

AUTOMATE

Intermediate

15 MIN

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Create a personal OneDrive agent for a project.

Select a set of OneDrive files and save them as a scoped agent so you can query all of them together instead of opening files one at a time.

MICROSOFT 365

OneDrive

WORKS WITH

Copilot

Business Outcome

Faster answers when you need to pull a fact or figure from across a project's files, without re-opening and re-searching each one.

Workflow Steps

Step 1: Pick the files that actually belong together

OneDrive

Select up to 20 files tied to one specific project or question set — a budget workbook, a timeline, a vendor contract that all relate to the same decision.

Mixing in a file from an unrelated project dilutes the agent's answers with context it shouldn't be drawing on, and makes a wrong answer harder to trace back to its cause.

Step 2: Create and name the agent

OneDrive

Select the files in OneDrive, use the "Create agent" option from the selection menu, and give it a name specific enough to still make sense in three months — "Q3 Vendor Renewal Files" beats "Project Agent," which you'll have forgotten the scope of by the time you need it again.

Step 3: Query across the whole set

Copilot

Ask questions that span multiple files at once – this is the actual value over opening files individually.

PROMPT

Across these budget, timeline, and vendor contract files, what is our total committed spend so far, and does it match what the timeline document says we've delivered?

Step 4: Refresh the file set as the project evolves

OneDrive

Add new files and remove outdated ones as the project moves forward so the agent isn't answering from a stale version of a document you've since replaced.

✓ Check the work

- When the agent answers from a specific file, open that file and confirm the figure or quote is accurate and current.
- Watch for the agent blending numbers from an outdated file version if you forgot to remove it from the set.
- Re-verify anything you plan to repeat outside the team, since this agent is scoped for your personal reference, not a source of record.

Expected Outcome

A saved personal agent scoped to your chosen files that you can reuse for the life of the project.

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