

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

1. Build onboarding assistant agent

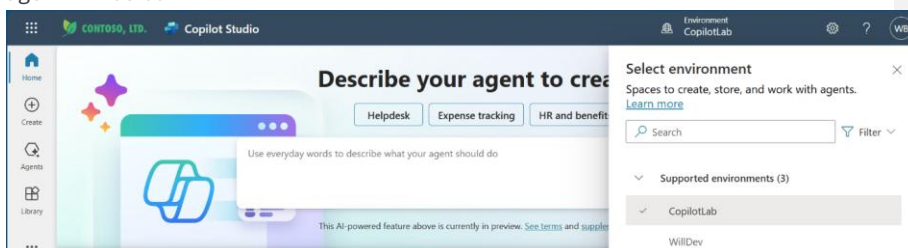
1.1 Overview

New hires often face challenges in understanding company policies, accessing necessary resources, and integrating into the team. This can lead to a prolonged onboarding process and decreased productivity.

1.2 Agent Creation and Deployment Steps

We will use conversational experience to build an onboarding assistant. You can skip conversational experience at any time by selecting **Skip to configure** button.

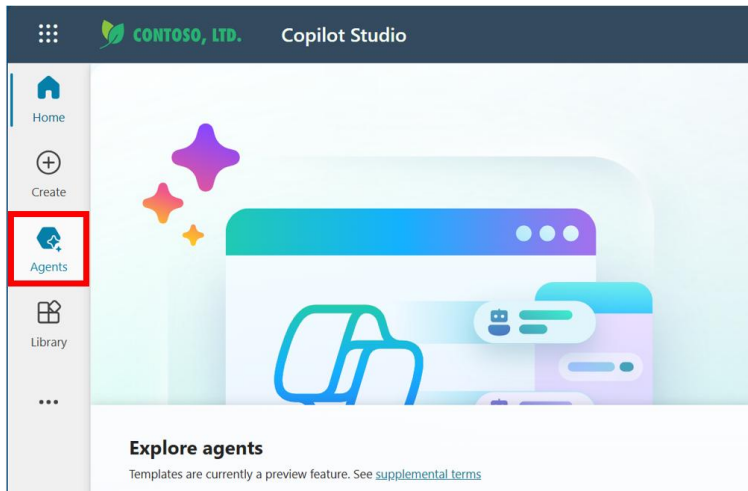
1. Navigate to <https://copilotstudio.microsoft.com> and select Environment where agent will be built.



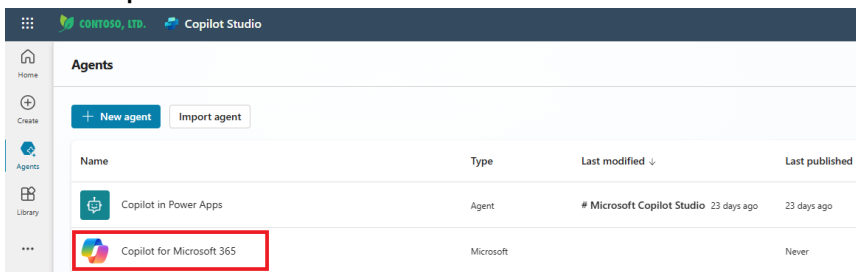
Commented [IB1]: Hi @Michal Slowikowski , I added agent at the end

I added what I mean by adding Situation , Solution, (please fill Michal for al sections) and added Creating and Deployment steps

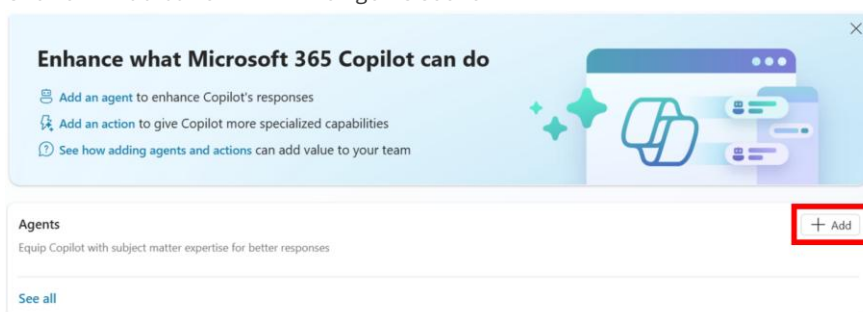
2. Select Agents on the left navigation.



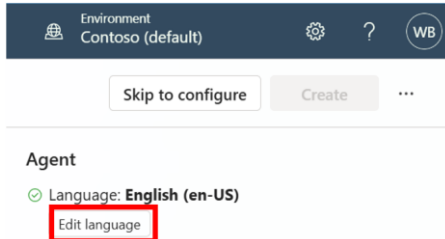
3. Click on **Copilot for Microsoft 365**



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



5. Select primary agent language by clicking **Edit language** button. Primary agent language cannot be changed later.



6. Start conversation with agent builder. In the first step you will explain what you are building. You can experiment with your own prompts, or you can use below sample:

I want to build an assistant responsible for providing clear and insightful instructions to new employees joining the company. Your role is to reactively respond to all questions about company-related information for new joiners and other employees. Provide detailed explanations to users. Whenever a user asks about the next steps, inquire if they are just starting, if it is their first week, or their first month to provide the most relevant information.

Sample prompts:

"What are the steps to complete my onboarding process?"

"Can you guide me on how to access the company's intranet?"

"What should I do in my first week at the company?"

7. Provide the name for your assistant - you can either use auto generated suggestions, ask for more examples, or just provide your own agent's name.

Great! Now let's determine a name for your assistant. How about "Onboarding Guide"?
Please confirm if you like this name or suggest another one.

Make it Onboarding Assistant

Now, let's refine the instructions for the Onboarding Assistant.
First, let's define the main actions and behavior. What specific tasks should the Onboarding Assistant perform? For example, should it provide step-by-step guides, connect new employees with mentors, or offer resources for company policies?

8. After assigning name, refine instructions by providing further details

Whenever it is required provide clear list of tasks, people to reach out to and expected outcomes

Detailed Explanation: Provide a thorough and clear explanation based on the HRPortal information.

Follow-Up Question: Ask the user if they are just starting, if it is their first week, or their first month to tailor the information accordingly.

9. Provide information about style of response:

Stay professional and empathic, use diverse and inclusive language

10. After finishing setup click on **Create** button. You will see that description and Starter prompts will be automatically filled out.

11. 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.

12. Select **SharePoint**

Add knowledge

Help your agent provide more relevant information and insights. [Learn more](#)

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

Search for a knowledge source

Featured

Advanced

Public websites

Coming soon

SharePoint

Dataaverse

Dynamics 365

Cancel

13. Click on **Browse items** button

SharePoint

SharePoint will only be available to authenticated end-users. [Learn more](#)

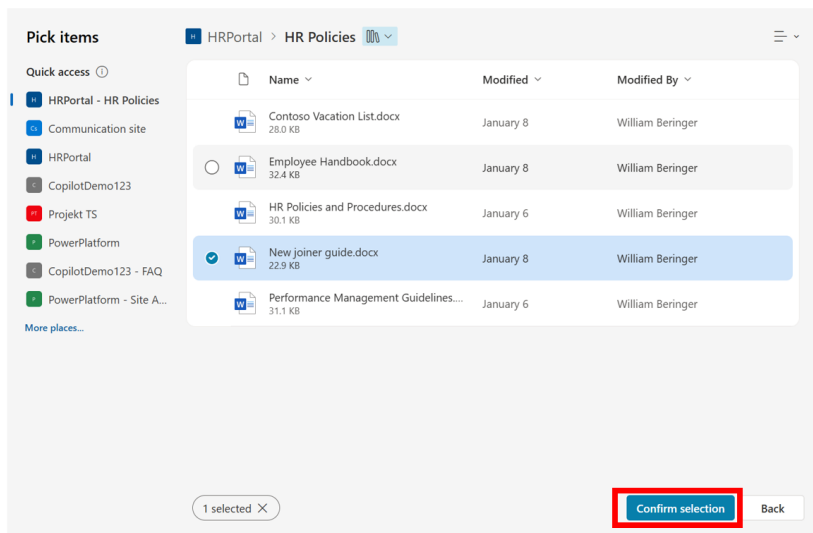
Browse items

or

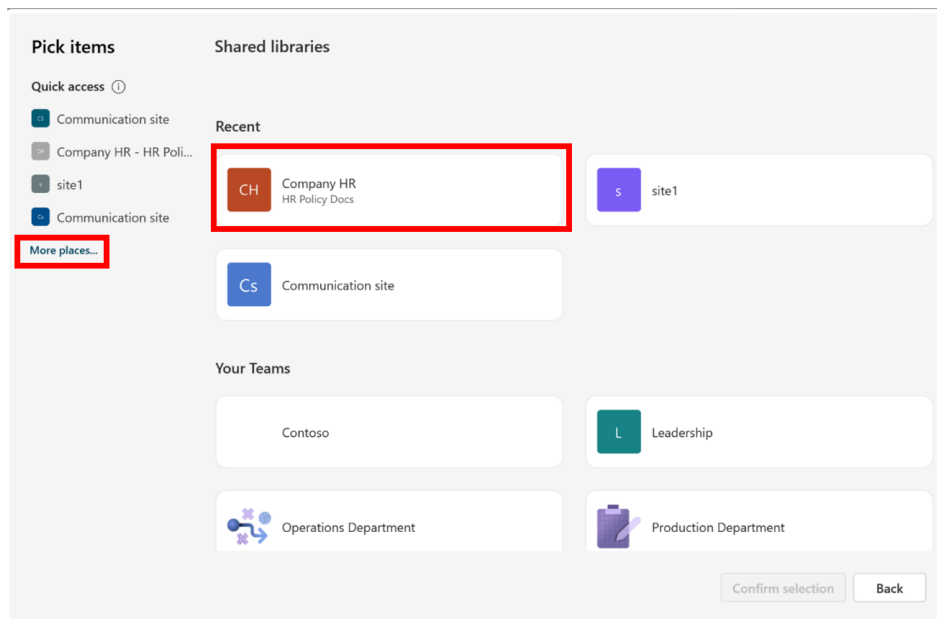
Enter URL of a SharePoint site

Add

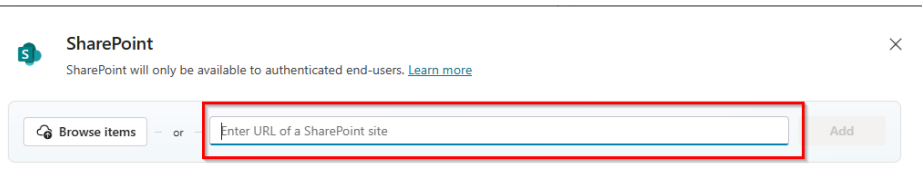
14. From item picker, pick **HR Policy Docs** library from left navigation, select “**New joiner guide.docx**” and click on **Confirm selection** button.



NOTE: if your library is missing from the left navigation, click on **More places** and click on your SharePoint site.





If your site is still missing, it means that it wasn't indexed yet. To proceed with demo, you can click on **Back** button and provide direct path to specific SharePoint site and click **Add**:

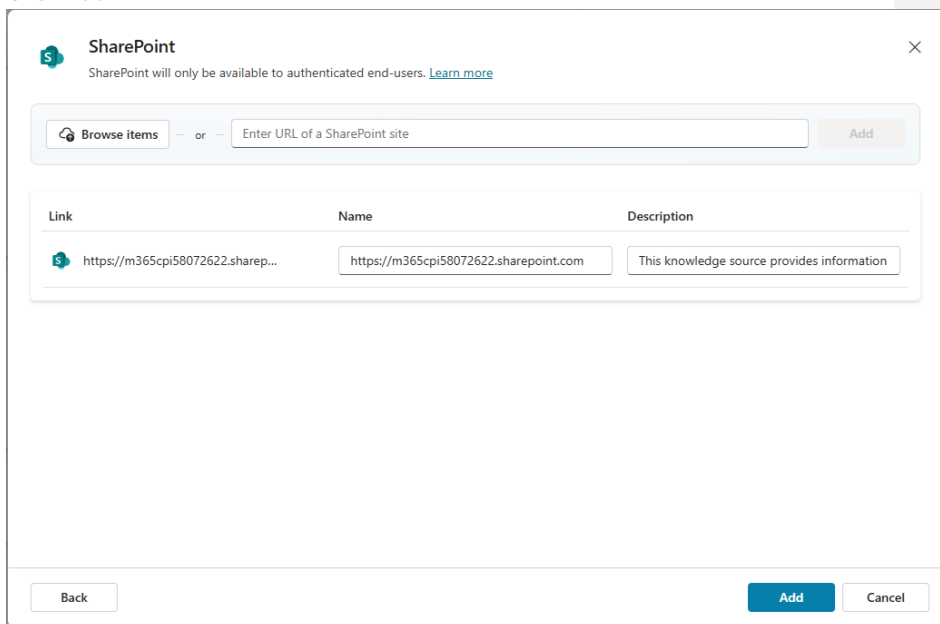


SharePoint

SharePoint will only be available to authenticated end-users. [Learn more](#)



 Browse items — or — 


15. Click **Add**






SharePoint

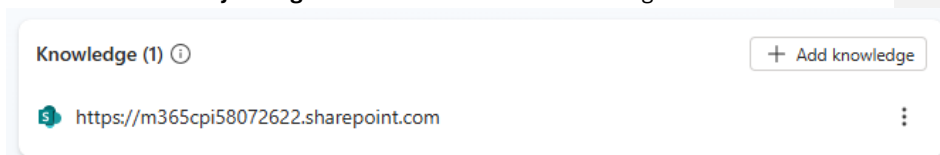
SharePoint will only be available to authenticated end-users. [Learn more](#)


 Browse items — or — 



Link	Name	Description
 https://m365cpi58072622.sharep...	https://m365cpi58072622.sharepoint.com	This knowledge source provides information

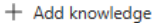
  

You should see **new joiner guide.docx** added to the knowledge section:

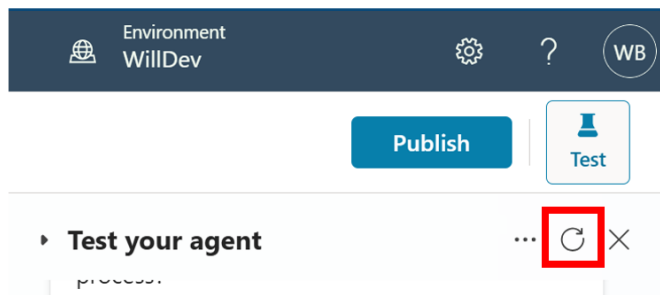


Knowledge (1) 

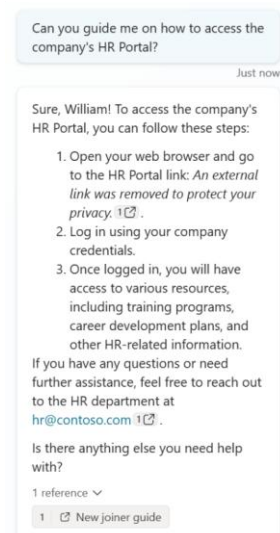
 <https://m365cpi58072622.sharepoint.com> 



16. Refresh the chat session to use recently added knowledge by clicking the refresh button:



17. Test out your agent in Microsoft Copilot Studio



Commented [VK2]: @Michal Slowikowski, can we put some more screen shots showcasing the different prompts for onboarding

Commented [MS3R2]: @Vishal KULSHRESHTHA do we need to? It's just showcasing, so we can definitely provide more examples of prompts to type in but screenshots?

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


Publish agent


×

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

Onboarding Assistant

Short description *

Built using Microsoft Copilot Studio.

Long description *

Help employees stay informed, productive, and connected. Create agents by describing its functionality and addi

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

19. Wait for assistant to get published

Publish agent

×

Agent will be published to Microsoft 365 Copilot and Teams




Publishing your agent

Closing this modal will discard the publishing progress

20. Deploy your agent into the whole organization. Click **Show to everyone in my org.**

Share link

Shared users can open the agent in Microsoft 365 Copilot with this link. [Manage sharing](#)

 Copy


User access

Show to my teammates and shared users
Appear under the works with agent section

Show to everyone in my org
Submit to your admin for approval to appear under Built by your org section

Download as a .zip

You can upload the agent directly as a custom app into Microsoft 365 Copilot. [Learn more](#)

 Download .zip file

Back

Done

Cancel

21. Confirm sharing with organization:

Share this agent with your organization

Get your agent ready

Admins can feature your agent prominently as an app in the Built by your org section of Microsoft Teams, pre-install for users in your org, and more. [Learn more](#)

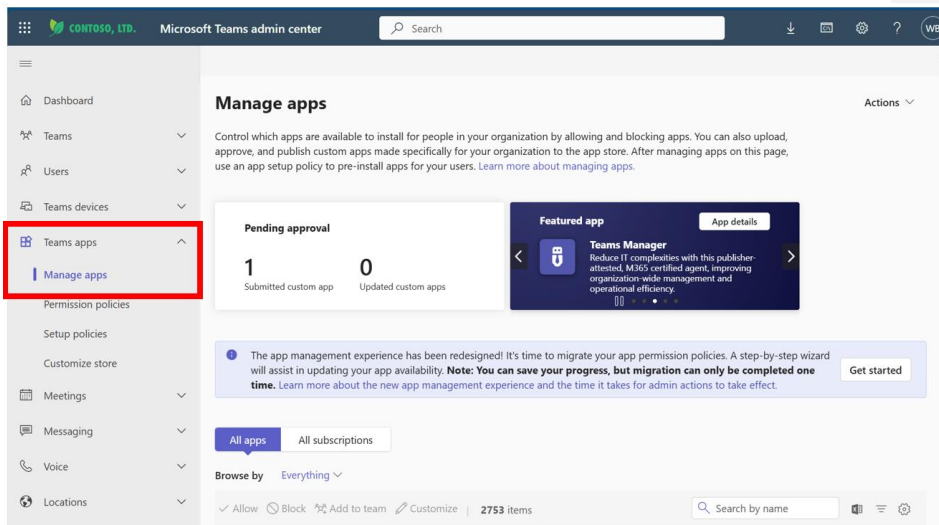
Before submitting, make sure to:

- Ensure your agent is ready for release and in compliance with company standards, rules, and policies
- Coordinate with your teammates. Once the agent is submitted, it can't be resubmitted by others until an admin approves or rejects it

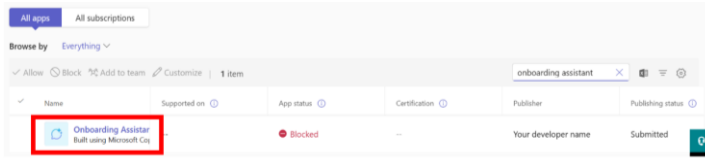
Yes

Cancel

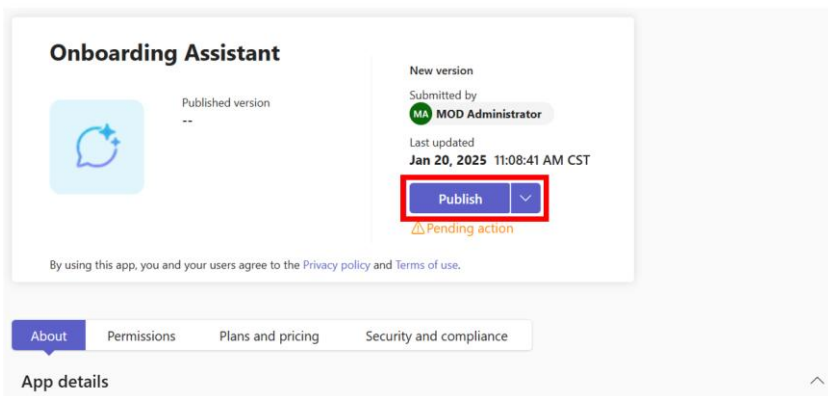
22. As a Teams Administrator go to [Teams Admin Center](#) and in **Teams Apps** section, select **Manage Apps**.



23. Search for your agent.

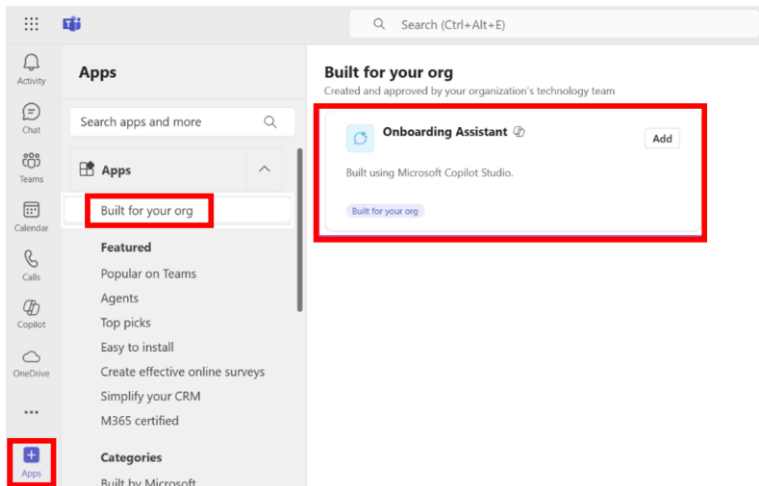


24. Select it and publish it to Teams catalog.



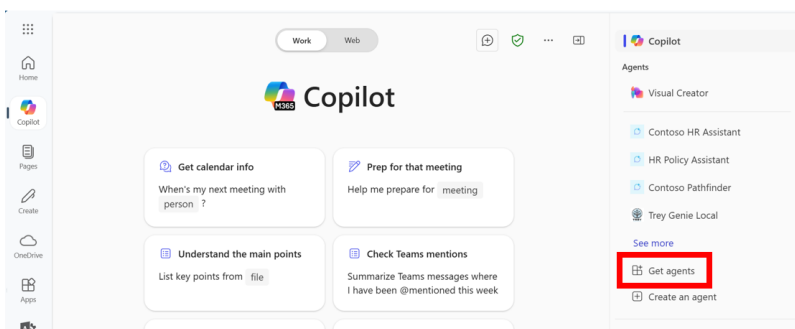
25. Go to Microsoft Teams (web or desktop), select Apps and **Built for your org** and add the agent to your Microsoft 365 Copilot chat. As an alternative, you can also go to your [Copilot](#) website and add your agent there:

a. **OPTION A – Microsoft Teams**



Go to **Apps > Built for your org > Onboarding Assistant**. Click **Add** on the next screen.

b. **OPTION B – In M365 Copilot** click on *Get Agents* in right navigation



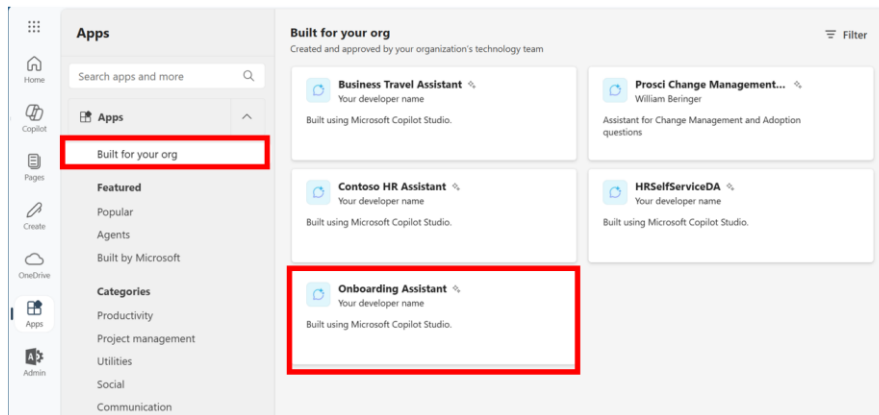
In next screen select **Built for your org** and select **Onboarding Assistant**

Commented [VK4]: @Michal Slowikowski , can we add some screen shot for using the different prompts for onboarding agent after publishing it?

Commented [IB5R4]: Love the idea Vishal. Thanks

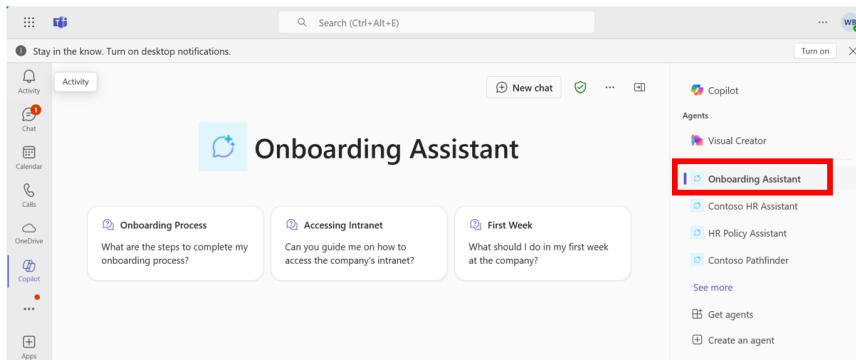
With clear show case result impact and value . How the agent can help HR in their KPI

Commented [MS6R4]: @Vishal KULSHRESHTHA and @Iman Boukly as with previous comment - wouldn't the one screenshot of using the agent be sufficient and rather adding more sample prompts for CSA to use? I thought that this showcase was targeted more for CSA to guide people and not for customers to do step-by-step

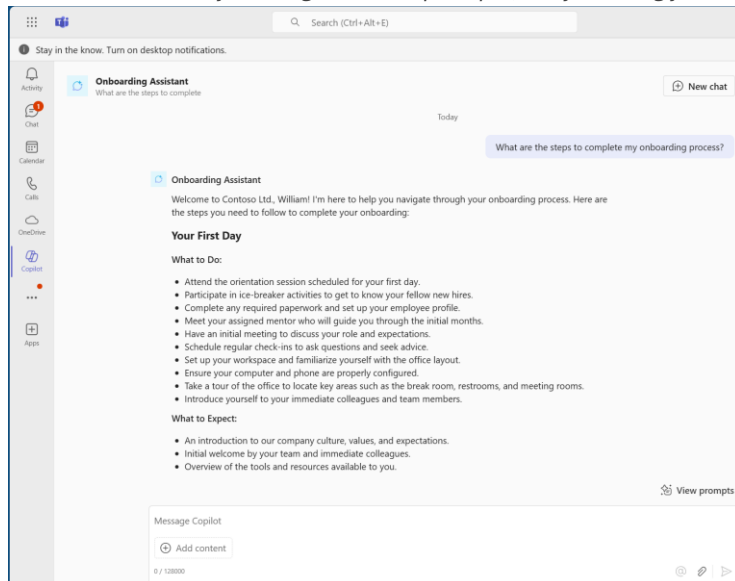


Click **Add** on the next screen.

26. After successfully adding the Agent, you should be taken directly to your Onboarding Assistant agent. If this would not happen, you can find your agent in the right copilot panel (both for Teams and Copilot).



27. Start conversation by clicking on starter prompts, or by entering your own:



2. Build HR Self-Service agent

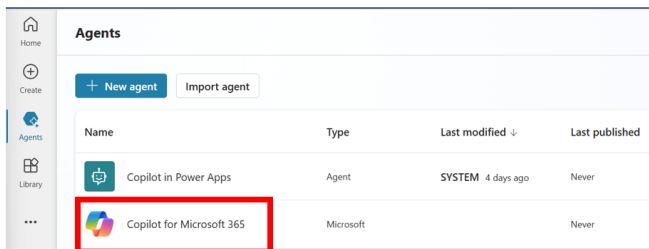
2.1 Overview

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

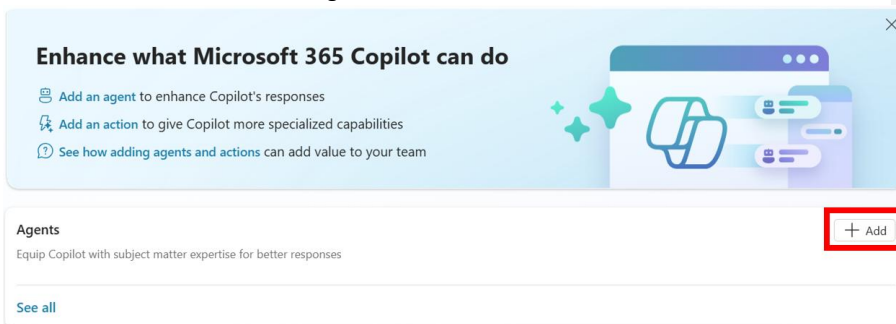
Commented [VK7]: @Michał Slowikowski , please add some introductory text like Purpose, and use, before jumping to create section

2.2 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 

 **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 HR Policy Docs library from left navigation, select all files and click on **Confirm selection** button.
- 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

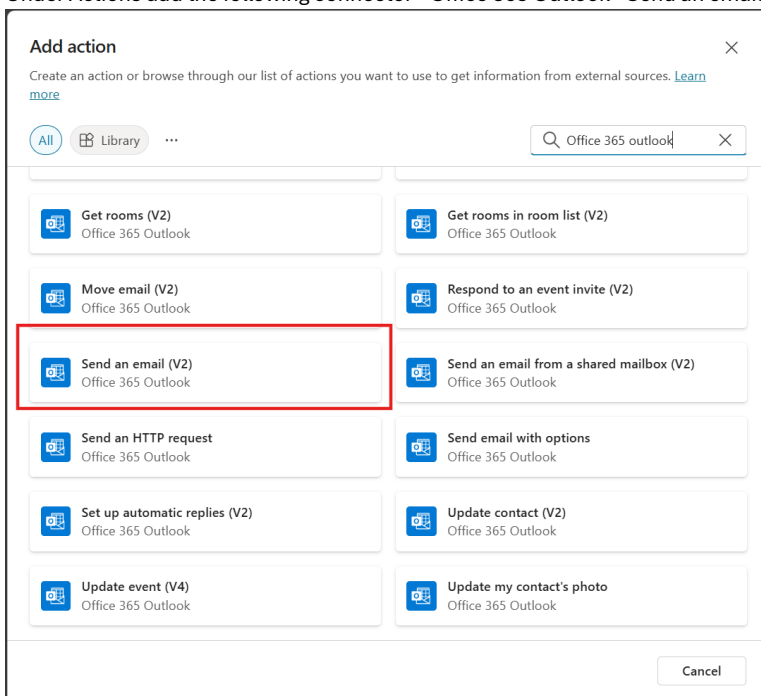
Link	Name	Description
 https://m365cpi37500424.sharepoint.co...	Employee Handbook.docx	This knowledge source provides information
 https://m365cpi37500424.sharepoint.co...	HR Policies and Procedures.docx	This knowledge source provides information
 https://m365cpi37500424.sharepoint.co...	New joiner guide.docx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


Test your agent

Publish agent

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 addi

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. Deploy your agent into the whole organization. Click **Show to everyone in my org.**

Availability options

Share link

Shared users can open the agent in Microsoft 365 Copilot with this link. [Manage sharing](#)

Copy

User access

Show to my teammates and shared users

Appear under the works with agent section

Show to everyone in my org

Submit to your admin for approval to appear under Built by your org section

Download as a .zip

You can upload the agent directly as a custom app into Microsoft 365 Copilot. [Learn more](#)

Download .zip file

Back

Done

Cancel

18. Confirm sharing with organization:

Share this agent with your organization

Get your agent ready

Admins can feature your agent prominently as an app in the Built by your org section of Microsoft Teams, pre-install for users in your org, and more. [Learn more](#)

Before submitting, make sure to:

- Ensure your agent is ready for release and in compliance with company standards, rules, and policies
- Coordinate with your teammates. Once the agent is submitted, it can't be resubmitted by others until an admin approves or rejects it

Yes

Cancel

19. As a Global Administrator go to [Microsoft 365 Admin Center](#) Integrated Apps page and click on **Requested apps** tab.

Home > Integrated apps Enable Dark mode





Integrated apps

Discover, purchase, acquire, manage, and deploy Microsoft 365 Apps developed by Microsoft partners. You can also deploy and manage Line-of-business add-ins developed within your organization. For advanced management of these apps go to the respective admin center or page : [Azure Active Directory](#) | [SharePoint](#) | [Teams](#) | [Add-ins](#)

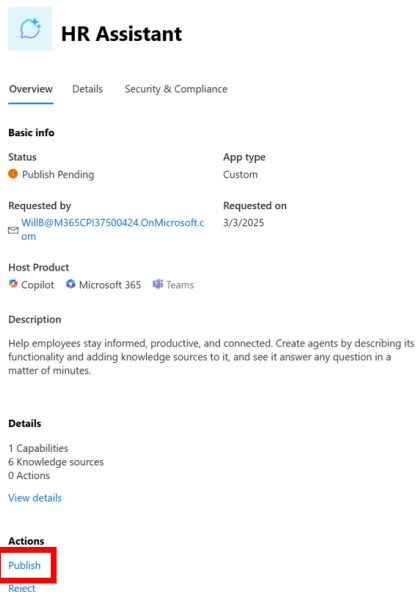
Deployed apps Available apps Blocked apps **Requested apps** Shared agents

All apps in this list have been submitted for review. Accepted apps are published and made available to users in your organization according to tenant settings.

20. Search for your agent, and click on it

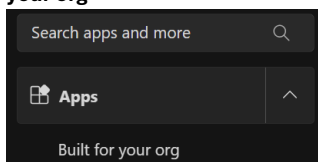
Name	Host products	Status	Last Modified ↓
 HR Assistant Built using Microsoft Copilot Studio.	Copilot, Microsoft 365, Teams	 Publish Pending	3/3/2025
 Contoso Pathfinder Built using Microsoft Copilot Studio.	Copilot, Microsoft 365, Teams	 Publish Pending	1/20/2025

21. In the recently opened panel scroll to the bottom and click **Publish**

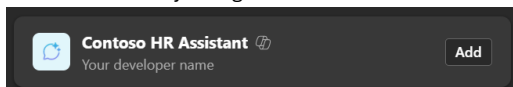


22. Click **Confirm** at the bottom of the panel to publish the app.

23. After successful publishing of the agent, go to Microsoft Teams, select Apps and **Built for your org**

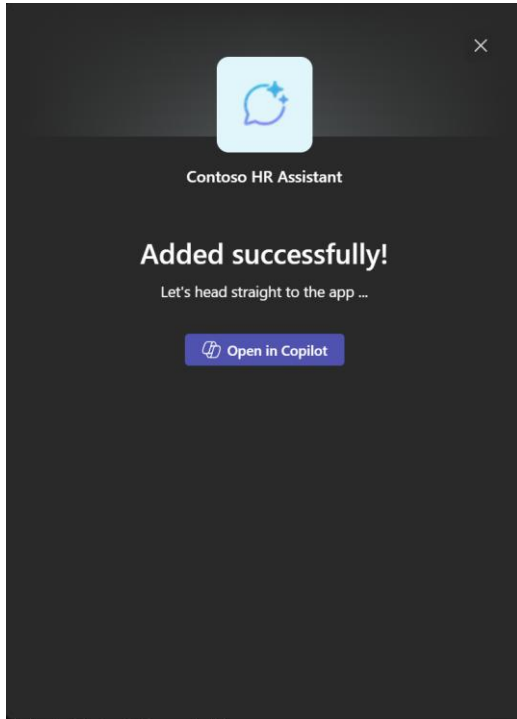


24. Click **Add** next to your agent



25. Confirm installation by clicking **Add** again

26. After successful installation you will see a confirmation screen. Click **Open in Copilot**



27. Test your Agent with starter prompts or type in your own prompt. You can use one of 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

1  HR Policies and Procedures

 Edit in Pages

 Copy





AI-generated content may be incorrect


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

 Copy





AI-generated content may be incorrect

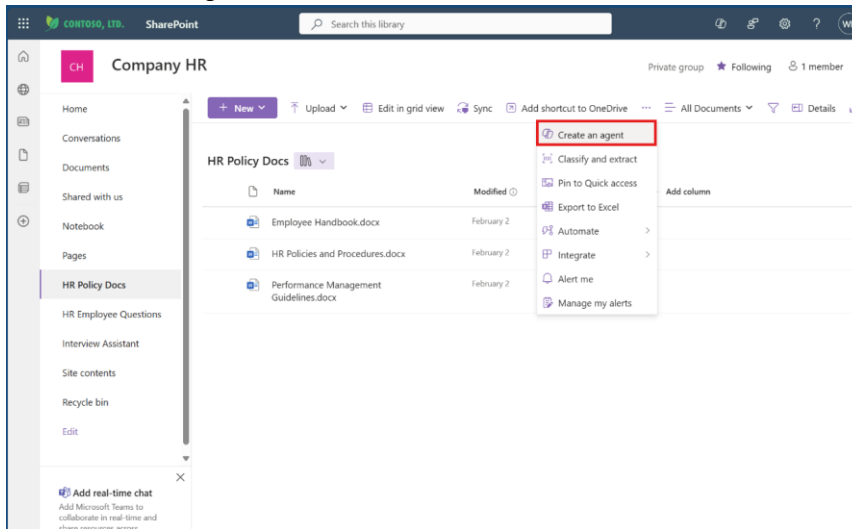
3. Build HR Professional SharePoint Agent

3.1 Overview

HR Professionals are often working on multiple documents – creating new policies, updating existing ones or looking for clarification of policies to respond to employees' questions.

3.2 Agent Creation and Deployment Steps

1. Open **HR Policy Docs** SharePoint library and click on "**Create an agent**" on the action bar. From the 'Your new agent' screen choose the **Edit** button



2. Create a unique name for your new agent, add a description, and do a quick test of your agent! Our proposed name is **HR Policies and Procedures agent**.

3. You can add more SharePoint sites, libraries, folders and files from **Sources** tab

Edit agent

IdentitySourcesBehavior

Responses from agents are based on the sources selected. Users must have permissions to these sources for an optimal experience. Up to 20 sources can be chosen for each agent.

Add a SharePoint site ⓘ
Search by site title or enter a URL
Company HRRemove
Sourced from document libraries, folders or files
HR Policy Docs
+ Add document libraries, folders or files

Add additional knowledge from a public website, third-party knowledge base, and more in Copilot Studio

Add advanced customization in Copilot Studio

Save

Test this agentGive Feedback

HR Policies and Procedures agent
Welcome! Enhance your productivity with this agent. Start a conversation by asking a question or selecting one of the suggested prompts.
Summarize any key highlights
Create an FAQ based on these resources
How can I use these resources?
Ask questions or type / to add files or people.

4. Use the **Behavior** tab to define how your Copilot should assist its users including a welcome message, starter prompts and any other instructions you want to give your agent for responding to users.

Edit agent

IdentitySourcesBehavior

Welcome messaging
Help users understand how to best use this agent
Welcome! Enhance your productivity with this agent. Start a conversation by asking a question or selecting one of the suggested prompts.

Starter prompts
Help users engage with this agent by giving them a starting point
Summarize any key highlights
Create an FAQ based on these resources
How can I use these resources?

Instructions for agent
Describe how the agent should engage with users
Provide accurate information about the content in the selected files and reply in a formal tone.

Customize conversation workflows in Copilot Studio

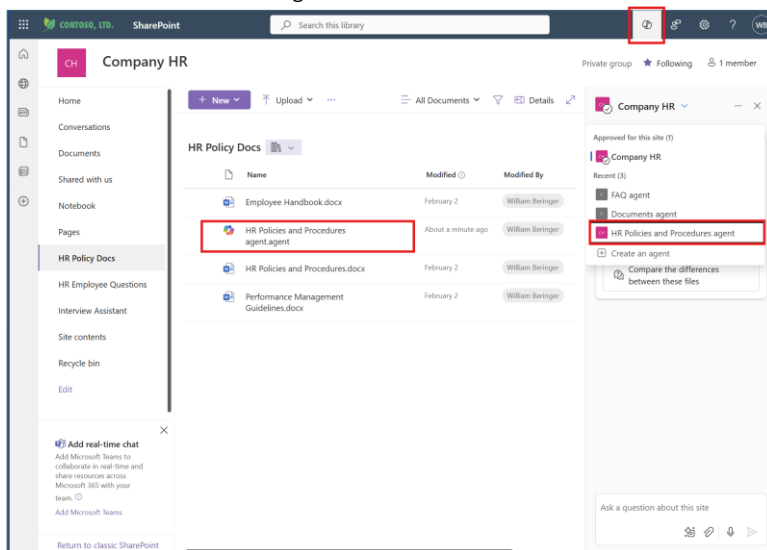
Add advanced customization in Copilot Studio

Save

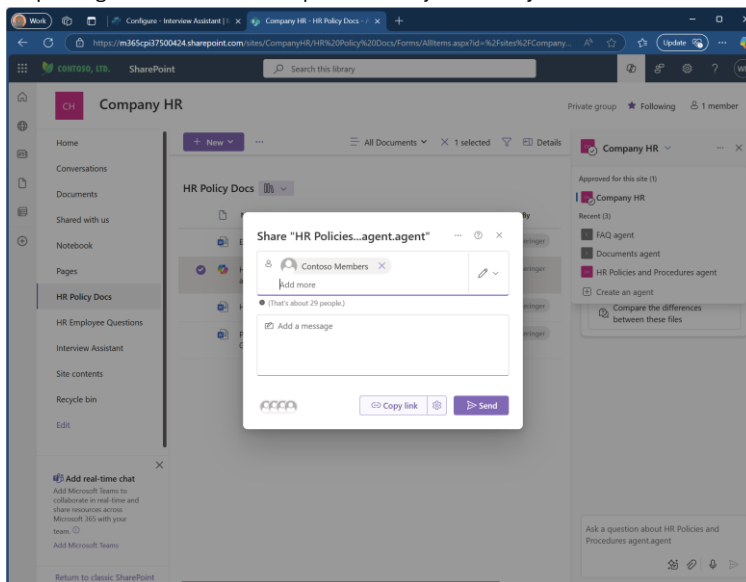
Test this agentGive Feedback

HR Policies and Procedures agent
Welcome! Enhance your productivity with this agent. Start a conversation by asking a question or selecting one of the suggested prompts.
Summarize any key highlights
Create an FAQ based on these resources
How can I use these resources?
Ask questions or type / to add files or people.

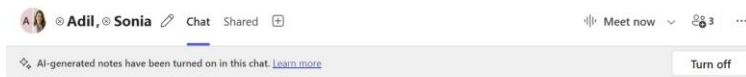
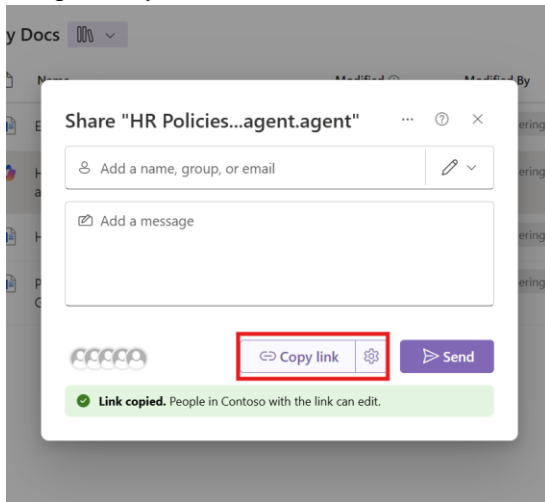
5. Once you **Save** your agent and close the Edit agent screen, your agent will appear in the sidebar of your SharePoint site. You can also display your agent in full-screen mode using the short-cut menu from the agent file.



6. Share your agent just like you'd share any other document from SharePoint. Your agent will respect agent and data access permissions just like any item in a SharePoint library



7. You can add your agent to Teams. Just copy the link and paste into a Teams channel to share the agent with your collaborators




You're starting a new conversation

Type your first message below.



[HR Policies and Procedures agent.agent](#)

**HR Policies and Procedures...**
Company HR


This is an agent curated based on the content from the selected file sources.

[Privacy](#) | [Terms of use](#) | [Permissions](#)

[Add to this chat](#)

 William Beringer added HR Policies and Procedures age here.



HR Policies and Procedures age AI generated 3:32 PM




Welcome! Enhance your productivity with this agent. Start a conversation by asking a question or selecting one of the suggested prompts.

[Summarize any key highlights](#) [Create an FAQ based on these resources](#)

[How can I use these resources?](#)


 

8. You can test it out by @mentioning the agent and sending your prompt

[HR Policies and Procedures agent](#) How can I use these resources? 

9. If chat members don't have access to your content you'll be prompted to review the response

HR Policies and Procedures age 3:33 PM Updated



William Beringer, please review my response before I share it in the chat. Some people in this chat don't have access to some of the sources I searched through.

[View response](#)

10. Send your prompt

CH

HR Policies and Procedures age

✕




Hi William Beringer, please review my response and confirm that I can send it to everyone in the chat.

This is HR Policies and Procedures agent. Welcome! Here are some key resources and guidelines to help you navigate your journey at Contoso:

- 1. Employee Handbook:** This comprehensive guide provides essential information about our company's policies, procedures, and organizational culture. It covers topics such as equal employment opportunity, code of conduct, workplace safety, onboarding process, performance reviews, continuous learning and development, recognition and rewards, and employee benefits[1].
- 2. Performance Management Guidelines:** This document outlines our approach to performance management, including setting clear expectations, providing regular feedback, recognizing achievements, and supporting professional development. It emphasizes the importance of continuous learning and development through on-the-job training, workshops, seminars, online courses, and tuition reimbursement programs[2].
- 3. HR Policies and Procedures:** This document details the Human Resources policies and procedures that all employees are expected to follow. It includes guidelines on employee code of conduct, work hours and attendance, employee benefits, professional development, and performance evaluation[3].

These resources are designed to help you understand our company's values, expectations, and the support available to you. If you have any specific questions or need further assistance, feel free to ask![1] [2] [3]

These are the files used for the response that some people in the chat don't have access to.

	File name	Sensitivity label
1	 Employee Handbook.docx	
2	 Performance Management Guidelines.docx	
3	 HR Policies and Procedures.docx	

☐ Don't ask about these files again for 24 hours

Send

Don't send