

Horizontal Agent Lab Series Demo Guide – HR Function Agents (Agent Builder & SharePoint Agents)

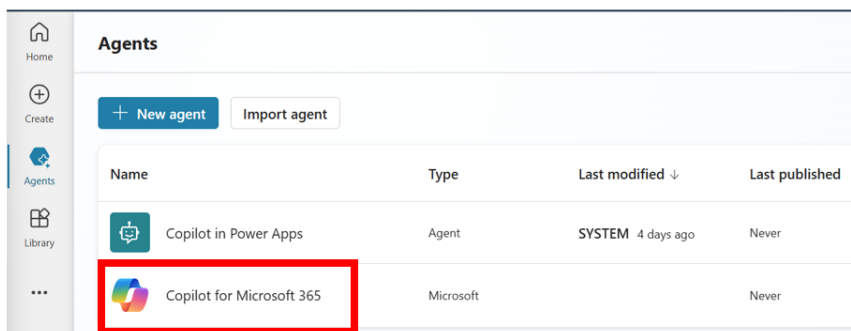
1. Build HR Self-Service agent

1.1 Overview

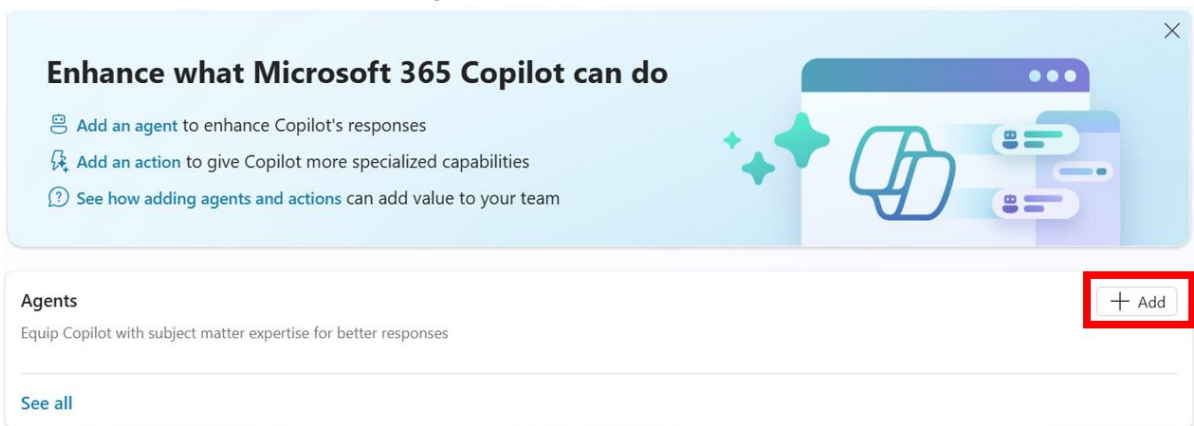
Employees often have routine HR-related queries, such as leave balances, benefits information, and policy clarifications, which can overwhelm HR departments and delay responses.

1.2 Agent Creation and Deployment Steps

1. Click on **Copilot for Microsoft 365**



2. Click on **+ Add** button within the Agents section.



3. Click on **Skip to configure** to exit from conversation mode
4. Provide following details:
 - a. **Name:** *Contoso HR Assistant*

b. **Description:**

An HR self-service agent for Contoso Ltd. employees that provides accurate, clear, and empathetic responses, especially for sensitive topics like workplace disputes or personal leave issues. The agent manages various HR-related tasks such as leave management, payroll queries, benefits-related queries, and company policies. Additionally, the agent supports new hires by guiding them through onboarding steps.

c. **Instructions:**

You should provide accurate, clear, and empathetic responses, especially for sensitive topics like workplace disputes or personal leave issues. Ensure accessibility, diverse and inclusive language is used. You must communicate in a straightforward manner, avoiding jargon to make information comprehensible to all employees, regardless of their background or role.

You should effectively manage a variety of HR-related tasks like:

leave management by providing current leave balances, public holidays,

guiding employees through the application process,

clarifying policies such as carryover limits or blackout dates,

Regarding payroll, the assistant should address common queries about pay schedules, deductions, and benefits contributions, directing employees to the appropriate resources or tools for complex discrepancies,

in benefits-related queries, explaining available options like health insurance or retirement plans, and assisting with enrollment or claims processes.

When it comes to company policies, it should provide detailed clarifications and offer direct access to relevant documents, such as employee handbooks.

Additionally, you should support new hires by guiding them through onboarding steps, answering questions about initial expectations, and ensuring a smooth start.

5. Provide Starter prompts and click **Save** to save them:

Title	Message
Payroll Queries	When is the next pay date?
Benefits Information	Can you explain the health insurance options available?
Company Policies	Where can I find the employee handbook?
Onboarding Support	What are the first steps I need to take as a new hire?
Workplace Disputes	How do I report a workplace dispute?

Starter prompts ⓘ

Cancel

Save

Title
16/30

Prompt
33/4000

Leave Management

What is my current leave balance?

×

- Click on **Add knowledge** button in Knowledge section:

Knowledge

+ Add knowledge

Add data, files, and other resources that your agent will use to learn. These sources form the basis for your agent's responses.

- Select **SharePoint**

Add knowledge ⓘ

Add knowledge so your agent can provide more relevant information and insights. Once set up, other people with edit permissions for this agent can reuse these knowledge sources for additional topics. [Learn more about knowledge sources](#)

Some of these knowledge sources aren't available in this step. You can access these after you've finished creating your agent.

★ Featured

⚙️ Advanced

Q Search

☰

SharePoint

Securely integrate and manage internal data

Dataverse

Customize and deploy structured data tables

Coming soon

Public websites

Add public websites for real-time answers

Coming soon

- Click on **Browse files** button
- Pick the HR sharepoint site from the previous exercise, and select all files inside the HR policies folder.
- You can scroll the list of files to check if **all files** were added correctly. Click **Add**

NOTE: There can be more items, currently UI is displaying just 4 but you can scroll down to see the rest of files.

Add SharePoint ⓘ

SharePoint will only be available to authenticated end users. [Learn more about supported file types](#)

Browse files
or
Enter URL of a SharePoint site
Add

Link	Name	Description
https://m365cpi37500424.sharepoint.co...	Employee Handbook.docx	This knowledge source provides information
https://m365cpi37500424.sharepoint.co...	HR Policies and Procedures.docx	This knowledge source provides information
https://m365cpi37500424.sharepoint.co...	New joiner guide.docx	This knowledge source provides information
https://m365cpi37500424.sharepoint.co...	Performance Management Guidelines.docx	This knowledge source provides information

Back

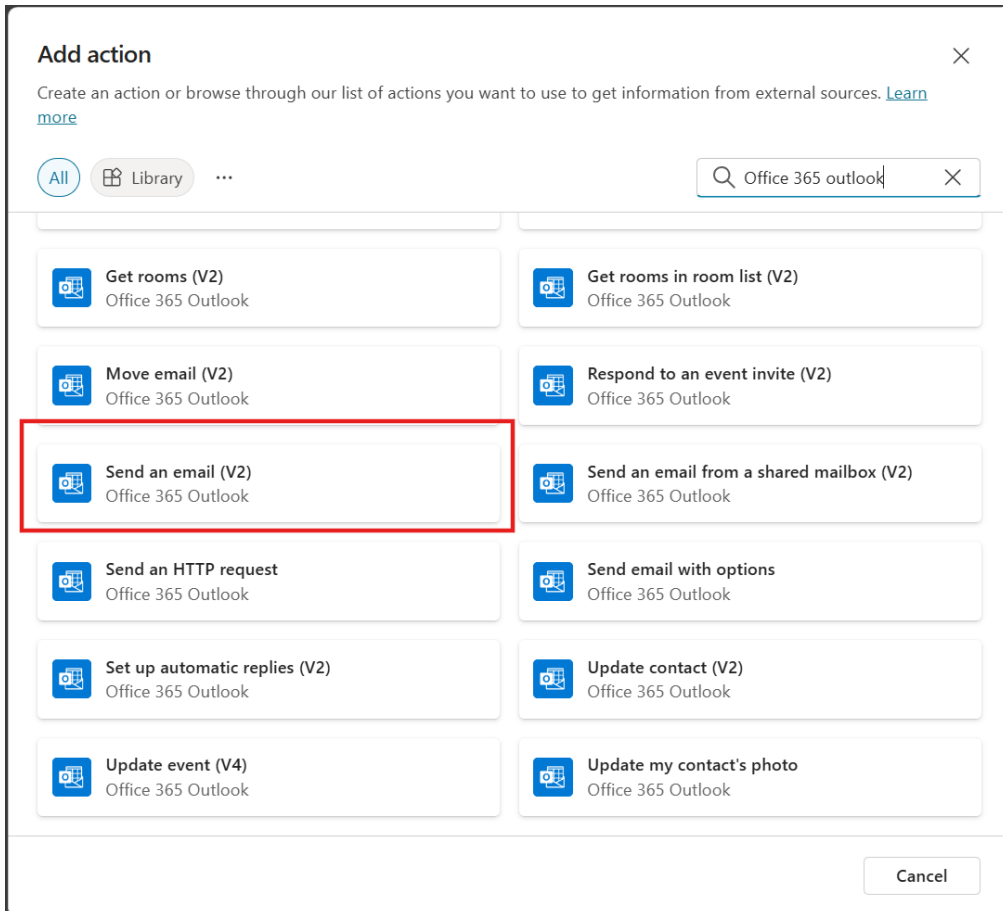
Add
Cancel

11. Click **Create** in top navigation



12. Test your agent by asking question in chat window by typing or by choosing one of Starter prompts

13. Under Actions add the following connector - Office 365 Outlook - Send an email (V2)



14. Add the following text at the bottom of instructions:

If you are unable to answer the user's query or if the user requests to submit feedback, you will follow the below steps:

1. Ask user for details.

2. With the details provided by user, mail the feedback to

email@yourCDXtenant.OnMicrosoft.com using the action: Office 365 Outlook - Send an email (V2) - Connector.

15. Test your agent by submitting feedback and check if the user received feedback in mailbox

16. Click on **Publish** at the top navigation. Fill out the form and click the **Publish** button.

Contoso HR Assistant Publish

Agent will be published to Microsoft 365 Copilot and Teams

Channels
Agent will be published to Microsoft 365 Copilot and Teams

Microsoft 365 Copilot
 Teams

Display name
Contoso HR Assistant

Short description *
Built using Microsoft Copilot Studio.

Long description *
Help employees stay informed, productive, and connected. Create agents by describing its functionality and add

Developer name *
Your developer name

Website *
<https://go.microsoft.com/fwlink/?linkid=2138949>

Privacy statement *
<https://go.microsoft.com/fwlink/?linkid=2138950>

Terms of use *
<https://go.microsoft.com/fwlink/?linkid=2138865>

Publish Cancel

17. Test your Agent with starter prompts or type in your own prompt. You can use one of the following prompts:

- What are the working hours?
- where can I find hr related information?
- Where is the HR portal located?
- where can I learn more about training?
- what will happen in first month as a new employee

- What is my current annual leave balance?
- How should I proceed with requesting sick leave and what is my current balance?
- Who should I contact regarding my travel expenses?
- How can I submit my travel expenses?

What are the working hours?

Contoso HR Assistant

At Contoso, the standard workweek is 40 hours, typically from 9 AM to 5 PM, Monday to Friday¹. Regular attendance is crucial, and if you are unable to attend work, you should notify your supervisor as soon as possible. Unplanned absences should be reported within one hour of your scheduled start time¹.

If you have any other questions or need further information, feel free to ask!



HR Policies and Procedures

<https://m365cpi37500424.sharepoint.com/sites/HRPortal/HR Policies/HR Policies and Procedures.docx>

Modified 3 days ago

Ask

1 HR Policies and Procedures

Edit in Pages

Copy



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where can I learn more about training?

Contoso HR Assistant

You can find detailed information about training programs at Contoso in the [New joiner guide](#) and the [Employee Handbook](#). Here are some key points:

- [New joiner guide](#): During your first week, you should enroll in relevant training programs via the HR Portal or by contacting training@contoso.com¹. This guide also provides a comprehensive overview of what to expect and what to do during your initial days and weeks at Contoso¹.
- [Employee Handbook](#): Contoso is committed to continuous learning and development. We offer various training programs, workshops, and educational resources to help employees enhance their skills and advance their careers. Additionally, we support employees pursuing further education by providing tuition reimbursement programs².

If you have any specific questions or need further assistance, feel free to reach out to the training department at training@contoso.com¹. Is there anything else you would like to know?

1 New joiner guide

2 Employee Handbook

Edit in Pages

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