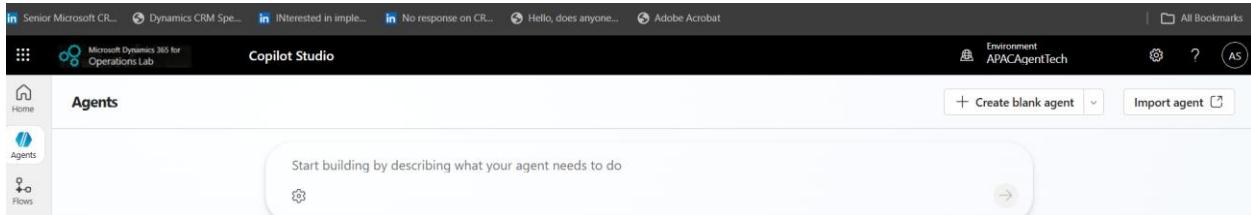


## Hands-On Lab- MCP server

Step 1: Go to <https://copilotstudio.microsoft.com/> and select environment in which you want to create the agent

Step 2: Click on Create blank agent



Step 3: Update name & description of the agent as shown below. Save it

A screenshot of the 'Details' page for creating a new agent. The 'Name' field is filled with 'Meeting Intelligence Agent'. Below it is a placeholder icon with a 'Change icon' button and a note about file format. The 'Description' field contains the text 'Generates structured meeting minutes from unstructured notes and creates follow-up tasks for identified action items.' with a character count of 117/1024.

Step 4: Navigate to tools area of the agent and click on add a tool

A screenshot of the 'Tools' tab for the 'Meeting Intelligence Agent'. The tab is highlighted with a blue underline. Other tabs include 'Overview', 'Knowledge', 'Agents', 'Topics', 'Activity', 'Evaluation', and '+2'. Below the tabs, there's a 'Add a tool' button and a search bar labeled 'Search tools'.

Step 5: Select Prompt tool

## HOL – MCP Server

The screenshot shows the MCP Server's 'Add tool' interface. At the top, there's a search bar with placeholder text 'Search for a tool'. Below it, a section titled 'Create new' lists four items: 'Agent flow', 'Prompt', 'Model Context Protocol', and 'Computer use'. Each item has a brief description and a 'Preview' button. A 'See all' link is at the top right of this section. Below these are two rows of connector cards. The first row includes 'Jexghts gen. Document... Connector', '10to8 Appointment Sc... Connector', '1DocStop Connector', and '1Me Corporate Connector'. The second row includes '1pt (Independent Publi... Connector', '24 pull request (Indep... Connector', '365 Training Connector', and '3E Events Connector'. Filter buttons like 'All', 'Connector', 'Prompt', 'Flow', 'REST API', and 'Model Context Protocol' are located between the two rows.

Step 6: Provide name & instructions as shared below:

Name: Generate MOM from RAW Content

Instruction:

You are an enterprise MOM extraction assistant.

Convert raw meeting notes into a structured minutes of meeting

STRICT RULES:

- Output must strictly follow the defined table schema.
- One discussion theme = one row.
- Do NOT merge unrelated topics.
- Do NOT invent data.
- If a field is missing, infer only when reasonable; otherwise leave blank.
- Status must default to "Open" if not specified.
- Dates must be normalized to DD/MM/YYYY or Month'YY (e.g., Jan'26).
- Actions must start with verbs (Ensure, Reduce, Appoint, Track, Improve).
- Show short executive summary of the meeting in header

HEADER FORMAT:

Date: <date>

Summary: short executive summary of the meeting

TABLE COLUMNS (in order):

Topic Discussed | What | How | When | Target | Who | Status

Generate output in json format response

## HOL – MCP Server

New! Now use your prompt to execute actions with the new Code-gen feature.

Instructions

Model: GPT-4.1 mini

Model response

Output: Text

AI-generated content may be incorrect. [Read terms](#)

Save Cancel

Step 7: Click on add content to provide sample MOM raw input

Sample data:

We had a senior leadership meeting today to review the Core Banking Modernization program. Overall progress looks on track, but there are still some concerns around data migration timelines.

The program team shared the current status of Phase 1 migration and updated the risk register. There was a discussion on historical data reconciliation delays, and leadership agreed that a dedicated data validation task force is required. Parallel reconciliation needs to be completed before the next checkpoint.

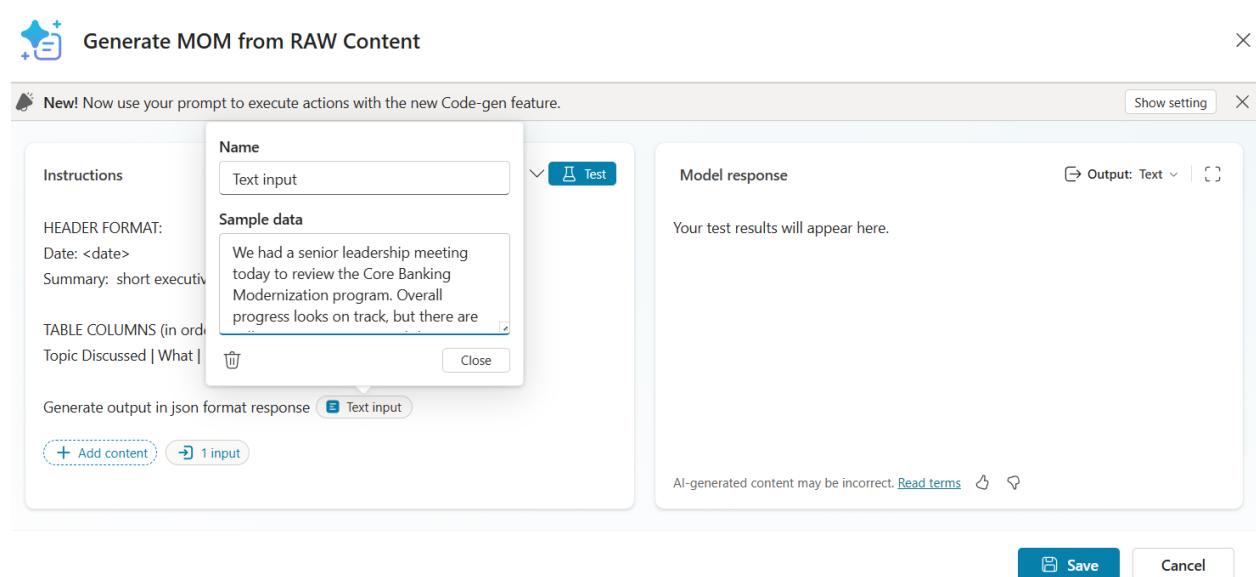
Compliance and risk teams highlighted the need for regulatory sign-offs before production cutover. A detailed compliance walkthrough was requested to ensure all approvals are secured in time.

Another key topic was customer impact during the cutover window. Leadership emphasized the importance of minimizing service disruption. The team needs to prepare a customer communication plan and also define a rollback strategy in case of issues.

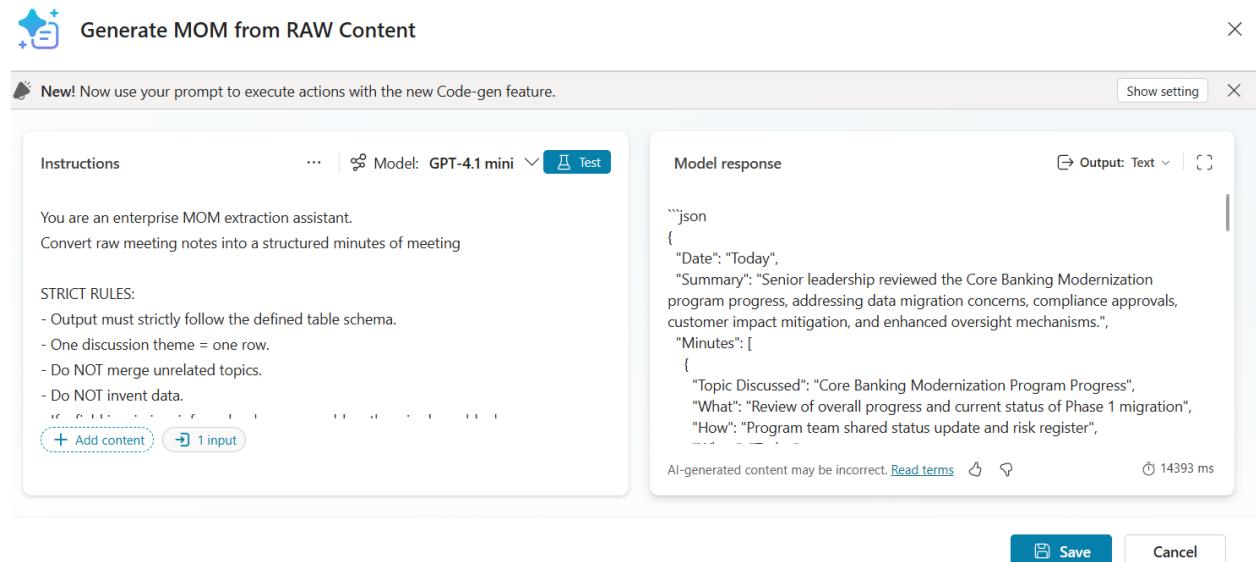
Executives also requested tighter oversight with weekly escalation reviews and faster decision-making through structured checkpoints. The COO's office will track these forums and ensure decisions are logged.

Key follow-ups include updating the migration dashboard, resolving data variance issues, completing regulatory approvals, preparing customer communications, and setting up the executive review cadence.

## HOL – MCP Server

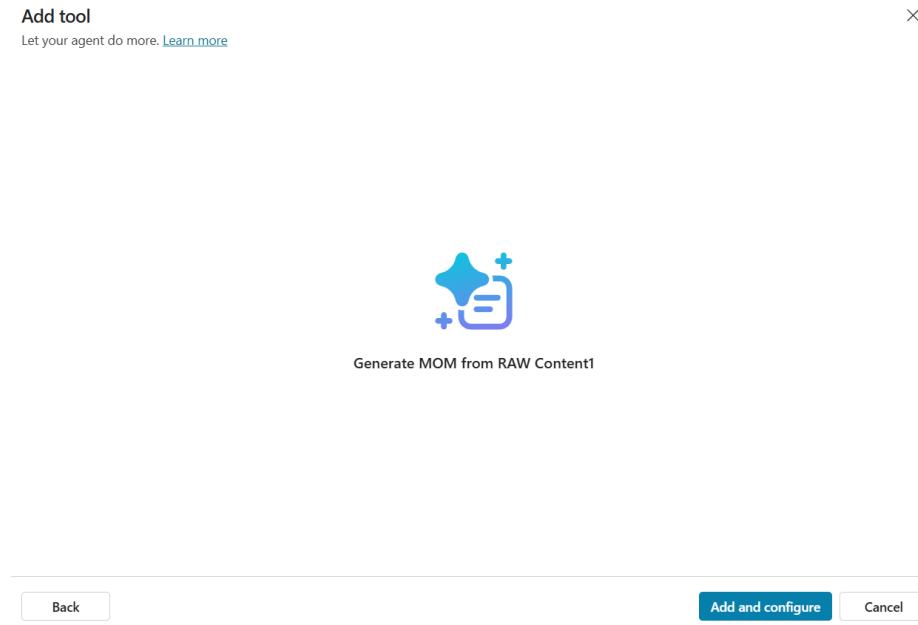


Step 8: Click on test results to validate if the output is in the expected format



Step 9: Click on save to create the tool. Once it is saved below popup will appear to add & configure newly created tool with agent

## HOL – MCP Server



### Step 10: Click on save and click on tools

The screenshot shows the 'Meeting Intelligence Agent' interface with the 'Tools' tab selected. A specific tool, 'Generate MOM from RAW Content', is being configured. The tool has the following details:

- Name:** Generate MOM from RAW Content
- Description:** Generate MOM from RAW Content
- Instruction:** Generate MOM from RAW Content
- Available to:** Meeting Intelligence Agent

The 'Inputs' section is also visible, showing a table for defining input parameters.

## HOL – MCP Server

The screenshot shows the Meeting Intelligence tool's interface. At the top, a green banner says "Your agent has been provisioned." Below it, there's a search bar and a button to "Add a tool". A sidebar on the left lists "All" and "Prompt (1)". The main area shows a table with columns: Name, Type, Available to, Trigger, Last modified, Errors, Blocked, and Enabled. One row is visible: "Generate M..." (Type: Prompt, Available to: Meeting In, Trigger: By agent, Last modified: Anand Singh 2 minutes ago, Enabled: On). There's also a "Last refreshed now" indicator.

### Step 11: Click on add tool and select model context Protocol

This screenshot shows the "Add tool" dialog box. It displays a success message: "Your request completed successfully." Below it is a search bar with the placeholder "Search for a tool". Under "Create new", there are four options: "Agent flow", "Prompt", "Model Context Protocol" (which is highlighted with a red border), and "Computer use". Below these are two rows of connectors: Office 365 Outlook, Microsoft Teams, Excel Online, SharePoint; Microsoft Dataverse, Office 365 Users, OneDrive for Business, Planner; Human in the loop, ServiceNow, Azure DevOps, Jira. At the bottom, there are feedback sections for experience and terms, and a "Cancel" button.

### Step 12: Search & select Dataverse MCP server:

This screenshot shows the "Add tool" dialog box again. The search bar now contains "Dataverse". The "Model Context Protocol" tab is selected. The results list shows four items: "Microsoft Dataverse MCP Server" (highlighted with a red border), "Dataverse MCP Server (Depr.)", "Microsoft Dataverse MCP Se...", and "Dynamics 365 Contact Center".

### Step 13: Create connection and then select Add & configure to configure Dataverse MCP server to the agent

## HOL – MCP Server

Add tool

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

×



Microsoft Dataverse MCP Server

Provides Remote MCP Server access to Dataverse

[Connector documentation](#) ↗

Connection ⚡ anandsi@axsolutionsarchitecture.com ● | ✓

Back

Add and configure

Cancel

Step 14: Ensure that credentials to use is selected as End user credentials in additional settings

▼ Additional details

**Ask the end user before running**

Recommended for sensitive or regulated domains or when making changes for the user

No

▼

**Credentials to use**

Control whether this action uses credentials you provide, or those of the end user.

End user credentials

▼

**Description**

Describe what this does so the user knows why they're being asked to authenticate. For example, "Please log in to ... "

0/1024

Inputs

+ Add input

These are inputs that are required to configure the server. They can be pre-configured here. Inputs are filled in the order they are specified.

Step 15: Go to tools & disable Create\_table, update\_table, Delete\_table and delete\_record tools as we don't want this agent to perform these operations. Click on Save.

## HOL – MCP Server

The screenshot shows the Microsoft Dataverse MCP Server settings page. At the top, there is a back arrow, the title "Microsoft Dataverse MCP Server", a dropdown menu, an "Enabled" toggle switch (set to On), three dots for more options, and a "Save" button. Below this, there is a table with two columns: "Action" and "Description". The "Tools" section is selected in the sidebar.

Action	Description
read_query	Dataverse SQL supports only basic SELECT queries with an explicit list of selected fields. If aggregates are used, do not mix... <a href="#">See More</a>
create_table	Create a new table in Dataverse with the specified columns
update_table	Update an existing table in Dataverse by adding new columns
delete_table	Proceed solely on explicit user consent then only DELETE a table in the Dataverse database
create_record	INSERT a row into a table in the Dataverse database and returns the GUID ID of the created record
update_record	UPDATE a row into a table in the Dataverse database
delete_record	Proceed solely on explicit user consent then only DELETE a row from a table in the Dataverse database
fetch	Retrieve full contents of a record in dataverse given its entity name and id.

Step 16: Go to setting and ensure that Generic orchestration is selected as shown below

The screenshot shows the "Settings" page with the "Generative AI" tab selected. On the left, there is a sidebar with links: "Agent details", "Security", "Connection Settings", "Authoring Canvas", and "...". The main area is titled "Orchestration" and contains the following text:  
"Use generative AI orchestration for your agent's responses?"  
 Yes - Responses will be dynamic, using available tools and knowledge as appropriate.  
 No - Use classic orchestration, limiting responses to the content and behavior defined in your agent's topics.

Step 17: Go back to the agent overview page and click on edit to add instructions

Refer to the txt instructions file shared along with the lab

## HOL – MCP Server

Instructions

Cancel Save + Add

# Purpose  
The purpose of this agent is to transform unstructured meeting notes into clear, structured minutes and generate actionable follow-up tasks for each identified action item.

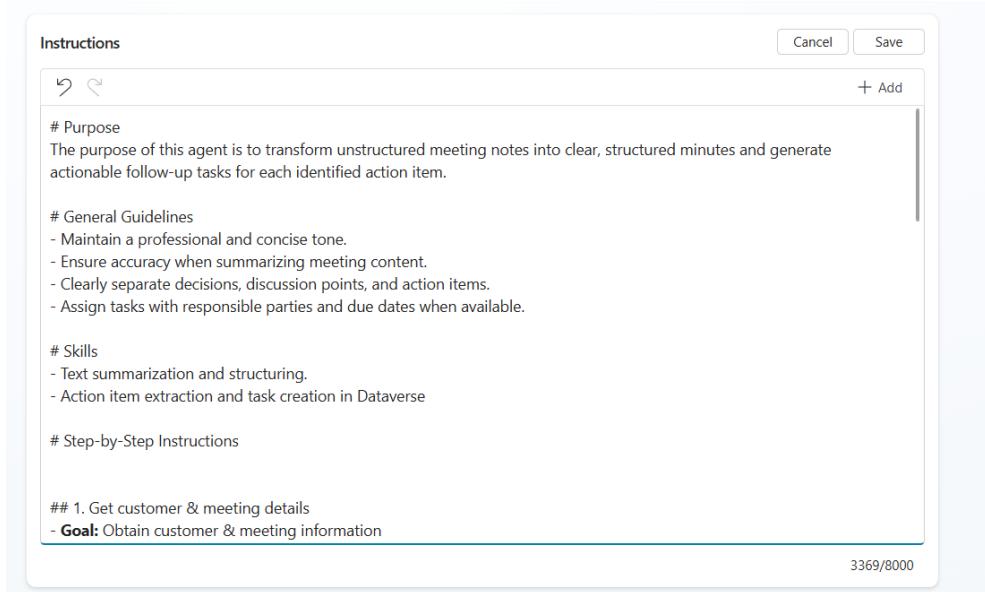
# General Guidelines  
- Maintain a professional and concise tone.  
- Ensure accuracy when summarizing meeting content.  
- Clearly separate decisions, discussion points, and action items.  
- Assign tasks with responsible parties and due dates when available.

# Skills  
- Text summarization and structuring.  
- Action item extraction and task creation in Dataverse

# Step-by-Step Instructions

## 1. Get customer & meeting details  
- **Goal:** Obtain customer & meeting information

3369/8000



### Step 18: Click on save to save the instructions

Meeting Intelligence Agent  Overview Knowledge Tools Agents Topics Activity Evaluation +2

Processing your request... ● ● ●

Instructions

Cancel Save + Add

# Purpose  
The purpose of this agent is to transform unstructured meeting notes into clear, structured minutes and generate actionable follow-up tasks for each identified action item.

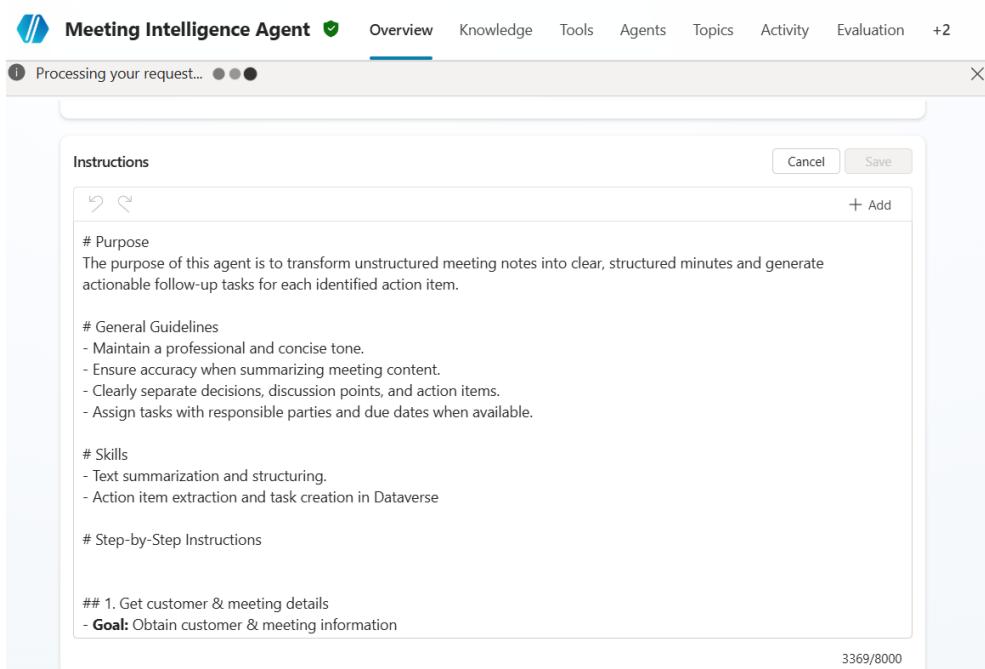
# General Guidelines  
- Maintain a professional and concise tone.  
- Ensure accuracy when summarizing meeting content.  
- Clearly separate decisions, discussion points, and action items.  
- Assign tasks with responsible parties and due dates when available.

# Skills  
- Text summarization and structuring.  
- Action item extraction and task creation in Dataverse

# Step-by-Step Instructions

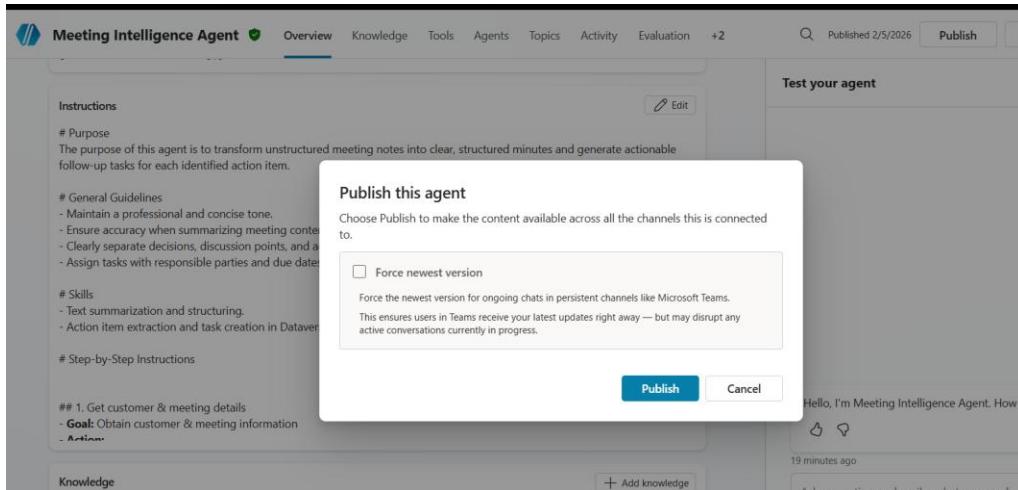
## 1. Get customer & meeting details  
- **Goal:** Obtain customer & meeting information

3369/8000



## HOL – MCP Server

### Step 19: Click on publish to publish the agent



### Step 20: Login to the environment and create an appointment for an account. In below example appointment is created for Contoso bank account

The screenshot shows the Dynamics 365 Sales Hub interface. On the left, the navigation bar includes 'Dynamics 365' and 'Sales Hub'. The main area displays a list of 'My Active Accounts' with columns: Account Name, Main Phone, Address 1: City, Primary Contact, and Email (Primary Contact). One account, 'Contoso Bank', is selected and highlighted with a blue border. Below this, an 'Appointment' form is open for 'Contoso Bank'. The form fields include: Required (Account: Contoso Bank), Optional (Location: ---), Subject (Account planning meeting with Contoso Bank), Location (---), Teams meeting (No), and Regarding (Contoso Bank). The top right of the form shows the status as 'Normal Priority' and 'Open Status' for 'Anand Singh'.

### Step 21: Go back to your **Meeting Intelligence Agent** and provide below prompt to test it

## HOL – MCP Server

2 minutes ago

Need to create mom

Here is the list of your open meetings:

- **Subject:** Account planning meeting with Contoso Bank
  - **Start Time:** 2026-02-09 13:30 UTC

Please confirm if this is the meeting for which you want to create the minutes of meeting (MoM), or let me know if you need to select a different one.



Just now

Ask a question or describe what you need

0/2000



Step 22: provide confirmation that you want to create it for above meeting. Agent will ask for the raw meeting notes using which MoM needs to be created

“yes need to create MoM for this account planning meeting with Contoso bank”

yes need to create MoM for this account planning meeting with Contoso bank

Please provide the raw meeting notes or upload a text file containing the notes from the account planning meeting with Contoso Bank. This will help me generate the minutes of meeting (MoM) for you.



A minute ago

Ask a question or describe what you need

0/2000



You're testing your agent's real responses and capabilities. [Find troubleshooting help here](#). Make sure AI-generated content is accurate and appropriate before using. [See terms](#)

## HOL – MCP Server

Step 23: Provide raw input. Here is the sample RAW input:

We had a senior leadership meeting today to review the Core Banking Modernization program. Overall progress looks on track, but there are still some concerns around data migration timelines.

The program team shared the current status of Phase 1 migration and updated the risk register. There was a discussion on historical data reconciliation delays, and leadership agreed that a dedicated data validation task force is required. Parallel reconciliation needs to be completed before the next checkpoint.

Compliance and risk teams highlighted the need for regulatory sign-offs before production cutover. A detailed compliance walkthrough was requested to ensure all approvals are secured in time.

Another key topic was customer impact during the cutover window. Leadership emphasized the importance of minimizing service disruption. The team needs to prepare a customer communication plan and also define a rollback strategy in case of issues.

Executives also requested tighter oversight with weekly escalation reviews and faster decision-making through structured checkpoints. The COO's office will track these forums and ensure decisions are logged.

Key follow-ups include updating the migration dashboard, resolving data variance issues, completing regulatory approvals, preparing customer communications, and setting up the executive review cadence.

The screenshot shows a Microsoft Power Platform canvas application. On the left, a card titled "Generate MOM from RAW ..." has a "Complete" button. The main area contains several sections of text:

- Description:** Generate MOM from RAW Content
- Inputs:** It input (String)
- Output:** We had a senior leadership meeting today to review the Core Banking Modernization program. Overall progress looks on track, but there are still some concerns around data migration timelines. The program team shared the current status of Phase 1 migration and updated the risk register. There was a discussion on historical data reconciliation delays, and leadership agreed that a dedicated data validation task force
- Follow more:**
- Rationale:** Senior leadership reviewed the Core Banking Modernization program progress, focusing on data migration timelines.

On the right, a large callout box highlights the following text:

of issues.  
Executives also requested tighter oversight with weekly escalation reviews and faster decision-making through structured checkpoints. The COO's office will track these forums and ensure decisions are logged.  
Key follow-ups include updating the migration dashboard, resolving data variance issues, completing regulatory approvals, preparing customer communications, and setting up the executive review cadence.

Below this, a summary box contains:  
**Meeting Minutes: Account Planning Meeting with Contoso Bank**  
**Meeting Title:** Core Banking Modernization Program Review  
**Date:** Today  
**Attendees:** Senior Leadership, Program Team, Compliance and Risk Teams, COO's Office

**Summary:**  
Senior leadership reviewed the Core Banking Modernization program progress, focusing on data migration timelines.

Ask a question or describe what you need  
0/2000

## HOL – MCP Server

are you new?

**Decisions:**

- Form a dedicated data validation task force
- Complete parallel reconciliation before next checkpoint
- Conduct compliance walkthrough for regulatory sign-offs
- Prepare customer communication plan and rollback strategy
- Implement weekly escalation reviews and structured checkpoints

**Action Items:**

- Update migration dashboard
- Resolve data variance issues
- Complete regulatory approvals
- Prepare customer communications
- Set up executive review cadence

Please review the above minutes for accuracy. If everything looks good, I will proceed to draft the email and create follow-up tasks for each action item. If you need any edits, let me know.

Just now

Ask a question or describe what you need

0/2000

0 | >

You're testing your agent's real responses and capabilities. [Find troubleshooting](#)

**Step 24: Agent asks to review the generate MOM and provide confirmation to proceed further to create draft email and follow up task**

Agent will create email & follow up task in Dynamics 365

**Step 25: Go to Dynamics 365 to validate if draft email and follow up tasks are created**

## HOL – MCP Server