

- 09 -

Enhance agents with
Knowledge integration



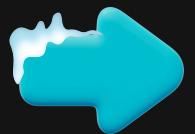
MONTHLY MASTERY

FEATURE-A-DAY

with Copilot Studio



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Katerina Chernevskaya

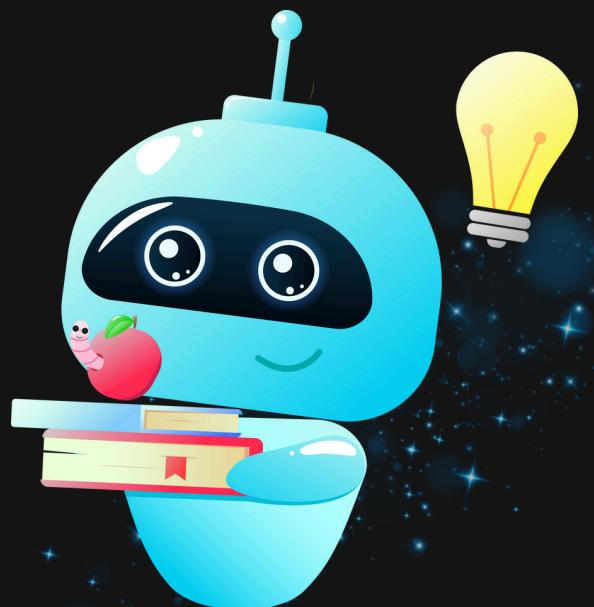


Knowledge integration

What is it?

In Copilot Studio, knowledge integration means adding information from **different sources** - like documents, websites, or databases - directly into your AI agent.

This helps the agent access and use specific data, so it can provide more accurate and relevant answers to users' questions.



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Knowledge integration Sources

Public websites

External sites with relevant information.

Documents

Files uploaded directly into the system.

SharePoint

Internal organizational content.



Dataverse

Data stored within Microsoft's Dataverse platform.

Enterprise data via Copilot connectors

Data from enterprise systems integrated through connectors.



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Knowledge integration

Manage agent's sources

You can manage the agent's knowledge sources on the **Knowledge** section on the **Overview** page, or on the **Knowledge** tab.

The screenshot shows two views of the Copilot Studio interface. The top view is the Overview page for the JingleBot agent, with a blue arrow pointing to the 'Knowledge' tab. The bottom view is a detailed look at the Knowledge section, with another blue arrow pointing to the list of sources. The Knowledge section includes a note about allowing AI general knowledge, a list of sources (Santas Workshop Ltd. Constitution.pdf, https://planetchristmas.com/, Shared Documents), and an 'Actions' section.



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Knowledge integration

Manage agent's sources

With a simple click on **+ Add knowledge**, you can expand your agent's expertise, just like adding a new ornament to your Christmas tree of AI wisdom!

Copilot Studio

JingleBot

Overview Knowledge Topics Actions Activity +2

All Public website SharePoint

Name

https://planetchristmas.com/

Shared Documents

Copilot Studio

JingleBot Overview Knowledge Topics Actions Activity +2

Allow the AI to use its own general knowledge. [Learn more](#)

Santas Workshop Ltd. Constitution.pdf

https://planetchristmas.com/

Shared Documents

Actions

+ Add action

Environment DEV

Publish Test

Disabled



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Knowledge integration

Manage agent's sources

Select a **knowledge source**.

Once selected, provide a unique **name** and a detailed **description**.

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](#)

★ Featured 🔗 Advanced 🔍 Search ≡

🌐 **Public websites**
Add public websites for real-time answers

⌚ **Dataverse (preview)**
Customize and deploy structured data tables

Upload files
Only text-based files are supported; images, audio, video, or executables are not. Files will be securely stored in Dataverse.

↑ Drag and drop a file here or [click to browse](#)
Up to 512MB per file

Cancel



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Knowledge integration

Manage agent's sources

The name helps identify the source, while the description supports **AI orchestration**, ensuring smooth and effective integration – like making sure each piece in your Christmas puzzle fits perfectly!

Upload files

Only text-based files are supported; images, audio, video, or executables are not. Files will be securely stored in Dataverse.

Drag and drop a file here or [click to browse](#)

Up to 512MB per file

File name	Name	Description
Santas Workshop Ltd. Constitution.pdf	Santas Workshop Ltd. Constitu	This knowledge source search

Back Add Cancel



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Knowledge integration

Manage agent's sources

If required, you can **edit** the name and description for the added source later.

The screenshot shows the JingleBot interface with a dark theme. At the top, there's a navigation bar with a user icon, the name "JingleBot", and icons for Overview, Knowledge (which is highlighted), and Topics. Below the navigation is a search bar with placeholder text "Search knowledge". Underneath the search bar are four buttons: "All", "Files", "Public website", and "SharePoint".

The main content area displays a list of knowledge sources:

Name	Type
https://planetchristmas.com/	Download
Shared Documents	Edit
Santas Workshop Ltd. Constitution.pdf	Files

A blue arrow points from the "Edit" button in the second row to a detailed view of the "Santas Workshop Ltd. Constitution.pdf" entry. This view includes fields for Knowledge name (set to "Santas Workshop Ltd. Constitution.pdf"), Knowledge description (containing the text "This knowledge source searches information contained in Santas Workshop Ltd. Constitution.pdf"), and File detail (showing "Santas Workshop Ltd. Constitution.pdf"). On the right side of this card, there are status details: Type (Files), Type detail (PDF File), Modified by (Katerina Chernevskaya 12 mi...), and Status (Ready).



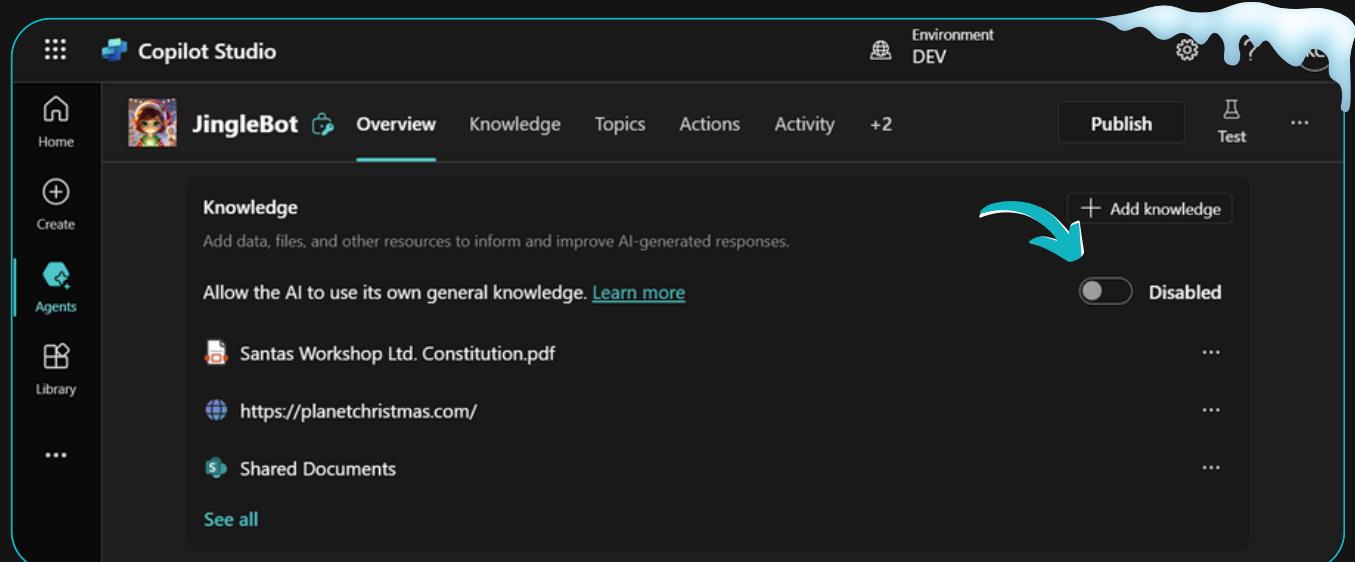
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Knowledge integration AI own general knowledge

What does this option mean?

- When enabled, the AI supplements the integrated knowledge base with its general understanding of the world, powered by its pre-trained model.
- This ensures the agent can:
 - Handle broader queries not covered by the specific knowledge base.
 - Maintain conversational fluency and provide context-aware responses.



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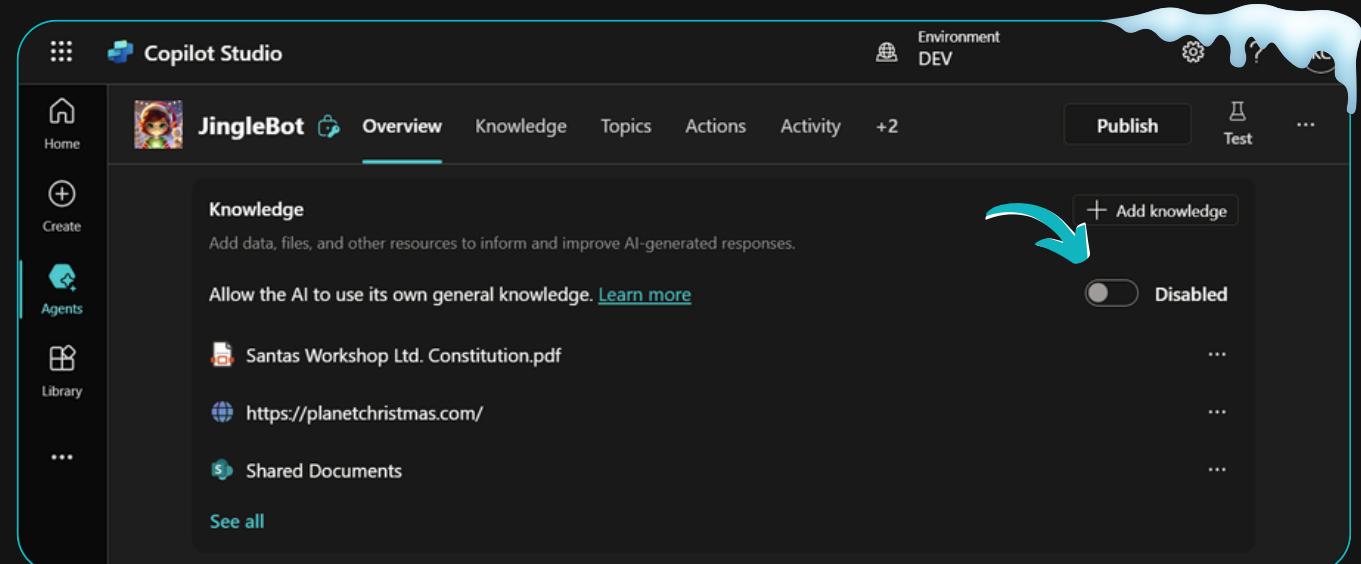


Knowledge integration

AI own general knowledge

When to use it:

- Use this option for agents requiring general knowledge, like answering common questions.
- Disable it for highly specialized agents where precision and alignment with the knowledge base are critical.



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Knowledge integration Benefits

Higher precision

AI responses are more accurate, leveraging specific data sources.

Enhanced contextual relevance

Responses become more tailored to users' needs.

Time savings

Automated access to knowledge eliminates manual lookups.

Dynamic scalability

Easily update and expand knowledge sources as your data grows.

Improved user experience

Delight users with AI that understands their needs better.



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Today's Task: Deck the Halls with Knowledge!



1. Select a knowledge source

Choose a public website or document relevant to your agent's purpose.

2. Integrate the source

Add this source to your agent.

3. Test your agent

Pose questions related to the new knowledge to ensure your agent responds accurately.



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