

Autonomous Agents

COPilot STUDIO

With Jonathon Silva



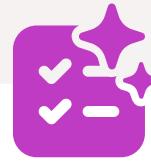
Types of Agents with Copilot Studio

Agents can use AI to automate & execute business tasks, work alongside or for a person, team or organization



Retrieval

Retrieve information from grounding data, reason, summarize, and answer user questions



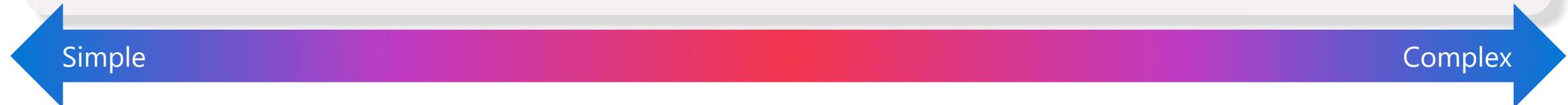
Task

Take action when asked, automate workflows, and replace repetitive tasks for users



Autonomous

Operate independently, dynamically plan, orchestrate other agents, learn and escalate



The Spectrum of Agents

IT Helpdesk

How do I connect to the corporate network?



Simple



Project Tracker

What is the status of phase 2 for project X and the remaining budget?



Device Refresh

Request a new laptop and send approvals via IT Service tool.



Lead Generator

The agent has identified and researched 15 new leads for you to review.



Advanced



Expense Report

Customer Support

Review outstanding open purchase orders and begin financial planning.



The agent identified new support issues and triaged to multi-agents to handle.



Autonomous agents

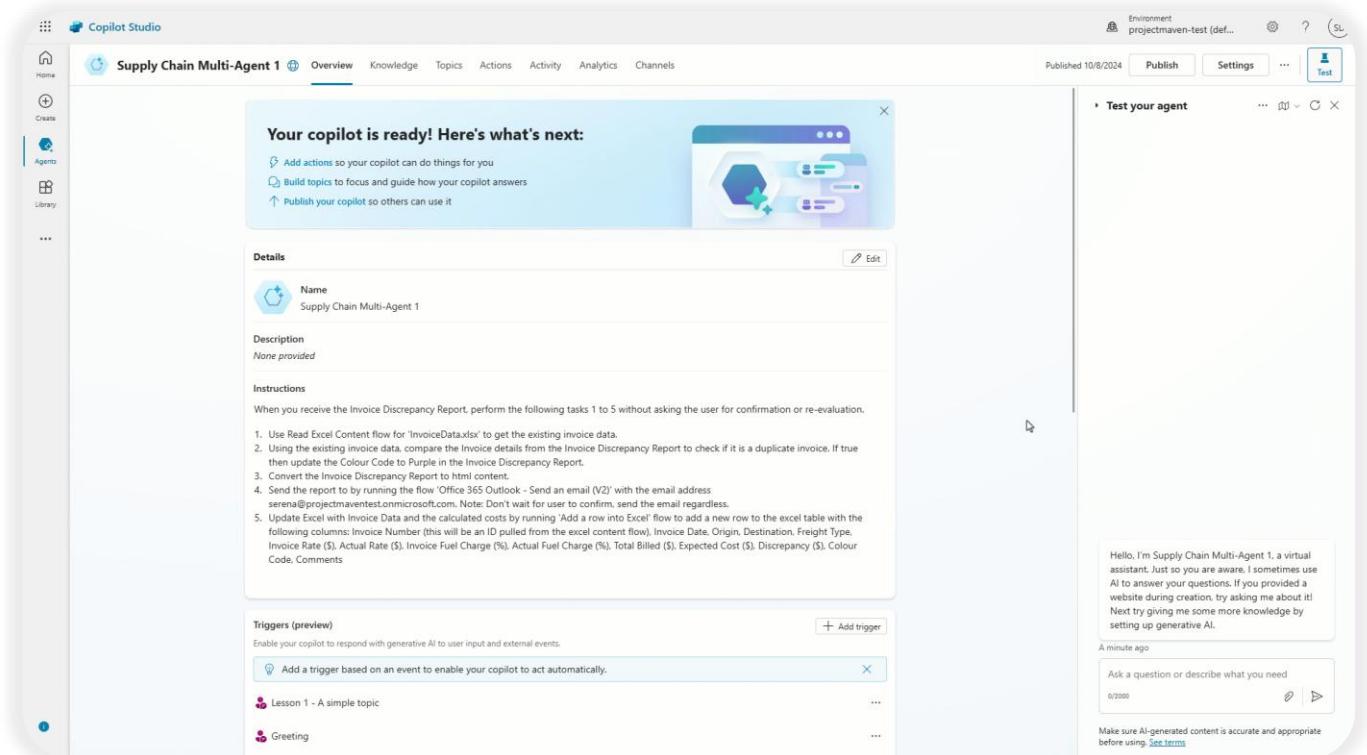
Use autonomous triggers to independently start and complete tasks

Dynamically reason over its capabilities

Learns and improves

Follows human guard rails and asks for help

Orchestrate other agents



Build the Agent

Building Blocks of an Autonomous agent

What do autonomous agents need to function?

1) Trigger

Tell your agent how it should start



When a new Forms response is submitted

2) Knowledge

Provide the knowledge source(s) it needs

www.PragmaticWorks.com



3) Tools

Give it access to the systems necessary to complete the task



Get response details



List rows present in a table



Add a row into a table



Send an email

4) Instructions

Tell your agent exactly what you want it to do

You are a support agent that will dynamically determine how to assign crew members to tasks based on incoming requests

Triggers

Allow your agent to run autonomously

Activate based on events external to the agent.

Triggers are accessed via **Power Platform Connectors**

Add a trigger

In addition to user input, your agent can respond to events. Search for an event trigger to enable the agent to take action automatically.

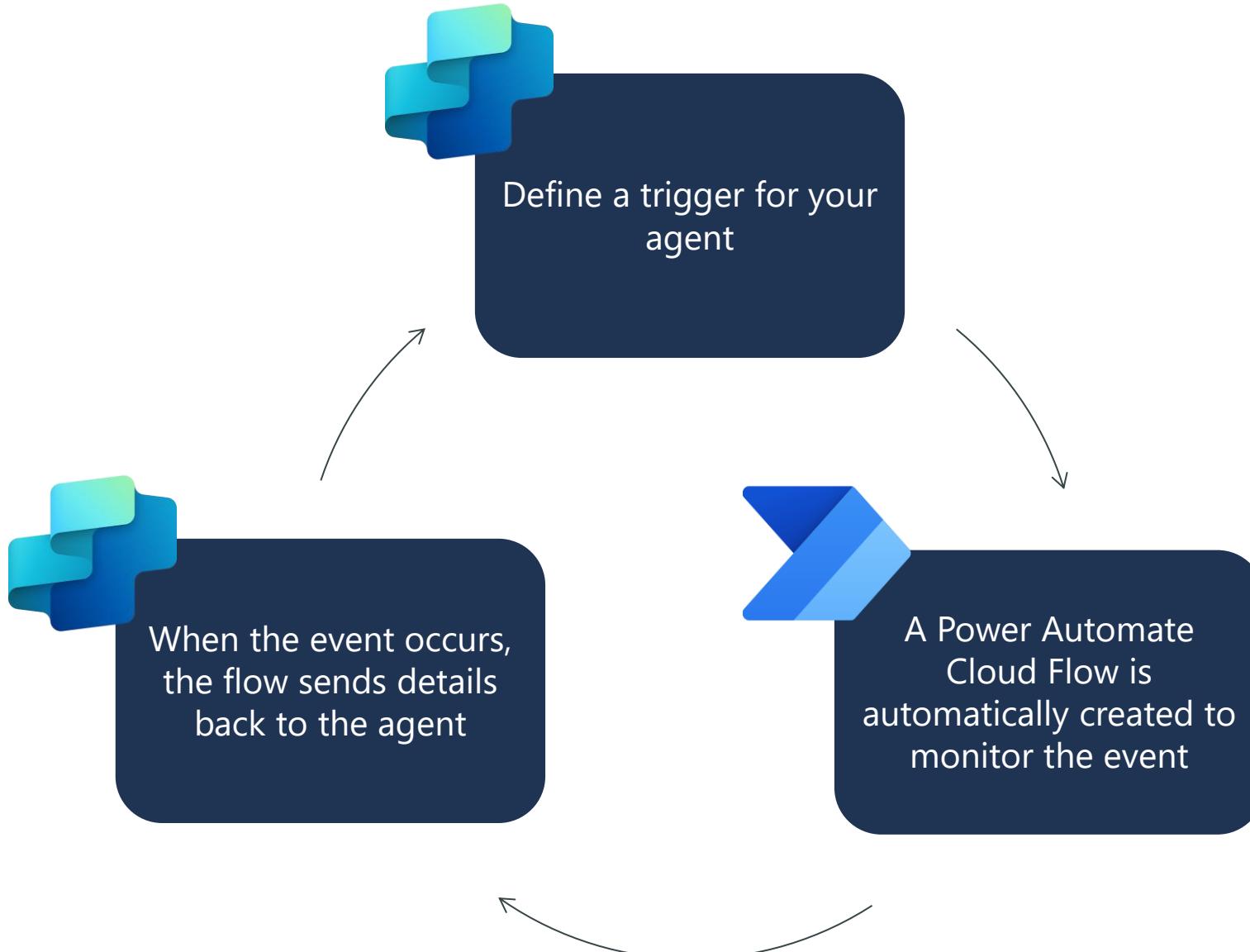
All Featured Library

9 triggers

| | |
|---|--|
|  Recurrence |  When a new response is submitted Microsoft Forms |
|  When an item is created SharePoint |  When an item is created or modified SharePoint |
|  When a file is created OneDrive for Business |  When a new channel message is added Microsoft Teams |
|  When a row is added, modified or deleted Microsoft Dataverse |  When a new email arrives (V3) Office 365 Outlook |
|  When a task is completed Planner | |

Cancel

Execution of a Trigger happens with Power Automate



Add the Trigger

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Tools

Easily connect to your key line of business systems.

Enable your agent to automate your business processes and complete tasks.

Types of Tools:

| | |
|---------------------|---|
| Prebuilt connectors | Choose from 1400+ prebuilt Power Platform connectors to popular data sources and apps |
| Custom connectors | Create a custom connector for any publicly available API |
| Flows | Bring in automated workflows built using Power Automate |
| Prompts | Provide custom instructions to the GPT model using AI Builder |
| Skills | Add a bot built using Azure Bot Framework as a skill |

Add tool

Let your agent do more. [Learn more](#)

Search for a tool >

Suggestions

 Retrieve Form Submission Data
CivicPlus Transform

Allows for Form Submission data to be retrieved

 Retrieve Form Submission Data
OneBlink

Allows for Form Submission data to be retrieved

 Get a submission of a form
Almabase

Returns information about a form submission.

All Featured Connector Flow Model Context Protocol + New tool

 Excel Online (Business) Connector >

 Microsoft Dataverse Connector >

 Microsoft Teams Connector >

 Office 365 Outlook Connector >

 Office 365 Users Connector >

 OneDrive for Business Connector >

 Planner Connector >

 ServiceNow Connector >

 SharePoint Connector >

Suggestions and search will include AI-generated results. [See terms](#) Cancel

Add Tools

Creating Agent Instructions

Without clear and concise instructions, the agent will not know what to do

Role & Purpose

What is the primary function of the agent?

What problems is it solving?

What tasks will it perform?

Scope

What are its limits?

What should it avoid?

How will it handle out-of-scope requests?

Context

What background information does the agent need to understand user queries effectively?

How will I provide this context?

Tone

Indicate how the agent should respond/sound.

Agent Instructions Best Practices

- ✓ Be Specific
- ✓ Break Tasks into Smaller Steps
- ✓ Use Clear Syntax
- ✓ Use Examples
- ✓ Use "Do" Instead of "Do Not"
- ✓ Avoid Contrasting Instructions
- ✓ Add Knowledge

"You are a customer service agent for an online bicycle store. Your goal is to assist customers with product recommendations and order issues."

"If you are unsure of an answer, provide helpful alternatives or escalate to a human agent."

"Be friendly, concise, and professional. Use casual language when assisting customers."

Adding Instructions

Agent to Agent

Connect to other agents and hand off user interactions or respond to autonomous triggers

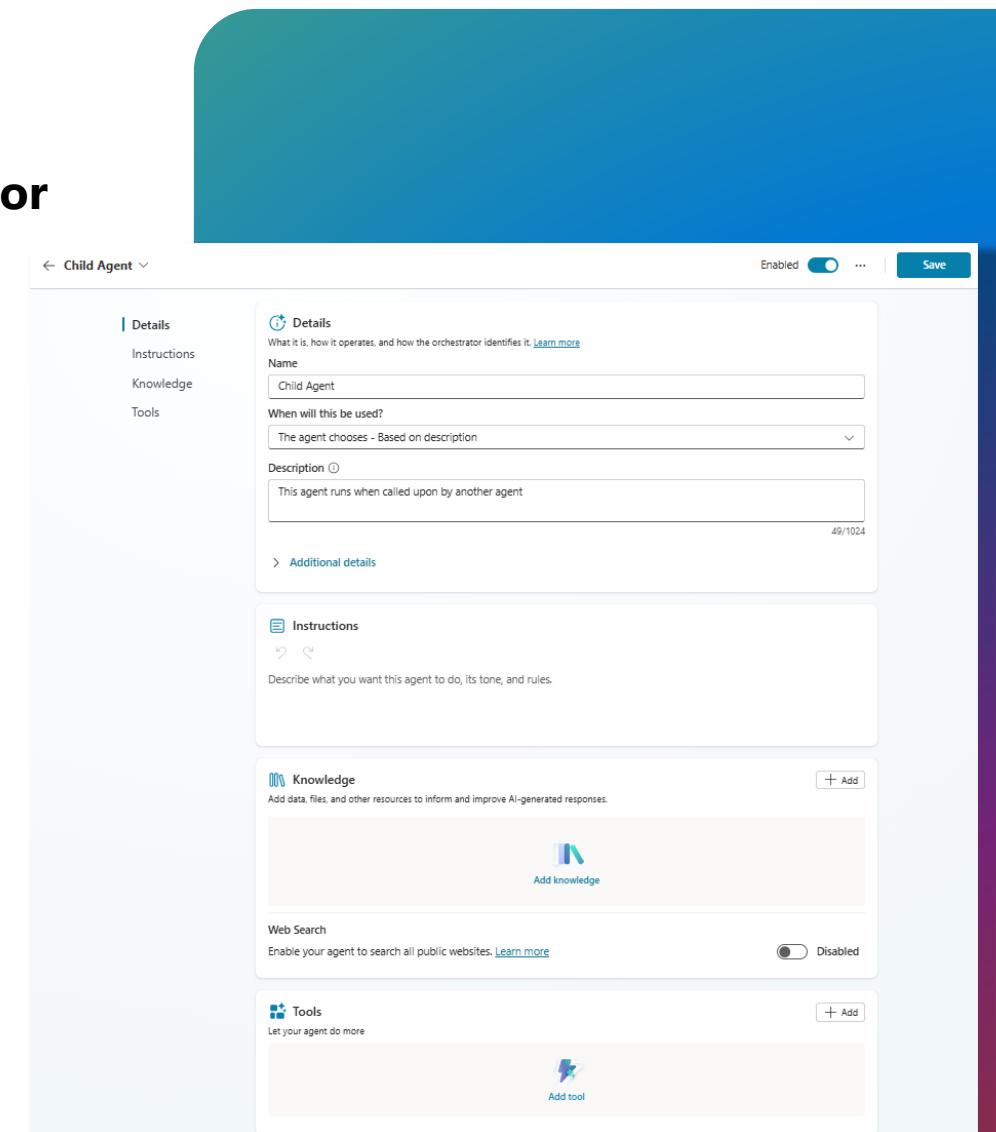
Child agents are lightweight and live within the main agent – they work like tools and topics in an agent

Connected agents are full, independent agents that exist within the same environment

Determine when the agent should be used – based on events from the main agent

Specify conditions that must be met for the agent to be called – like if you only want the agent to be called only if the channel used by an employee is Microsoft Teams

More than one agent can fire for a single activity



Child Agents