

AUTOMATE **Advanced** 45 MIN · UPDATED 2026-09-30

Automate SharePoint site provisioning and policy checks.

Build a governance agent that handles new SharePoint site requests and checks them against policy without a manual admin ticket.

MICROSOFT 365

SharePoint

WORKS WITH

Copilot Studio

Business Outcome

Faster turnaround on new site requests without loosening governance standards.

Workflow Steps

Step 1: Write down the actual policy rules

SharePoint

Convert your governance standard into rules specific enough to check programmatically.

A naming pattern expressed as something close to a regex (e.g., `^[A-Za-z0-9]+-(Internal|External)$`), the default sharing setting as an explicit allow/deny, the required sensitivity label by name, and the minimum owner count — rather than leaving any of it as "an admin would know if this looks wrong."

Step 2: Build the governance agent

Copilot Studio

In Copilot Studio, have the agent take a new site request's details and check them against the policy rules, provisioning the site automatically when everything passes and flagging the specific rule that failed when it doesn't.

PROMPT

A new site request comes in named "ProjectX-External" requesting external sharing enabled. Check this against our naming convention and default sharing policy, and either provision it or state exactly which rule it violates.

Step 3: Route exceptions to an admin with full context

SharePoint

Route failed requests to a dedicated admin queue (a SharePoint list or Planner bucket, not a shared inbox) with the specific rule violated and the requester's original input attached, so the admin can approve a documented exception or ask the requester to fix it, instead of starting from a generic "needs review" with no context.

Step 4: Log every provisioning decision

SharePoint

Write every decision — auto-approved, auto-rejected, or manually overridden — to a SharePoint list with the timestamp, the rule evaluated, and (for overrides) who approved it and why. Treat this list as permanent; it's the first thing a compliance review or a "why does this site exist" question will ask for.

✓ Check the work

- Periodically audit a sample of auto-provisioned sites against the actual policy to confirm the agent's checks are still accurate as policy evolves.
- Confirm flagged violations name the specific rule broken, not a vague "doesn't meet policy."
- Review the exception log for any pattern of the same rule being overridden repeatedly — that's a sign the policy itself needs updating.



Expected Outcome

New site requests provisioned automatically when they meet policy, and flagged with a specific reason when they don't.

Want help rolling this out across your team? **Go to Liminals.Tech** ■