

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



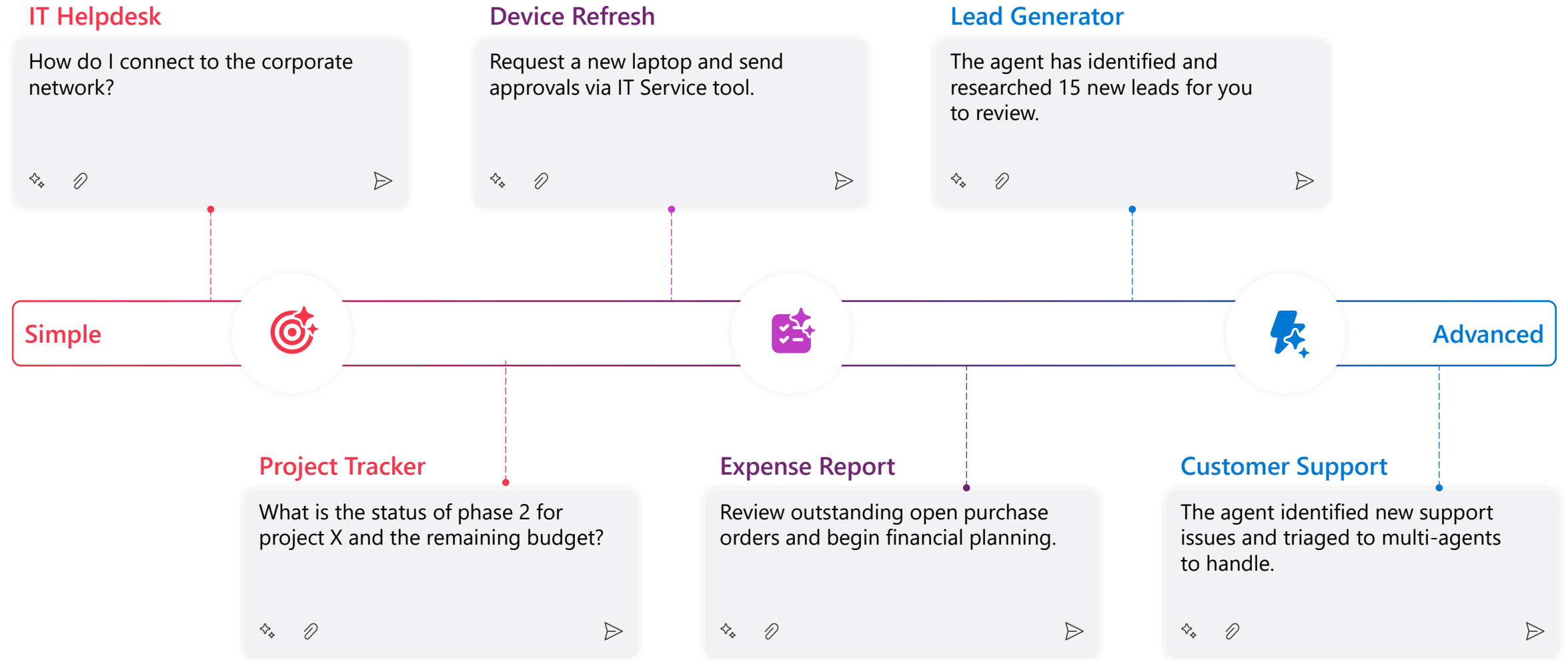
Autonomous

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

Simple

Complex

The Spectrum of Agents



Autonomous agents

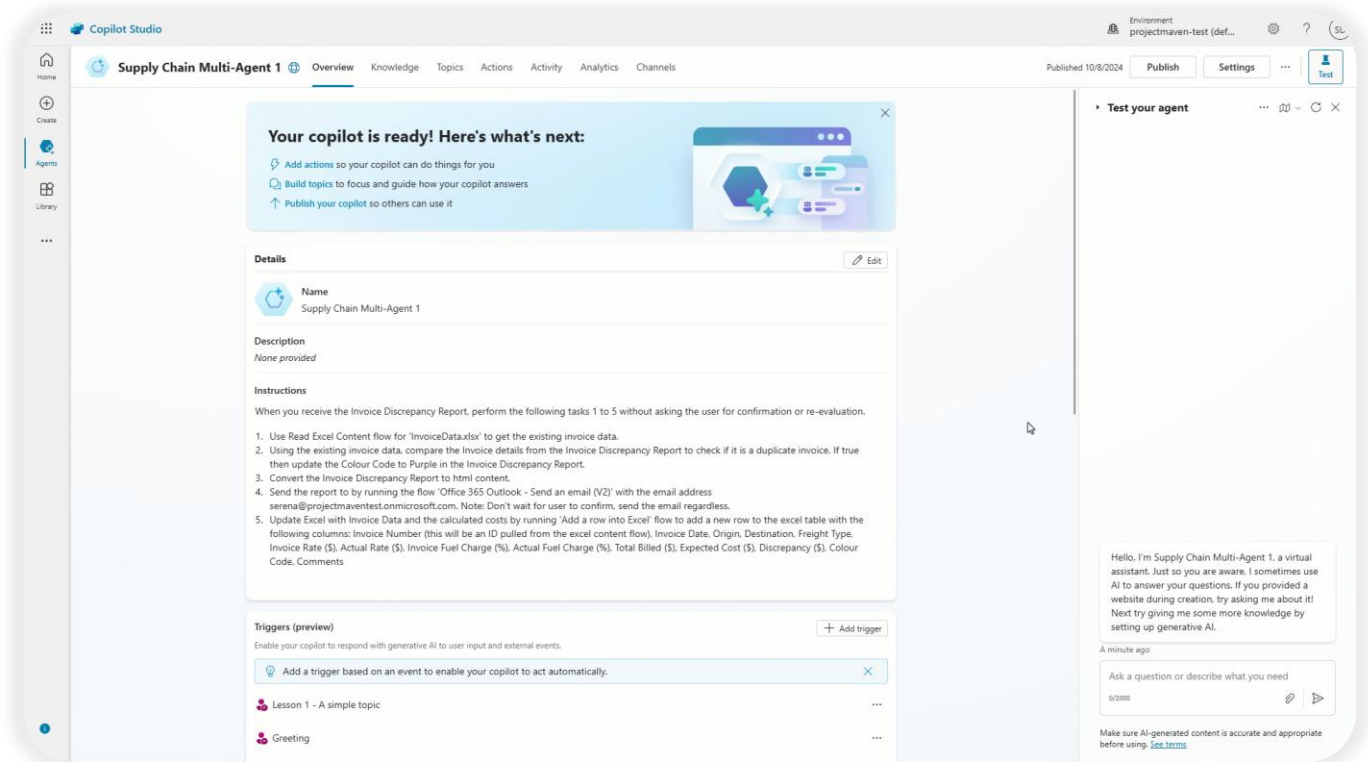
Use autonomous triggers to independently start and complete tasks

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

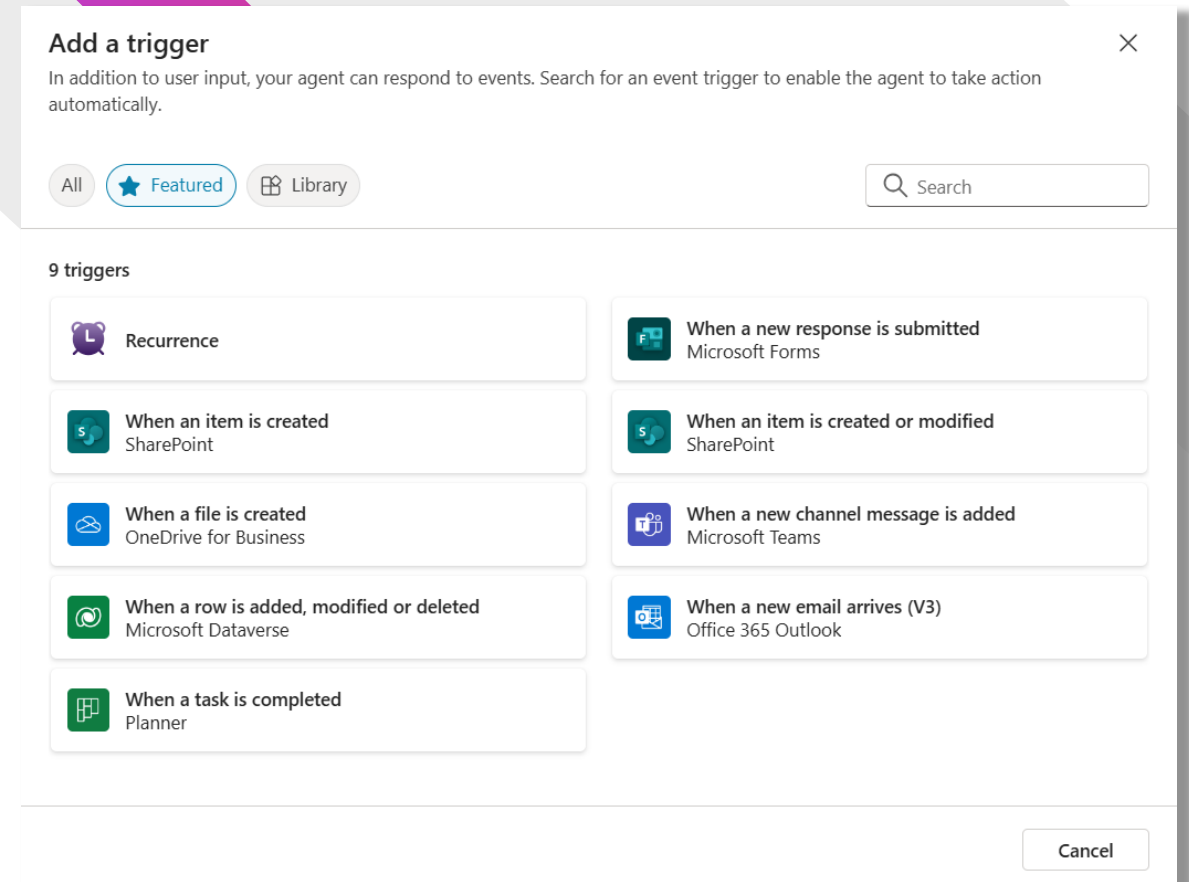
You are a support agent that will dynamically determine how to assign crew members to tasks based on incoming requests

Triggers

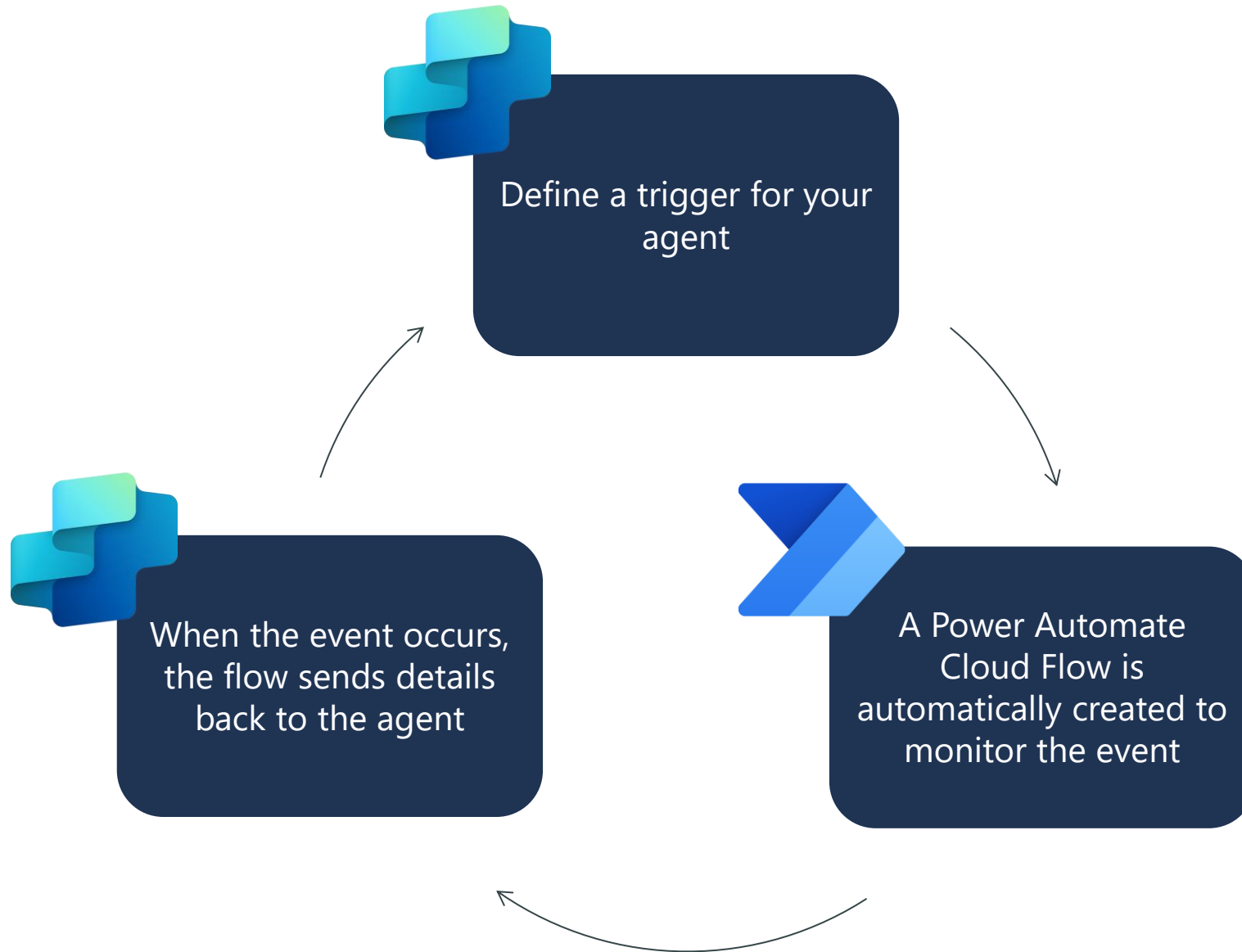
Allow your agent to run autonomously

Activate based on events external to the agent.

Triggers are accessed via **Power Platform Connectors**



Execution of a Trigger happens with Power Automate



Add the Trigger

Building Blocks of an Autonomous agent

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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

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

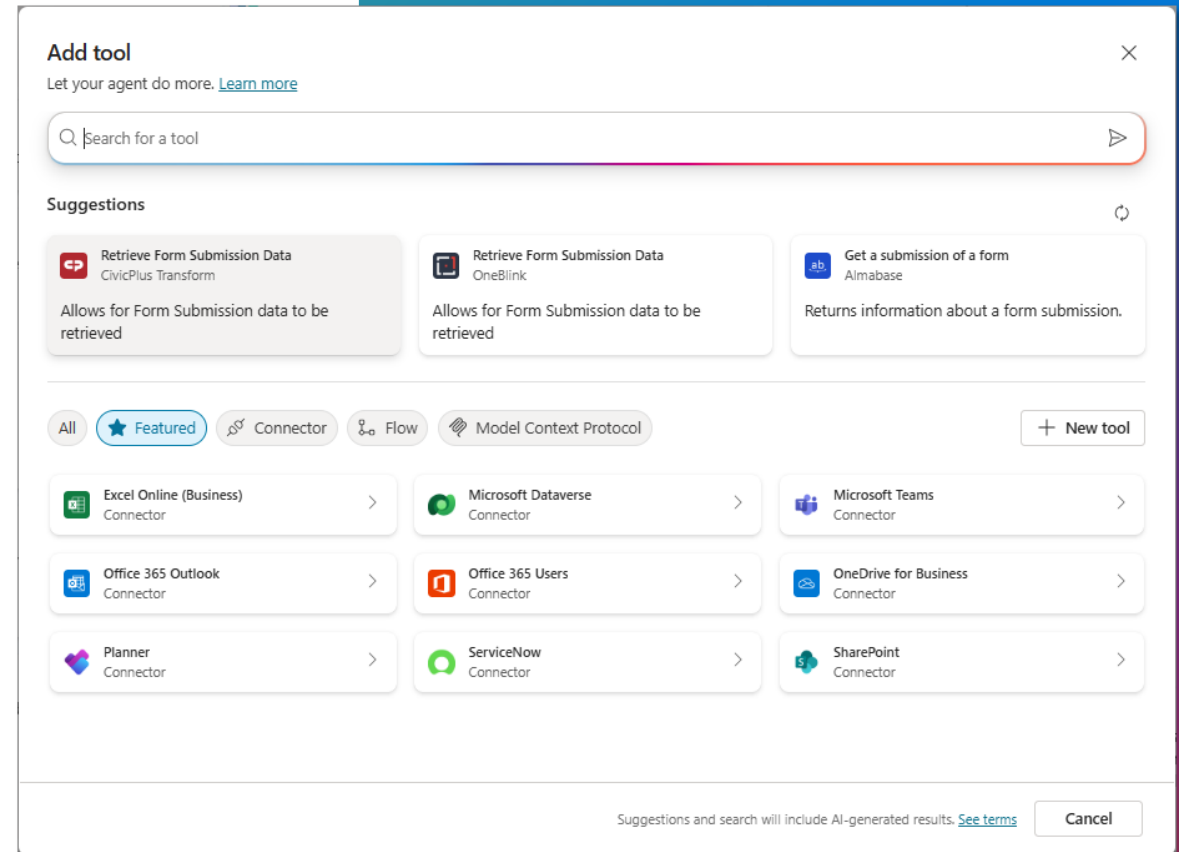
Bring in automated workflows built using Power Automate

Prompts

Provide custom instructions to the GPT model using AI Builder

Skills

Add a bot built using Azure Bot Framework as a skill





Add 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

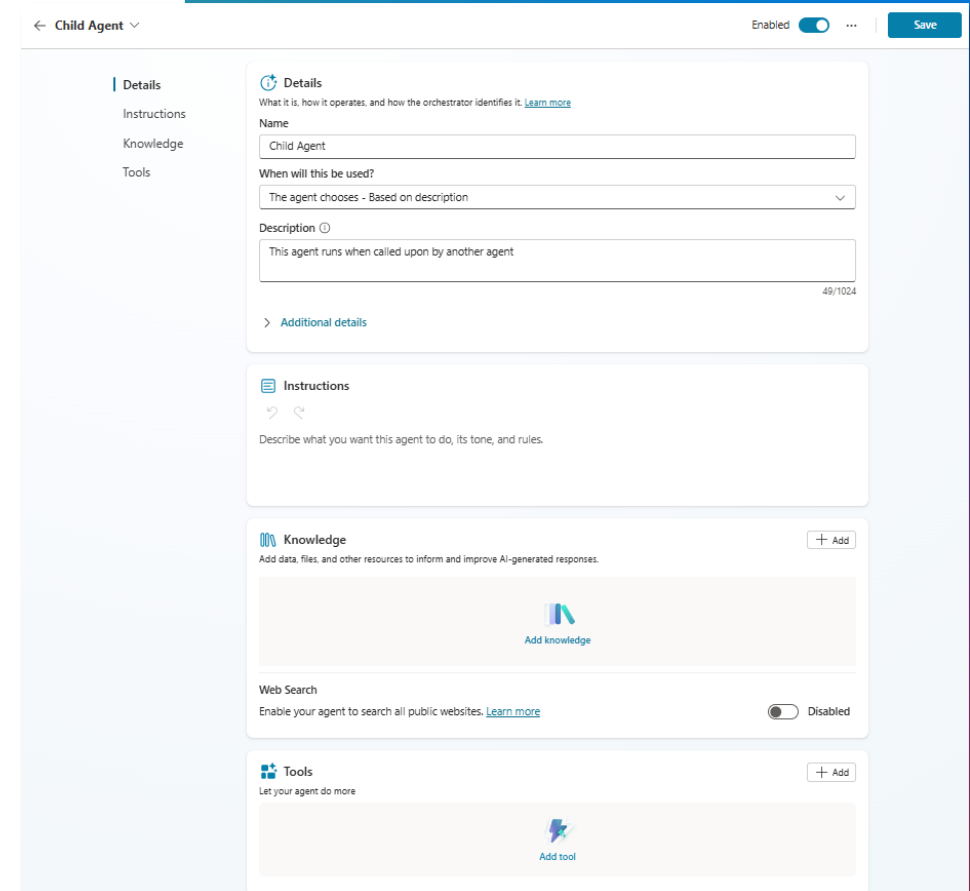
Child agents are lightweight and live within the main agent – they work like tools and topics in an agent

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



The screenshot displays the 'Child Agent' configuration page. At the top, there's a header with a back arrow, the title 'Child Agent', and an 'Enabled' toggle switch. Below the header, a sidebar on the left contains navigation links: 'Details' (selected), 'Instructions', 'Knowledge', and 'Tools'. The main content area is divided into several sections: 1. 'Details' section: Includes a 'Name' field with 'Child Agent', a 'When will this be used?' dropdown menu set to 'The agent chooses - Based on description', and a 'Description' text area containing 'This agent runs when called upon by another agent'. 2. 'Instructions' section: Features a text area for describing the agent's tasks, tone, and rules. 3. 'Knowledge' section: Includes a '+ Add' button and a text area for adding data, files, and other resources. 4. 'Web Search' section: Contains a toggle switch labeled 'Disabled' and a link to 'Learn more'. 5. 'Tools' section: Includes a '+ Add' button and a text area for letting the agent do more.

Child Agents