

Knowledge Agent in SharePoint

Cheatsheet

The Knowledge Agent in SharePoint is an **AI assistant built into SharePoint** that helps organizations keep their content organized, up to date, and ready for use in Copilot. It can automatically tag and classify documents with metadata, suggest improvements for sites, pages, and libraries, answer questions about files with summaries or comparisons, and highlight issues like broken links, stale content, or missing information. The agent appears as a floating button in SharePoint and adapts its actions depending on the context, making it easy to manage and improve content directly where you work. It's currently in Public Preview for Microsoft 365 Copilot users, with general availability expected in early 2026.

Core Capabilities

- **Metadata enrichment**
Automatically extracts and fills properties (e.g. contract dates, customer names, invoice numbers).
- **Contextual actions**
Shows AI-powered suggestions based on where you are (site, library, document).
- **Content improvement**
Flags outdated pages, broken links, and missing information.
- **Role-based assistance**
Different actions for site owners, editors, and viewers.
- **Automated checks & rules**
Monitor content quality, governance, and compliance triggers.
- **Smarter views**
Creates and filters lists based on metadata (e.g. contracts expiring in 90 days).

✓ Inspiration for data management using Knowledge Agent in SharePoint

- HR resumes**
A candidate uploads their resume to the HR library → Knowledge Agent extracts the applicant's name and automatically fills the "Candidate Name" column.
- Contracts**
A new contract is uploaded to Legal → Knowledge Agent identifies Client Name and Contract Expiry Date, tagging them so renewal alerts can be set.
- Invoice processing**
A supplier invoice is added to the Finance library → Knowledge Agent detects the invoice amount and due date, and adds them as metadata for easy tracking.
- Product manuals**
A technical manual is uploaded → Knowledge Agent extracts the Product ID and Version, and auto-fills metadata so engineers can quickly filter by model.

Examples

- HR Policy Refresh Radar (governance + trust)**
Every org has policies. Fresh, findable policies remove risk and cut "where's the latest file?" time.
Prompt: "Organize the HR policy library. Add Category, Owner, Review date. Create a view for policies expiring in the next 90 days and notify HR when new policies are added."
KPIs: Time-to-find policy ↓, % outdated policies ↓, audit findings ↓, HR tickets about policy links ↓.
Copilot uplift: Metadata reasoning disambiguates similarly named policies and fewer wrong answers.
- Legal Contract Lifecycle & Clause Watch (risk + compliance)**
Missed renewals and hidden clauses are expensive. Automating this is a board-level win.
Prompt: "Classify all contracts by Type, Vendor, Renewal date. Build a view for renewals in 60/90 days and flag documents with non-standard indemnity clauses. Alert Legal for review."
KPIs: Missed renewals → 0, legal review cycle time ↓, exceptions caught ↑, compliance incidents ↓.
Copilot uplift: Clean labels + clause flags give Copilot grounded, citeable contract answers.
- Sales Self-Serve Product Answers (speed + revenue)**
Cuts SME bottlenecks and accelerates proposals. Everyone feels the speed.
Prompt: "Organize the Sales library. Tag by Product, Region, Segment. Create views 'Won deals – EMEA – Manufacturing' and 'Competitor X'. Enable Q&A to answer product limits with sources."
KPIs: SME interrupts ↓, time-to-answer ↓, proposal cycle time ↓, win-rate (track trend) ↑.
Copilot uplift: Structured collateral → sharper, faster, grounded answers in Copilot chats.
Quick pilot recipe (for all three):
Scope: 1 library (200–500 docs) • Metadata: 3–5 columns • Views: 2 • Rules: 1–2
Baseline & re-measure after 4 weeks: search time, outdated content %, ticket volume, satisfaction.

