



Legal Review Triage Agent in SharePoint

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(recipe inspired by Bayer South East Asia Pte Ltd)

Purposes:

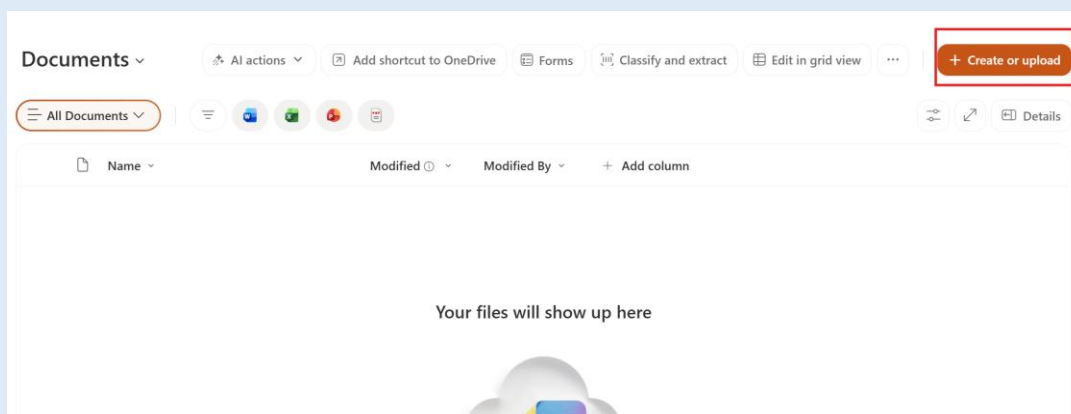
- Guide business users in navigating internal procedures and guidelines using dynamic SharePoint content.
- **Note:** This recipe serves as a simplified blueprint for beginners to familiarise themselves with the Copilot Studio ecosystem and its functionalities. You may adapt the agent according to your organisation's needs and consult the IT department as appropriate.

Step-by-step guide:

1. Follow the recipe **"Legal Review Triage Agent"** to create a basic triage agent in **Copilot Studio** and prepare a system instructions document.

2. This recipe leverages **SharePoint** knowledge management capabilities, meaning you do not have to manually re-upload the instructions document to the agent after keeping the revised version on SharePoint. The agent can provide accurate and timely responses based on your SharePoint site content.

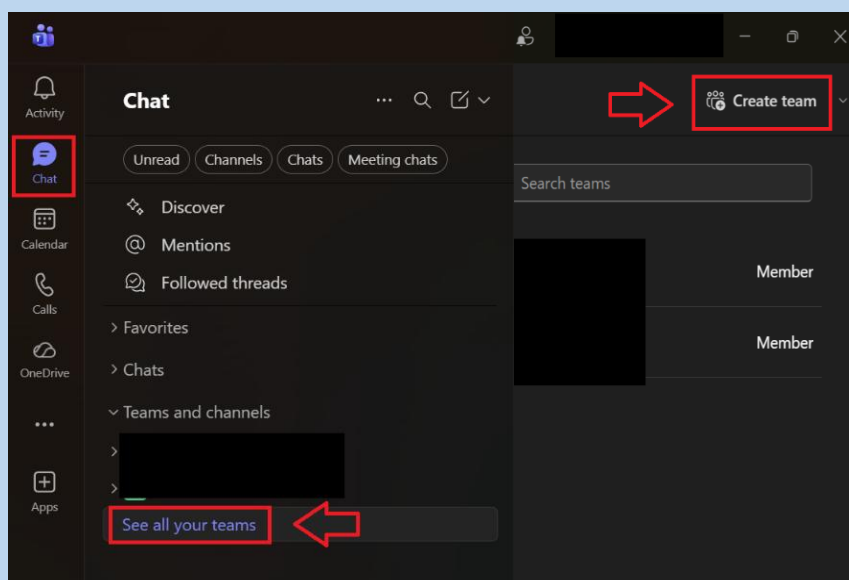
Upload the relevant instructions document (you may create it following the **"Legal Review Triage Agent"** recipe) to the document library of the designated SharePoint site. If your organisation does not have an appropriate SharePoint site for this purpose, consult the IT department on best practices for creating or managing a SharePoint site.



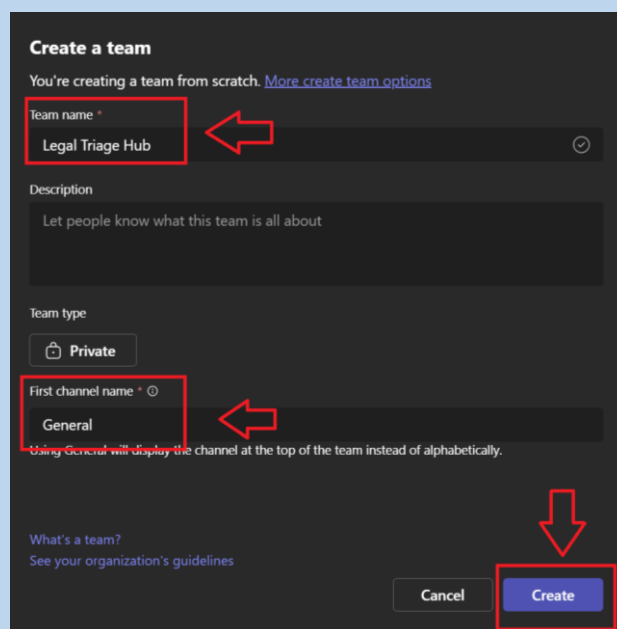
3. Alternatively, follow the below steps to create a simple private **SharePoint** site on **Microsoft Teams** for experimentation purposes.

Creating a "team" in **Teams** automatically generates a SharePoint site for storing shared files.

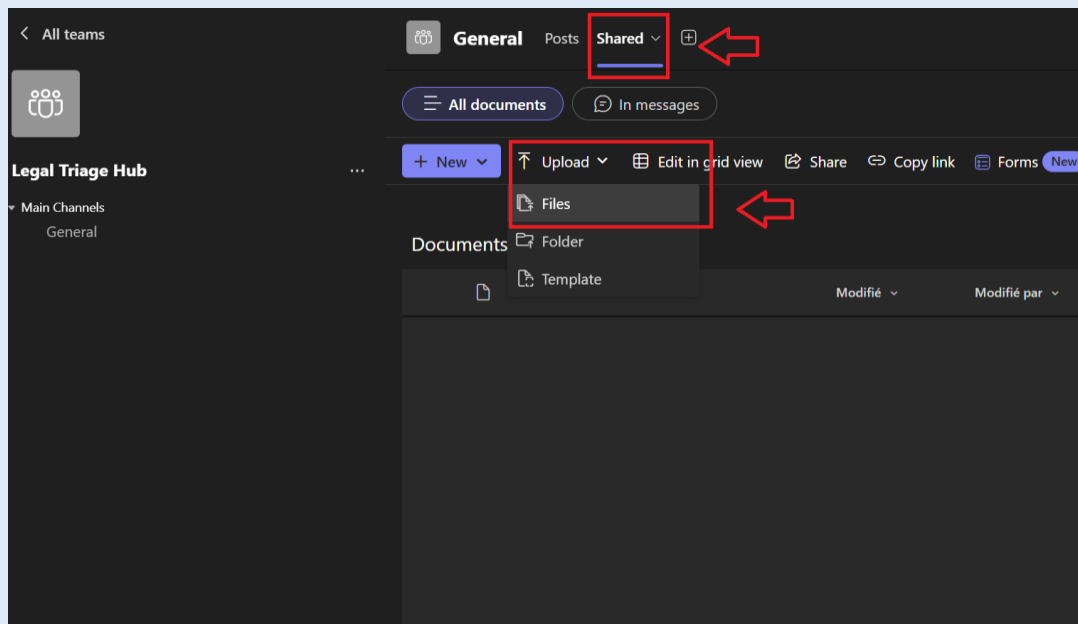
Open **Teams** app or navigate to <https://teams.cloud.microsoft/>. Click **Chat** in the left navigation bar, then click **See all your teams**. Click **Create team** at the top right corner.



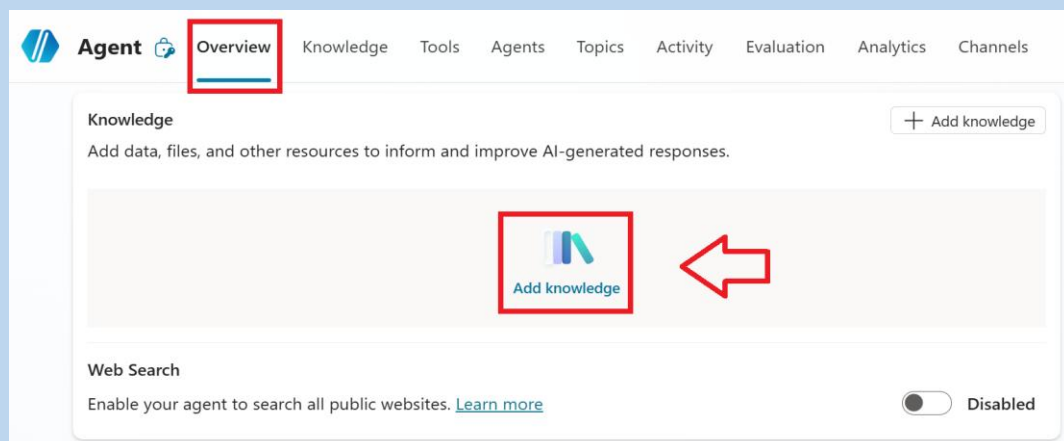
Enter the **Team and Channel names** as appropriate in the creation window. Click **Create**.

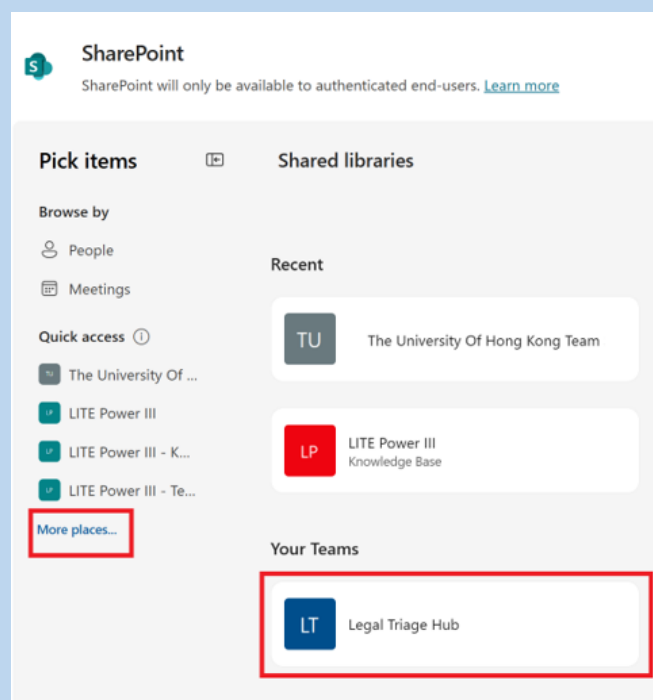
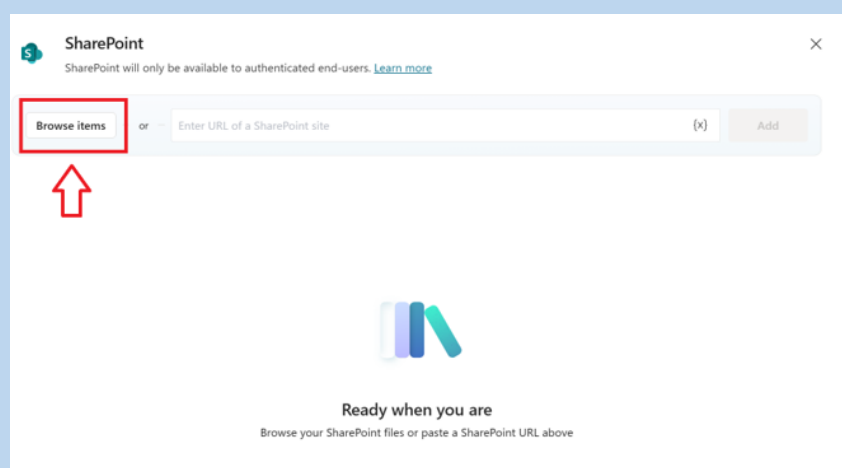
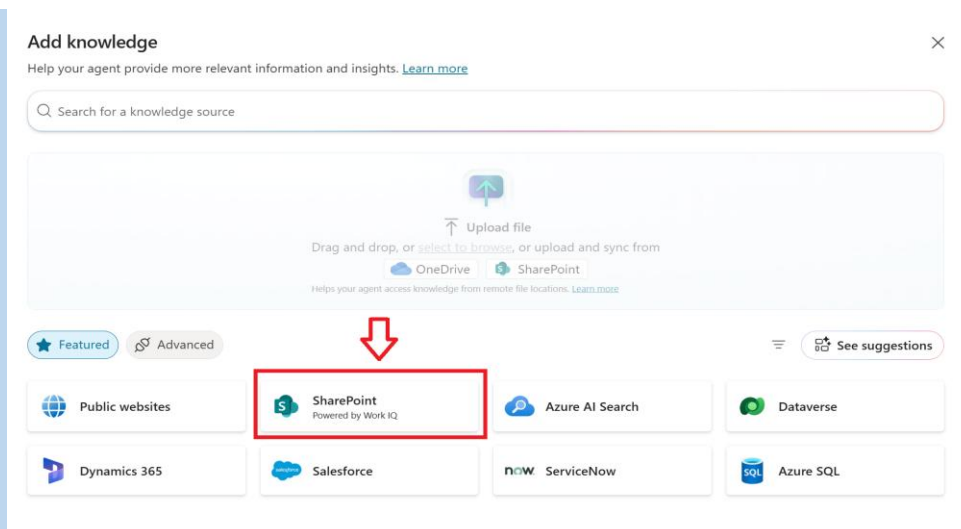


4. Open the team you have created. Click **Shared** tab at the top. Click **Upload**, then **Files** (or drag and drop), to upload the system instructions document. To access or edit the file later, return to this window.

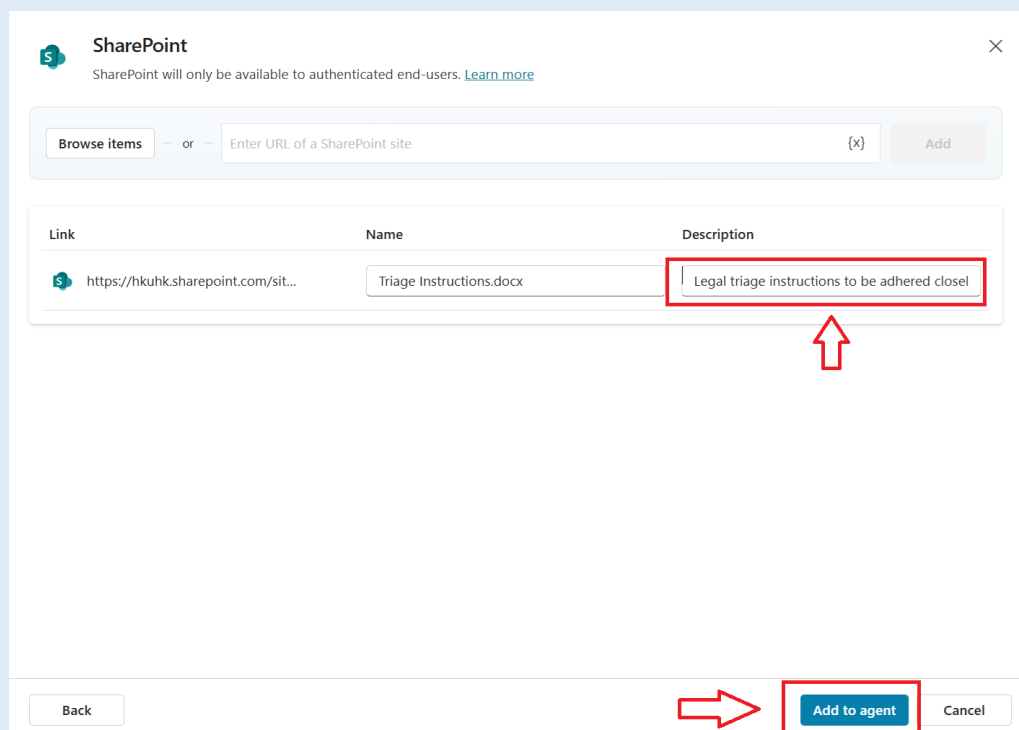
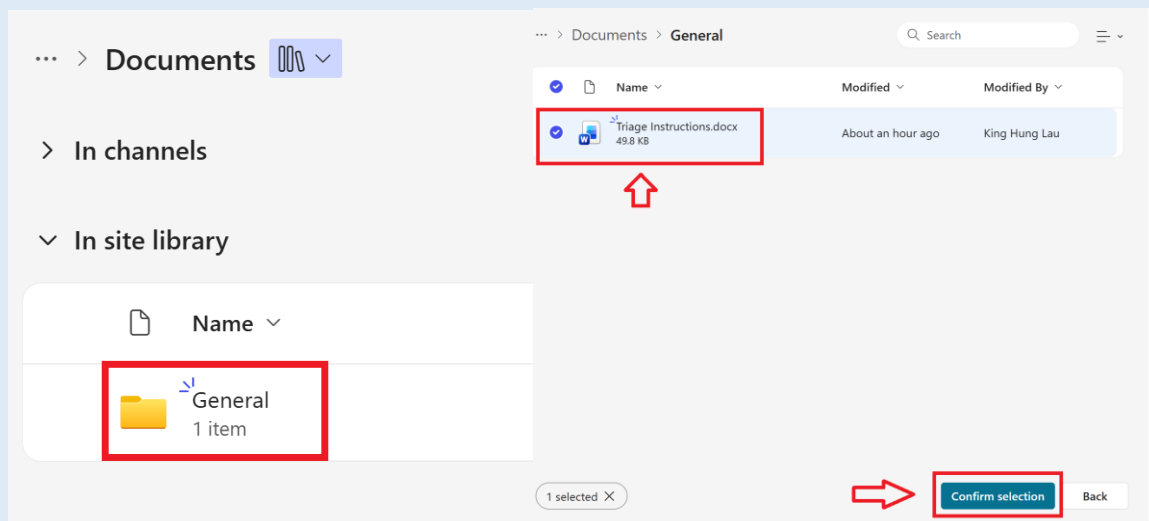


5. Revisit your agent in **Copilot Studio**. In the **Overview** tab, scroll to the **Knowledge** section and click **Add knowledge**. Select **SharePoint** in the new window. Click **Browse items**, then click **More places...** to locate and select the team you created.

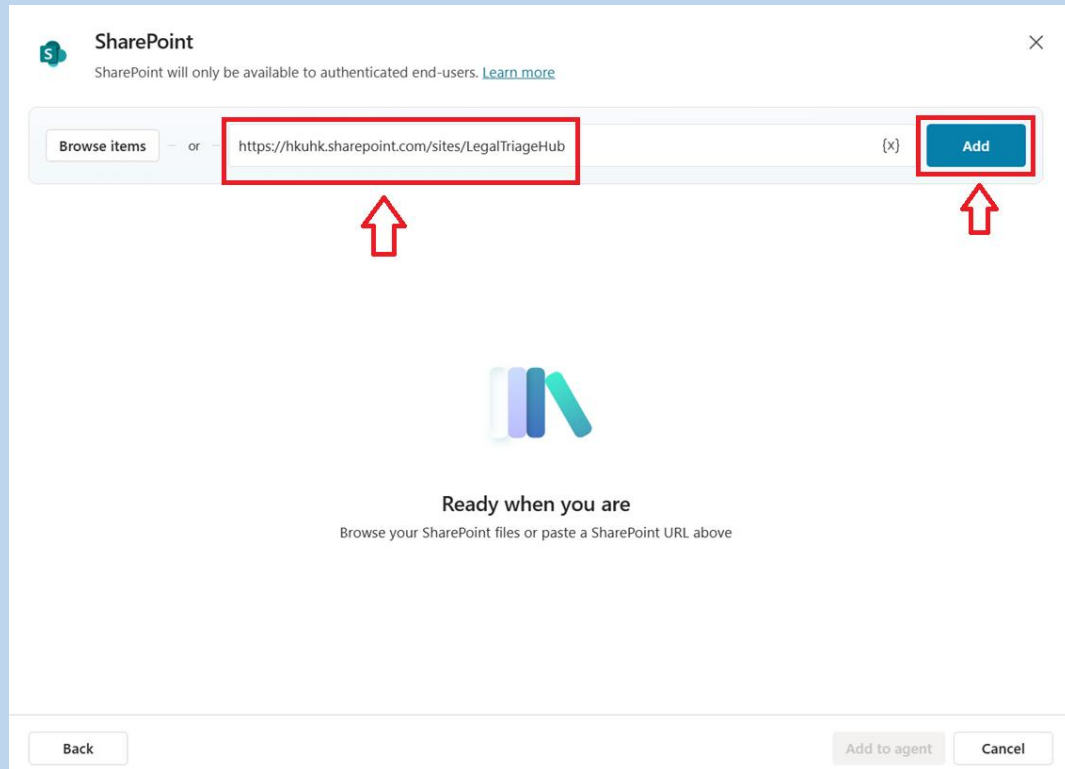




6. Select the uploaded instructions document from your channel's folder. Click **Confirm selection**. Update the description of the document to "Legal triage instructions to be adhered to closely when generating responses." Click **Add to agent**. You may similarly add other relevant documents from other SharePoint sites.



7. If your legal department has a SharePoint site containing further instructions or FAQs for legal review and approval processes (such as an information portal for business users), add the site link to the knowledge base by pasting the link and clicking **Add**. Follow similar instructions as above when adding other SharePoint content.



The screenshot shows a dialog box titled "SharePoint" with a close button (X) in the top right corner. Below the title, a note states: "SharePoint will only be available to authenticated end-users. [Learn more](#)". The main area contains a "Browse items" button, followed by "or", and a text input field containing the URL "https://hkuhk.sharepoint.com/sites/LegalTriageHub". To the right of the input field is a "(x)" icon and a blue "Add" button. Red rectangular boxes highlight the URL input field and the "Add" button, with red arrows pointing up to each. Below the input area is a large icon representing a document with a blue and green tab. Underneath the icon, the text reads: "Ready when you are" and "Browse your SharePoint files or paste a SharePoint URL above". At the bottom of the dialog, there are three buttons: "Back", "Add to agent", and "Cancel".

8. Follow the recipe "**Legal Review Triage Agent**" to conduct iterative testing and publish your agent.