

AUTOMATE

Advanced

60 MIN

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Deploy a compliance evidence-collection agent.

Build a Copilot Studio agent that gathers audit evidence from SharePoint and your compliance and security logs ahead of a SOC 2, HIPAA, or FedRAMP audit.

MICROSOFT 365

SharePoint

WORKS WITH

Copilot Studio

Business Outcome

Audit prep measured in days instead of weeks of manual evidence-gathering across teams.

Workflow Steps

Step 1: Start from the control list, not the documents

SharePoint

Load the specific framework's control requirements (SOC 2 Trust Services Criteria, HIPAA safeguards, or the relevant FedRAMP baseline) into the agent's task definition – the agent's job is to find evidence per control, not to summarize whatever it finds.

Step 2: Build the collection agent

Copilot Studio

In Copilot Studio, connect the agent to your SharePoint document libraries and any connected compliance/security log sources, and have it map available evidence to each control, flagging controls with no matching evidence found.

PROMPT

For control CC6.1 (logical access controls), find documented evidence in our policy library and access logs showing that access reviews are performed quarterly. List each piece of evidence with its source and date, and flag if the most recent review is more than 90 days old.

Step 3: Route gaps to control owners

SharePoint

Write each gap to a tracking list with the control number, what evidence is missing, and the responsible team, then notify that team directly rather than leaving them to discover it in a shared summary.

The earlier a real gap surfaces, the more runway the owning team has to actually produce the missing evidence before the audit window closes.

Step 4: Compile the package for auditor handoff

SharePoint

Once gaps are closed, have the agent assemble the final evidence package organized by control, with every item linked back to its source document or log entry.

✓ Check the work

- Open a sample of cited evidence documents directly and confirm they actually satisfy the control as claimed, not just mention related keywords.
- Verify dates on time-sensitive evidence (quarterly reviews, annual trainings) are actually within the required window.
- Have the compliance lead review flagged gaps before assuming "no evidence found" is accurate — the agent may have simply lacked access to the right library.

Expected Outcome

An organized evidence package mapped to each control, with source links, ready for auditor review.

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