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Building Autonomous Agents: Automate workflows with Copilot Studio



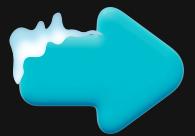
MONTHLY MASTERY

FEATURE-A-DAY

with Copilot Studio



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Katerina Chernevskaya



Autonomous agents

Explanation

AI-powered program that independently handles tasks without needing continuous human intervention, follows predefined instructions, understands business goals, makes decisions in real-time, and adapts based on data insights.

By setting triggers and defining actions, these agents can manage and automate complex business processes, recognizing patterns, and even forecasting future needs. This allows users to focus on creative and strategic tasks while the agent handles the repetitive and dynamic aspects of the workflow.



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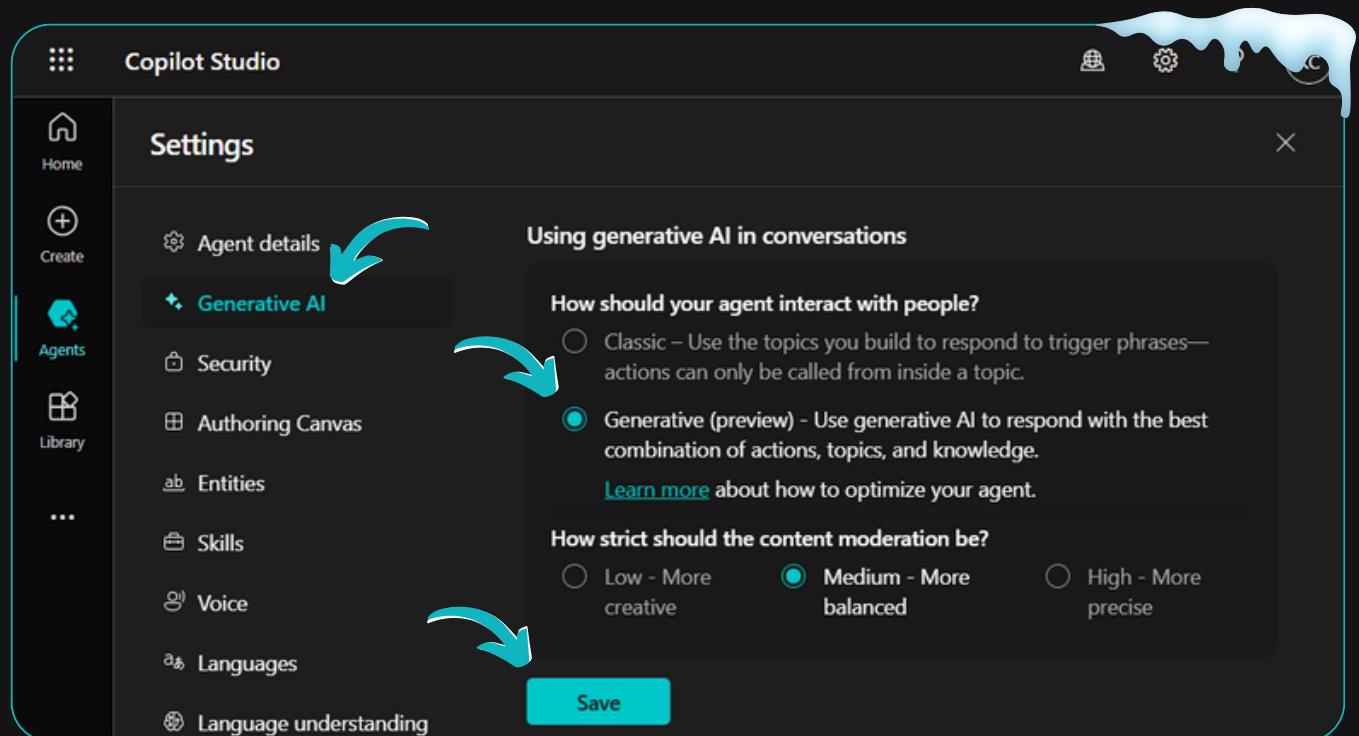


Create Autonomous agent Prerequisites

Start by enabling **Generative Orchestration**:

1. Open your agent and navigate to **Settings**.
2. On the **Generative AI** tab select the **Generative (preview)** option.

3. Click **Save**.



You can also define your preferred level of content moderation strictness on this page.



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Create Autonomous agent

Create a trigger

Define the triggers that will activate the agent. You can set triggers based on time schedules, data changes, or specific events.

4. On the [Overview](#) page, find the **Triggers** section and select [Add trigger](#).

5. Pick the [type of trigger](#) you want to add.

The screenshot shows the Copilot Studio interface. On the left, there's a sidebar with icons for Home, Create, Agents, and Library. The main area has tabs for Overview, Knowledge, Topics, Actions, Activity, and +2. The Overview tab is selected. In the center, there's a 'Triggers' section with a sub-section 'Set up your agent to activate when certain events happen.' Below it is a button labeled '+ Add trigger'. A large blue arrow points from this button to a detailed 'Add trigger' dialog box. The dialog box has a title 'Add trigger' and a subtitle 'Manage how your agent responds to user input and external events. This is a preview feature. [Learn more](#)'. It includes filters for All, Featured (which is selected), and Library, and a search bar. Below that is a list of '9 triggers' with icons and names: Recurrence (with a blue arrow pointing to it), When a new response is submitted (Microsoft Forms), When an item is created (SharePoint), When a file is created (Environment DEV), When a new channel message is added (Microsoft Teams), When an item is created or modified (SharePoint), and two others partially visible. At the bottom of the dialog are 'Publish' and 'Test' buttons, and a 'Cancel' button.



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Create Autonomous agent

Create a trigger

6. If needed, provide your **authentication detail**.

7. Configure your trigger as needed - define the **event parameters** that will activate your trigger and the **trigger payload**.
Triggers provide default payload content, but you can customize it with your own instructions.

The screenshot shows the 'Add trigger' interface. On the left, a sidebar lists triggers: 'When an item is created', 'When a file is added', 'When a file is modified', and 'When a file is deleted'. The 'When an item is created' trigger is selected. The main panel has the following fields:

- Site Address:** Copilot Studio Demo - https://microsoftcda.sharepoint.com/sites/c...
- List Name:** Letters To Santa
- Limit Columns by View (Optional):** All Items
- Additional instructions to the agent when it's invoked by this trigger:** Use content from **Body**. Summarize the key points of this letter, including the main request, tone, and any notable details or themes.

At the bottom are 'Back', 'Create trigger', and 'Cancel' buttons.



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Create Autonomous agent Trigger payload

The trigger payload is a JSON or plain text message that contains **information about an event**.

When adding a trigger, you can use the default payload or add your own instructions.

You can also modify the payload later in Power Automate, adding variables and string operators as needed.

This helps your agent understand exactly what to do when the trigger is activated.



Make sure to avoid conflicting instructions between the payload and general agent instructions to prevent errors.



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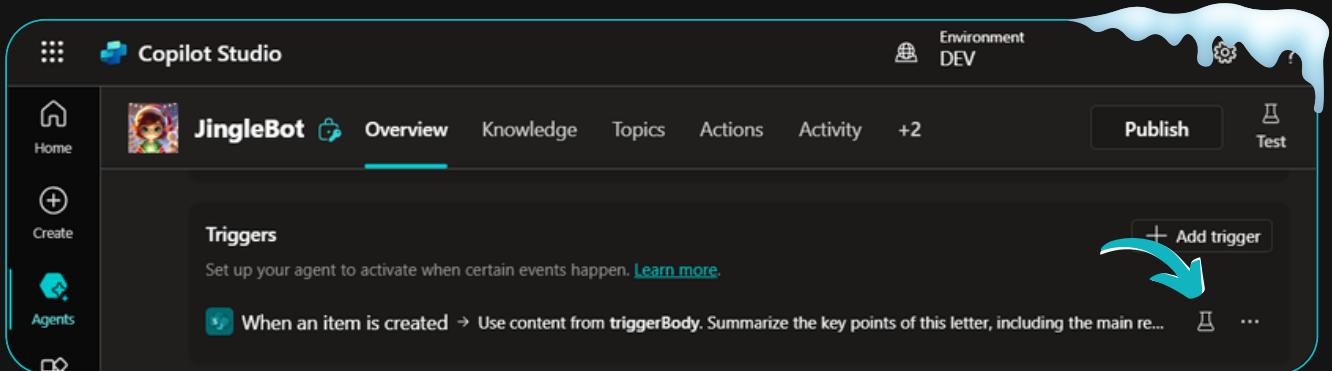


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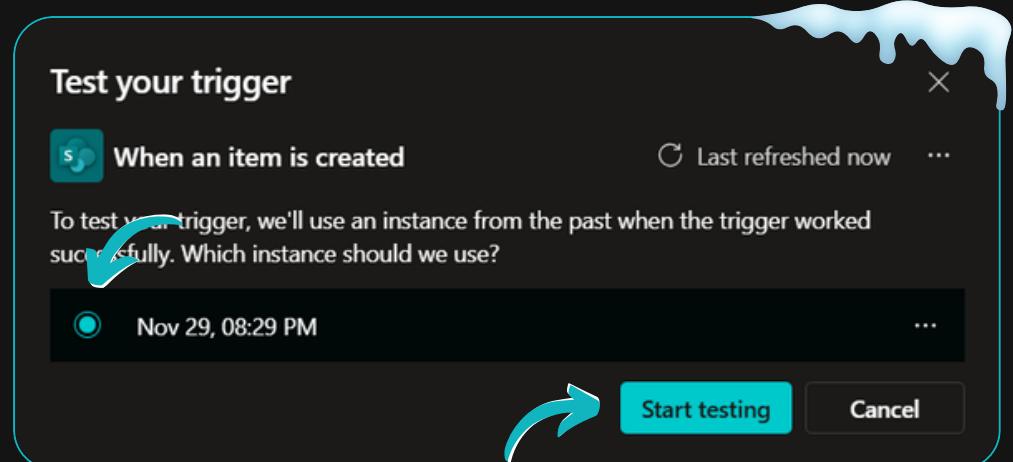
Test trigger

Always test your triggers and their reactions before publishing.

8. Run the trigger event once to generate a payload.



9. Click the **Test trigger** icon beside the trigger in the agent's Overview page. Choose an **instance** of the event and click **Start testing**.



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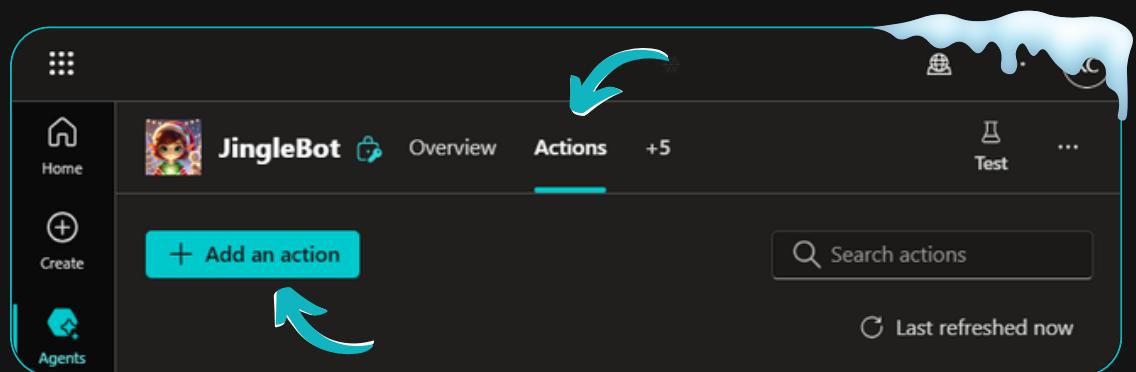


Create Autonomous agent

Design action

The Actions tab lets you set up specific tasks for your copilot to perform.

10. On the **Action** tab select **Add an action**.



Actions can include:

- **Connectors**: Integrate with popular apps like Excel, SharePoint, and Dynamics 365 for tasks like sending emails, retrieving data, or updating records.
- **Custom Connectors**: Connect to unique systems through internal APIs—great for custom CRMs or other proprietary tools.
- **Flows**: Create multi-step workflows in Power Automate for handling complex tasks like follow-ups or escalating issues.
- **Skills**: Use specialized AI functions for data analysis and classification.



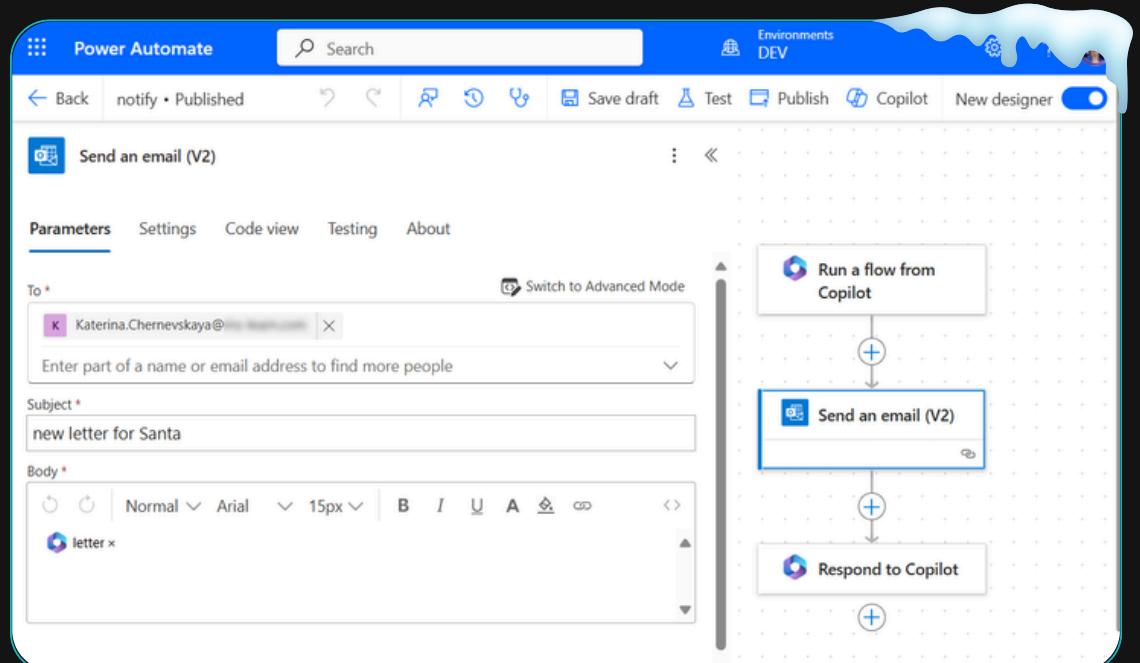
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Create Autonomous agent Design action

11. Use the drag-and-drop interface to create **actions** that the agent will take once triggered.

This could involve sending notifications, updating databases, or interacting with other systems.



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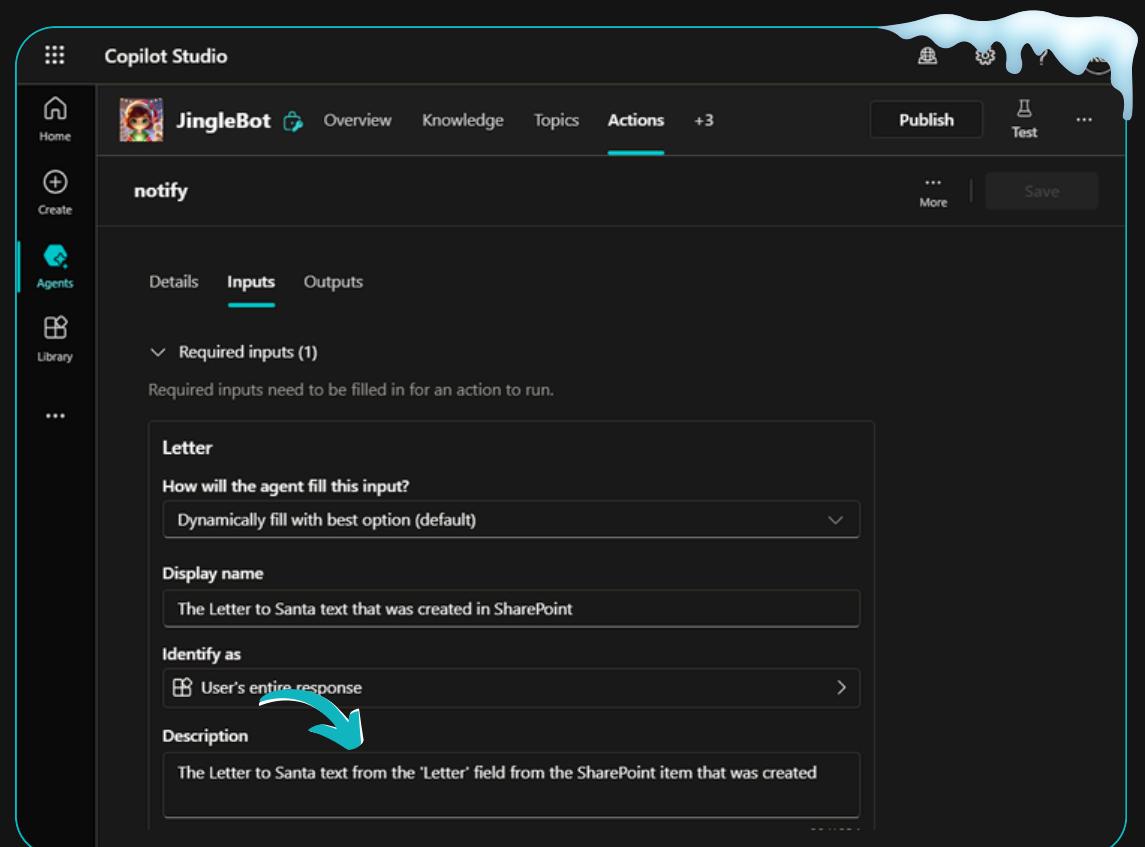


Create Autonomous agent

Design action

12. Specify **input** and **output** parameters for each action, using natural language to describe what value should be used.

This helps ensure that your copilot knows exactly what data to process and how to respond effectively.



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Create Autonomous agent Test action

13. To **test** perform an activity that triggers the agent you've created.

14. Go to the **Activity** tab to see the sessions and open a **session** to see how your action was executed.

The screenshot shows the Copilot Studio interface for the JingleBot agent. At the top, there's a navigation bar with 'Copilot Studio', the agent name 'JingleBot', and tabs for 'Overview', 'Knowledge', 'Topics', 'Activity' (which is highlighted), and '+3'. Below the navigation is a status message 'Last refreshed now'. The main area displays a table of activity sessions:

Name	Date	Summary	Status
Katerina Chernevskaya	11/29/2024, 22:05:05	The user wants to summarize the key ...	Complete
			Complete
			Complete

A blue arrow points from the 'Activity' tab in the top navigation to the 'Activity' tab in the session details. Another blue arrow points from the 'Status' column in the table to the 'Session complete' status in the session details. The session details show a 'Review' button, a 'Variables' section with '(x) Variables', and an 'Activity map' dropdown. A large callout box highlights the 'Activity map' section, which contains a 'notify Flow' card. The card has a 'Description' field: 'Send email with the 'Letter' text from the SharePoint item when the SharePoint item is created.', an 'Input (1)' section with '(x) The Letter to Sant...', and a preview text: 'Dear Santa,I hope this letter'. At the bottom of the session details is a 'Session complete' button.



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Autonomous agents

Benefits

Increased efficiency

Autonomous agents handle repetitive tasks, allowing for quicker and more consistent workflows.

Consistency and reliability

They ensure tasks are performed accurately and without errors, reducing risks caused by fatigue or oversight.

Scalable operations

Autonomous Agents can scale to handle large volumes of tasks, making it easy to expand operations without additional manual effort.

Focus on innovation

By taking over the mundane tasks, Autonomous agents free up valuable time, allowing teams to focus on creativity, problem-solving, and innovative projects.



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Autonomous agents

Tips

Start simple: Create basic triggers and actions to understand the process before adding complexity.

Test regularly: Continually test your agent to identify and fix issues early.

Leverage connectors: Use pre-built connectors for quicker setup.

Avoid conflicting instructions: Avoid writing payload instructions that conflict with the agent's general instructions to prevent errors.

Authentication restrictions: Triggers must use the agent maker's account, with the correct permissions.

Stay organized: Keep workflows documented for easy management.



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Today's Task: Create your Autonomous agent



1. Create trigger

Follow the guide to create a simple trigger that summarizes key points of a new item when it is added to a SharePoint list.

2. Create action

Add an action to your agent, such as sending an email when the trigger is activated.

3. Test trigger and action

Test your agent, refine it if needed, and share your experience with your colleagues or community.



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