

- 10 -

Add Knowledge in Copilot Studio:
Dataverse tables



MONTHLY MASTERY

FEATURE-A-DAY

with Copilot Studio



Sprinkled with holiday magic by
Katerina Chernevskaya

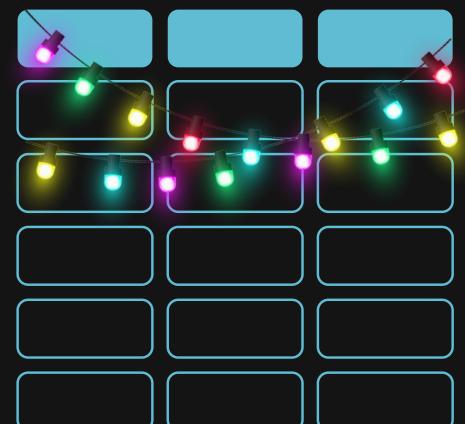


Dataverse tables as knowledge

Adding Dataverse Tables as knowledge means enabling your Copilot Studio agents to **access structured data** stored in Microsoft Dataverse, **transforming** it into a powerful source of information.

These tables act as a **dynamic knowledge base** that agents can reference to answer queries or provide insights, leveraging real-time, relational data.

This integration bridges the gap between static knowledge and dynamic, data-driven interactions, giving your agents the ability to be more **context-aware** and **responsive**.



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Dataverse as knowledge

Add to agent

In your agent click on **+ Add knowledge** and select **Dataverse (preview)**.

The screenshot shows the 'Add knowledge' dialog in Power Apps. At the top, it says 'Step 1 of 3: Select Dataverse tables'. It allows selecting up to 15 tables or creating new ones. Below this, there are two tabs: 'All' (selected) and 'Selected (0)'. A search bar and an AI-generated content note are also present. The 'Available tables' section lists 'User' (SystemUser), 'Account', and 'Action Approval Model'. A large blue arrow points from the 'Dataverse (preview)' option in the main list down to its detailed description below.

Step 1 of 3: Select Dataverse tables
Select up to 15 tables, or go to the data workspace in Power Apps to [create new tables](#)
 All Selected (0)
 Recommended by Copilot
 User SystemUser
Available tables
 Account Account
 Action Approval Model

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. [Learn more about knowledge sources](#)

Featured Advanced

Public websites
Add public websites for real-time answers

SharePoint
Securely integrate and manage internal data

Dataverse (preview)
Customize and deploy structured data tables

Next Cancel

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



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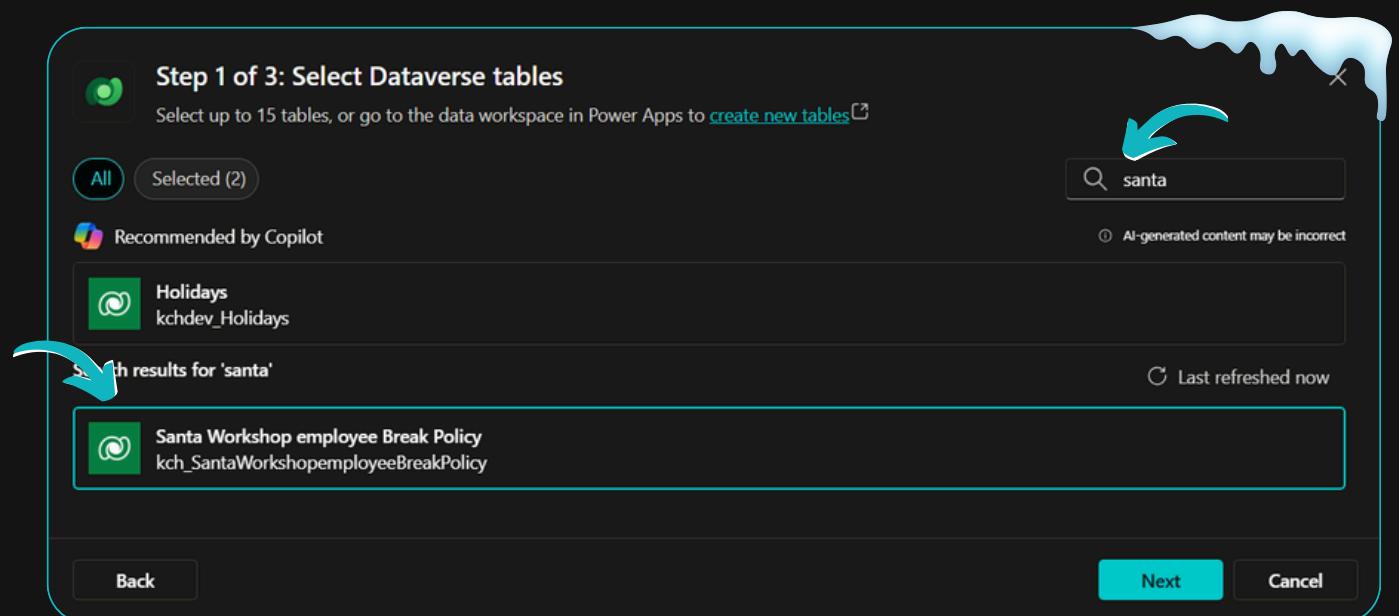


Dataverse as knowledge

Add to agent

Browse the list of available Dataverse tables and choose the one you want to add.

Use search field to find required tables.



You can select up to 15 tables



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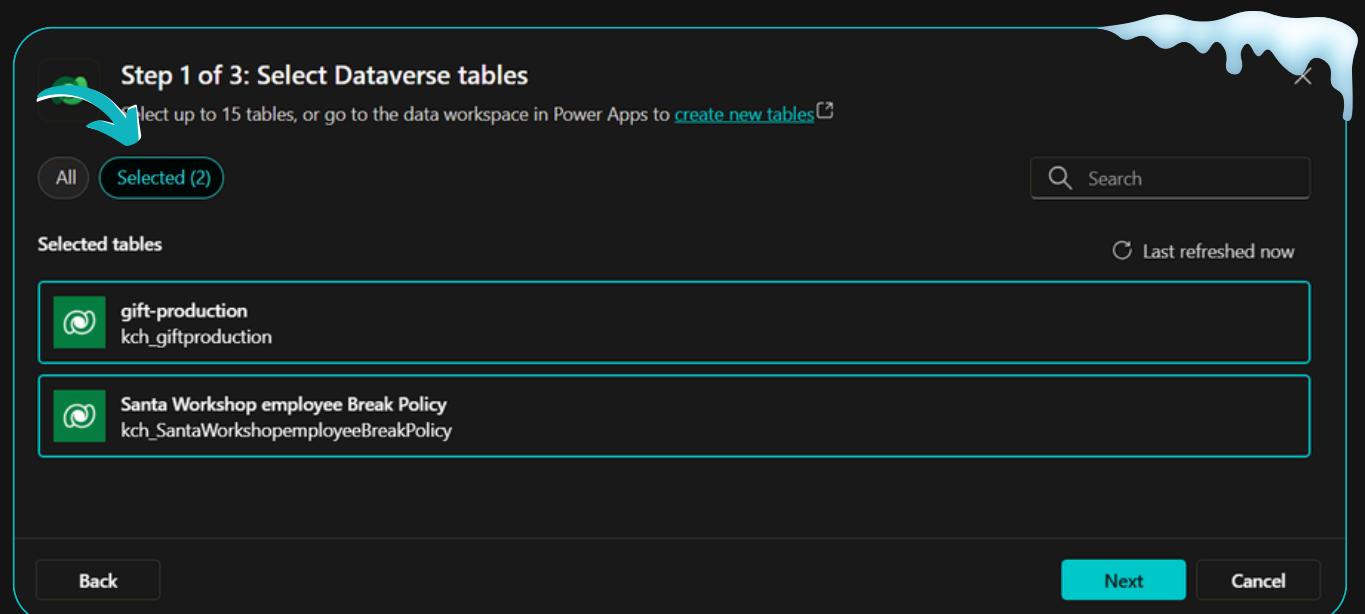


Dataverse as knowledge

Add to agent

In the **Selected** tab, review all the tables you have chosen.

Deselect any tables that are not required to ensure your agent focuses on relevant data.



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Dataverse as knowledge

Add to agent

Review a sample of the table data to ensure accuracy.

- ! The preview displays only the **first 20 rows** and a **subset of columns** for review, but rest assured, the entire dataset is incorporated into the knowledge source.

Step 2 of 3: Preview data

Preview the first 20 available rows and columns from your selected tables.

Select a table to review

gift-production

✓ gift-production

Santa Workshop employee Break Policy

2024-12-09T08:07:08Z	Mia	2024-12-24T00:00:00Z	Toycrafting	Doll
2024-12-09T08:06:12Z	Tim	2024-12-24T00:00:00Z	Toycrafting	Train set
2024-12-09T08:06:55Z	Emma	2024-12-24T00:00:00Z	Toycrafting	Doll
2024-12-09T08:07:00Z	Jack	2024-12-24T00:00:00Z	Toycrafting	Soccer Ball

Back Next Cancel



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DataVERSE as knowledge

Set knowledge attributes

Assign a unique **name** and a detailed **description** to the knowledge source to aid AI orchestration.

Step 3 of 3: Review and finish

Review your data selections and provide a name and description to help your agent access the data.

Knowledge name *

Santa Workshop employee Break Policy, gift-production

Knowledge description *

This knowledge source answers questions found in the following DataVERSE tables: Santa Workshop employee Break Policy, gift-production

Synonyms (0 synonym(s) in 0 column(s) in 0 table(s))

Increase your agent's data retrieval accuracy by adding synonyms for complex or unclear column names in your tables.

Glossary (0)

Enhance your agent's understanding and responses by defining domain-specific terms and acronyms.

Selected tables

gift-production
kch_giftproduction

Santa Workshop employee Break Policy
kch_SantaWorkshopemployeeBreakPolicy

Back Add Cancel



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Dataverse as knowledge

Set knowledge attributes

Add **synonyms** and **descriptions** for table columns to improve the agent's understanding of user queries.

Synonyms

Improve data discovery with synonyms
Increase your agent's data retrieval accuracy by adding synonyms for complex or unclear column names in your tables.

Select table
gift-production

Column name	Synonyms	Description
Delivery Date	+ Add synonyms	The scheduled date for the gift to be delivered
Department	+ Add synonyms	The workshop department responsible for prc
Gift requested	Desired gift.Gift wish.Present request	The specific toy or item the child has requested

Step 3 of 3: Review and finish

Review your data selections and provide a name and description to help your agent access the data.

Knowledge name *
Santa Workshop employee Break Policy, gift-production

Knowledge description *
This knowledge source answers questions found in the following Dataverse tables: Santa Workshop employee Break Policy, gift-production

Synonyms (0 synonym(s) in 0 column(s) in 0 table(s))

Increase your agent's data retrieval accuracy by adding synonyms for complex or unclear column names in your tables.

Glossary (0)

Enhance your agent's understanding and responses by defining domain-specific terms and acronyms.

Edit

Edit



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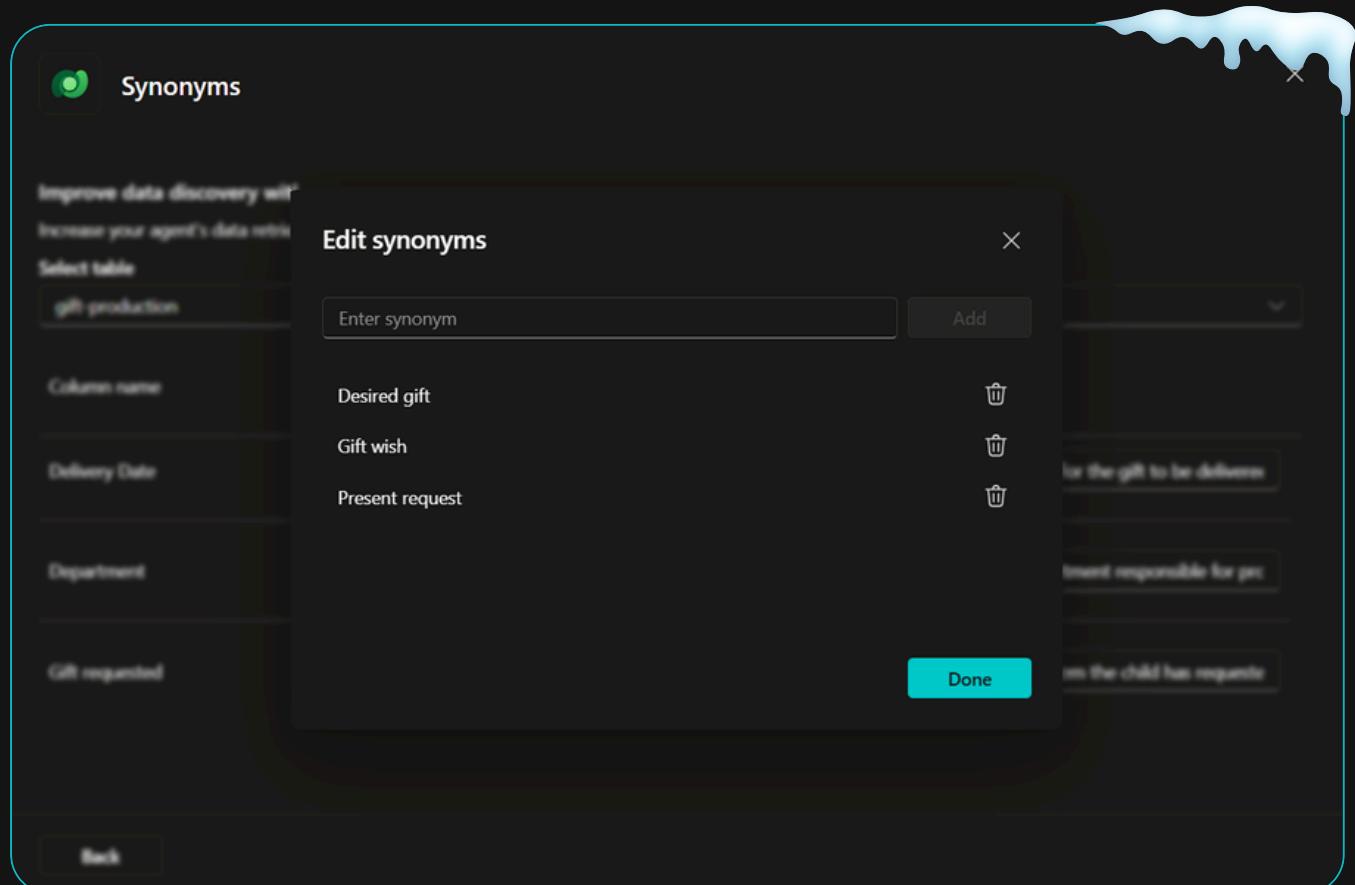
DataVERSE as knowledge

Set knowledge attributes

Synonyms help agents understand different user phrasings.

For example, “Inventory” might also be called “Stock” or “Supply.”

Add synonyms for numeric or coded data to make it comprehensible for the agent.



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Dataverse as knowledge

Set knowledge attributes

Define **glossary** entries to provide **context** and **clarity** for specific terms.

A glossary is a collection of terms and their definitions, ensuring that agents interpret the data correctly.

Glossary

Build your data glossary

Enhance your agent's understanding and responses by defining domain-specific terms and acronyms.

Enter term Enter description Next

Term	Description
kch_specialnotes	Additional festive details, such as treats provided or morale-boosting

Step 3 of 3: Review and finish

Review your data selections and provide a name and description to help your agent access the data.

Knowledge name *

Santa Workshop employee Break Policy, gift-production

Knowledge description *

This knowledge source answers questions found in the following Dataverse tables: Santa Workshop employee Break Policy, gift-production

Synonyms (0 synonym(s) in 0 column(s) in 0 table(s))

Increase your agent's data retrieval accuracy by adding synonyms for complex or unclear column names in your tables.

Glossary (0)

Enhance your agent's understanding and responses by defining domain-specific terms and acronyms.

Edit

Edit



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Dataverse as knowledge

Add to agent

When all attributes are configured, click **Add** to integrate the Dataverse tables into your agent's knowledge base.

 Step 3 of 3: Review and finish

Review your data selections and provide a name and description to help your agent access the data.

Knowledge name * Santa Workshop employee Break Policy, gift-production 53/100

Knowledge description * This knowledge source answers questions found in the following Dataverse tables: Santa Workshop employee Break Policy, gift-production 134/2500

Synonyms (3 synonym(s) in 1 column(s) in 1 table(s)) 

Increase your agent's data retrieval accuracy by adding synonyms for complex or unclear column names in your tables.

Glossary (6) 

Enhance your agent's understanding and responses by defining domain-specific terms and acronyms.

Selected tables

 gift-production kch_giftproduction
 Santa Workshop employee Break Policy kch_SantaWorkshopemployeeBreakPolicy



Back **Add** **Cancel**



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Dataverse as knowledge

Edit knowledge attributes

You can **edit** Dataverse knowledge attributes at any time.

Copilot Studio

JingleBot Overview Knowledge Topics Actions Activity +2 Publish Test

Environment DEV

Knowledge

Add data, files, and other resources to inform and improve AI-generated responses.

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

Santa Workshop employee Break Policy, gift-production

See all

Details Preview Synonyms Glossary

Knowledge details

Knowledge name *

Santa Workshop employee Break Policy, gift-production

Knowledge description *

This knowledge source answers questions found in the following Dataverse tables: Santa Workshop employee Break Policy, gift-production

Type
Dataverse

Modified by
Katerina Chernevskaya 38 seconds ago

Status
Unknown

Selected tables Edit tables

gift-production kch_giftproduction

Santa Workshop employee Break Policy kch_SantaWorkshopemployeeBreakPolicy



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Dataverse as knowledge

Test the new knowledge

Use the **Test tool** to test your agent.

The screenshot shows the Power Apps JingleBot interface. At the top, there's a navigation bar with 'Power Apps' and a search bar. Below it is a ribbon with 'Objects', 'New', 'Add existing', 'Edit', 'Create an app', 'Using this table', 'Import', and more. A 'Santa Workshop employee Break Policy columns and data' table is open, showing three rows of break types and their details:

Shift Type	Break Type	Duration
Holiday Rush (12 hrs)	Extended Lunch Break	1 hour
Holiday Rush (12 hrs)	Extra Cocoa Break	20 minutes
Regular Shift (8 hrs)	Lunch Break	1 hour
		15 minutes
		15 minutes

Below the table, a 'Test' button is highlighted. The main area shows a session with 'Session started'. On the left, a 'Knowledge sources' panel lists 'Public website (1)' and 'Dataverse (1)'. On the right, a 'Test your agent' panel has a message box containing 'what break can I take for 1 hour?' with a timestamp 'Just now'. The AI response is: 'You have 2 break options available for a 1-hour duration. The options include a Lunch Break with a gingerbread buffet available, and an Extended Lunch Break that includes a morale-boosting carol 🎅. Happy Wrapping!'. It also shows '1 reference' and a link 'kch_SantaWorkshopempl...'. A large blue arrow points from the bottom right towards the interface.



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Dataverse as knowledge Benefits

Improved contextual understanding

Enables agents to pull relevant data for better response accuracy.

Simplified data management

Centralized knowledge from Dataverse reduces redundancy and manual updates.



Enhanced user experience

Accurate and instant answers improve user satisfaction.

Increased interpretability

Synonyms and glossary entries ensure that even coded or numeric columns are understood and utilized effectively.

Scalability

Seamlessly handle large volumes of structured data.



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Today's Task: Add Dataverse table as Knowledge



1. Connect a Dataverse table

Choose a relevant table and add it as a knowledge source for your agent.

2. Create a Synonym set and Glossary entries

Define synonyms and descriptions for at least 3 key columns in the table to enhance query handling.

3. Simulate queries

Test the integration by simulating user questions based on the table's data, ensuring synonyms and glossary entries work as expected.



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