



User Manual

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Introduction

SharePoint Knowledge AI Search enhances how organizations access and manage business-critical information stored in SharePoint by embedding AI-powered semantic search directly into Microsoft 365.

Rather than relying on traditional keyword-based search or manually navigating multiple documents, it allows users to ask natural language questions and receive accurate, contextual answers instantly. Leveraging Azure AI Search and Semantic Indexing, the solution provides secure, scalable, and conversational access to SharePoint content across Teams, Outlook, Dynamics 365, and more - fully adhering to SharePoint's native security and permissions.

This intelligent document search platform supports large files, deep query handling, and cross-document analysis, delivering faster, more accurate, and context-rich results.

By providing a single, consolidated answer with references to relevant documents, it reduces search time from minutes to seconds, enabling better decision-making and significantly improving productivity—all within the user's familiar Microsoft 365 ecosystem.

Note: *Azure AI Search for SharePoint is currently in preview and is not recommended for production use.*

Key Features include:

- **Semantic Copilot Agent for SharePoint** – Understands user intent and delivers precise results even when keywords are vague.
- **Conversational Search Across Documents** – Retrieves and synthesizes information from multiple SharePoint documents into one unified, context-rich answer.
- **Context-Aware Responses with Citations** – Provides AI-generated answers along with source references for accuracy and trust.
- **Respect for SharePoint Permissions & Security** – Ensures search results follow SharePoint's native permissions so users only see authorized data.
- **Easy to Configure Azure AI Search Setup** – Simplifies deployment with ready-to-use configurations, reducing technical complexity.

Ultimately, **SharePoint Knowledge AI Search** gives Microsoft 365 users a smarter way to interact with SharePoint. It transforms information retrieval into a conversational, AI-powered experience—boosting efficiency, knowledge sharing, and business outcomes.

Salient Features:

- Provides intelligent, context-rich search across documents within one system.
- Enhances productivity with instant, conversational answers rather than manual document browsing.
- Respects data security and compliance by aligning with SharePoint's native permission settings.
- Boosts efficiency with automated, **AI-driven insights** to support smarter business decisions.
- Scales across **Teams, Outlook, and Microsoft 365**, ensuring a consistent user experience across apps.

Available for: Microsoft Teams, Microsoft 365 Copilot, Dynamics 365 CRM, Power Apps, SharePoint

Deployment: Online.

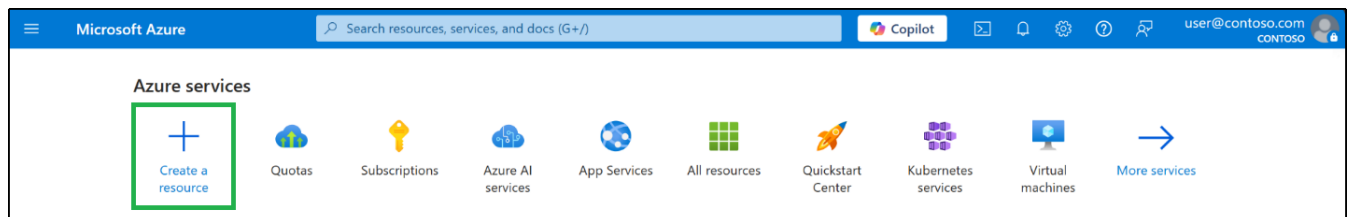
Prerequisites

Prerequisites for Configuring Copilot Agent - InoWiz

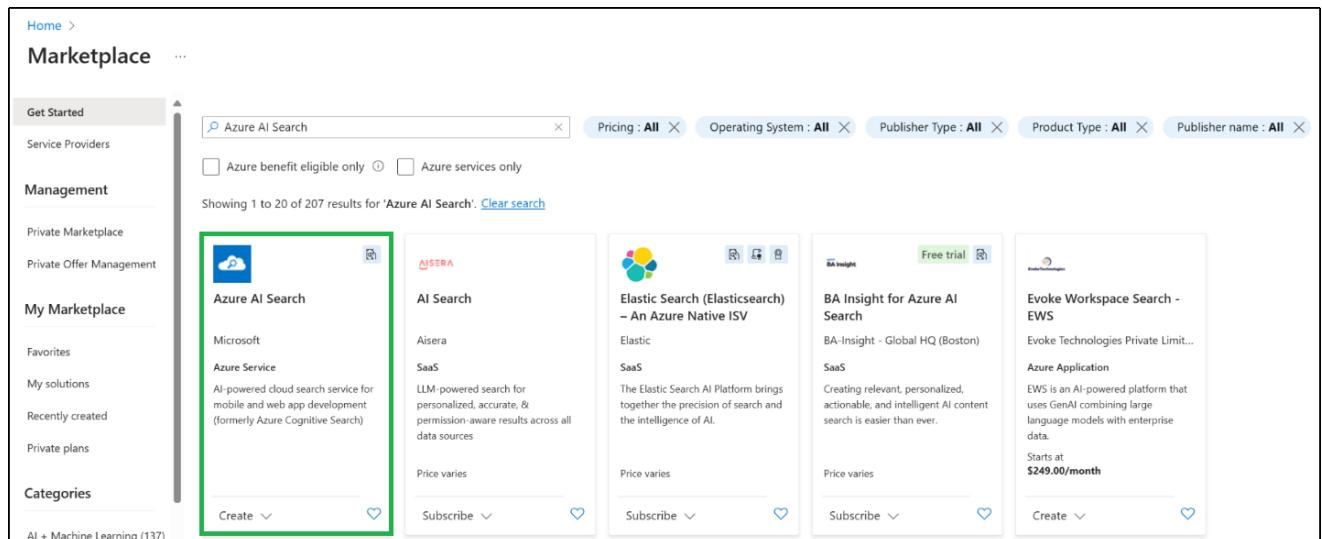
Create an Azure AI Search Service in the Azure Portal

1. Navigate to Create Azure AI Resource

- Open your browser and go to the Azure portal: <https://portal.azure.com>
- Sign in with your Azure account credentials
- In the upper-left corner of your dashboard, select Create a resource.



2. Use the search box to find Azure AI Search



3. Configure Basic Settings:

When setting up the search service, you will be asked to provide the following details:

- **Subscription:**
 - Select the Azure subscription under which the search service will be created.
 - If multiple subscriptions are available, choose the one you want to associate with this search service.
- **Resource Group:**
 - Choose an existing resource group or create a new one.
 - A resource group is a logical container that organizes related Azure resources.
 - Use it to manage and consolidate resources for the same solution, monitor associated costs, and track the creation date of your search service.

Home > Azure AI Search >

Create a search service

Basics | Scale | Networking | Tags | Review + create

Project details

Subscription *

Resource Group *

Instance Details

Service name * ⓘ

Location *

Pricing tier * ⓘ

Create new

A resource group is a container that holds related resources for an Azure solution.

Name *

OK Cancel

- **Service name:**

Enter a unique name for your search service. This name becomes part of the service endpoint used for API calls, for example: <https://your-service-name.search.windows.net>

Example: If you enter myservice, the endpoint will be:

<https://myservice.search.windows.net>

Naming Guidelines for Azure AI Search Services in the Azure Portal

- i. The name must be unique within the search.windows.net namespace.
 - ii. Use 2 to 60 characters.
 - iii. Only lowercase letters, digits, and dashes (-) are allowed.
 - iv. Do not use dashes as the first two characters or the last character.
 - v. Avoid consecutive dashes.
- **Region:** Choose the Azure region for your service. Ensure it supports the features required for your use case.
- **Pricing tier:** Select the appropriate pricing tier (Free, Basic, or higher) based on your capacity and feature requirements. Each tier has its own [capacity and limits](#).
- **Create your service:** After entering all required details, click Create to provision your search service.

[Home](#) > [Azure AI Search](#) >

Create a search service ...

Basics Scale Networking Tags Review + create

Project details

Subscription *

Resource Group * [Create new](#)

Instance Details

Service name * ⓘ

Location *

Pricing tier * ⓘ **Standard**
160 GB/Partition, max 12 replicas, max 12 partitions, max 36 search units
[Change Pricing Tier](#)

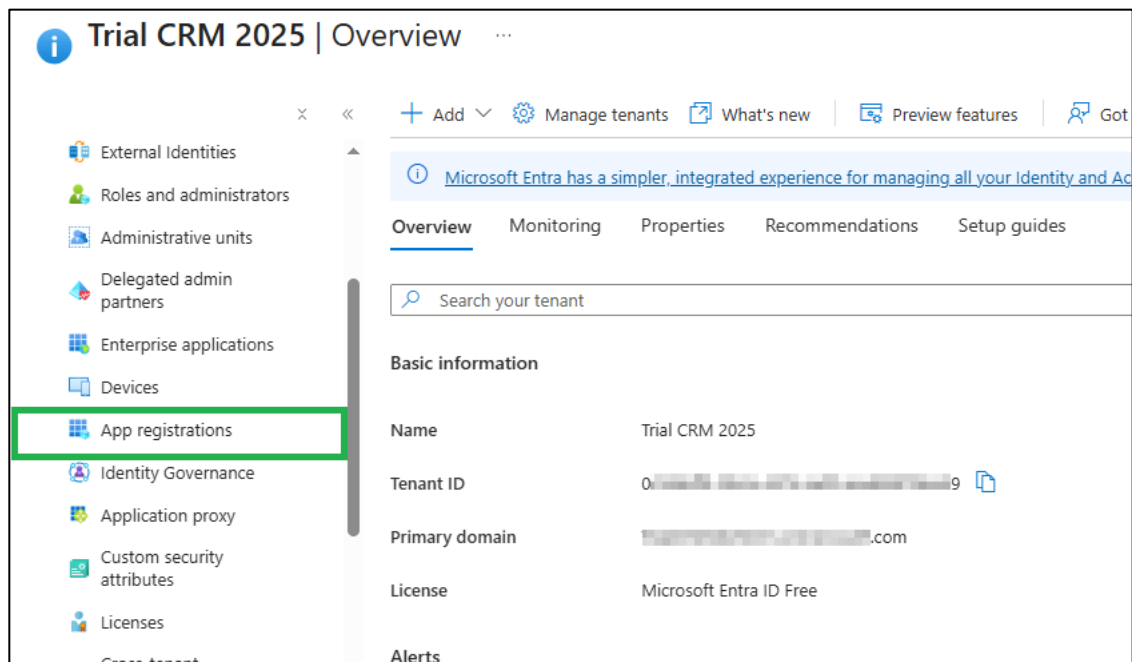
Review + create Previous Next: Scale

Create a Microsoft Entra application registration

The SharePoint Online index and Copilot Agent – InoWiz use a Microsoft Entra application for authentication. Ensure that this application is registered in the **same tenant as Azure AI Search**.

Sign in and create the application:

- Sign in to the [Azure portal](#).
- Navigate to **Microsoft Entra ID** (or search for it), then select **Add > App registrations**.



- Select **+ New registration** and provide the following:
 - Name: Enter a descriptive name for your app.
 - **Supported account type:** Select **Single tenant**.
 - **Redirect URI:** Skip this step; no URI is required.
- Click **Register** to create the application.

Register an application

*** Name**

The user-facing display name for this application (this can be changed later).

Supported account types

Who can use this application or access this API?

☒ Accounts in this organizational directory only (Trial CRM 2025 only - Single tenant)
 ☐ Accounts in any organizational directory (Any Microsoft Entra ID tenant - Multitenant)
 ☐ Accounts in any organizational directory (Any Microsoft Entra ID tenant - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)
 ☐ Personal Microsoft accounts only

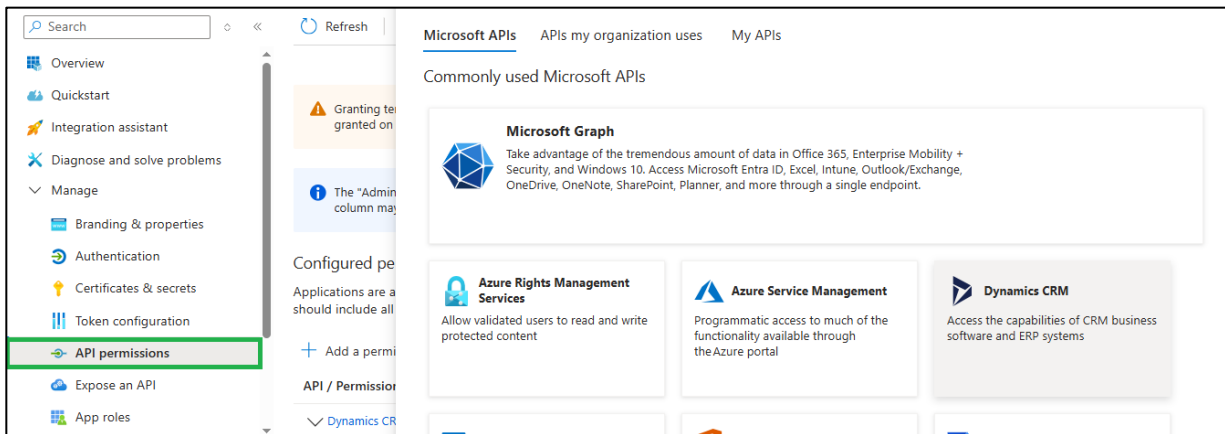
By proceeding, you agree to the [Microsoft Platform Policies](#)

Register

Assign API Permissions

- In the app's navigation pane, go to **Manage > API permissions** and select **Add a permission**.

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- Assign the following permissions:

Microsoft Graph - **Application Permission:**

- AuditActivity.Read
- Directory.ReadAll
- AuditLog.ReadAll
- Files.ReadAll
- Group.ReadAll
- Site.ReadAll
- User.ReadAll
- SharePointTenantSetting.ReadAll

SharePoint - **Application Permission:**

- AllSite.Read
- Site.ReadAll
- User.ReadAll

SharePoint - **Delegated Permission:**

- Site.SearchAll
- User.ReadAll

Office 365 Management API - **Application Permission:**

- ActivityFeed.Read
- ActivityFeed.ReadDlp
- ServiceHealth.Read

After adding the permissions, **grant admin consent** if required.

- Tenant admin consent is required for application API permissions.
- Some tenants may also require admin consent for delegated permissions.

Refresh | Got feedback?

Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions should include all the permissions the application needs. [Learn more about permissions and consent](#)

+ Add a permission ☒ Grant admin consent for Trial CRM 2025

API / Permissions name	Type	Description	Admin consent req...	Status
Microsoft Graph (15)				...
AuditActivity.Read	Application	Read activity audit log from the audit store.	Yes	⚠ Not granted for Trial CR... ...
AuditLog.Read.All	Application	Read all audit log data	Yes	⚠ Not granted for Trial CR... ...
Directory.Read.All	Application	Read directory data	Yes	⚠ Not granted for Trial CR... ...
Directory.ReadWrite.All	Application	Read and write directory data	Yes	⚠ Not granted for Trial CR... ...
Files.Read.All	Application	Read files in all site collections	Yes	⚠ Not granted for Trial CR... ...
Files.ReadWrite.All	Application	Read and write files in all site collections	Yes	⚠ Not granted for Trial CR... ...
Group.Read.All	Application	Read all groups	Yes	⚠ Not granted for Trial CR... ...

Create a Client Secret (for Application API Permissions)

- To authenticate using application permissions, the Azure AI Search Index and InoWiz Agent require a client secret.

i. In the app menu, go to **Certificates & Secrets > Client secrets > New client secret**.

Manage

- Branding
- Authentication
- Certificates & secrets**
- Token configuration
- API permissions

Certificates (0) Client secrets (0) Federated credentials (0)

A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.

+ New client secret

Description	Expires	Value	Secret ID
No client secrets have been created for this application.			

ii. Enter a description for the secret and adjust the expiration if necessary.

Note: If the secret expires, you must recreate it and update the indexer.

Add a client secret ×

Description

SharePoint-AzureAISearch-SecretKey

Expires

Recommended: 180 days (6 months) ▼

Add

Cancel

- iii. After creating the secret, copy it immediately and store it securely. Once you leave the page, the secret will no longer be visible.

Description	Expires	Value	Secret ID
SharePoint Online Indexer	5/18/2022		

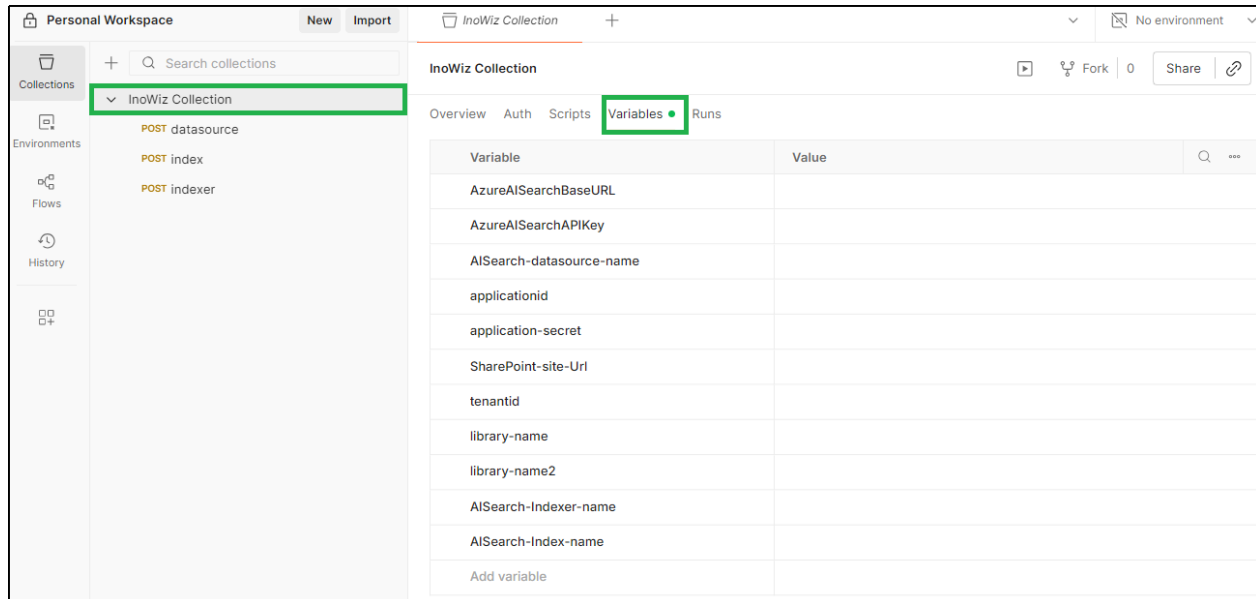
Create Data Source, Index, and Indexer in Azure AI Search

Once you have created the **Azure AI Search service**, the next step is to configure the **data source, index, and indexer**.

You can easily perform this setup using the **Postman collection** provided.

Simply enter the required input values while executing the collection.

Inside the collection, navigate to the **Variables tab**, where you can provide the necessary input details for the data being requested.

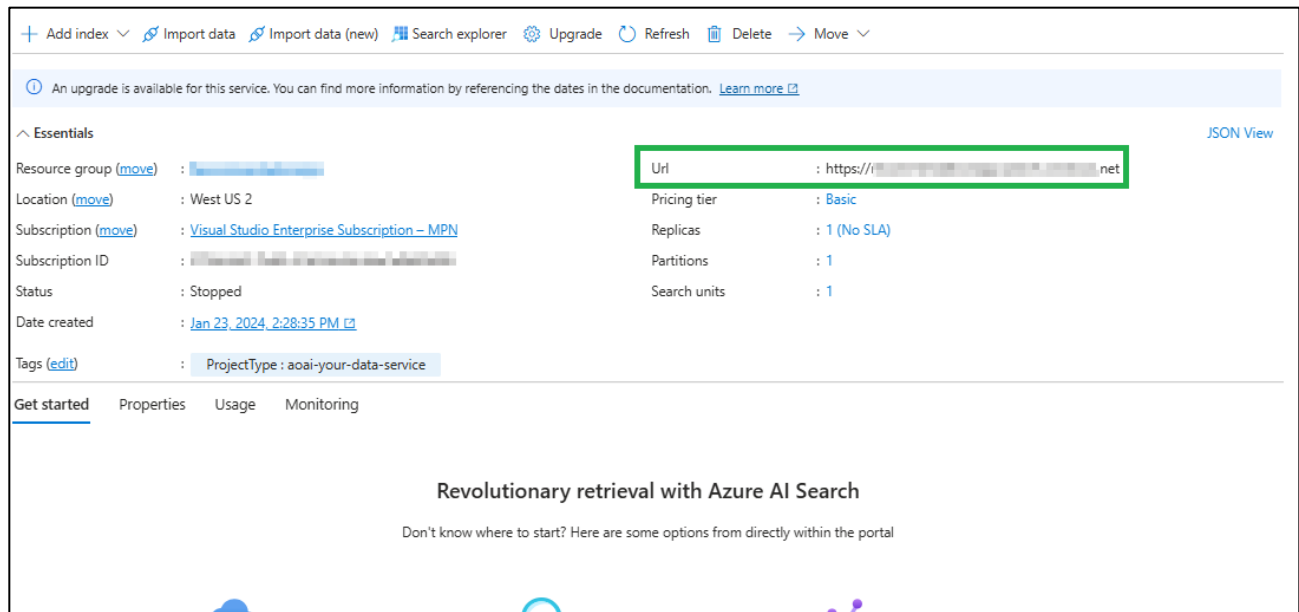


Below is the table to find all the input data

i). AzureAISearchBaseURL:

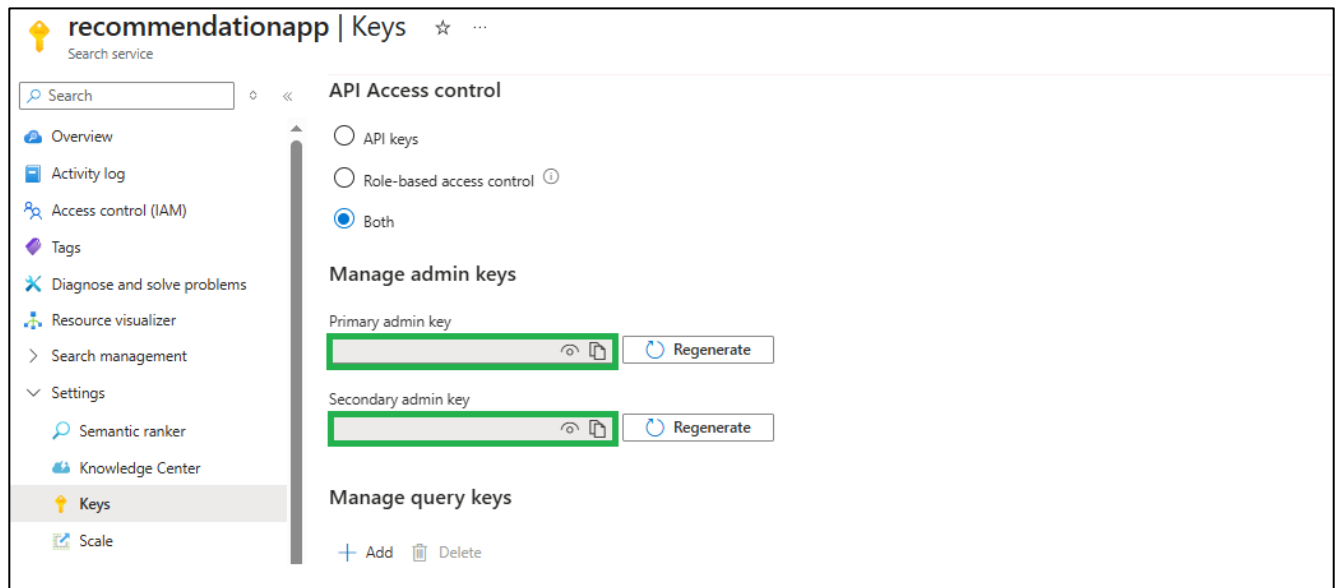
- Sign in to the **Azure Portal**.
- Navigate to **Azure AI Search Service → Overview**.
- Copy the **URL** listed here. This will be your AzureAISearchBaseURL.

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ii) AzureAISearchAPIKey:

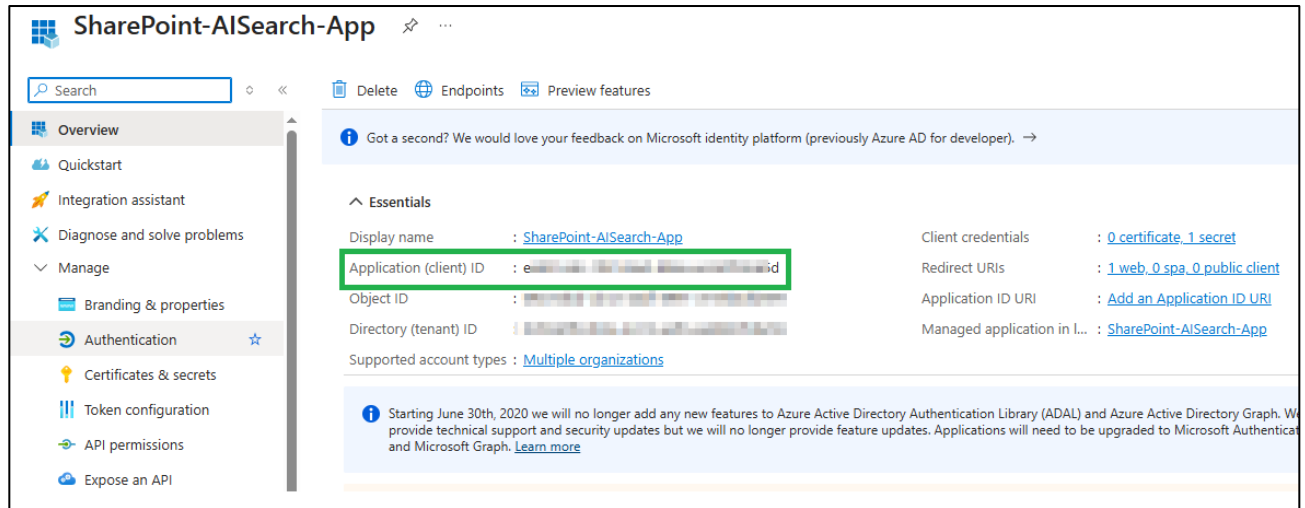
- In the **Azure Portal**, go to your **Azure AI Search Service** → **Settings** → **Keys**.
- Copy either the **Primary Key** or **Secondary Key**. This will be your AzureAISearchAPIKey.



iii) AISearch-datasource-name: Decide a **custom name** for your SharePoint data source.

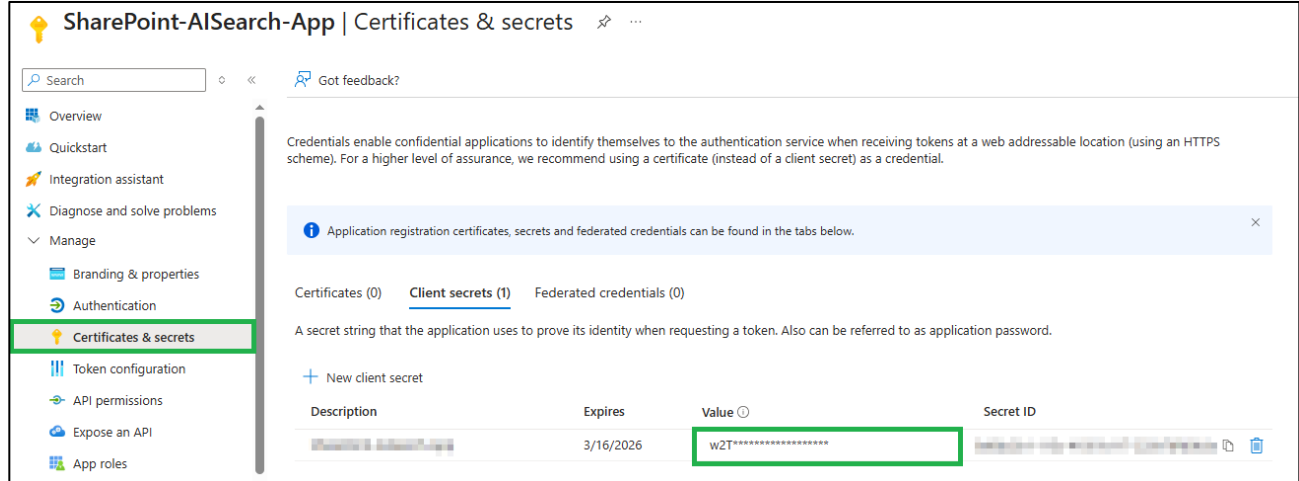
iv) Applicationid:

- In the **Azure Portal**, go to **App Registrations → Your App → Overview**.
- Copy the **Application (Client) ID**. This will be your Applicationid.



v) Application-secret:

- Go to **Azure Portal → App Registrations → Certificates & Secrets**.
- Create or copy the existing **Client Secret**.

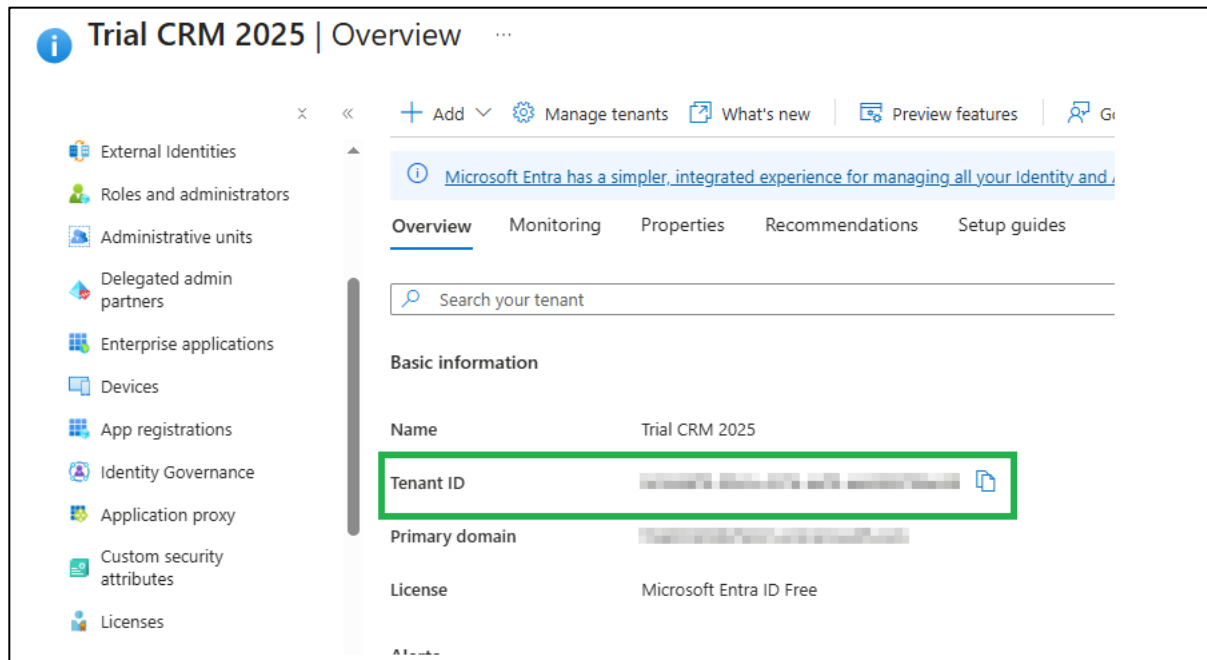


vi) SharePoint-site-Url:

- Open your **SharePoint Site** in a web browser.
- Copy the full **Site URL**.

vii) Tenantid:

- In the **Azure Portal**, go to **App Registrations → Overview**.
- Copy the **Directory (Tenant) ID**.



viii) Library-name:

- Navigate to your **SharePoint Site Library**.
- Copy the **Library URL**.
- If you need a second library, repeat the same process.

ix) **Library-name2:** If you need a second library, repeat the same process.

x). **AIsearch-Indexer-name:** Choose a **custom name** for your indexer.

Note: Remember this name, you'll need it later when running the indexer.

xi). **AIsearch-Index-name:** Choose a **custom name** for your search index.

Note: Remember this name, you'll need it later when running the indexer.

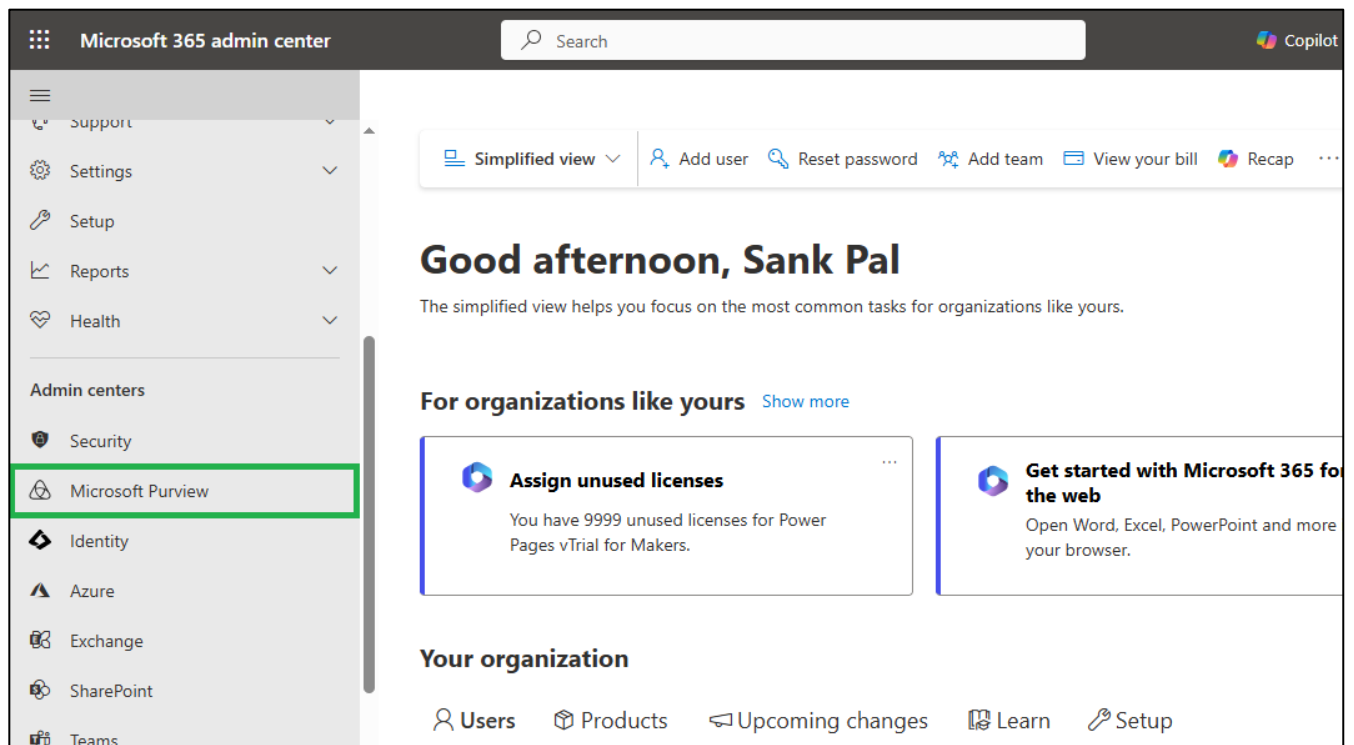
Enable Audit Logs (Required for Copilot Agent)

If you haven't already enabled audit logs, the Copilot Agent will display the message:

"Audit Log Not Enabled."

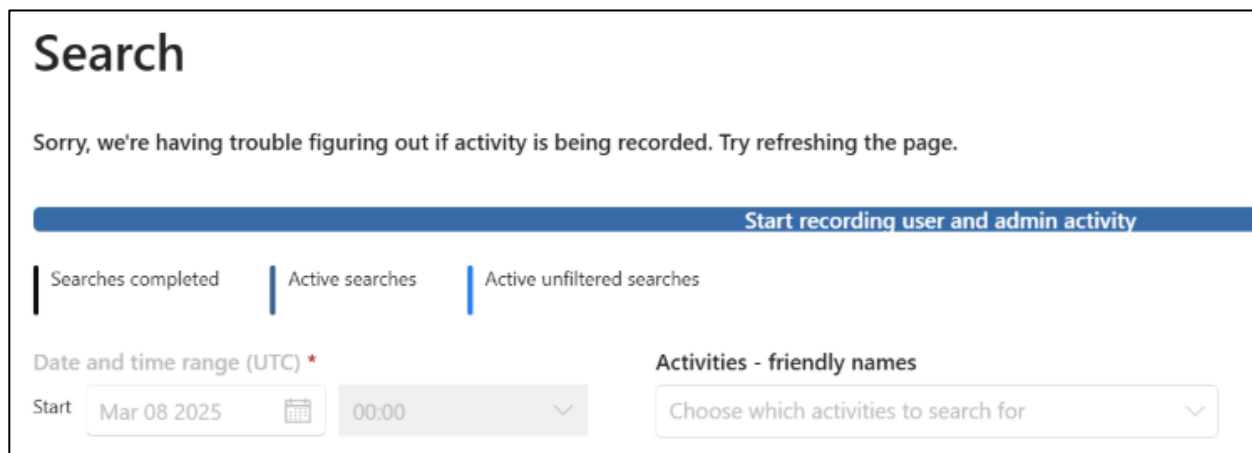
To fix this:

1. Go to admin.microsoft.com.
2. In the left panel, scroll down, select "Show All", and then select **Microsoft Purview**.



3. In the Purview portal:
 - Look for the **Audit solution**.
 - If it isn't on the homepage, click **View all solutions → Audit**.
4. On the **Audit page**, you will see a banner message:

"Start recording user and admin activity."



- Click on it to enable audit logging.

Configuration

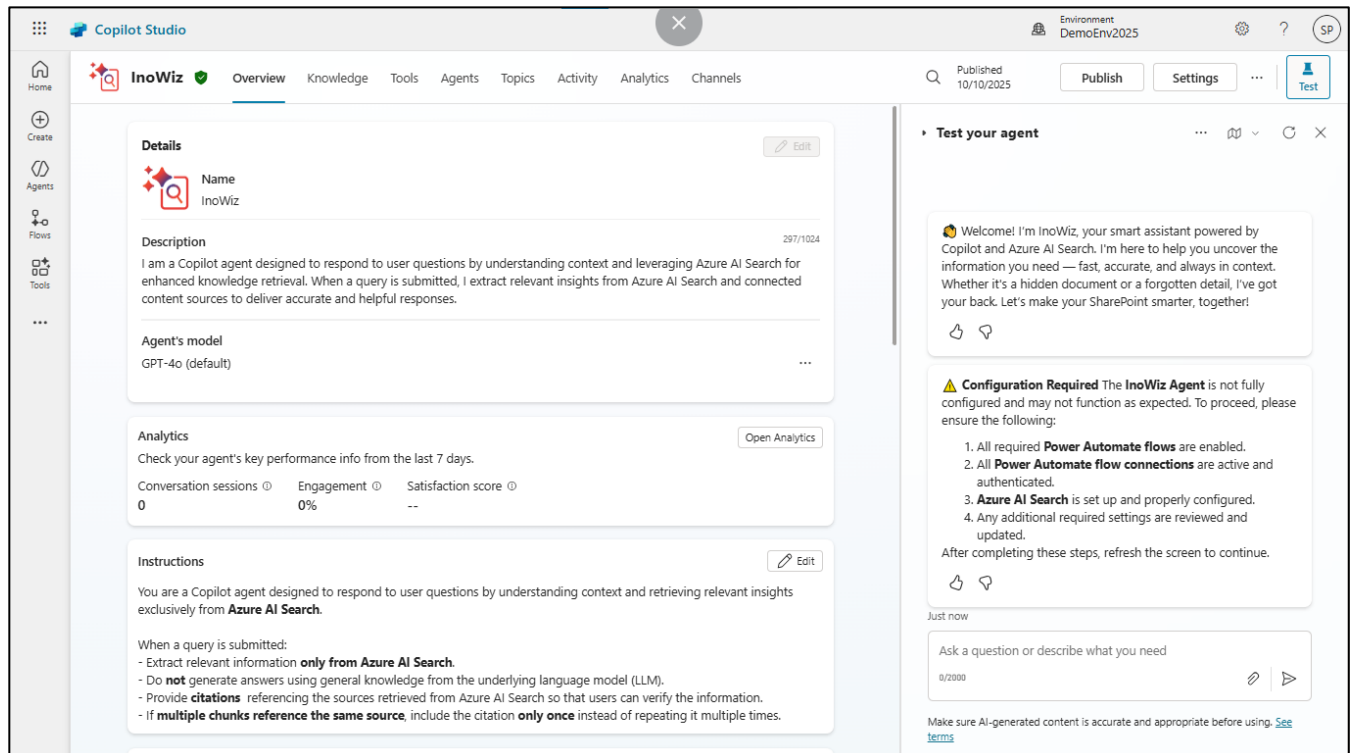
Installation of SharePoint Knowledge AI Search Agent

Once the Azure AI Search service is configured with the data source, index, and indexer, proceed to **import the InoWiz application** into your environment.

Validate and Configure the Copilot Agent

After importing the solution, you need to validate and configure the **InoWiz Agent** to ensure it works correctly. Follow the steps below:

- Go to your imported solutions in Dynamics 365 or Power Platform.
- Locate **InoWiz Agent**.
- Click to open the agent.
- From the left navigation panel, select Managed Solutions.
- Find the solution named SharePoint Knowledge AI Search.
- Open the solution to view its details.
- Within the solution, select the Agent tab from the left menu.
- Open the agent for configuration.
- If the agent is not set up properly, you may see the message: **“Configuration Required.”**



Resolve Configuration Issues

- This error typically occurs when **one or more cloud flows are turned off** during the import process.
- The most common reason is that the imported flows cannot find a valid connection for the **connection reference**.

To fix this, reconfigure the connection references and enable the required flows.

Configure Connection References

1. Navigate to the **Default Solution** in your environment.

The screenshot shows the 'Solutions' page in the Power Platform. The left sidebar contains navigation options: Home, Create, Learn, Plans, Apps, AI hub, Tables, Flows, Solutions (selected), Azure Synapse Link, More, and Power Platform. The main area shows a list of solutions. The 'Default Solution' is highlighted with a green box. Below the list are tabs for 'Unmanaged', 'Managed', and 'All'.

Display name	Name	Created	Version	Publisher	Solution check	Source control status
Common Data Services Def	Cr60213	3 weeks ago	1.0.0.0	CDS Default Publ...	Hasn't been run	Not Connected to Git
Default Solution	Default	3 weeks ago	1.0	Default Publisher...	Not supported for analy...	Not Connected to Git

2. Navigate to **Connection References**.

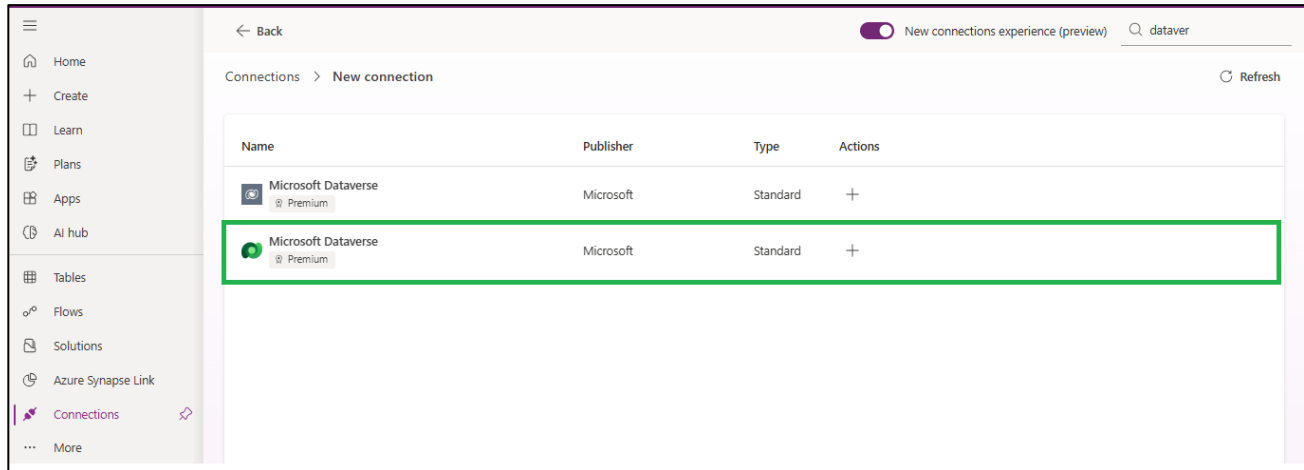
The screenshot shows the 'Connection references' page for the 'Default Solution'. The left sidebar shows the 'Objects' pane with 'connection references' selected. The main area displays a table of connection references. The 'AzureAISearch SharePoint' entry is highlighted with a green box. Below it, a group of other connection references is also highlighted with a green box.

Display name	Name	Type	Managed	Customized	Last Modif...	Owner	Status
AzureAISearch SharePoi...	ikl_agentshared_...	Connection Refer...	Yes	No	1 week ago	Sanket Paikar	Off
Content Conversion	msdyn_ContentC...	Connection Refer...	Yes	No	3 weeks ago	SYSTEM	Off
Dataverse	msdyn_Dataverse	Connection Refer...	Yes	No	3 weeks ago	SYSTEM	Off
Microsoft Dataverse Sha...	ikl_microsoftDat...	Connection Refer...	Yes	No	1 week ago	Sanket Paikar	Off
PowerAppsMakers Shar...	ikl_powerAppsM...	Connection Refer...	Yes	No	1 week ago	Sanket Paikar	Off
PowerAutomateManage...	ikl_powerAutom...	Connection Refer...	Yes	No	1 week ago	Sanket Paikar	Off
SharePoint SharePointK...	ikl_sharePointSh...	Connection Refer...	Yes	No	1 week ago	Sanket Paikar	Off

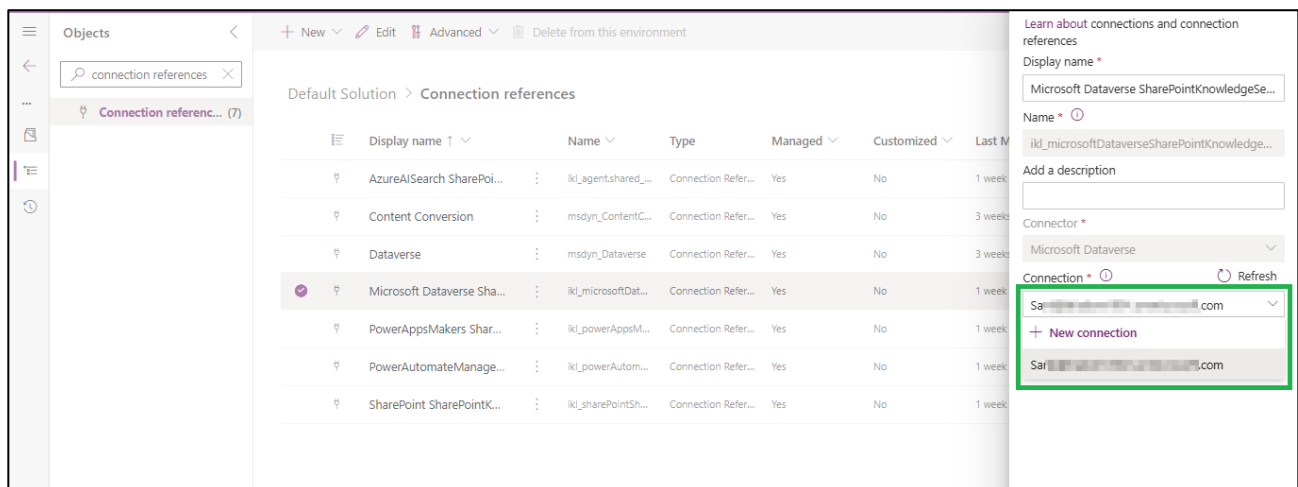
3. Locate and configure the following connection references:

a) Microsoft Dataverse SharePointKnowledgeSearch

- Click on the connection reference, and a new tab will open.
- Under the **Connection field**, select **+ New Connection**.
- A new tab will open to create the connection.
- Search for Microsoft Dataverse and create a new connection



- Ensure you use **OAuth 2.0 authentication** while creating the connection. Save the connection.
- Return to the previous tab, click **Refresh** in the **Connection field**, and select the newly created connection.



- Click **Save**.

b) PowerAppsMakers SharePointKnowledgeAISearch

- Repeat the same steps as above:
 - Open the connection reference.
 - Create a **New Connection of “Power Apps for Makers”**.
 - Once again, ensure you use **OAuth 2.0 authentication** while creating the connection.
- Refresh the connection list and select the new connection.
- Save the configuration.

c) PowerAutomateManagement SharePointKnowledgeAISearch

- Open the connection reference.
- Create a **New Connection of “Power Automate Management”**.
- Sign in with your Power Automate Management account using **Microsoft Entra ID Integrated** authentication.

Once the connection is created, return to the connection reference, refresh, select the connection, and save it.

d) SharePoint SharePointKnowledgeAISearch

- Open the connection reference.
- Create a **New Connection of SharePoint**.
- **Sign in with your SharePoint account.**

When prompted to create a new SharePoint connection, you’ll see two options:

Connect directly (cloud services) – Select this if you are using **SharePoint Online / cloud services**.

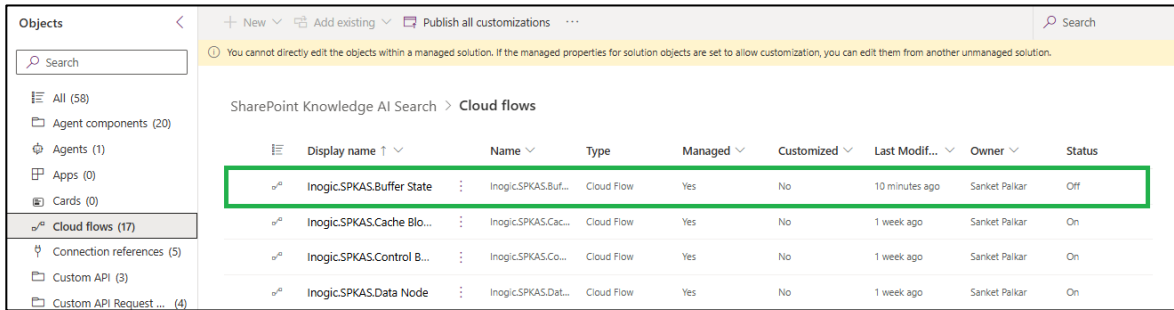
Connect using on-premises data gateway – Select this if you are connecting to **on-premises SharePoint servers**.

Choose the option that best matches your SharePoint environment to establish the connection.

- Once the connection is created, return to the connection reference, refresh, select the connection, and save it.

Active Disables Flows to Resolve Cloud Flow Connection Issues

- Navigate to the **SharePoint Knowledge AI Search Solution** in your environment.
- Identify any cloud flows that are turned **off**.



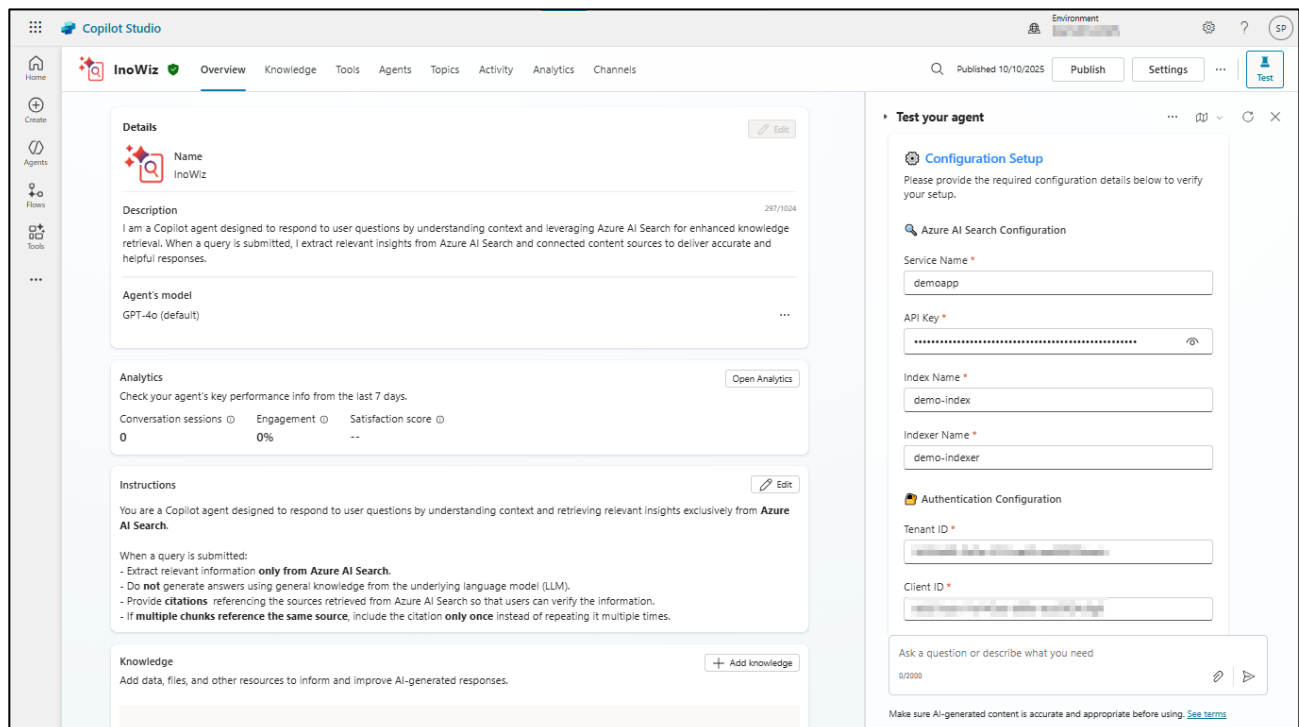
SharePoint Knowledge AI Search > Cloud flows

	Display name ↑	Name	Type	Managed	Customized	Last Modif...	Owner	Status
	Inogic.SPKAS.Buffer State	Inogic.SPKAS.Buf...	Cloud Flow	Yes	No	10 minutes ago	Sanket Paikar	Off
	Inogic.SPKAS.Cache Blo...	Inogic.SPKAS.Cac...	Cloud Flow	Yes	No	1 week ago	Sanket Paikar	On
	Inogic.SPKAS.Control B...	Inogic.SPKAS.Co...	Cloud Flow	Yes	No	1 week ago	Sanket Paikar	On
	Inogic.SPKAS.Data Node	Inogic.SPKAS.Dat...	Cloud Flow	Yes	No	1 week ago	Sanket Paikar	On

- For each disabled flow, click on the three dots to open a menu that includes the “Turn on’ option, which will activate the flow.
- Repeat this process for all flows that are disabled.

Complete the Agent Configuration Setup

- Once the flows are enabled, open the **InoWiz Agent** again. This time, you will be prompted to complete the **Configuration Setup**. The setup consists of three groups:



Copilot Studio Environment

InoWiz Overview Knowledge Tools Agents Topics Activity Analytics Channels

Published 10/10/2025 Publish Settings Test

Details Edit

Name: InoWiz

Description: I am a Copilot agent designed to respond to user questions by understanding context and leveraging Azure AI Search for enhanced knowledge retrieval. When a query is submitted, I extract relevant insights from Azure AI Search and connected content sources to deliver accurate and helpful responses. 28/1/2024

Agent's model: GPT-4o (default)

Analytics Open Analytics

Check your agent's key performance info from the last 7 days.

Conversation sessions 0 Engagement 0 Satisfaction score 0

Instructions Edit

You are a Copilot agent designed to respond to user questions by understanding context and retrieving relevant insights exclusively from **Azure AI Search**.

When a query is submitted:

- Extract relevant information **only from Azure AI Search**.
- Do **not** generate answers using general knowledge from the underlying language model (LLM).
- Provide **citations** referencing the sources retrieved from Azure AI Search so that users can verify the information.
- If **multiple chunks reference the same source**, include the citation **only once** instead of repeating it multiple times.

Knowledge Add knowledge

Add data, files, and other resources to inform and improve AI-generated responses.

Test your agent

Configuration Setup

Please provide the required configuration details below to verify your setup.

Azure AI Search Configuration

Service Name *

demoapp

API Key *

Index Name *

demo-index

Indexer Name *

demo-indexer

Authentication Configuration

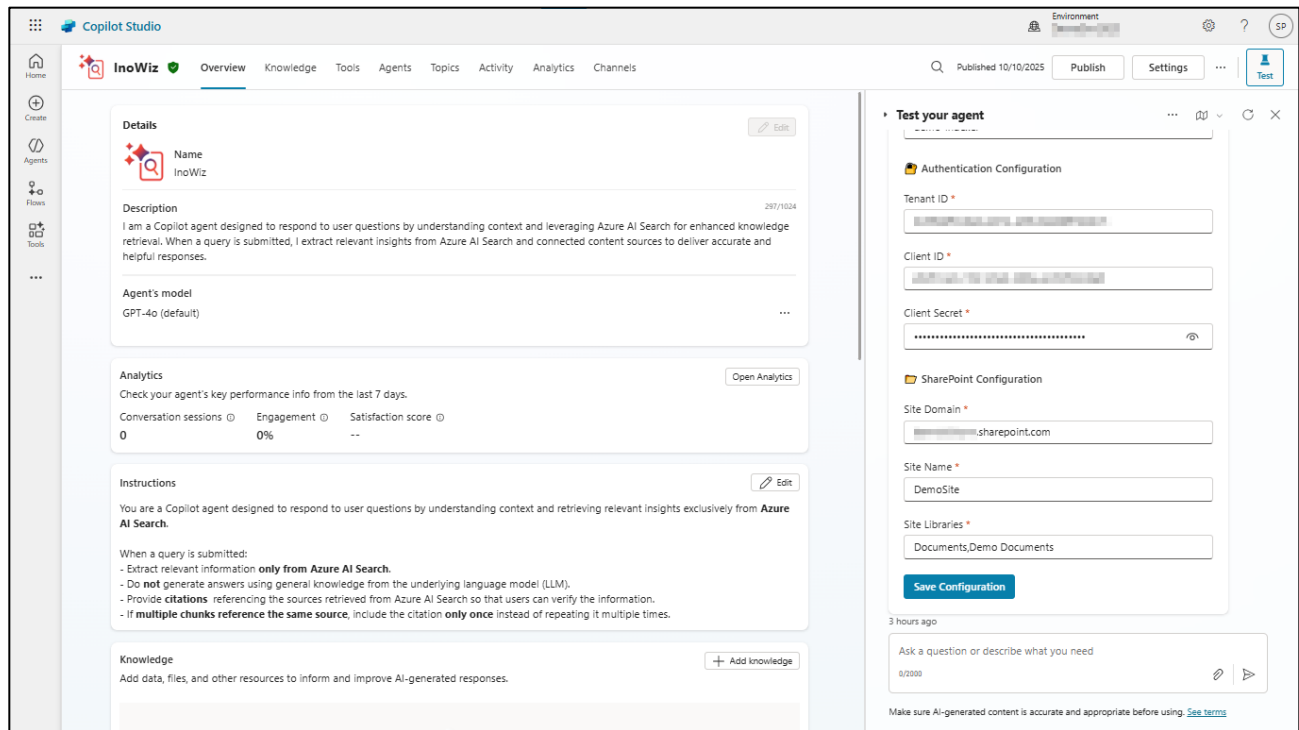
Tenant ID *

Client ID *

Ask a question or describe what you need

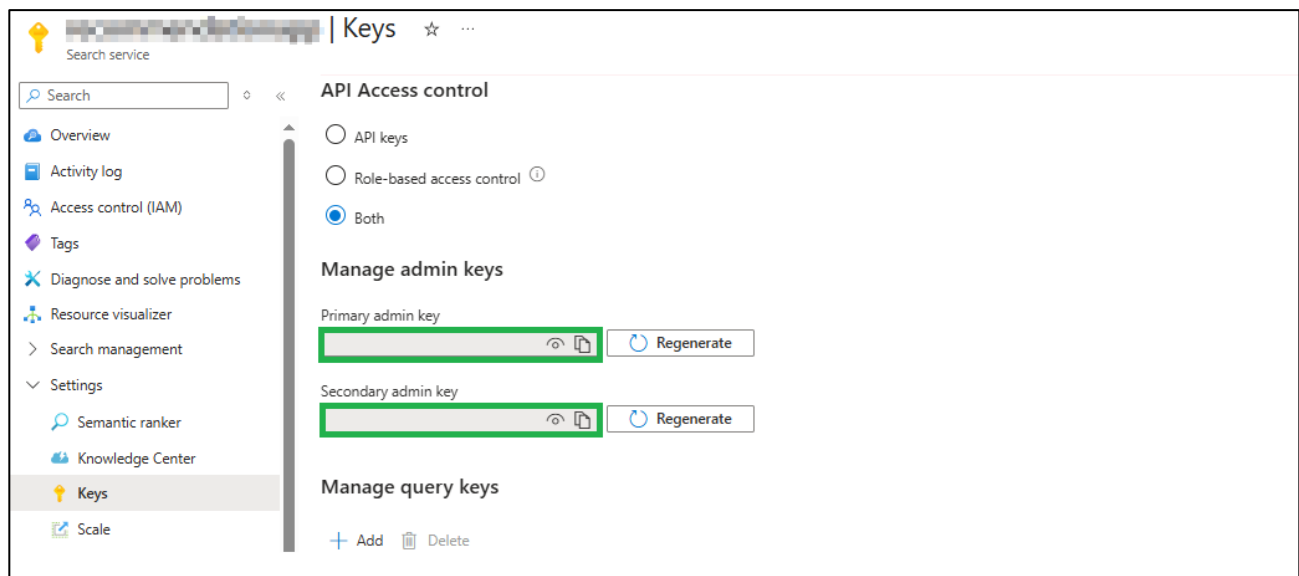
8/22/2020

Make sure AI-generated content is accurate and appropriate before using. [See terms](#)



a) Azure AI Search Configuration

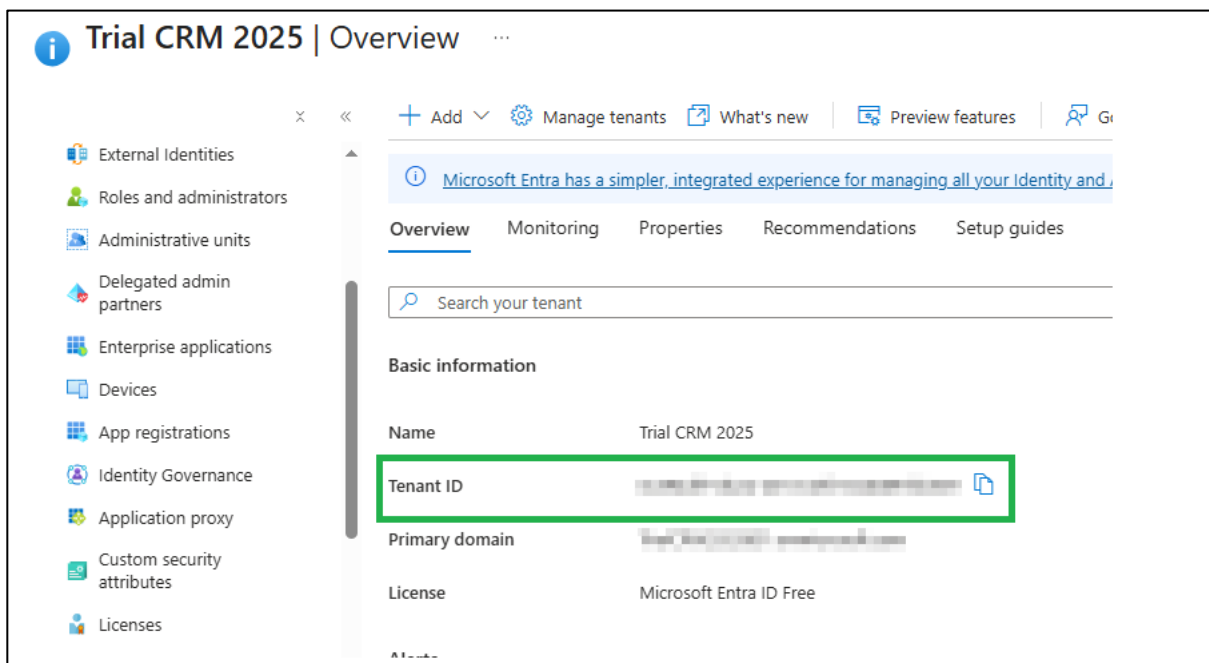
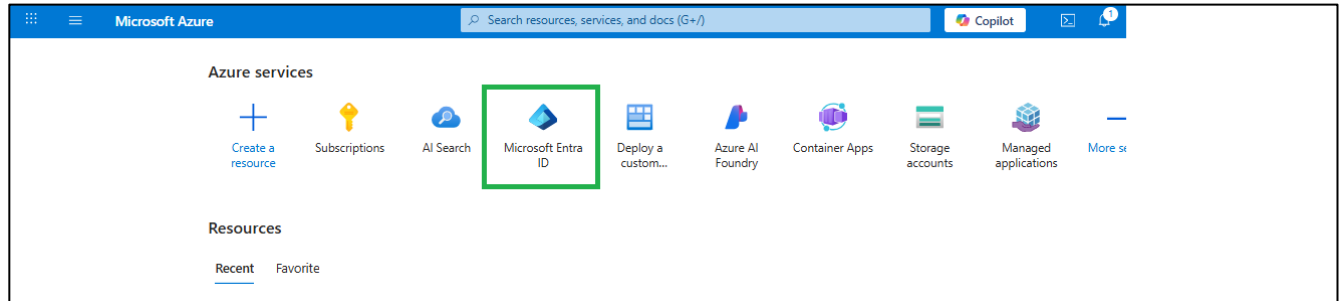
- **Service Name** → The name of the Azure AI Search service created in Step 1.
- **API Key** → Found in the Azure AI Search service under **Settings** → **Keys**. Copy either the **Primary Admin Key** or **Secondary Admin Key**.



- **Index Name** → Enter the index name you created via the Postman collection.
- **Indexer Name** → Enter the indexer name you created via the Postman collection.

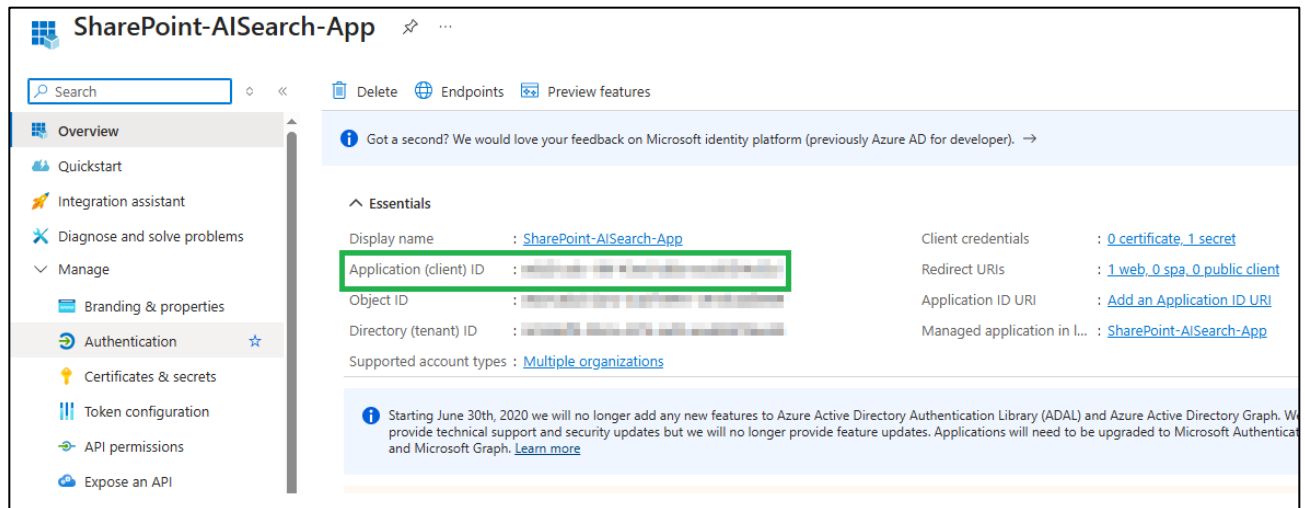
b) Authentication Configuration

- **Tenant ID** → Found in the Azure portal in the Microsoft Entra ID section.

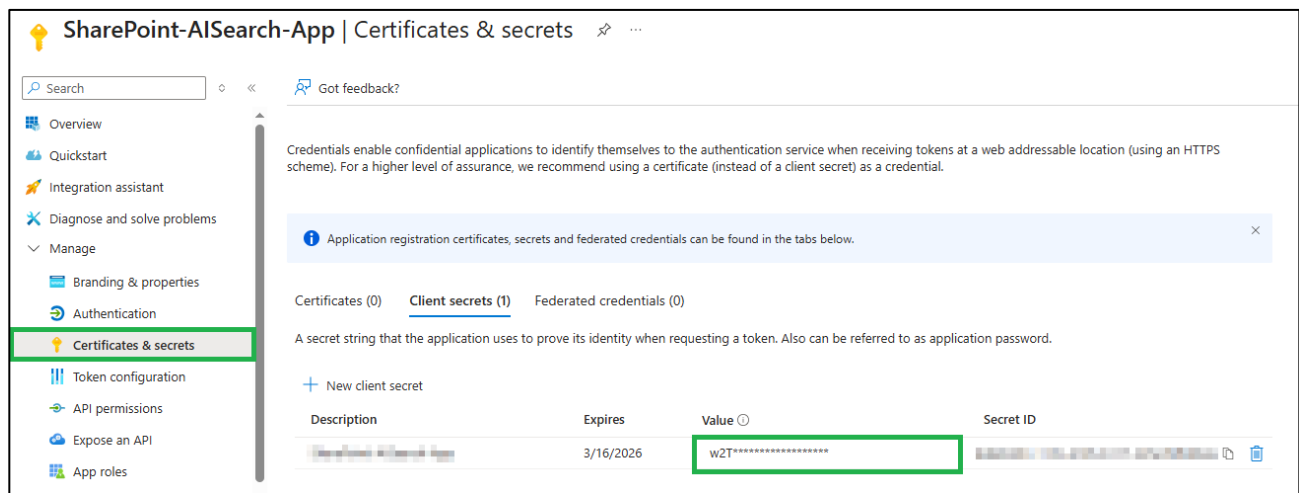


- **Client ID** → From the App Registration details, search for your app name which you created in step 2

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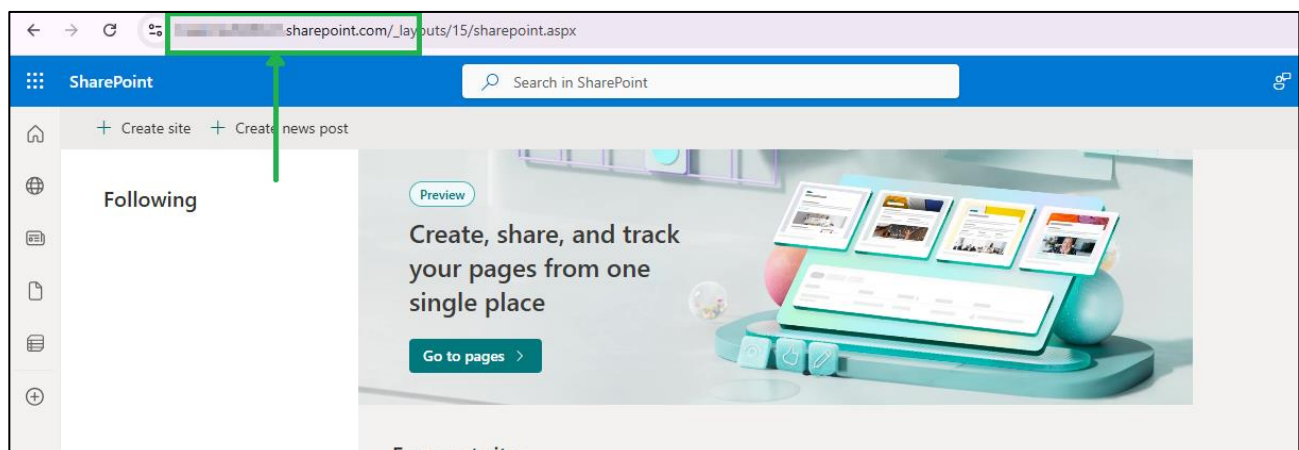


- **Client Secret** → The secret generated in the App Registration, which you can find in the Client and Secret section.

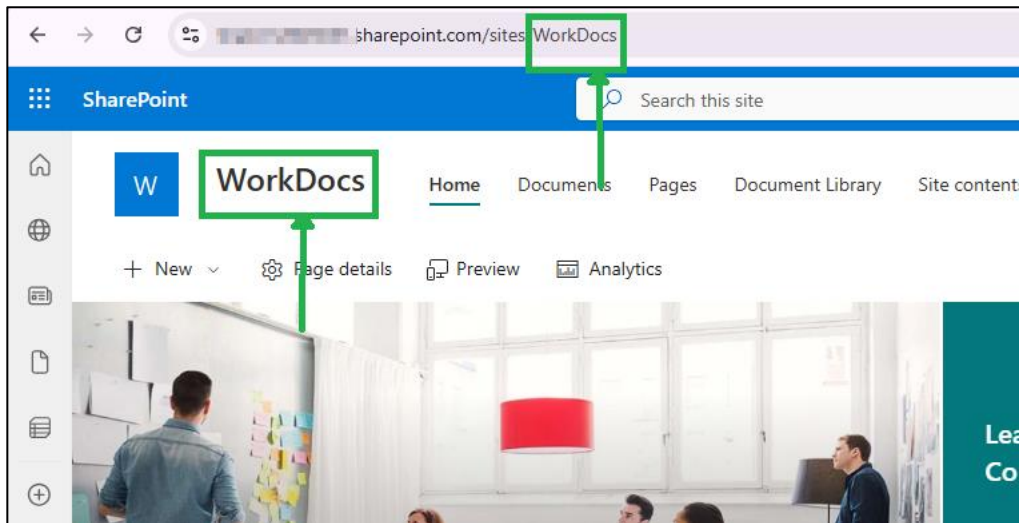


c) SharePoint Configuration

- **SharePoint Domain** → Example: yourdomain.sharepoint.com

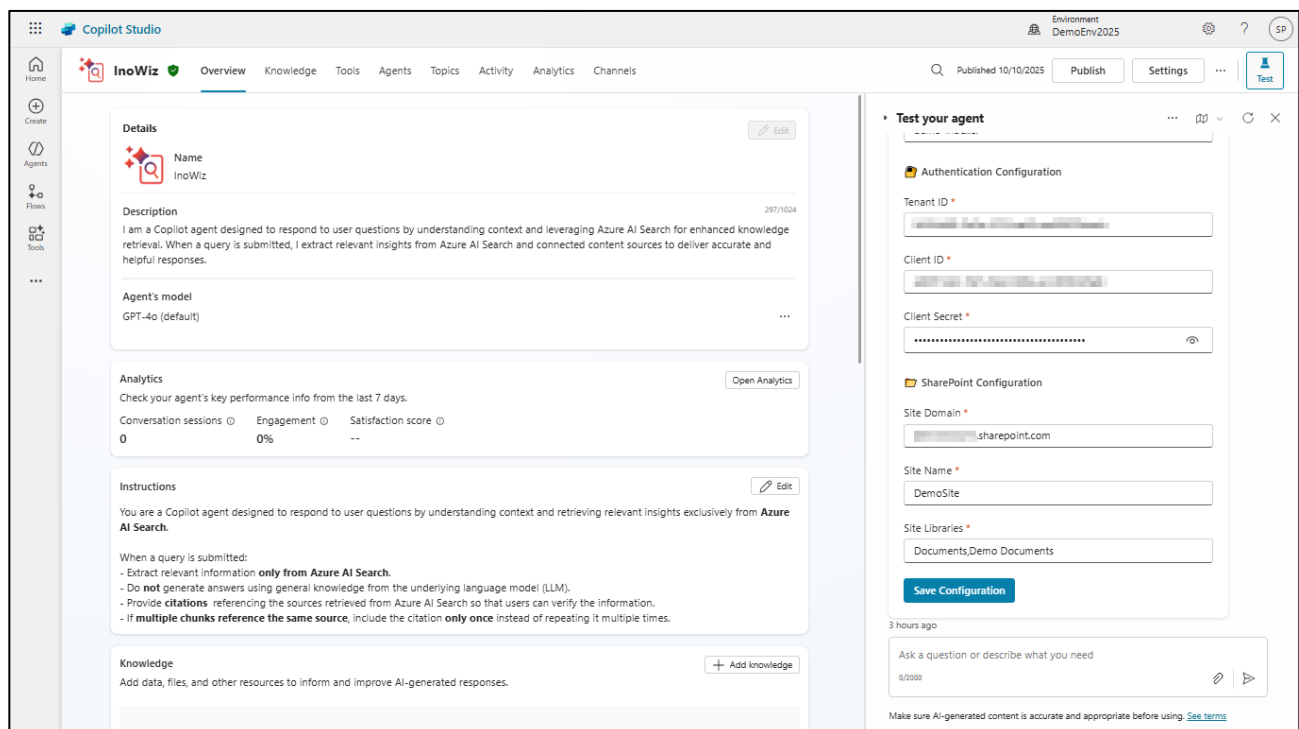


- **SharePoint Site Name** → The site name where all the documents you have stored.



- **Libraries** → Provide a comma-separated list of document libraries you want to configure. These can be found by navigating to your SharePoint site, and copying the names of the libraries.

Once all required input values (Azure AI Search, Authentication, and SharePoint details) are provided, click **Save Configuration**.

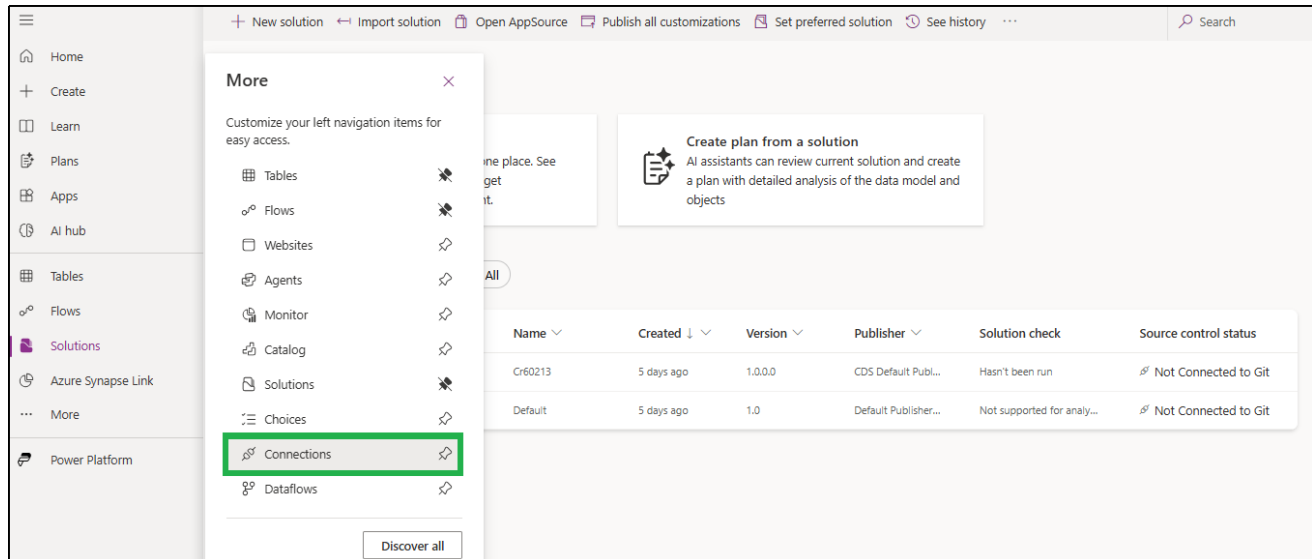


This will create an **Azure AI Search connection** in the backend and finalize the setup.

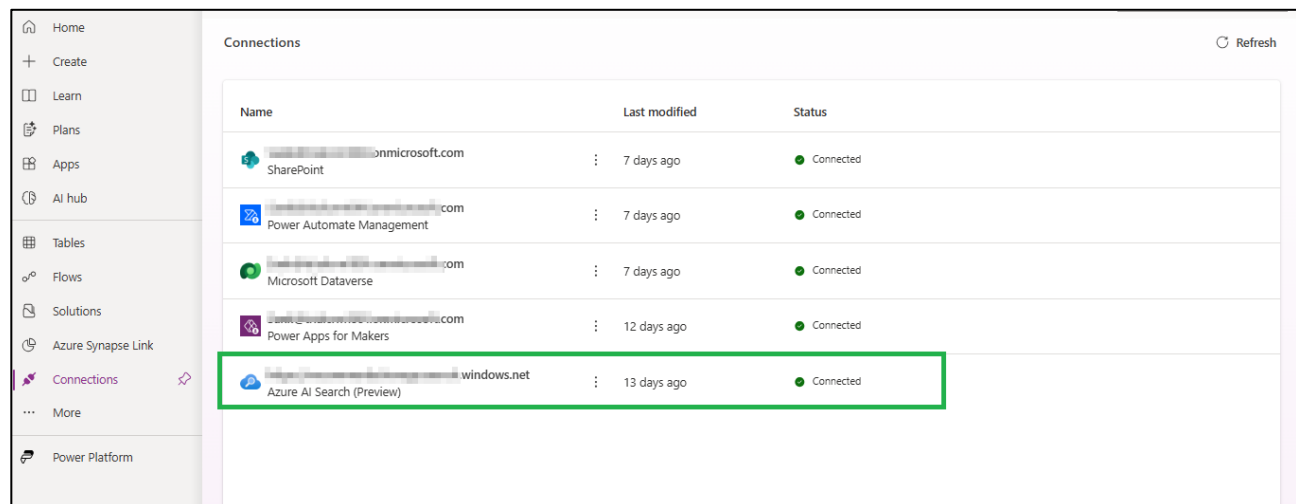
Share the Azure AI Search Connection

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- Once the configuration is done, it creates an Azure AI search connection, which you need to share.
- Navigate to make.powerapps.com.
- Go to **Connections**.



- You will see the newly created Azure AI Search connection.

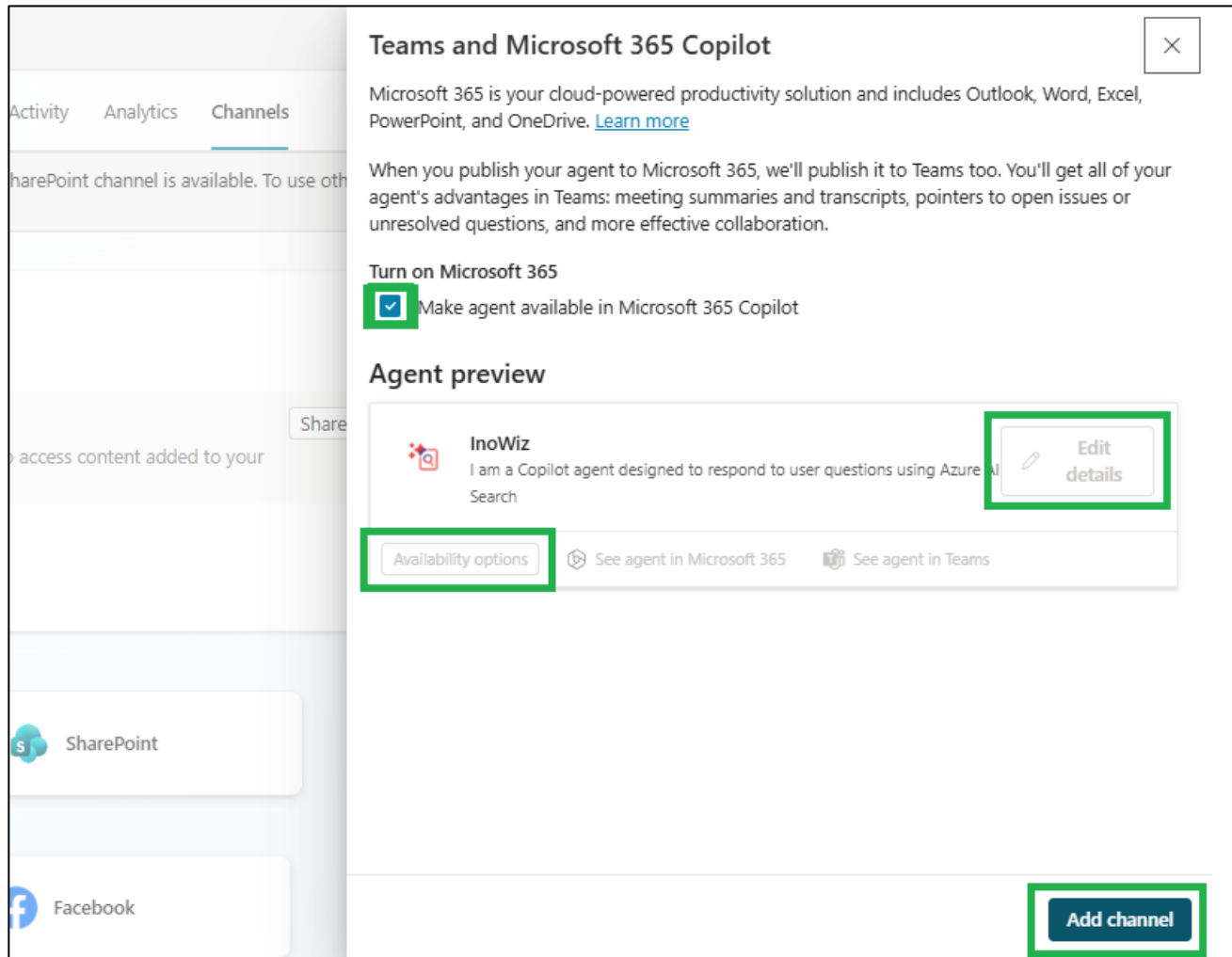


- To allow others to use this connection, **share it** with either:
 - **Your organization** → available for everyone, or
 - **Specific users** → available only for selected people.

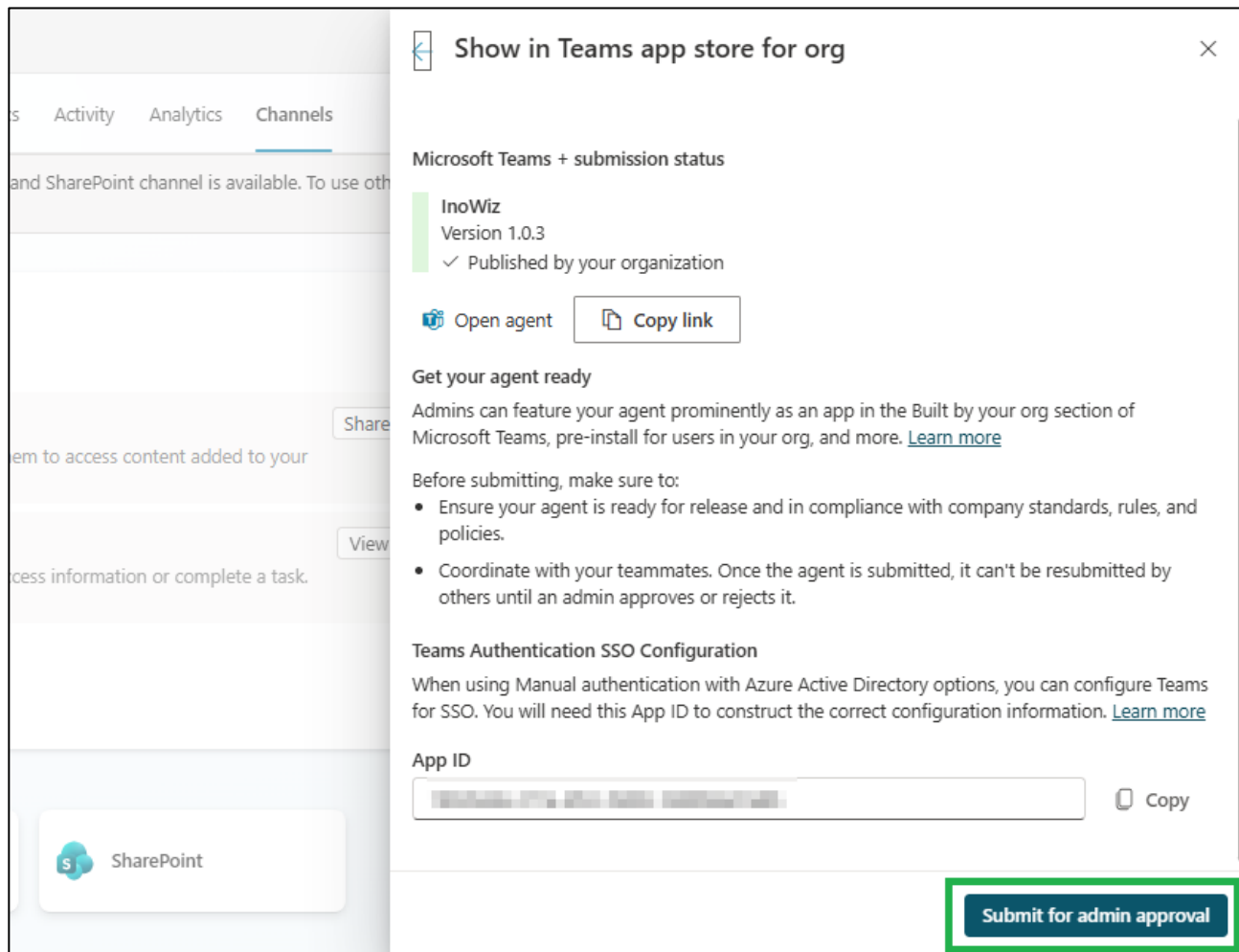
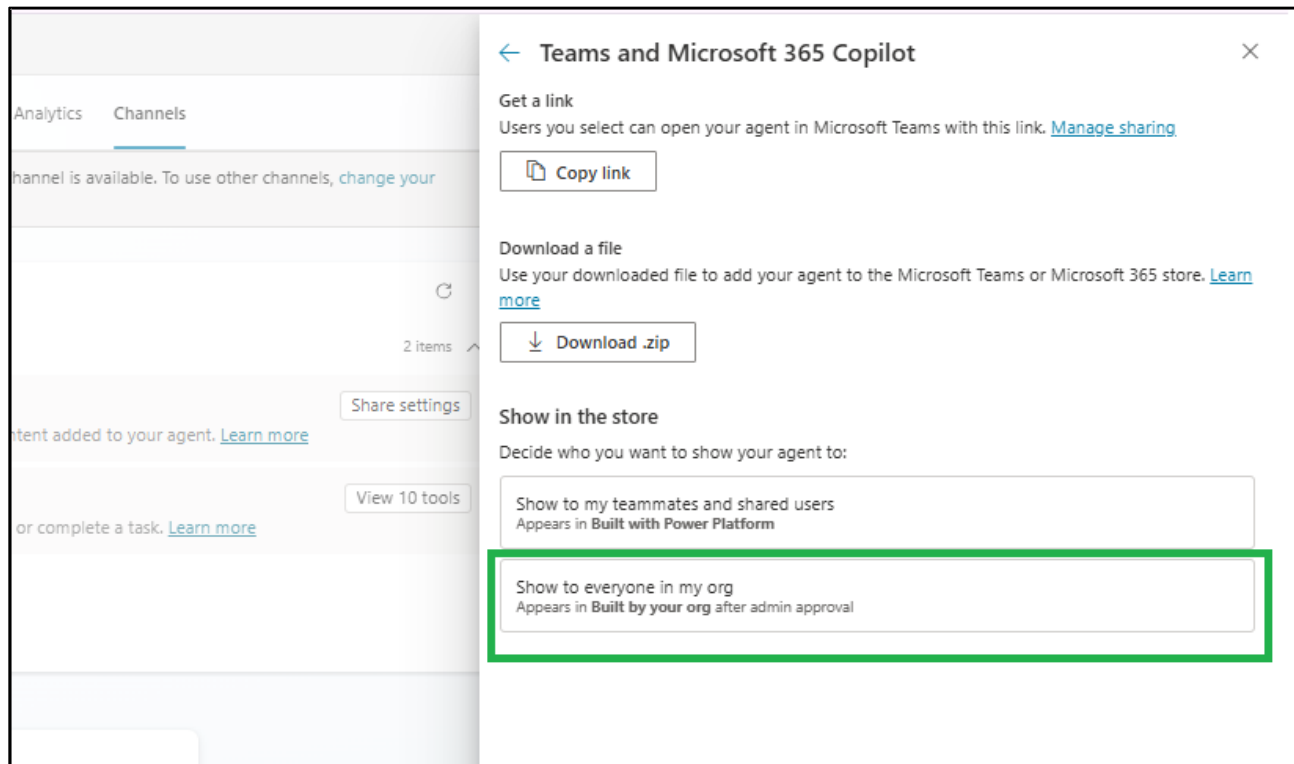
Add the Agent to Teams and Microsoft 365 Copilot

1. Open the **Agent** in your environment.
2. Under **Teams and Microsoft 365 Copilot**, add the agent to a specific **Teams channel**.
3. Check the option **"Make agent available in Microsoft 365 Copilot."**
4. Save your changes.

5. (Optional) Customize your agent:
 - Change the **icon** and **background color** under **Edit details**.

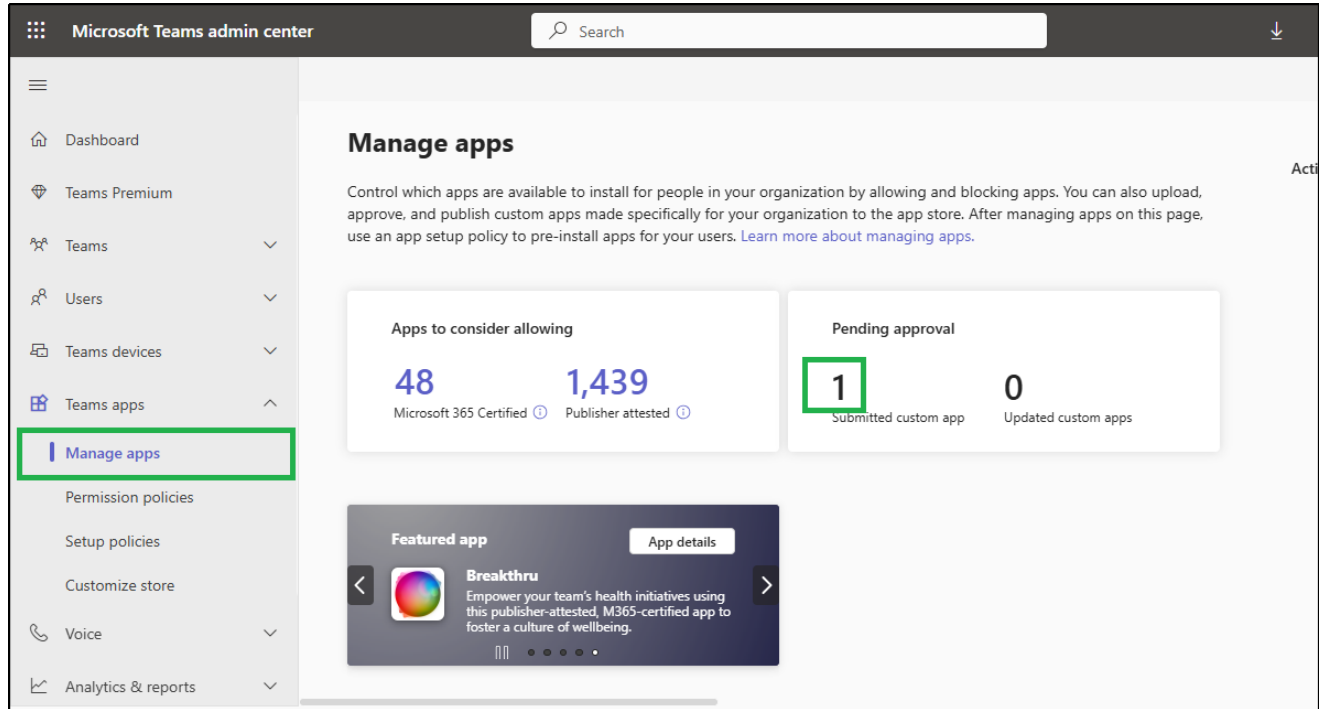


6. Go to **Availability Options** → select **“Show to everyone in the org”** → submit for **admin approval**.

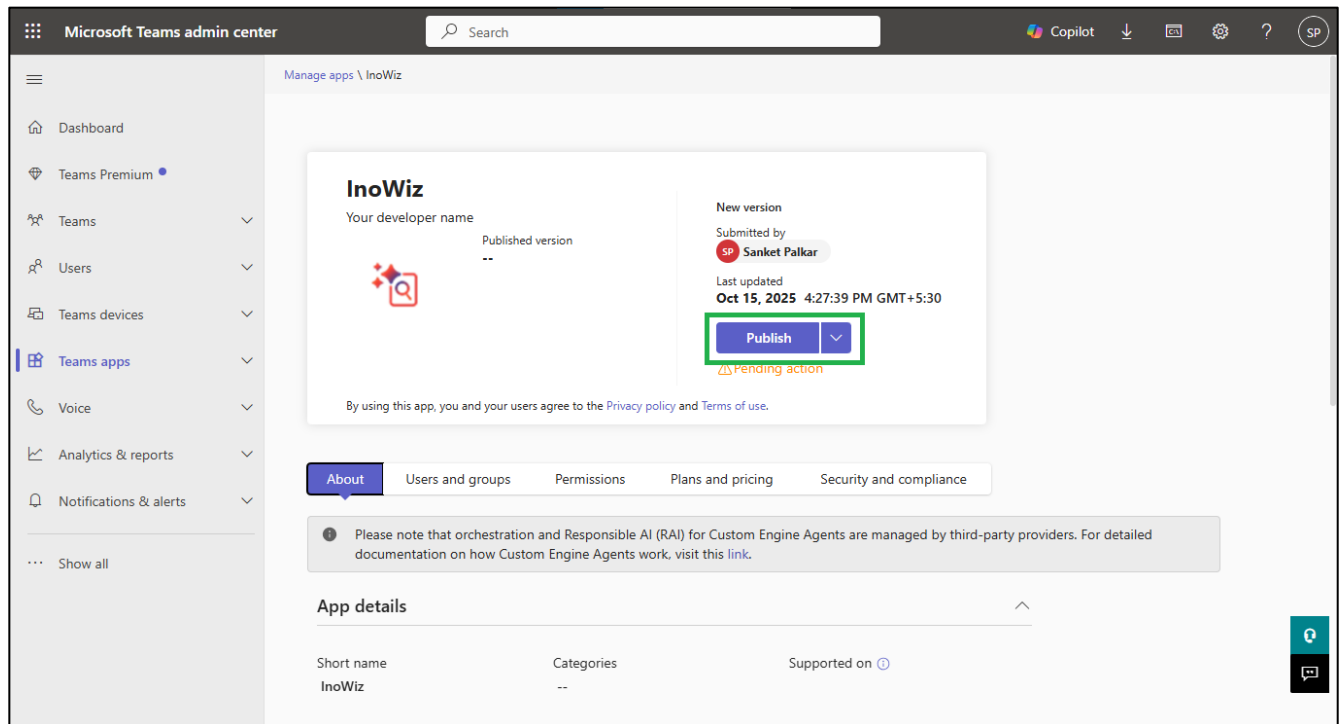


Approve the App in Teams Admin Center

1. Now the admin needs to approve the app to make it available to the organization or to other users or teams
2. Go to admin.teams.microsoft.com.
3. Navigate to **Teams apps** → **Manage apps**.
4. You will see **1 app pending approval**.



5. In the **All apps** section, search for your app name.
6. You will see it in a **Blocked** state.
7. Click on the app → choose to **Publish** it:
 - Either to the **entire organization**, or
 - To **specific users/teams** via the **Users and Groups** section.

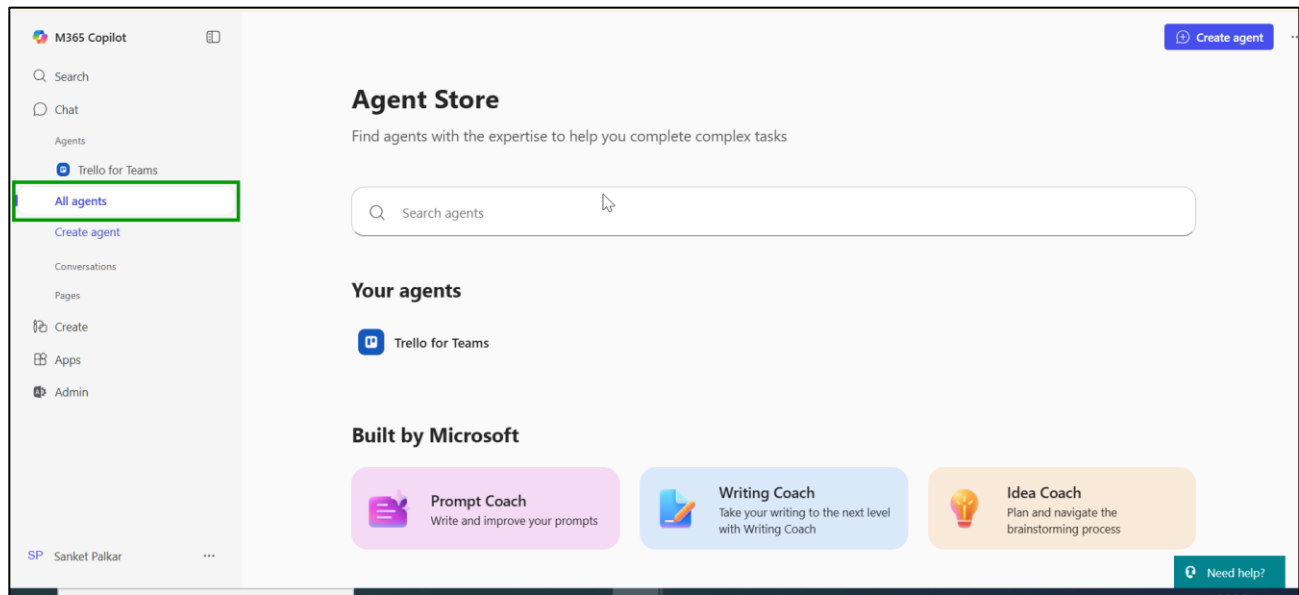


How to Add InoWiz Copilot Agent in Teams

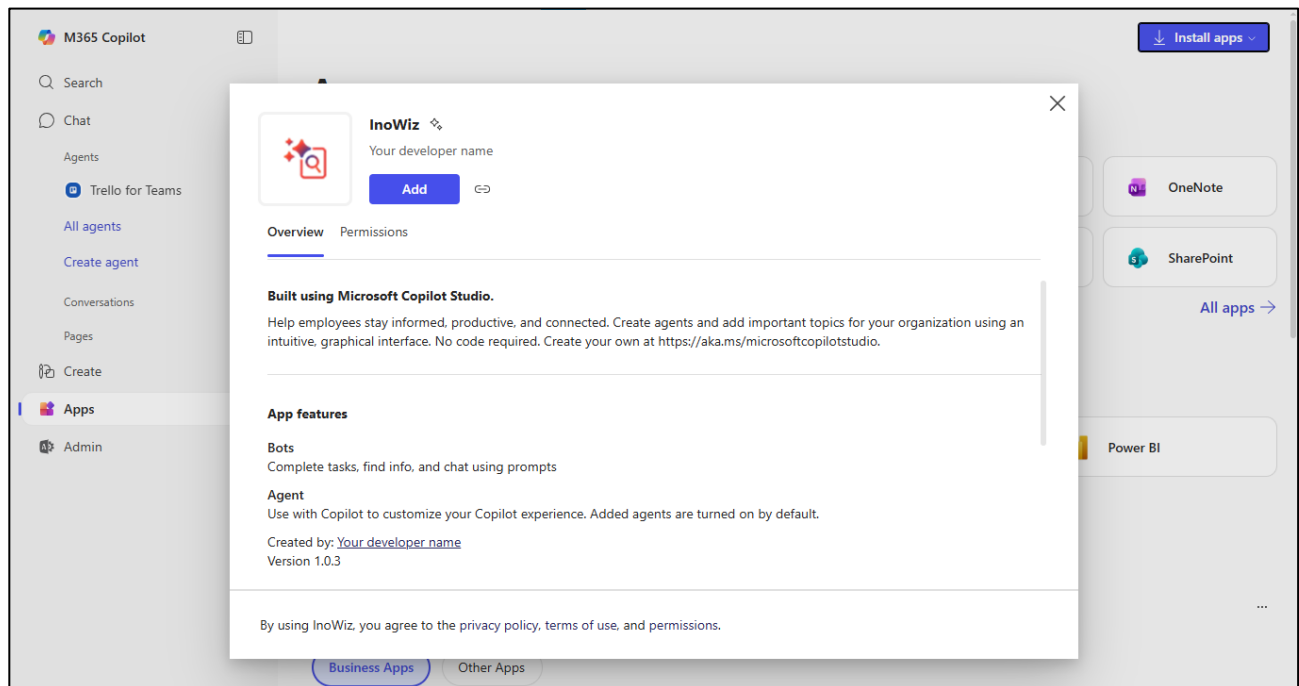
- Open **Microsoft Teams**.
- Go to the **+ Apps** tab.
- Select the **Built by your org** section.
- Find your app → click **Add**.
- The InoWiz Agent will now be available in Teams for chatting.

How to Add InoWiz Copilot Agent to M365

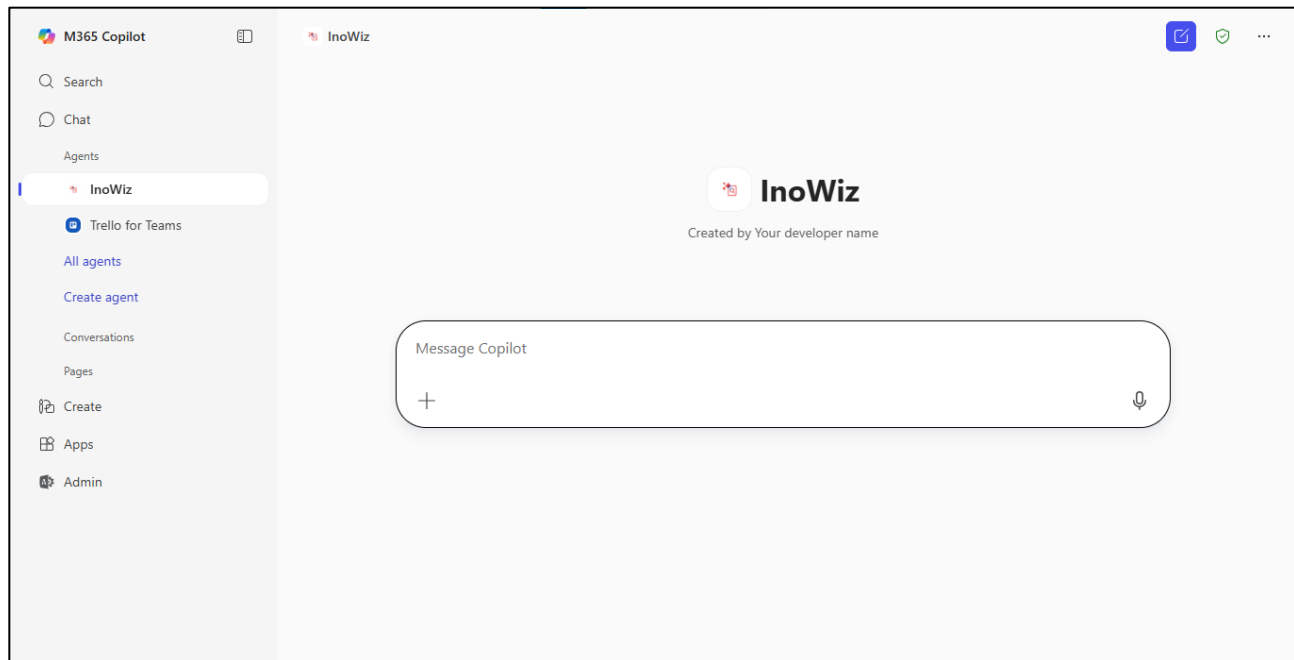
- Log in to [Microsoft Copilot Studio](#).
- From the left navigation panel, go to **All agents**.



- Scroll down to locate **InoWiz Copilot Agent**.
- Select the **InoWiz Copilot Agent** and click **Add**.
- Click on InoWiz Copilot agent and click on “Add”.



- The agent will be successfully added to your Microsoft 365 environment.



Summary of What We Did

- Saved the **InoWiz Agent configuration**, which created an Azure AI Search connection.
- Shared the connection with others in the organization.
- Enabled **Microsoft Purview Audit Logs** and subscribed SharePoint logs using PowerShell.
- Added the Agent to **Teams and Copilot**, set availability, and submitted for admin approval.
- Approved and published the app in the **Teams Admin Center**.
- Installed the app in Teams, making it available for chat across the org.

Features

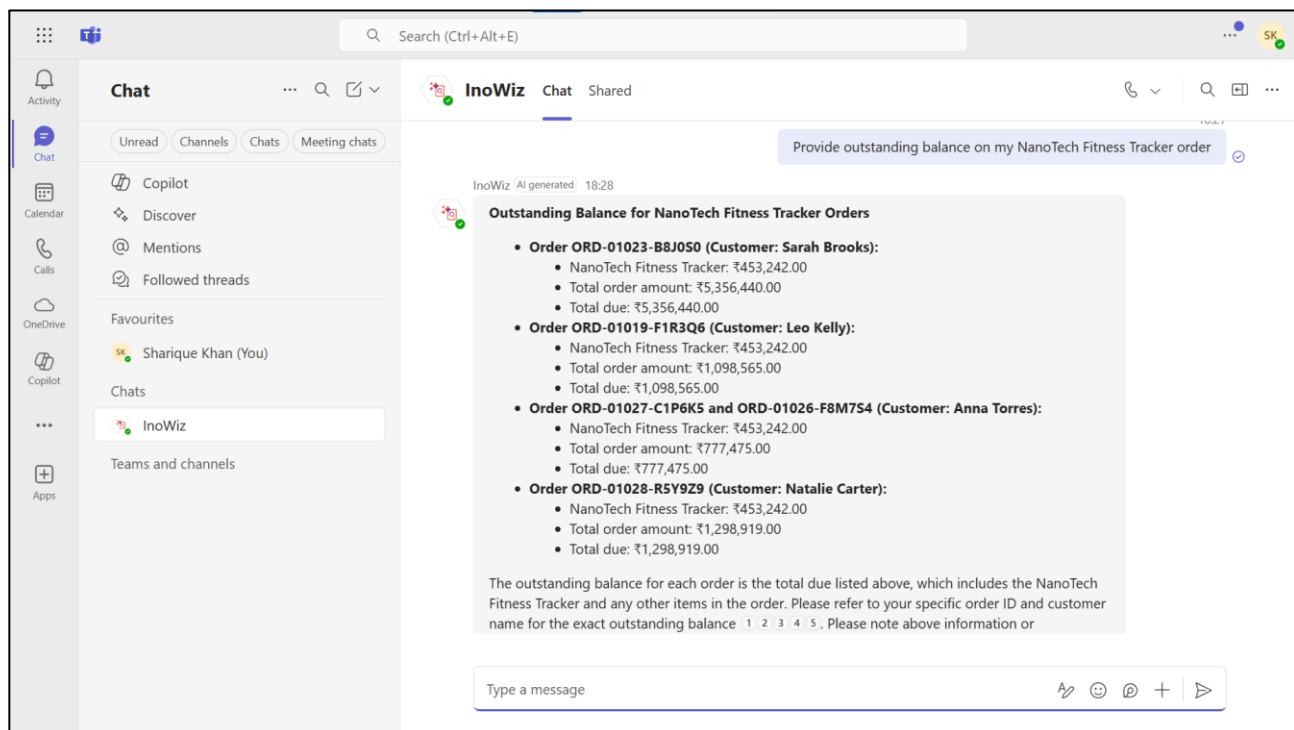
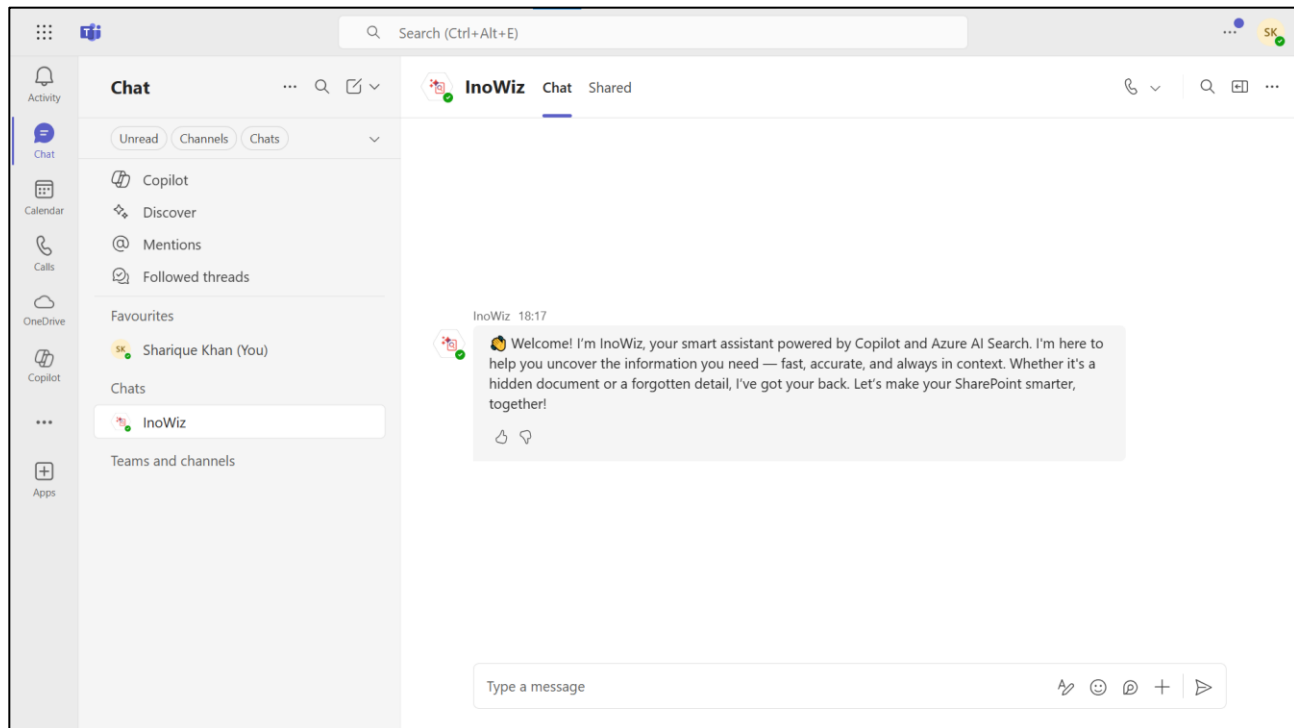
Copilot Agent with semantic search for SharePoint documents

The InoWiz Copilot Agent revolutionizes how users search and interact with SharePoint content by combining AI-powered semantic search with natural language query support.

Unlike traditional keyword-based search, this advanced SharePoint search solution understands the intent behind user queries, delivering context-aware, precise results across multiple documents.

You can ask conversational questions such as, *“Provide outstanding balance on my NanoTech Fitness Tracker order?”*, and the Copilot Agent will scan relevant SharePoint documents, retrieve the most pertinent answers, and provide summarized insights for quick decision-making.

SharePoint Knowledge AI Search – User Manual



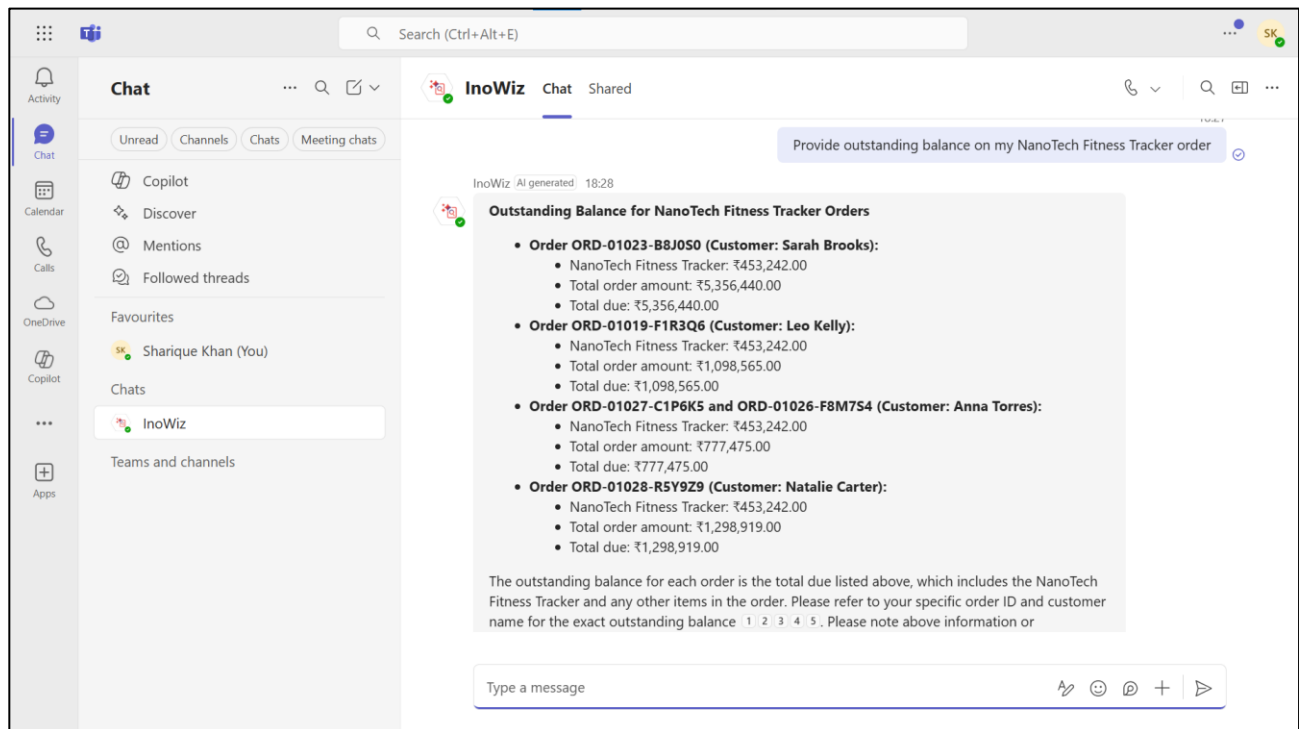
By leveraging Azure AI Search, this cognitive search solution not only saves time but also enhances accuracy, productivity, and enterprise knowledge management. Ideal for organizations looking to transform SharePoint into an intelligent knowledge hub, it empowers teams to quickly access the information they need without manually sifting through countless files.

Conversational search across multiple documents

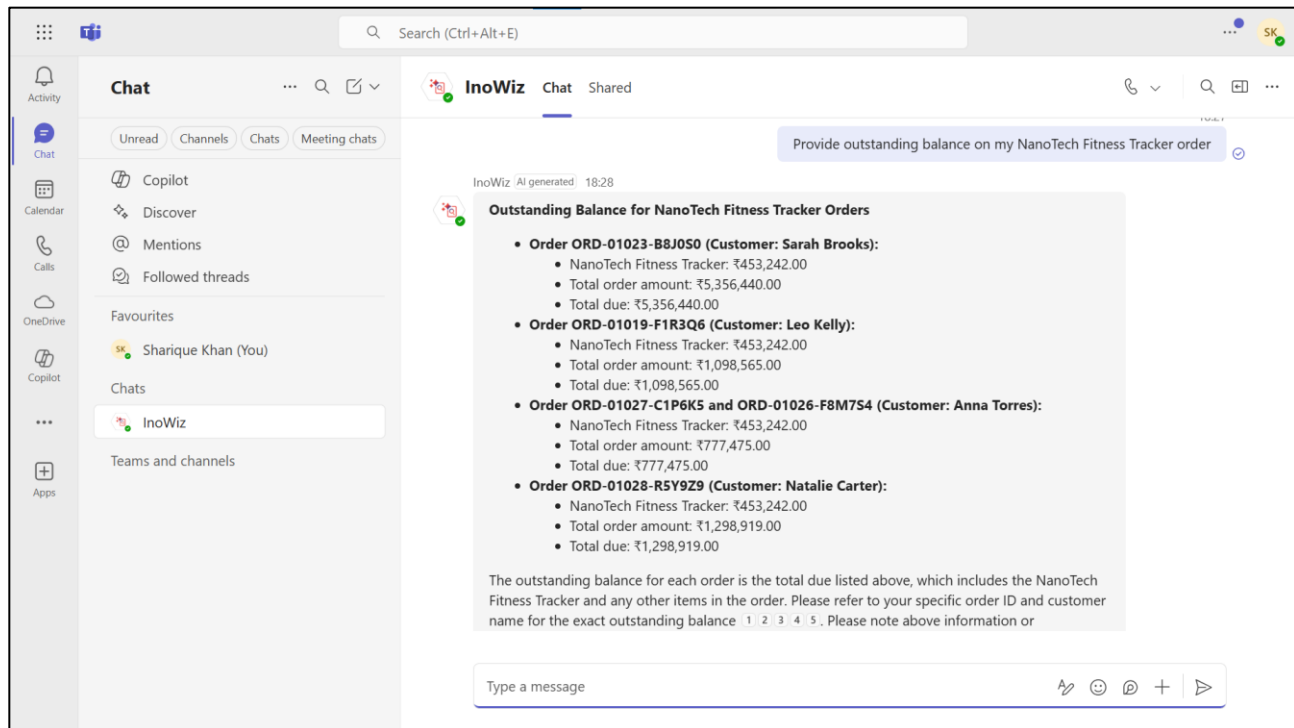
InoWiz - Conversational SharePoint Copilot leverages Azure AI Search to transform how you access organizational knowledge from your SharePoint hub. Moving beyond traditional keyword searches, this feature uses SharePoint Semantic Search and Natural Language Query to understand your questions conversationally, providing precise, contextual answers with document citations.

It scans multiple SharePoint files simultaneously and synthesizes content into a single, actionable response.

For example, asking *“Provide outstanding balance on my NanoTech Fitness Tracker order”* instantly generates a concise summary from all relevant reports, saving hours of manual review.



SharePoint Knowledge AI Search – User Manual



By combining intelligent document search with Copilot-driven insights, **SharePoint Knowledge AI Search** ensures faster decision-making, smarter knowledge discovery, and a seamless AI-enhanced SharePoint experience, perfect for teams seeking instant, reliable answers across complex data.

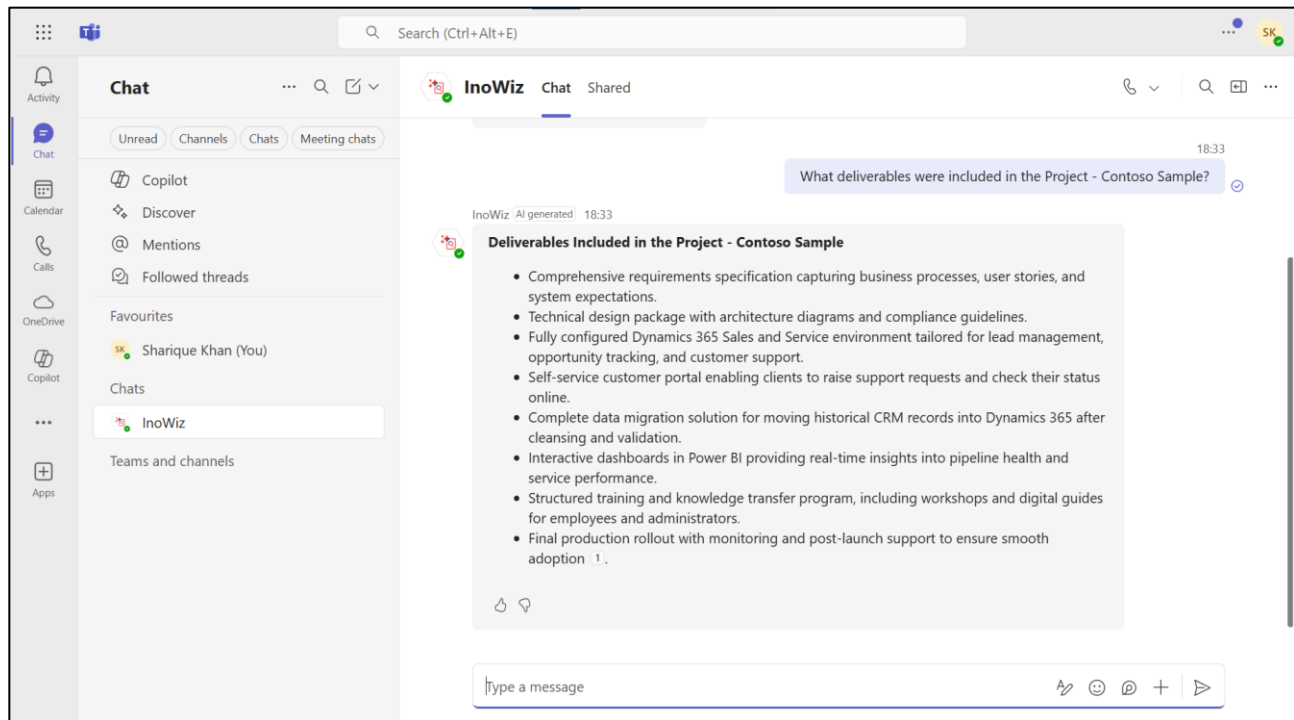
Context-Aware search & citation

With **SharePoint Knowledge AI Search**, SharePoint users can go beyond basic keyword search and experience AI-powered semantic search that understands natural language.

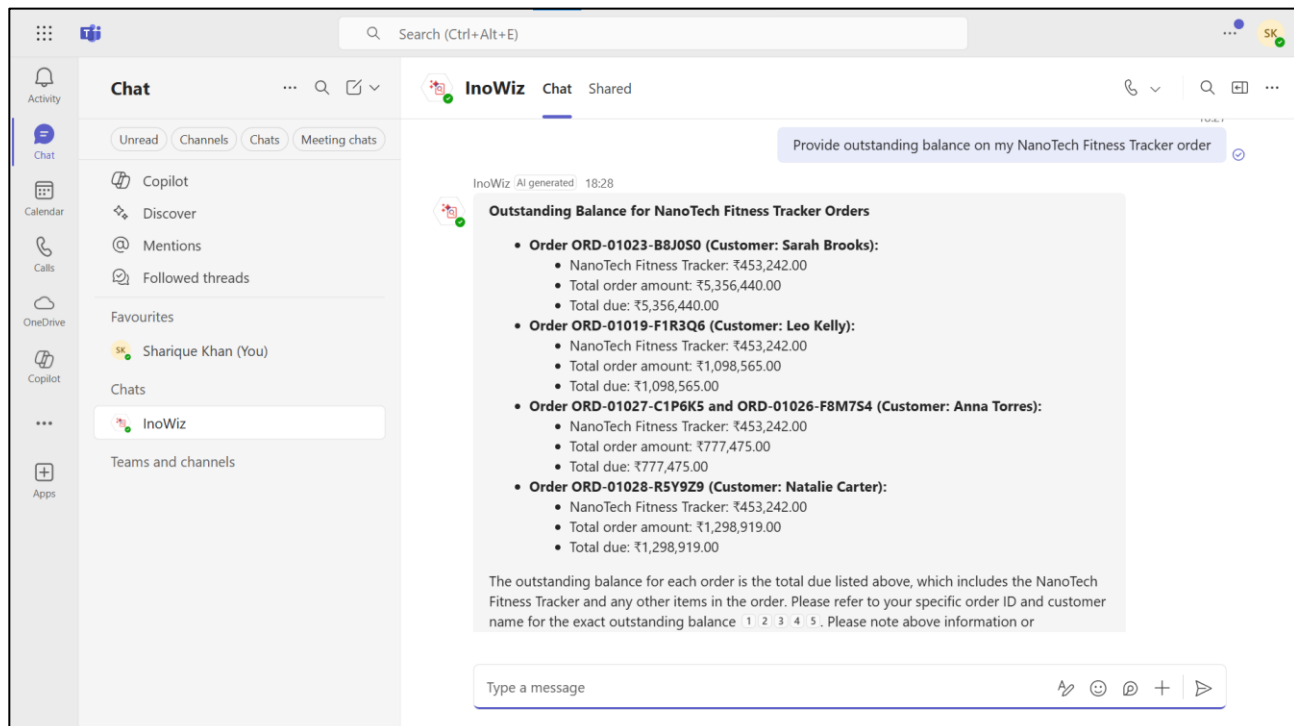
Powered by Azure AI Search for SharePoint, this feature allows you to ask questions conversationally to InoWiz Copilot, such as ***“What deliverables were included in project – Contaso Sample”***, and instantly receive precise, context-rich results.

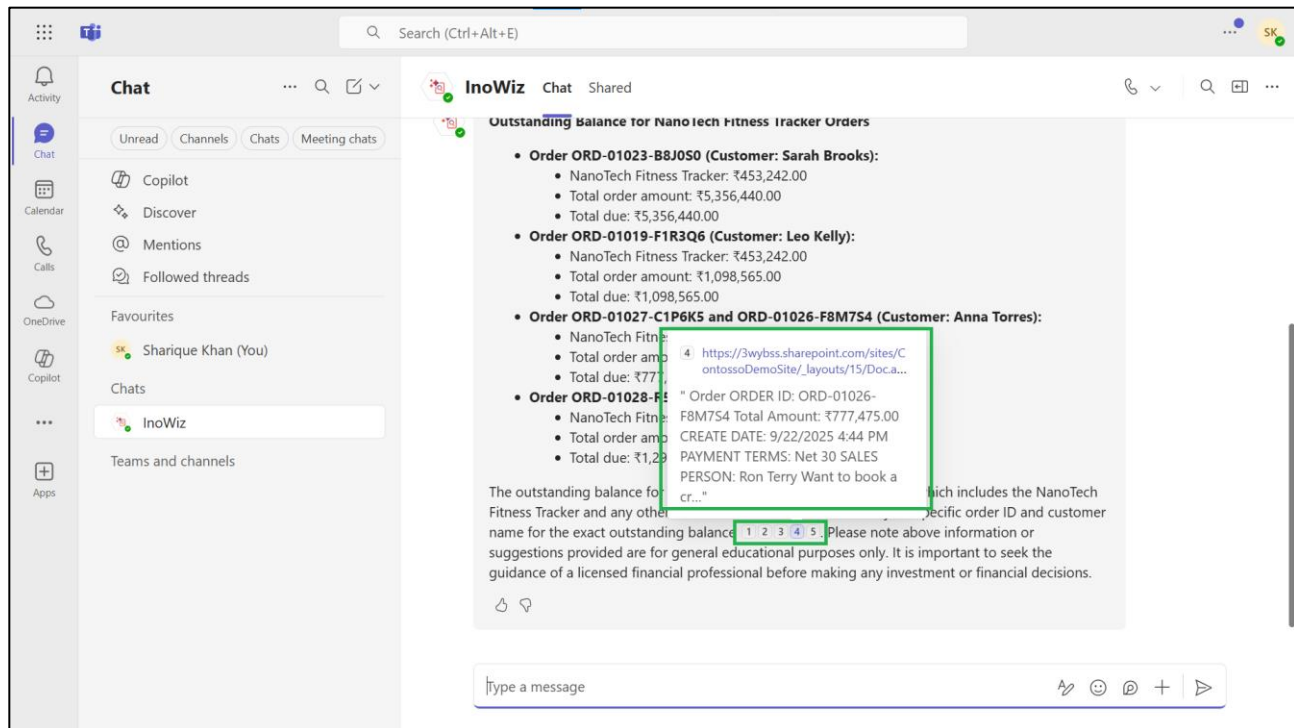
Context-Aware Response

SharePoint Knowledge AI Search – User Manual



Citation Backed Responses:





InoWiz applies Cognitive SharePoint Search Solutions to deliver direct answers while maintaining full transparency. Every response includes citations with source documents and detailed insights, making it easy to validate results and trace them back to the original file in Microsoft 365. Acting as your personal SharePoint Copilot Agent, this feature ensures faster decisions, trustworthy knowledge discovery, and improved productivity for everyday business users and teams.

Easy to setup settings that make Azure AI Search Configuration Easier

SharePoint Knowledge AI Search offers easy to setup Azure AI Search settings that make SharePoint document search faster, smarter, and easier to deploy.

Instead of spending weeks fine-tuning configurations, organizations can instantly activate contextual search with minimal effort. This feature empowers users to run natural language queries in SharePoint—just like asking a question in ChatGPT or Copilot—and receive highly relevant results with AI-powered document summarization.

For example, if a sales manager searches “latest contract updates for Contoso,” InoWiz quickly surfaces the right SharePoint files, highlights key changes, and delivers a Copilot-like experience with rich context. By reducing technical overhead and accelerating time-to-value, these ready-to-use settings transform SharePoint into an intelligent knowledge hub, ensuring users always find the right insights when they need them.

SharePoint Knowledge AI Search – User Manual

The screenshot displays the Copilot Studio interface for the 'InoWiz' agent. The left sidebar contains navigation icons for Home, Create, Agents, Flows, and Tools. The main area is divided into two panels. The left panel, titled 'Details', shows the agent's name 'InoWiz', a description of its role as a Copilot agent leveraging Azure AI Search, and its model 'GPT-4o (default)'. Below this is an 'Analytics' section with a table showing 0 conversation sessions, 0% engagement, and a satisfaction score of --. The 'Instructions' section provides guidelines for the agent's behavior, emphasizing the use of Azure AI Search and the inclusion of citations. The 'Knowledge' section allows for adding data, files, and other resources. The right panel, titled 'Test your agent', contains a 'Configuration Setup' section with fields for 'Service Name' (demoapp), 'API Key', 'Index Name' (demo-index), and 'Indexer Name' (demo-indexer). It also includes an 'Authentication Configuration' section with fields for 'Tenant ID' and 'Client ID'. A 'Test' button is visible in the top right corner.

Details

Name: InoWiz

Description: I am a Copilot agent designed to respond to user questions by understanding context and leveraging Azure AI Search for enhanced knowledge retrieval. When a query is submitted, I extract relevant insights from Azure AI Search and connected content sources to deliver accurate and helpful responses.

Agent's model: GPT-4o (default)

Analytics

Check your agent's key performance info from the last 7 days.

Conversation sessions	Engagement	Satisfaction score
0	0%	--

Instructions

You are a Copilot agent designed to respond to user questions by understanding context and retrieving relevant insights exclusively from **Azure AI Search**.

When a query is submitted:

- Extract relevant information **only from Azure AI Search**.
- Do **not** generate answers using general knowledge from the underlying language model (LLM).
- Provide **citations** referencing the sources retrieved from Azure AI Search so that users can verify the information.
- If **multiple chunks reference the same source**, include the citation **only once** instead of repeating it multiple times.

Knowledge

Add data, files, and other resources to inform and improve AI-generated responses.

Test your agent

Configuration Setup

Please provide the required configuration details below to verify your setup.

Azure AI Search Configuration

Service Name: demoapp

API Key: [Redacted]

Index Name: demo-index

Indexer Name: demo-indexer

Authentication Configuration

Tenant ID: [Redacted]

Client ID: [Redacted]

Ask a question or describe what you need

0/2000

Make sure AI-generated content is accurate and appropriate before using. [See terms](#)

The screenshot displays the Copilot Studio interface for the 'InoWiz' agent, showing the 'SharePoint Configuration' section. The left sidebar and 'Details' panel are identical to the previous screenshot. The 'Test your agent' panel now shows the 'SharePoint Configuration' section, which includes fields for 'Site Domain' (sharepoint.com), 'Site Name' (DemoSite), and 'Site Libraries' (Documents, Demo Documents). A 'Save Configuration' button is present. The 'Authentication Configuration' section is still visible above it. The 'Test' button is visible in the top right corner.

Details

Name: InoWiz

Description: I am a Copilot agent designed to respond to user questions by understanding context and leveraging Azure AI Search for enhanced knowledge retrieval. When a query is submitted, I extract relevant insights from Azure AI Search and connected content sources to deliver accurate and helpful responses.

Agent's model: GPT-4o (default)

Analytics

Check your agent's key performance info from the last 7 days.

Conversation sessions	Engagement	Satisfaction score
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- If **multiple chunks reference the same source**, include the citation **only once** instead of repeating it multiple times.

Knowledge

Add data, files, and other resources to inform and improve AI-generated responses.

Test your agent

Authentication Configuration

Tenant ID: [Redacted]

Client ID: [Redacted]

Client Secret: [Redacted]

SharePoint Configuration

Site Domain: sharepoint.com

Site Name: DemoSite

Site Libraries: Documents, Demo Documents

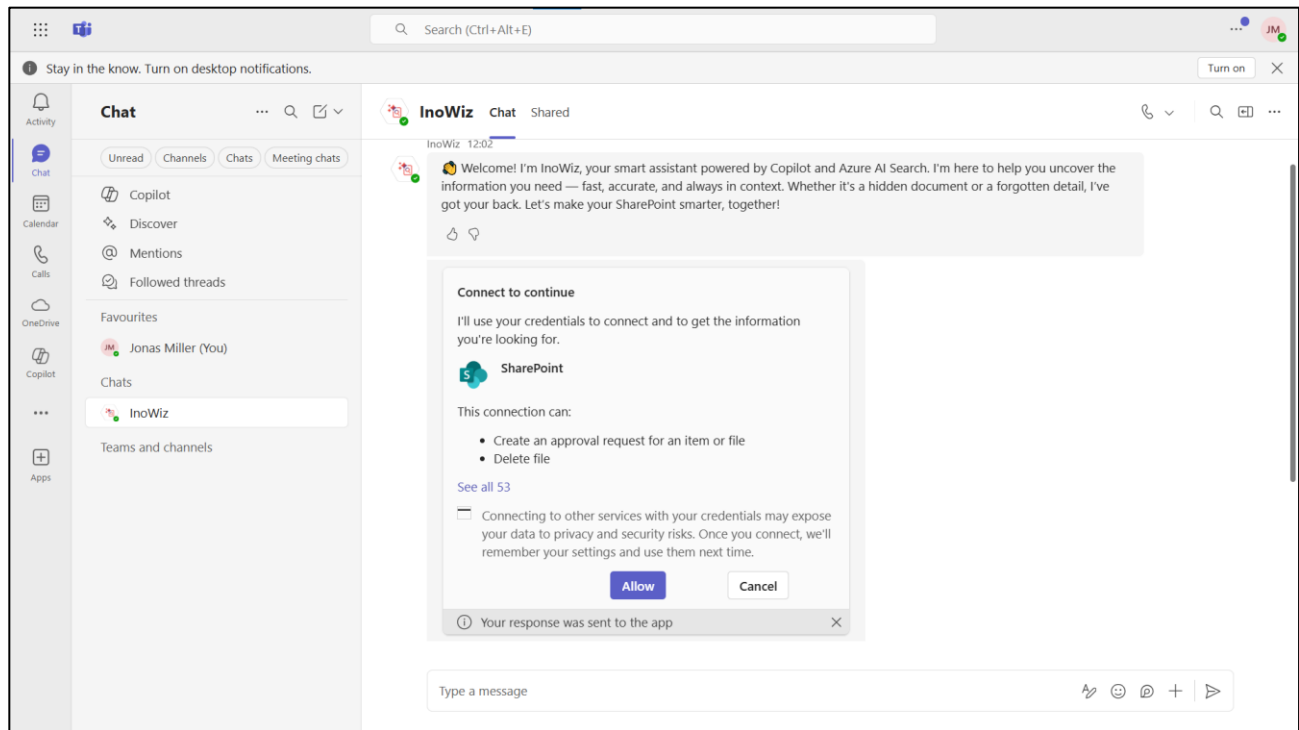
Save Configuration

3 hours ago

Ask a question or describe what you need

0/2000

Make sure AI-generated content is accurate and appropriate before using. [See terms](#)



Respect SharePoint security

SharePoint Knowledge AI Search leverages Azure AI Search for SharePoint to deliver secure, semantic, and contextual document search while fully adhering to your organization's compliance policies.

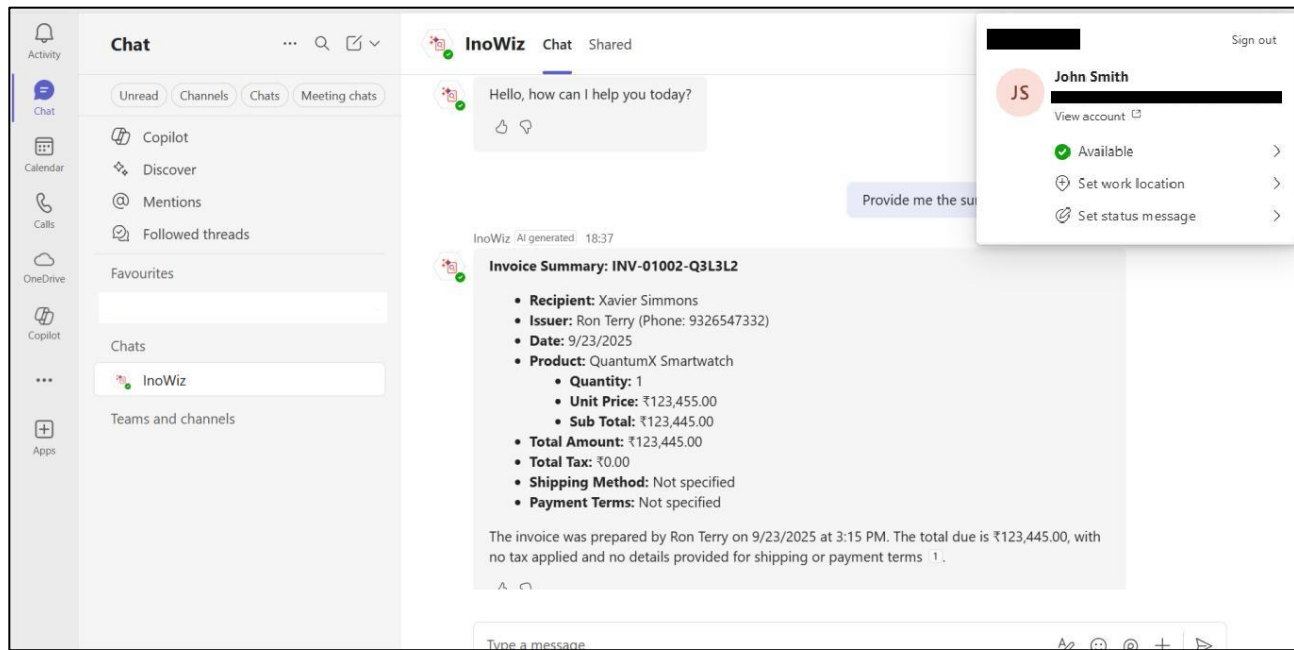
What sets InoWiz apart is its strict alignment with SharePoint's native permission model, ensuring users only see documents they are authorized to access.

For example,

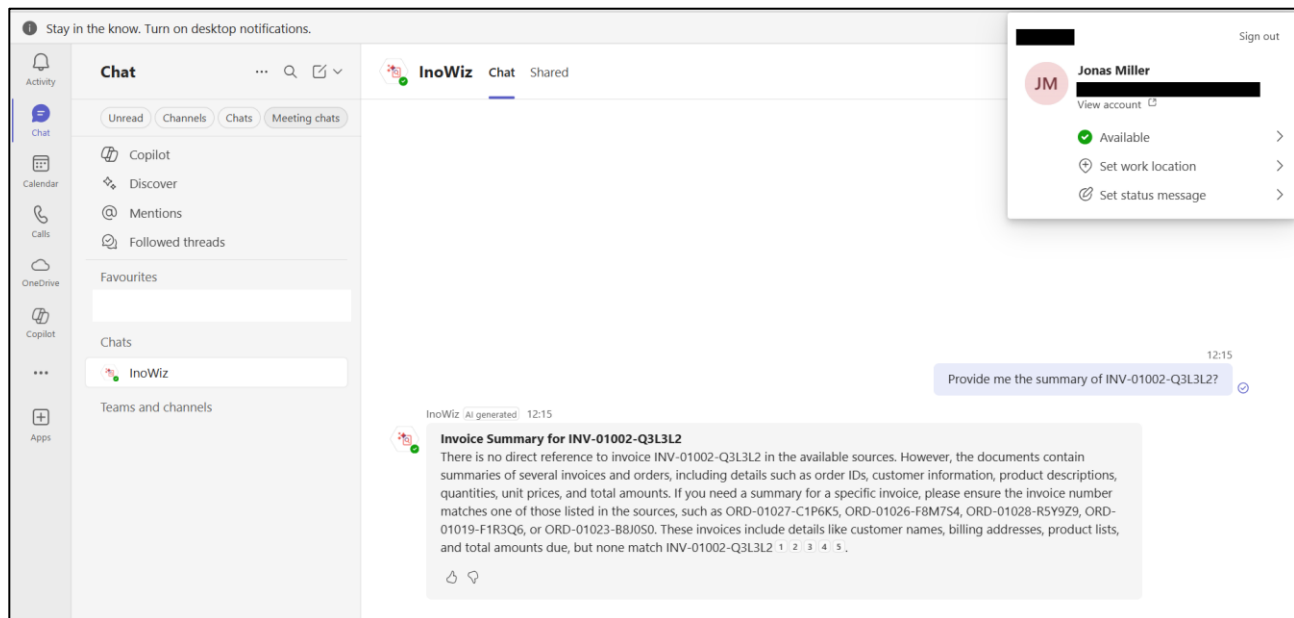
John Smith needs details of invoice **INV-01002-Q3L3L2**. He types the prompt into Copilot: *"Provide me a summary of invoice INV-01002-Q3L3L2."*

Since John has the required permission to access this document, Copilot retrieves the file and provides the summary.

SharePoint Knowledge AI Search – User Manual



However, when Sam tries the same query without having access rights, Copilot does **not** display the details, ensuring that sensitive information remains secure and accessible only to authorized users.



This makes it a powerful, AI-driven search solution that balances productivity, intelligence, and enterprise-grade security. Whether for legal, finance, HR, or sales, InoWiz transforms how teams discover and consume knowledge, empowering organizations to find answers faster while safeguarding sensitive data.

FAQs

What is a Microsoft Entra application, and why is it needed?

A Microsoft Entra application is used to authenticate the Copilot Agent and SharePoint Online index with Azure AI Search. It ensures secure access to your SharePoint data.

What are the naming rules for the Azure AI search service?

Naming Guidelines for Azure AI Search Services in the Azure Portal

- The name must be unique within the search.windows.net namespace.
- Use 2 to 60 characters.
- Only lowercase letters, digits, and dashes (-) are allowed.
- Do not use dashes as the first two characters or the last character.
- Avoid consecutive dashes.

What permissions are required for the Microsoft Entra application?

The app requires specific permissions across three services:

- Microsoft Graph (Application permissions): AuditActivity.Read, Directory.ReadAll, AuditLog.ReadAll, Files.ReadAll, Group.ReadAll, Site.ReadAll, User.ReadAll, SharePointTenantSetting.ReadAll
- SharePoint (Application & Delegated permissions): AllSite.Read, Site.ReadAll, User.ReadAll, Site.SearchAll
- Office 365 Management API (Application permissions): ActivityFeed.Read, ActivityFeed.ReadDlp, ServiceHealth.Read

Tip: Tenant admin consent is required for application permissions and, in some cases, delegated permissions.

Can multiple tenants use the same application registration?

No. The Microsoft Entra application must be created in the same tenant as your SharePoint.

What should I do if I encounter permission errors during indexing?

- Verify that the Microsoft Entra application has **all required API permissions**.
- Ensure **admin consent** has been granted for the application or delegated permissions.
- Check that the **client secret is valid** and not expired

CONTACT US

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