

AUTOMATE **Advanced** 50 MIN · UPDATED 2026-09-30

Build a knowledge agent that auto-organizes project files.

Build an agent that tags and organizes files across SharePoint and Teams channels and produces summaries without manual compilation.

MICROSOFT 365

SharePoint

Teams

WORKS WITH

Copilot

Business Outcome

A project's files stay findable and current without someone manually sorting and tagging them as the project grows.

Workflow Steps

Step 1: Define the tagging taxonomy before turning the agent loose

SharePoint

Create the taxonomy as actual SharePoint metadata columns (Managed Metadata or Choice fields for file type, project phase, status, owner) on the library, not a convention you just describe to the agent in a prompt.

Real columns are what let anyone build a filtered view later, and what keeps the tags structured instead of becoming free-text that drifts over time.

Step 2: Build the tagging and organizing agent

Copilot

Have the agent scan new and existing files across the project's SharePoint library and linked Teams channels, apply the taxonomy consistently, and flag anything it's not confident how to categorize rather than guessing.

PROMPT

Scan the files added to the Project Atlas SharePoint library and Teams channel this week. Tag each by file type, project phase, and status using our taxonomy, and flag any file where the category isn't clear from the content or filename.

Step 3: Generate a standing summary view

SharePoint

Set up a filtered/grouped SharePoint view (group by phase, filter by status) as the actual landing page people check, and have the agent keep a short written summary of the overall state alongside it.

The view shows what exists, the summary explains what changed since last time, and together they replace someone manually digging through folders.

Step 4: Review flagged and ambiguous files manually

SharePoint

Files the agent couldn't confidently categorize go to a person for a quick manual tag — don't let ambiguous files sit untagged and effectively invisible to the summary view.



✓ Check the work

- Spot-check a sample of tagged files to confirm the category actually matches the content, not just a filename keyword match.
- Confirm the summary view reflects files added this week, not a stale snapshot from an earlier run.
- Periodically review the taxonomy itself – if a lot of files are landing in an "other" or ambiguous bucket, the taxonomy likely needs a new category.

Expected Outcome

Files across the project's SharePoint library and Teams channels tagged and organized consistently, with a current summary of what's there.

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