

AUTOMATE **Intermediate** 30 MIN · UPDATED 2026-09-30

Build a SharePoint knowledge agent for a site.

Stand up a Copilot Studio agent scoped to one SharePoint site's documents and lists so a team can ask questions instead of searching.

MICROSOFT 365

SharePoint

WORKS WITH

Copilot Studio

Business Outcome

Less time spent hunting through a SharePoint site for the right document or answer, especially for new team members.

Workflow Steps

Step 1: Clean up the source site first

SharePoint

Sort the document library by Modified date and archive or delete anything clearly superseded – duplicate copies, draft versions, last year's process doc – before connecting the agent.

Anything still sitting in scope can get surfaced as a confident answer, so an outdated file left in place becomes an outdated answer someone acts on.

Step 2: Scope the agent to just this site

Copilot Studio

In Copilot Studio, build the agent and set its knowledge source strictly to the target SharePoint site – resist the temptation to widen scope to "the whole department" if the goal is answers specific to this site's content.

PROMPT

A team member asks: "What's our current process for requesting a new vendor onboarding, and who approves it?" Answer using only this site's process documentation, and name the specific document you pulled it from.

Step 3: Require citations on every answer

Copilot Studio

Configure the agent to name the source document or list item for each answer so users can verify it themselves rather than trusting a confident-sounding summary.

Step 4: Publish and share access with the site's team

Copilot Studio

In the agent's publish settings, set its audience to match the SharePoint site's existing permission group exactly – don't default to "everyone in the org," since the agent will happily surface a document's contents to someone who couldn't have opened the file directly.

✓ Check the work

- Ask the agent a handful of questions you already know the answer to and confirm it cites the right document.
- Confirm the agent's access matches the SharePoint site's permissions, not a broader audience.
- Recheck the agent's answers after any major reorganization of the site's content.



Expected Outcome

A published agent scoped to the site that team members can query, citing the specific document or list item behind each answer.

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