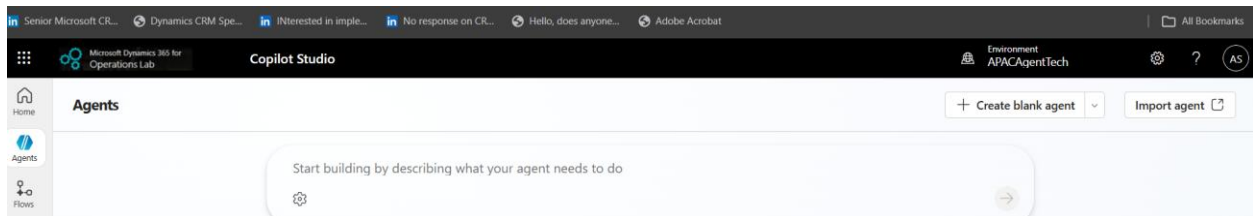


Hands-On Lab- MCP server

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

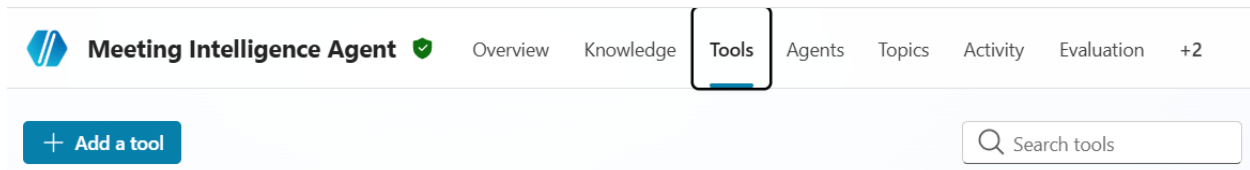
Step 2: Click on Create blank agent



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

A screenshot of the 'Details' form for creating a new agent. The form has a 'Name' field with the text 'Meeting Intelligence Agent' and a 'Description' field with the text 'Generates structured meeting minutes from unstructured notes and creates follow-up tasks for identified action items.' There is a 'Change icon' button and a note 'Used to represent the agent. Icon should be in PNG format.' at the bottom. The form also includes 'Cancel' and 'Save' buttons at the top right.

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



Step 5: Select Prompt tool

HOL – MCP Server


Add tool


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


Search for a tool


Create new

[See all](#)


**Agent flow**
These predictable automations run the same way each time, giving you more control when you need it.


**Prompt**
Analyze and transform text, documents, images, and data, with natural language and AI reasoning.


**Model Context Protocol**
Open standard for connecting your agent to data, designed with AI in mind.


**Computer use** [Preview](#)
Empower your agent to directly use web and desktop apps.


[All](#) [Connector](#) [Prompt](#) [Flow](#) [REST API](#) [Model Context Protocol](#)


Jexghts gen. Document Connector >


10to8 Appointment Scheduler Connector >


1DocStop Connector >

1Me Corporate Connector >

1pt (Independent Publisher) Connector >

24 pull request (Independent Publisher) Connector >

365 Training Connector >

3E Events Connector >

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

 **Generate MOM from RAW Content** ×

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

Instructions ... Model: GPT-4.1 mini Test

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

+ Add content

Model response Output: Text ↔

Your test results will appear here.

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

 **Generate MOM from RAW Content** ×

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

Instructions

HEADER FORMAT:
Date: <date>
Summary: short executive summary

TABLE COLUMNS (in order):
Topic Discussed | What | When | How

Generate output in json format response Text input

+ Add content → 1 input

Name

Text 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

Close

Test

Model response


Output: Text ↗


Your test results will appear here.

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

Save Cancel

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

 **Generate MOM from RAW Content** ×

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

Instructions

Model: GPT-4.1 mini Test

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.

+ Add content → 1 input

Model response

Output: Text ↗

```
```json
{
 "Date": "Today",
 "Summary": "Senior leadership reviewed the Core Banking Modernization program progress, addressing data migration concerns, compliance approvals, customer impact mitigation, and enhanced oversight mechanisms.",
 "Minutes": [
 {
 "Topic Discussed": "Core Banking Modernization Program Progress",
 "What": "Review of overall progress and current status of Phase 1 migration",
 "How": "Program team shared status update and risk register",
 "When": "Today",
 "Who": "Senior Leadership"
 }
]
}
```

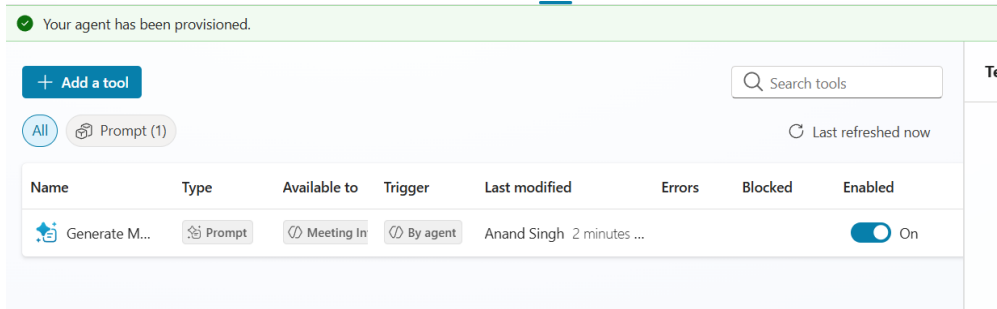
AI-generated content may be incorrect. [Read terms](#) 👍 👎 🕒 14393 ms

Save Cancel

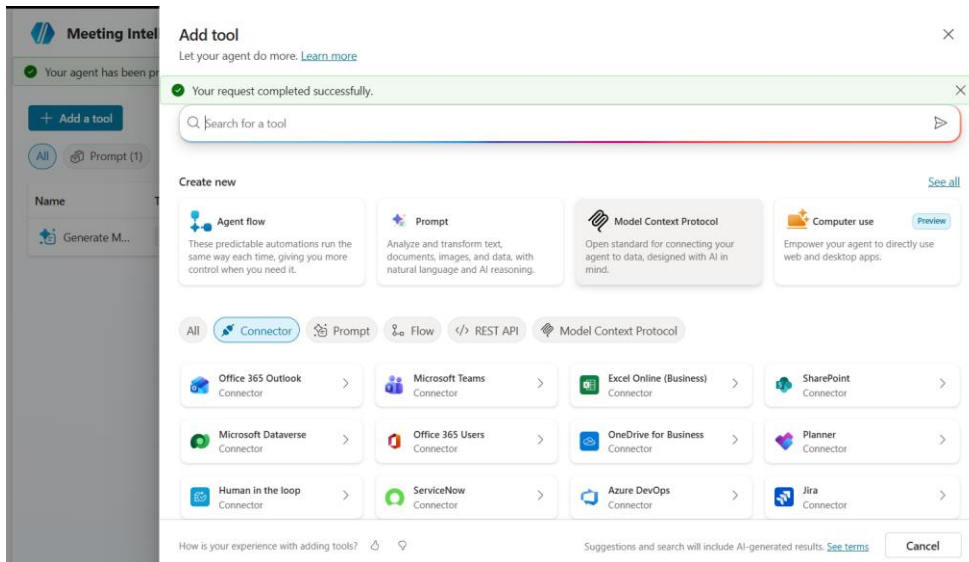
Step 9: Click on save to create the tool. Once it is saved below popup will appear to add & configure newly created tool with agent



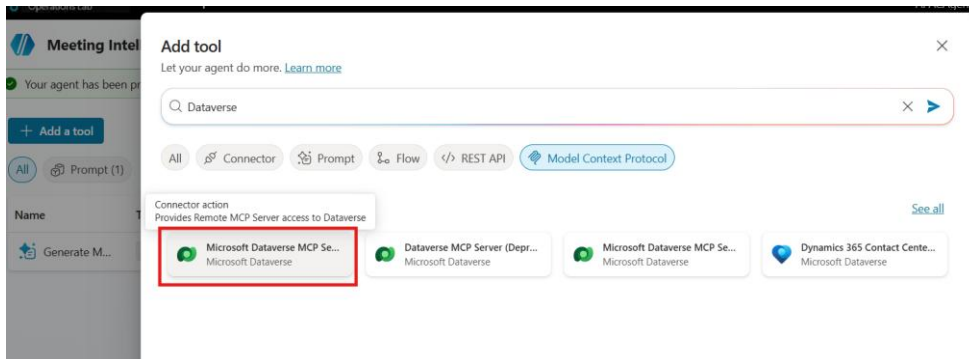
## HOL – MCP Server



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



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



### 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 Dataaverse MCP Server

Provides Remote MCP Server access to Dataaverse

[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

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.









+ Add input

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

← Microsoft Dataverse MCP Server ▾ Enabled  ... [Save](#)

the Dataverse database

Details	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>	
Inputs	create_table	Create a new table in Dataverse with the specified columns	
Tools	update_table	Update an existing table in Dataverse by adding new columns	
Resources	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

Settings

[Generative AI](#)


- Agent details
- Security
- Connection Settings
- Authoring Canvas

Orchestration

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.

Deep reasoning (preview) [Premium](#)  Off

Enable advanced reasoning for AI actions. [Learn more](#)

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

CancelSave

↶ ↷ + 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... X

Instructions

CancelSave

↶ ↷ + 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.
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# Skills

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

# Step-by-Step Instructions

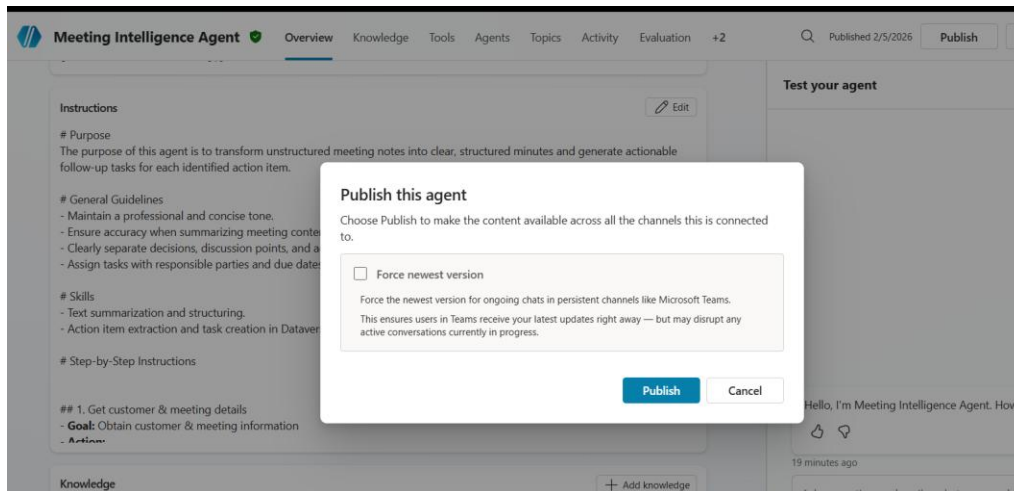
## 1. Get customer & meeting details

- **Goal:** Obtain customer & meeting information

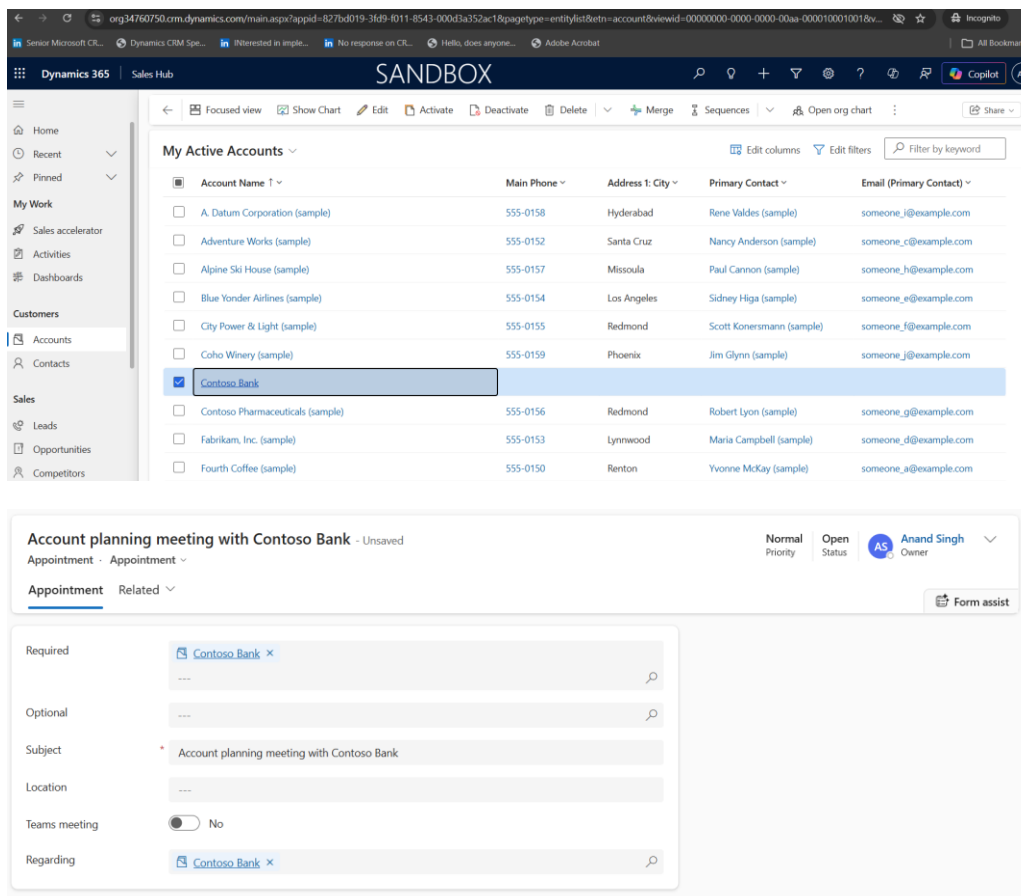
3369/8000

## 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



### 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.

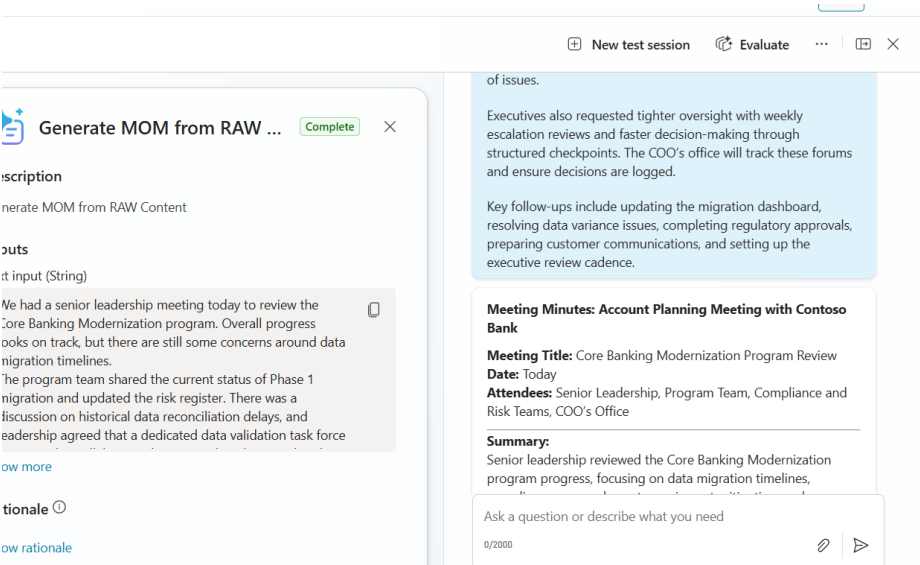
The program team shared the current status of Phase 1 migration and updated the risk register. There was a discussion on historical data reconciliation delays, and leadership agreed that a dedicated data validation task force is required. Parallel reconciliation needs to be completed before the next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

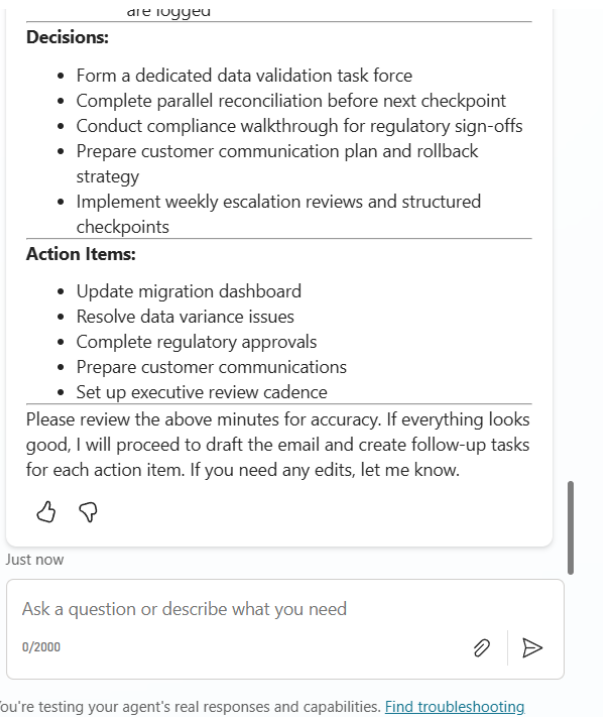
Another key topic was customer impact during the cutover window. Leadership emphasized the importance of minimizing service disruption. The team needs to prepare a customer communication plan and also define a rollback strategy in case of issues.

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.



## HOL – MCP Server



**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