

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

Build a machine configuration recommendation agent.

Build a Copilot Studio agent that recommends device settings for performance, security, and regulatory compliance based on a device's role and current configuration.

MICROSOFT 365

SharePoint

WORKS WITH

Copilot Studio

Business Outcome

More consistent device configuration across the fleet, reducing security gaps that come from manual, inconsistent setup.

Workflow Steps

Step 1: Document the baseline standards

SharePoint

Load your organization's configuration baselines per device role (a finance laptop's security requirements differ from a shared kiosk device) into the agent's reference source — recommendations are only useful if measured against a real, specific standard.

Step 2: Build the recommendation agent

Copilot Studio

Have the agent take a device's current configuration and role, compare it to the applicable baseline, and return the specific settings that are out of compliance along with the recommended value for each.

PROMPT

This laptop is configured as a Finance-role device. Compare its current security and update settings against our Finance baseline, and list every setting that doesn't match, with the current value and the recommended value.

Step 3: Route recommendations to IT for review before applying

SharePoint

Post each device's recommended changes to a SharePoint review list an IT admin works through manually — never wire this agent to push configuration changes directly to a device.

A misclassified device role feeding the wrong baseline is an easy mistake to make, and applied automatically it could lock out or break a device that was actually fine.

Step 4: Track compliance improvement over time

SharePoint

Keep a dated snapshot of the compliant/non-compliant count by device role each time you run this, so you can chart the trend rather than only ever seeing a single point-in-time number.

A device type that keeps reappearing in the non-compliant list after repeated fixes points to a provisioning process problem worth fixing upstream, not just another one-off correction.

✓ Check the work

- Confirm the device's assigned role is actually correct before trusting a baseline comparison built on it.
- Spot-check a sample of "compliant" (no-flag) devices manually to make sure the comparison logic isn't missing a setting.
- Have IT validate that a recommended change doesn't conflict with a legitimate, documented exception for that specific device.

Expected Outcome

A specific configuration recommendation per device, mapped to the applicable standard, with the gap between current and recommended state stated clearly.

Want help rolling this out across your team? [Go to Liminals.Tech](#) ■