

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

Deploy an HR policy Q&A agent.

Build a Copilot Studio agent that answers employee benefits and policy questions from your HR SharePoint content, escalating only what actually needs a person.

MICROSOFT 365

SharePoint

Teams

WORKS WITH

Copilot Studio

Business Outcome

Lower helpdesk ticket volume for routine HR questions, with faster answers for employees.

Workflow Steps

Step 1: Audit the source documents first

SharePoint

Before building anything, confirm the SharePoint policy library is current — outdated PDFs (last year's PTO policy, a superseded benefits guide) will get cited as fact by the agent. Archive or clearly version anything stale.

Step 2: Build the agent grounded only in that library

Copilot Studio

In Copilot Studio, scope the agent's knowledge source strictly to the vetted HR SharePoint site — don't let it fall back to general web knowledge for policy questions, since benefits details are company-specific.

PROMPT

An employee asks: "How many weeks of parental leave do I get, and does it run concurrently with short-term disability?" Answer using only the current parental leave policy document, and cite the section you pulled from.

Step 3: Require source citations on every answer

Copilot Studio

Configure the agent to cite the specific document and section for every policy answer, not just a confident-sounding paraphrase. This is what lets employees (and you) verify the answer without opening a ticket.

Step 4: Define the escalation boundary

Teams

Write the escalation triggers into the agent's instructions explicitly — anything touching an individual's specific pay or leave balance, or a question that isn't directly covered in the source documents.

And test each trigger with a real example question before launch to confirm it actually routes to a person instead of attempting an extrapolated answer.

✓ Check the work

- Spot-check a batch of answered questions against the actual source documents for accuracy.
- Confirm every policy answer includes a citation employees can click through to verify.
- Review escalated vs. auto-answered questions monthly to catch policy areas the agent is guessing on.

Expected Outcome

A published Teams-accessible agent answering the top recurring HR questions correctly, with a defined escalation path for anything it can't source.

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