Microsoft Copilot

Getting Started Guide: Copilot in SharePoint

Your guide to using Copilot across SharePoint to transform scattered content into organized, connected knowledge that powers people, agents, and AI workflows.

Chat: Ask questions, compare content, summarize documents, generate insights, and create reports or outputs like Word, Excel, PowerPoint, or HTML from your SharePoint Knowledge.

Sites & Pages: Create and improve sites, edit pages, generate sections, build navigation, and design layouts from a prompt using natural language.

Libraries & Documents: Organize content, autofill metadata, create views, manage approvals, and keep content structured.

Lists: Create and manage lists, add or update columns and items, and build filtered views.

Skills: Save repeatable instructions as reusable skills so people across your organization can run the same process consistently.

Microsoft

Overview of Copilot in SharePoint

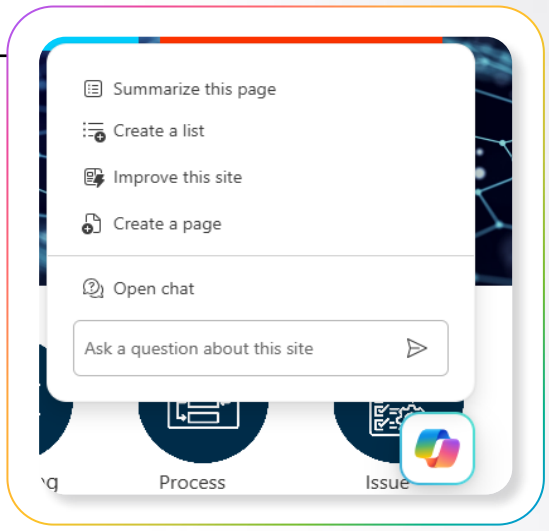
Copilot in SharePoint brings agentic capabilities into SharePoint so teams can ask questions, run workflows, and create sites, pages, interactive reports, and Office files from their SharePoint content.

How to access Copilot in SharePoint

01 Open a SharePoint surface
Go to a site, page, library, list, or file and look for the Copilot button.

02 Select the Copilot button
View context-aware actions based on your content and permissions.

03 Start an action in chat
Describe what you need, like asking a question, summarizing content, or taking action.



How to prompt

AI reasoning models are powerful! Experiment with different prompting styles depending on the outcome you want.

Specific prompt

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

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.”

Outcome-driven prompt

“Help me organize this library of invoices and make it easy for the different cost centers to 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.”

How to create a skill

A skill is a reusable set of instructions you can save and apply later. Use them to capture your organization’s rules, standards, and processes. Define once, save, and reuse across your team for consistent results.

Describe the rule in chat

State your instruction in natural language, for example, “follow approved layouts and branding.”

Save as a skill

Tell Copilot to save it as a skill so your team can reuse it consistently.

Apply it through chat

Reference the skill when creating or updating content to apply it automatically.

Need further help? Ask Copilot in SharePoint! “What can you help me with?”

Insider tip for ‘builder mindsets’: Tell Copilot “--agent tools” in chat to show you what tools are available to the orchestrator

*Microsoft Copilot subscription required.

Chat

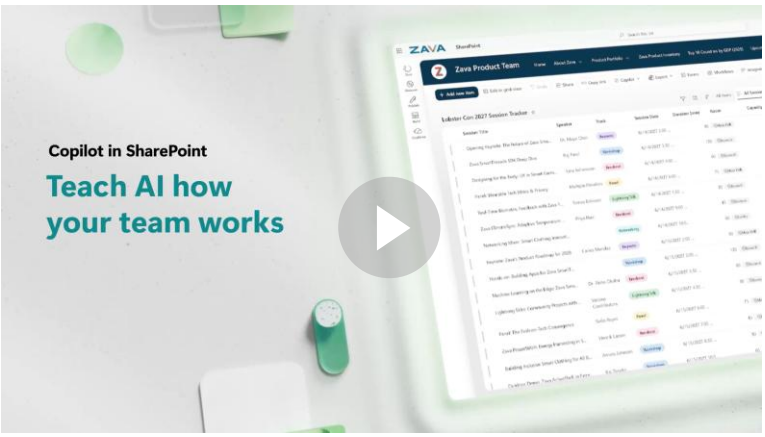
Scope your question to a single file, a page, a library, or an entire site, and get precise answers grounded in that content and your permissions. Copilot narrows the search so responses stay accurate and on-topic, and can generate outputs like summaries, reports, or documents based on that content.

Get started with Chat

01 Open Copilot on any SharePoint surface
Open Copilot from a page, file, library, or site. Responses are scoped to the content you have open.

02 Describe what you need
Use chat to ask questions about your content or take action, like summarizing, comparing, or generating insights.

03 Generate content from your data
Tell Copilot to create documents or outputs, like a Word doc, Excel file, PowerPoint, or report based on your SharePoint content.



aka.ms/CopilotinSP/TeachAI

Prompts to try for Chat

Scenario	Prompt
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?
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.
Generate FAQ	Based on the HR policy documents in this library, generate a FAQ page covering the top 10 questions new employees typically ask.
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
Create an interactive report	Create an interactive dashboard based on this quarter's sales performance data [folder link]. 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
Create a Word doc	Create a press release as a Word doc based on the sales performance dashboard [doc link]. Summarize key results, highlight top growth areas, call out trends, and frame it for an internal leadership audience.

Skill suggestion

Reports and dashboard: If you create the same report each quarter, capture it as a skill. Describe the structure, key metrics, and output format to Copilot and ask it to save it. Next time, just say "use the quarterly report skill" and update the source data, and Copilot will generate the report in the same format.

*Microsoft Copilot subscription required.

Sites & Pages

Plan, create, and update SharePoint sites and pages using natural language. Describe what you need, and Copilot generates layout, sections, navigation, and content.

Get started with Sites and Pages

01 Start building or editing
To build a new site, select the Build tab. To create a new page, open Copilot on an existing page. To edit a page, select Edit, then choose Copilot.

02 Describe what you need
Tell Copilot what to create or update, like building a full site or adding content to a page.

03 Review and refine
Iterate in chat until the site meets your needs.

aka.ms/CopilotinSP/TurnIdeas

Prompts to try for Sites and Pages

Scenario	Prompt
Create a site	Create a SharePoint site for [this initiative]. Propose the best structure before creating anything, including a homepage, key pages, a document library for assets, and a list for action items or tracking. Add starter content. Use relevant SharePoint content as grounding material
Create a page	Create a SharePoint page using the relevant files on this site as source material. Draft a clear title, executive summary, key sections, helpful links, and suggested page structure. Organize the content so it reads cleanly for an internal audience and show me a draft before finalizing it.
Edit a page	Update this page by adding content from [PowerPoint file] under [section name]. Organize it into a clear structure and adjust the tone to be warm, friendly, and easy to read.
Create a section	Add a new section that outlines the project overview, goals, scope, and key milestones.
Create a chart or infographic	Create a bar chart based on [Excel file]. Add sorting options to view results alphabetically or by highest to lowest values.
Find the latest decision on this site	Search this site and find the latest documented decision about [this topic]. Look across pages, files, and lists that are relevant, summarize the decision, and include the exact supporting language or source excerpt when available. If there are multiple conflicting decisions, show me the most recent one and flag the conflict. Also tell me which file, page, or list the decision came from so I can verify.

Skill suggestion

Content style and tone guidelines: Find yourself repeatedly shaping pages for the same audience or tone? Explain the structure, voice, and audience to Copilot and ask it to save it as a skill. Next time you create or edit a page, just tell Copilot to use the style and tone skill you created, and it will apply those standards automatically.

*Microsoft Copilot subscription required.

Document Libraries

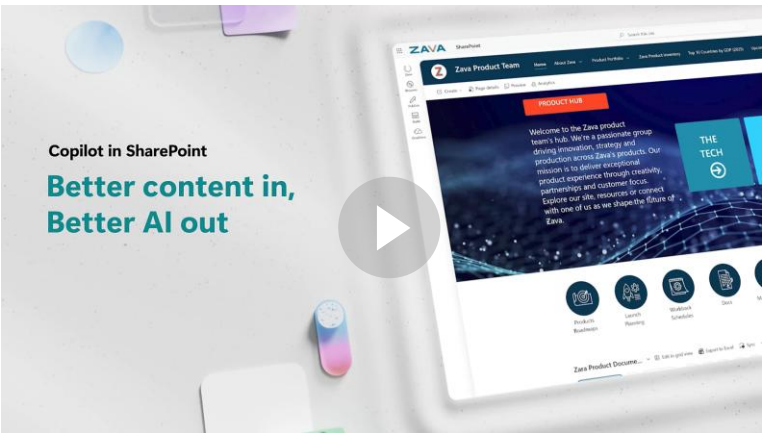
Turn document libraries into a structured, easy-to-manage workspace. Use Copilot to organize files, apply metadata, and automate common tasks.

Get started with Document Libraries

01 Open a document library
Navigate to the document library and select the Copilot button.

02 Describe what you need
Use chat to organize content and take actions across your library, or select suggested options like autofill columns, views, or rules.

03 Let Copilot do the work
As you add files, Copilot will continue to extract metadata to keep things organized.



aka.ms/CopilotinSP/BetterContent

Prompts to try for Document Libraries

Scenario	Prompt
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, apply it.
Rename files	Apply the following naming convention to files in this library: [insert naming convention]. Save this as context.
Move files	Move all [file type, e.g., contracts] to the [folder name] folder. Save this as context.
Classify documents	Analyze files in this library and suggest autofill columns with extracted metadata based on their content.
Specify autofill columns	Create autofill columns for document type, project name, and review status.
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.
Create a doc approval workflow	Create an approval workflow for this library using metadata (document type, owner, review status). Route documents to the right reviewer, track progress with a status column (Draft, In Review, Approved, Blocked), and create a view grouped by status. Highlight overdue or stalled items and suggest next steps.

Skill suggestion

File organization and naming rules: Do you tend to organize files the same way each time? Explain your folder structure and naming conventions to Copilot and ask it to save it as a skill. Next time you add or update content, just say "use the file organization skill for this library," and it will keep everything structured and consistent.

*Microsoft Copilot subscription required.

Lists

Create and manage business trackers, project plans, inventories, requests, and operational workflows using natural language. Copilot can help structure, update, analyze, and automate your data so teams can move from information to action.

Get started with Lists

01 Open or create a list

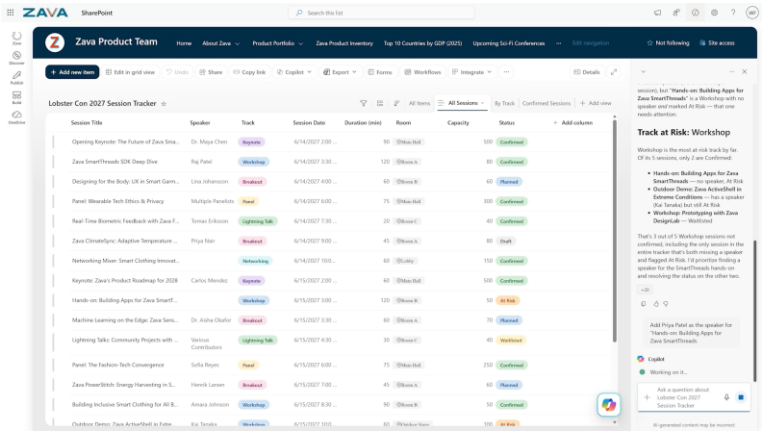
To create a new list, navigate to a page and select the Copilot button. To edit an existing list, open the list and select Copilot.

02 Describe what you need

Use chat to create a list by describing the columns, fields, and structure you want to track, or update an existing list using natural language.

03 Ask questions and analyze your data

Chat with your list to explore insights, generate reports or dashboards, and get answers based on your data.



Edit and ask questions about lists with Copilot

Prompts to try for Lists

Scenario	Prompt
Create a list	Create a list to track work for [this scenario]. Include the right columns, useful defaults, and views that make the list easy to manage, such as items due soon, items at risk, or items grouped by owner or status. If helpful, add formatting, alerts, or lightweight rules to make follow-up easier.
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.
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.
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.
Enhance readability	Format this list to make it easier to scan both rows and columns based on the importance and type of the information.
Create an interactive report	Build an interactive HTML report from this list. Summarize key themes, status, risks, gaps, trends, and recommended next steps. If useful, include charts, visuals, or interactive elements that make the report easier to explore. Show me a draft before finalizing it.

Skill suggestion

Standard project tracker: If your team relies on the same project tracker setup, capture it as a skill. Describe the columns, statuses, and views to Copilot and ask it to save it. Next time you create a list, just say "use the project tracker skill," and it will set everything up the same way.

*Microsoft Copilot subscription required.

Sample Use Cases

Use Copilot in SharePoint to go beyond individual actions and create end-to-end solutions from your content. These examples show how to leverage AI capabilities across SharePoint to drive real business outcomes.

Scenario	Prompt	Data needed
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 ease of reading.** 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 Department". **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 items. **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.	• Excel file with columns for project name, status, owner, department, and risk level.
Create an expense tracking 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.	• Document library with invoice files • Invoices should contain fields for vendor region transaction date, CY-quarter, and cost center (or update Step 1) • Enough variety for meaningful analysis (12+ invoices is better than a handful)

*Microsoft Copilot subscription required.

Sample Use Cases

Use Copilot in SharePoint to go beyond individual actions and create end-to-end solutions from your content. These examples show how to leverage AI capabilities across SharePoint to drive real business outcomes.

Scenario	Prompt	Data needed
Create a sales performance report	Generate a polished, executive-ready sales performance report from this asset: [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.	• Excel file with columns for: date (sales trend), revenue, geography/ region, product or category, profit or margin, and order ID.
Create a project command center	Create an interactive HTML "Project Command Center" titled "[Project Name] Command Center." Use this SharePoint 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: **1. 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. **2. Situational overview:** three tiles — On Track (progressing as expected), At Risk (delays, blockers, stale updates), Needs Decision (requires leadership input). **3. Mode selector:** tabs for Status (default), Risks & Issues, and Activity & Ownership. **4. Project pulse**: summarize recent activity (file updates, list changes, comments); identify active vs inactive workstreams; flag missing updates or ownership gaps. **5. 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. **6. Supporting insights:** risk trends (increasing/stable/resolved), ownership clarity (assigned vs unassigned), and update cadence (recent vs stale). **7. Design:** clean executive style (Segoe UI) with traffic-light indicators, simple visuals (e.g., bars for risk/activity), and highlighted recommendation callouts. **8. 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?"	• Project management content, such as: risk tracker, issues list, decisions log, project workstreams tracker, RACI, project charter, steering committee notes, go-live plan

*Microsoft Copilot subscription required.

Resources: Expertise and tools for your journey

Bookmark these links to stay current, build skills, and get the most from Copilot in SharePoint.

01

SharePoint Documentation

Official guides, API references, and admin docs for SharePoint Online.

learn.microsoft.com/sharepoint

02

Microsoft Learn

Interactive training modules and learning paths for SharePoint and AI skills.

learn.microsoft.com/training

03

Tech Community

Connect with experts, ask questions, and share best practices in the forums.

techcommunity.microsoft.com

04

Adoption Hub

Change management tools, templates, and rollout guides for your organization.

adoption.microsoft.com

05

SharePoint Look Book – Create

Design inspiration with ready-to-use site templates and layout ideas.

SharePoint Look Book – Microsoft Adoption

06

Microsoft 365 Roadmap

Track upcoming features, planned releases, and updates across the platform.

microsoft.com/microsoft-365/roadmap

*Microsoft Copilot subscription required.