2025	\$10800	Complete
INV-2025-0208_Liberty-Security.pdf	CC-400 Facilities	Liberty Security Systems	CY25 Q1	Northeast	2/8/2025	\$3635.88	Complete
INV-2025-0325_Bayou-Industrial.pdf	CC-100 Store Operatio	Bayou Industrial Supply	CY25 Q1	Southwest	3/25/2025	\$7534.2	Complete
INV-2025-0415_Empire-Office.pdf	CC-300 IT & Technolo	Empire Office Solutions	CY25 Q2	Northeast	4/15/2025	\$11667.04	Complete
INV-2025-0512_Metro-Waste.pdf	CC-400 Facilities	Metro Waste Services	CY25 Q2		5/12/2025	\$2020	Missing metadata
INV-2025-0520_Great-Lakes-Packaging.pdf	CC-500 Logistics & Su	Great Lakes Packaging Inc.	CY25 Q2	Midwest	5/20/2025	\$5188.81	Complete
INV-2025-0610_Pacific-Coast-Cleaning.pdf	CC-400 Facilities	Pacific Coast Cleaning Co.	CY25 Q2	West	6/10/2025	\$7635	Complete
INV-2025-0712_Heartland-Freight.pdf	CC-500 Logistics & Su	Heartland Freight LLC	CY25 Q3	Midwest	7/12/2025	\$7195.5	Complete

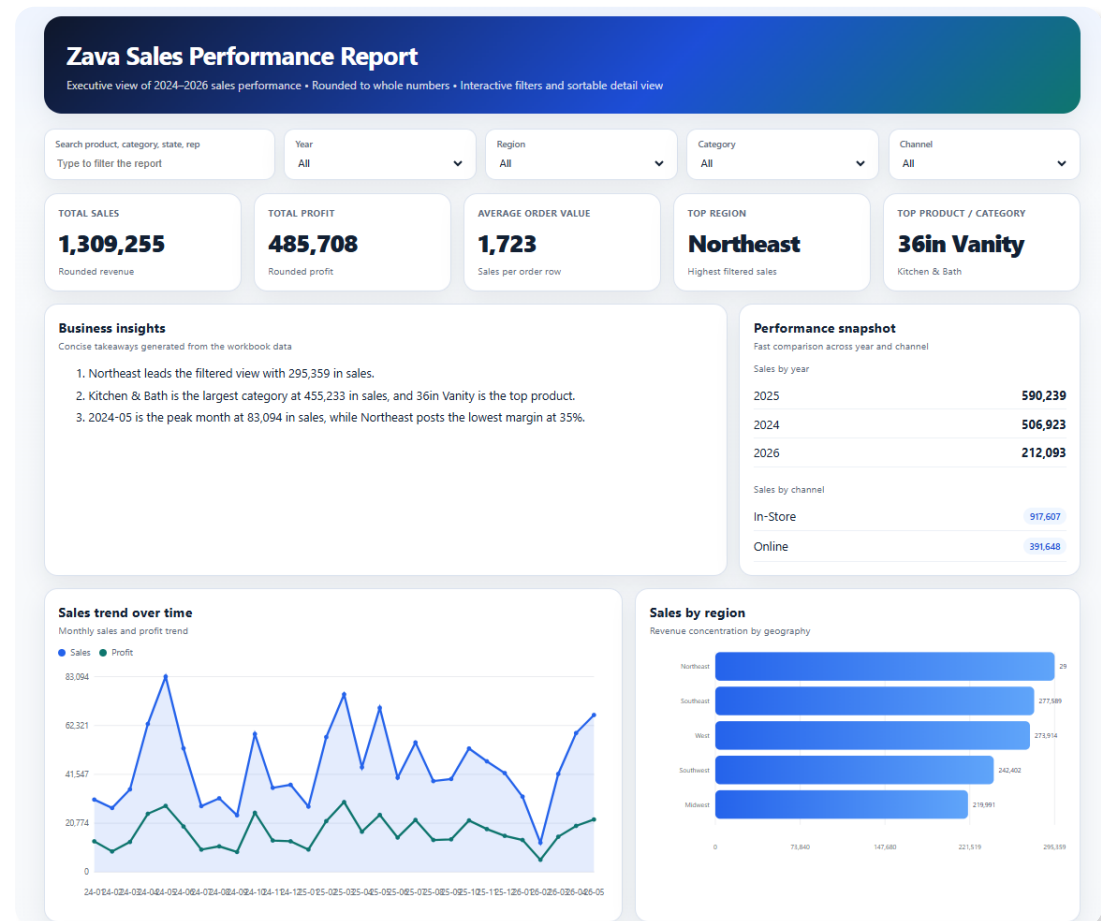
Complex prompts

Create a sales performance report

Generate a polished, executive-ready sales performance report from this Excel. [[link to Excel or Document Library or List](#)]

Requirements:

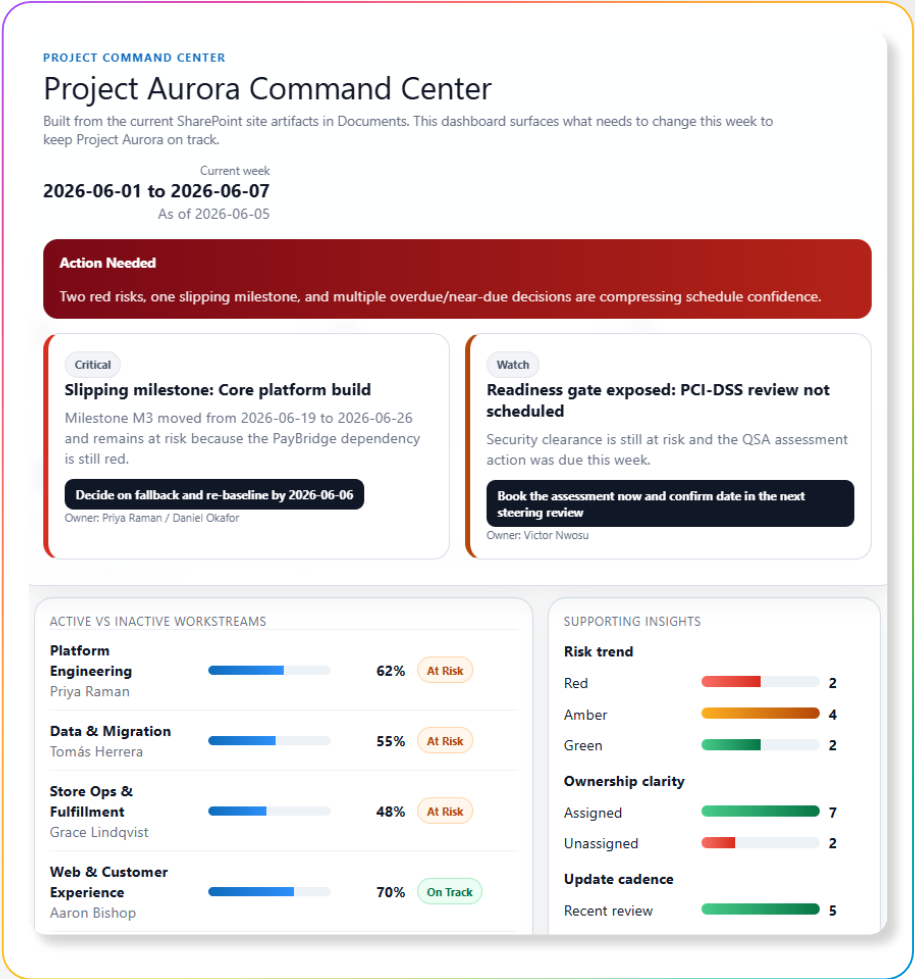
1. Use a modern theme.
2. Include KPI cards for total sales, total profit, average order value, top region, and top product/category if available.
3. Include charts for sales trend over time, sales by region, sales by product/category, and profit or margin performance. Round all numbers to the nearest whole number.
4. Include interactive filters/search where useful.
5. Include a sortable detail table with the most important rows from the workbook. Add 3 concise business insights based on the data.
6. Make the report self-contained in a single HTML file with embedded CSS and JavaScript.
7. Name the file [Zava_Sales_AI_Report_<my alias>.html](#), using my email alias.
8. Save the report to the same folder of the excel sheet.
9. Open the finished report in the OneUp viewer. Work independently and do not ask me for confirmation unless you cannot access the workbook or cannot save the report.



Complex prompts

Create a project command center

- Create an interactive HTML “Project Command Center” titled “[Project Name] Command Center.”
- Use this SharePoint site [site] as the source of truth (libraries, lists, pages, activity) to highlight what requires attention this week. Design this as a single scrollable dashboard. Structure the output as follows:
- Header:** Current week/dates, “Action Needed” banner, and 1–2 priority alerts (e.g., slipping milestone, unresolved risk, inactive owner) with clear calls to action.
 - Situational overview:** Three tiles — On Track (progressing as expected), At Risk (delays, blockers, stale updates), Needs Decision (requires leadership input).
 - Mode selector:** Tabs for Status (default), Risks and Issues, and Activity and Ownership.
 - Project pulse:** Summarize recent activity (file updates, list changes, comments); identify active vs inactive workstreams; flag missing updates or ownership gaps.
 - Prescriptive insight (priority):** Provide 2–3 recommendations — Resolve Now (critical risks), Follow Up (ownership gaps), Re-align (misaligned priorities). For each include the signal observed (e.g., stale document, unresolved issue) and a clear action with owner.
 - Supporting insights:** Risk trends (increasing/stable/resolved), ownership clarity (assigned vs unassigned), and update cadence (recent vs stale).
 - Design:** Clean executive style (Segoe UI) with traffic-light indicators, simple visuals (e.g., bars for risk/activity), and highlighted recommendation callouts.
 - Interactivity:** Expandable sections, clear top-down hierarchy (urgent to detailed).The output should feel like a live command center that answers: “What does the team need to do differently this week to stay on track?”



Some ideas on how teams can use Copilot in SharePoint



IT & Project Teams

Fix broken links, flag outdated pages, and surface missing content to keep sites accurate and up to date

Keep sites healthy and Copilot-ready with automated content governance



HR

Tag policies, highlight outdated content, and create views to streamline audits and reduce compliance risk

Maintain compliance-ready content with less manual oversight



Legal

Classify documents, extract key clauses, and automate routing for faster reviews and reduced risk

Accelerate reviews with structured evaluation and intelligent routing



Communications & Marketing

Publish high-quality pages in minutes, freeing up time to focus on messaging rather than formatting

Produce polished content faster with governed templates and brand standards



Operations & Facilities

Organize lease applications and contracts with smart metadata and views for clarity and control

Bring structure to complex document libraries with intelligent organization



Sales

Surface grounded responses from product docs and specs, minimizing dependencies and increasing efficiency

Accelerate deal cycles with AI-powered content discovery and generation

Early Customer Examples: AI-Powered Workflows



Content & Knowledge Management

Organize, classify, and enrich document libraries with AI-generated metadata and smart views

Outcome: Transform unstructured content into Copilot-ready knowledge at scale



Contractor Compliance

Review contractor documents against QA requirements and authority specifications with evidence-based compliance checks

Outcome: Produce traceable compliance assessments that reduce risk and manual effort



Clinical Trial Screening

Cross-reference candidate data with protocol requirements to support eligibility determinations

Outcome: Criteria-based decision support that accelerates screening and reduces manual review



Change Management

Guide teams through complex change projects, from initial assessment to structured planning and execution

Outcome: Structured work orchestration with coordinated plans and execution



Risk Management

Review project risk data and recommend mitigation actions to proactively manage risk across large portfolios

Outcome: Surface trends, risks, and actionable recommendations at portfolio scale



Proposal Automation

Orchestrate end-to-end RFP intake, map existing content, set response strategy, and generate aligned drafts

Outcome: Governed document generation with enforced templates and review gates

Appendix: Note on custom agents

Copilot in SharePoint vs. custom agents

Copilot in SharePoint

Software Engineer Resumes

Name	AI-generated Candidate	AI-generated Most recent title	AI-generated Professional summary
resume_RadaM_2025.docx	Rada Mihaylova	Sr. Software Engineer	Rada Mihaylova has experience as a senior engineer at Contoso, a backend developer at Fabrikam, and a software intern at Relicloud. She has expertise in distributed systems, API design, and cloud infrastructure.
Gupta P resume.pdf	Pradeep Gupta	Full Stack Developer	Pradeep Gupta has experience as a backend intern at Northwind, a teaching assistant at UofT, and a freelance developer. He has expertise in Java, Spring Boot, and RESTful APIs.
final_resume_MiriamG.docx	Miriam Graham	Jr. Frontend Developer	Miriam Graham has experience as a frontend developer at Litware, a UX engineer at Tailspin Toys, and a design intern at Woodgrove Bank. She has expertise in React, accessibility, and design systems.
Resume_EmilyB.docx	Emily Braun	Software Engineer	Emily Braun has experience as a software engineer at Contoso, a QA analyst at Fabrikam, and a research assistant at UBC. She has expertise in test automation, agile delivery, and CI/CD pipelines.
JLorenz 2025 resume.pdf	Johanna Lorenz	Backend Developer	Johanna Lorenz has experience as a backend engineer at Relicloud, a systems analyst at Alpine Ski House, and a junior developer at Trey Research. She has expertise in .NET, SQL optimization, and microservices.

from the resume content... see more

Most recent title
New column
Autofill prompt
Identify the candidate's most recent job title from the resume... see more

Professional summary
New column
Autofill prompt
Summarize the candidate's professional background... see more

Type your message...

SharePoint's built-in AI

Custom agents in SharePoint

Create your new agent

Overview Sources Behavior

Agent preview Give Feedback

Product Expert agent

Hello Carole Poland!

Ask a question or get started with one of these prompts:

Summarize recent files

Tell me more about...

How can you help me?

Work smarter with your own AI assistant

Agents are AI assistants that can help you stay on track by simplifying complex tasks and providing guidance based on what you're working on. Create your own by naming it, choosing its [sources](#), and defining its [behavior](#).

Customize your agent to fit your business needs. Share your agent with your team or keep it as your own. [Learn more](#).

Name *

Product Expert agent

Z

Change

Purpose *

Provide a brief description of the agent's objective.

*This agent was created based on the content from the selected files.

Agents you create to be
subject-matter experts for your business

Two products, two roles: Key attributes of both

Copilot in SharePoint

SharePoint's built-in AI

Purpose

Helps you plan, build, enrich, and maintain SharePoint content, and ensure your content is Copilot ready

What they do

- Plans, builds and edits sites and pages
- Enriches files with structured metadata
- Automates tagging, cleanup, and site health
- Answers questions about SharePoint content **where you are** – a site, folder, file or List – in SharePoint

License

Microsoft 365 Copilot

Outcome

Streamlined SharePoint tasks; more precise Copilot and agent responses; better organized content.

Custom agents in SharePoint

Agents you create in SharePoint

Turn SharePoint content into scoped subject-matter experts for your business.

- Enables users to build no-code agents by selecting SharePoint grounding sources and giving role-specific agent instructions
- Answers questions about SharePoint content **the agent is grounded on** – any combination of sites, files, and folders – in SharePoint, Copilot, or Teams.

Microsoft 365 Copilot or Pay-As-You-Go (PAYG)

Faster decisions with focused, scoped intelligence.



4

Q&A and Resources

Expertise and tools for your journey



Technical expertise via
our FastTrack partners

aka.ms/Microsoft/FastTrack



Tools, resources & training
on our Adoption Hub

adoption.microsoft.com



Events and real-world
knowledge in our
community

aka.ms/TechCommunity

News & community content



Microsoft Community Learning

aka.ms/Community/LearningChannel

Community led expert content on all your favorite Microsoft services.



Start your week with live news and event updates aka.ms/MondaysatMicrosoft
Watch live or on-demand & share our blog.

Home / Microsoft 365 Copilot

Microsoft 365 Copilot

Deliver value and employee satisfaction with our tools for Microsoft 365 Copilot deployment and adoption. This powerful technology combines the power of large language models (LLMs) with your organization's data – all in the flow of work – to turn your words into one of the most powerful productivity tools on the planet.

Microsoft 365 Copilot Chat and in-app experiences provide real-time intelligent assistance, enabling users to enhance their creativity, productivity, and skills.

[Looking for Copilot resources for Small and Medium Businesses? >](#)

Copilot Success Kit

Our Success Kit empowers you to achieve rapid value with Copilot while enabling your progressive skilling journey with AI tools.

[Download here >](#)

Copilot Chat and agent starter kit

This new kit includes guidance on IT controls, setup, and resources to help prepare your tenant and enable your users to create and use agents.

[Explore the kit >](#)

Join the Copilot community

The Microsoft 365 Copilot community is your hub for the official blog, latest news, and discussions.

[Join now >](#)

Microsoft 365 Copilot

Welcome to the Microsoft 365 Copilot community. Your hub for the latest news, live events, and discussions on Microsoft 365 Copilot. For help & learning (how-to articles and training resources), please visit [Microsoft 365 Copilot Adoption hub](#).

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Microsoft 365 COMMUNITY CONFERENCE May 6-8 Las Vegas Microsoft

Your front-row seat to the future of work

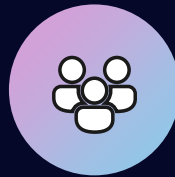
[Learn more!](#)

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best community in
tech...
There's something
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Microsoft Tech Community

The community platform for Microsoft 365 –
forums, blogs, and events

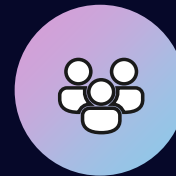
<https://aka.ms/joinMTC>



CommunityDays.org

Find or host a local event in your area
or to match your interests

www.communitydays.org



Microsoft Community on LinkedIn

News, announcements and training delivered to
your news feed

<https://aka.ms/microsoftcommunitylinkedin>



The one stop shop for Microsoft ecosystem community events

The screenshot displays the Community Days website interface. At the top, the logo "Community Days" is accompanied by the tagline "Supporting the Microsoft Community". Navigation links for "Home", "Events", and "Calls" are visible in the top right corner. A large banner area features the text "Discover Community Events happening across the world." Below this, a search bar and filter controls are present. The "WHERE" section includes radio buttons for "Global", "Country", "Region", and "Sub Region". The "WHEN" section shows a dropdown for "Upcoming Events". The "VIEW AS" section has a dropdown for "Tiles". The "FILTERS" section includes checkboxes for "Registration Open", "Call for Speakers", "Call for Sponsors", "Hide Paid", and "Hide Others". The main content area is a grid of event tiles, each with a unique background image and event details. The events listed are:

- FABRIC DATA DAYS**: Nov 4 - Dec 11, 2025, Hybrid, Free, United States.
- SMARTCLOUD 365 - 2025**: November 25, 2025, Virtual, Free, Germany.
- DYNUG AUTUMN CONFERENCE 2025**: November 25 - 26, 2025, Paid, Oslo, Gardermoen, Norway.
- SHIFT ENTER SUMMIT 2025**: November 26, 2025, Paid, Budapest, Hungary.
- AI COMMUNITY CONFERENCE - TORONTO 2025**: November 28, 2025, Free, Toronto, Ontario, Canada.
- SEASON OF AI - MCP**: November 29, 2025, Hybrid, Free, Gurugram, Haryana, India.
- ESPC25**: December 1 - 4, 2025, Paid, Dublin, Dublin 1, Ireland.
- MSREBUILD 2025**: December 2, 2025, Free, Nantes, Pays de la Loire, France.
- AI COMMUNITY CONFERENCE**: November 28, 2025, Paid, Seoul, Jungno District Seoul, Korea, Republic of.
- TECHBAYANIHAN 2025**: December 3 - 4, 2025, Free, Manila City, National Capital Region, Philippines.

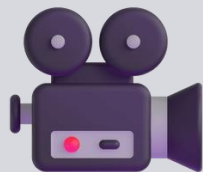
www.communitydays.org



SharePoint at 25 film: *More than Code*

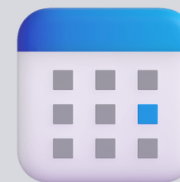
In honor of SharePoint's 25th birthday, *More Than Code* is a short film that explores the people, passion, and innovation behind one of the most transformative platforms in modern work. This film captures the stories of builders, leaders, and community champions who helped shape SharePoint into the knowledge backbone for collaboration, Copilot, and the next generation of agents.

SharePoint is more than code—it's 25 years of connection, innovation and impact.



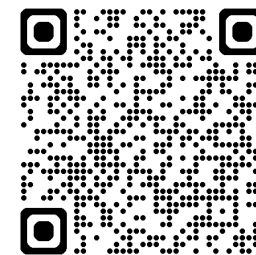
Watch the digital premiere

Stream the documentary online globally in late April and celebrate SharePoint's 25-year journey from anywhere.



Watch the SharePoint at 25 digital event

Prepare for the film with a special digital event featuring insights, stories, and what's next for SharePoint in the era of AI.



The Microsoft Global Community Initiative (MGCI) - Empowering global Microsoft communities with the tools, training, and resources to create impactful events and amplify diverse voices.

Learn, Share, Grow.

Event producers unite!

Join MGCI today!

<https://aka.ms/MGCI>



Thank you to our
Microsoft
Most Valuable
Professionals (MVP)
and Regional Directors!



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