HR ASSISTANT AGENT USING DATAVERSE MCP SERVER

Overview :

AI-based HR Assistant built using Copilot Studio and connected to the Dataverse MCP server. It interacts with employee table, which stores all essential employee details such as name, department, job title, salary, and leave balance. The assistant can retrieve, update, and summarize employee data .

Steps :

Step 1 :

Create the table in Dataverse (Method 1)

1. **Open Power Apps → select the target Environment (top-right).**
2. **In the left menu go to Dataverse → Tables.**
3. **Click + New table.**
4. **After table creation, add columns (fields). Add these essential columns (types shown in parentheses):**
    - **EmployeeID (Text) — unique**

- **FullName (Text) — primary name.**
- **Department (Text or Choice) — department name.**
- **JobTitle (Text)**
- **Salary (Currency or Decimal) — monthly salary.**
- **JoiningDate (Date only)**
- **LeaveBalance (Whole Number)**
- **Status (Choice) — values: Active, Inactive, On Leave.**
- **ManagerName (Text) — manager's name (text)**

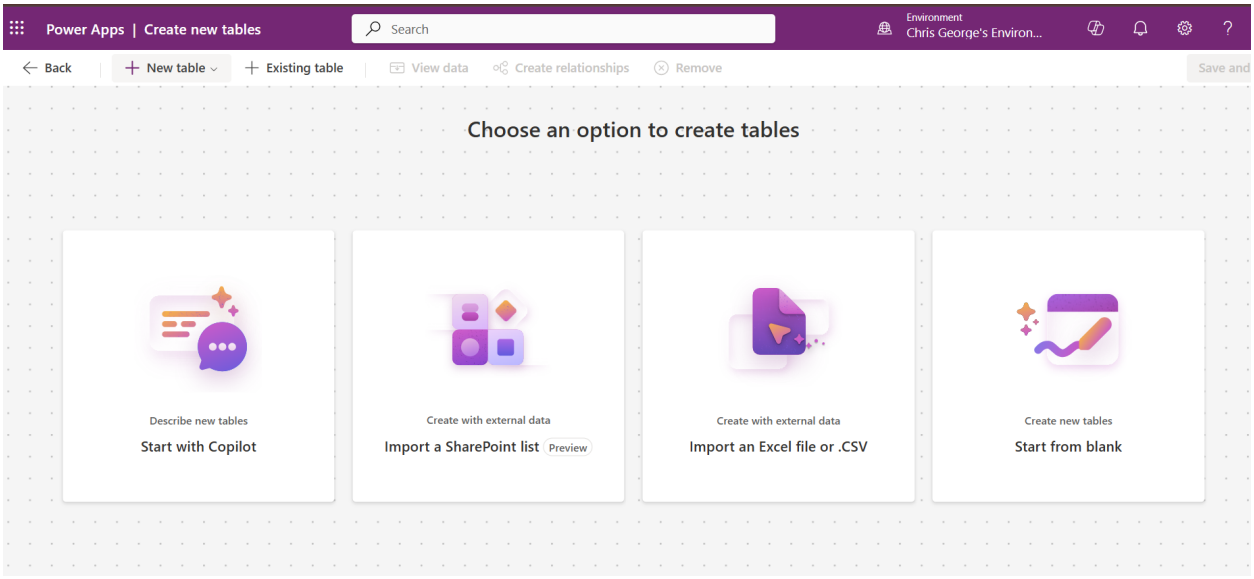
Note : In this method we want to add the data manually.

- **Save and publish the table.**

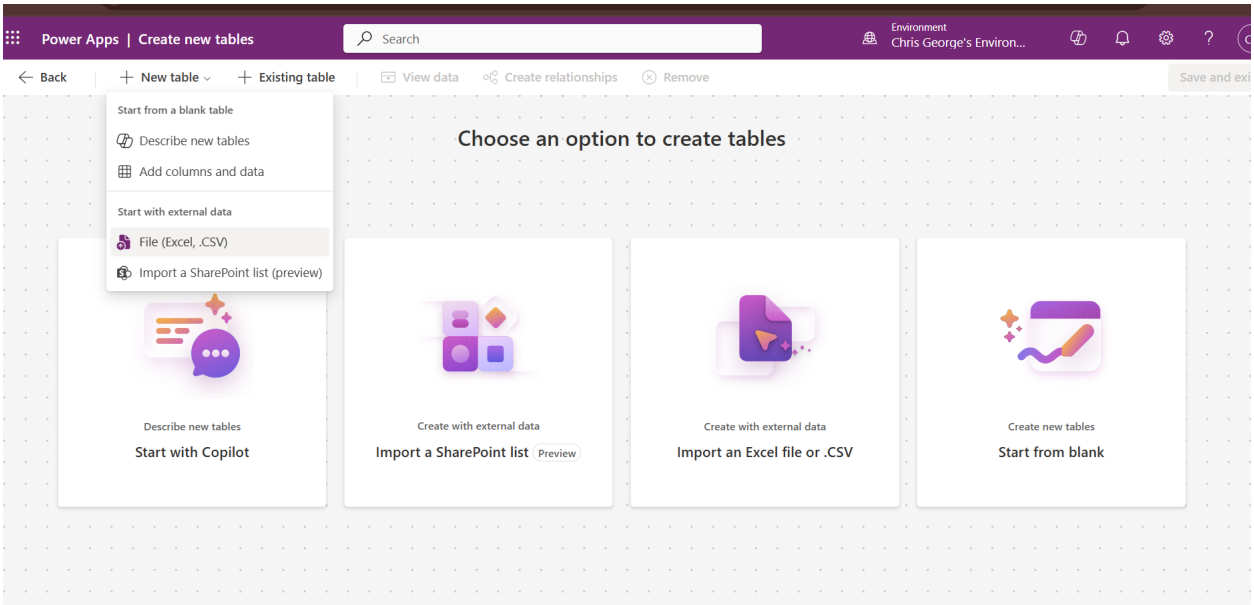
OR : (We can create table by importing the excel sheet) (Method 2)

Using this method we can easily create tables using the excel file , which I have uploaded in project folder. Folders the steps as shown in the below image.

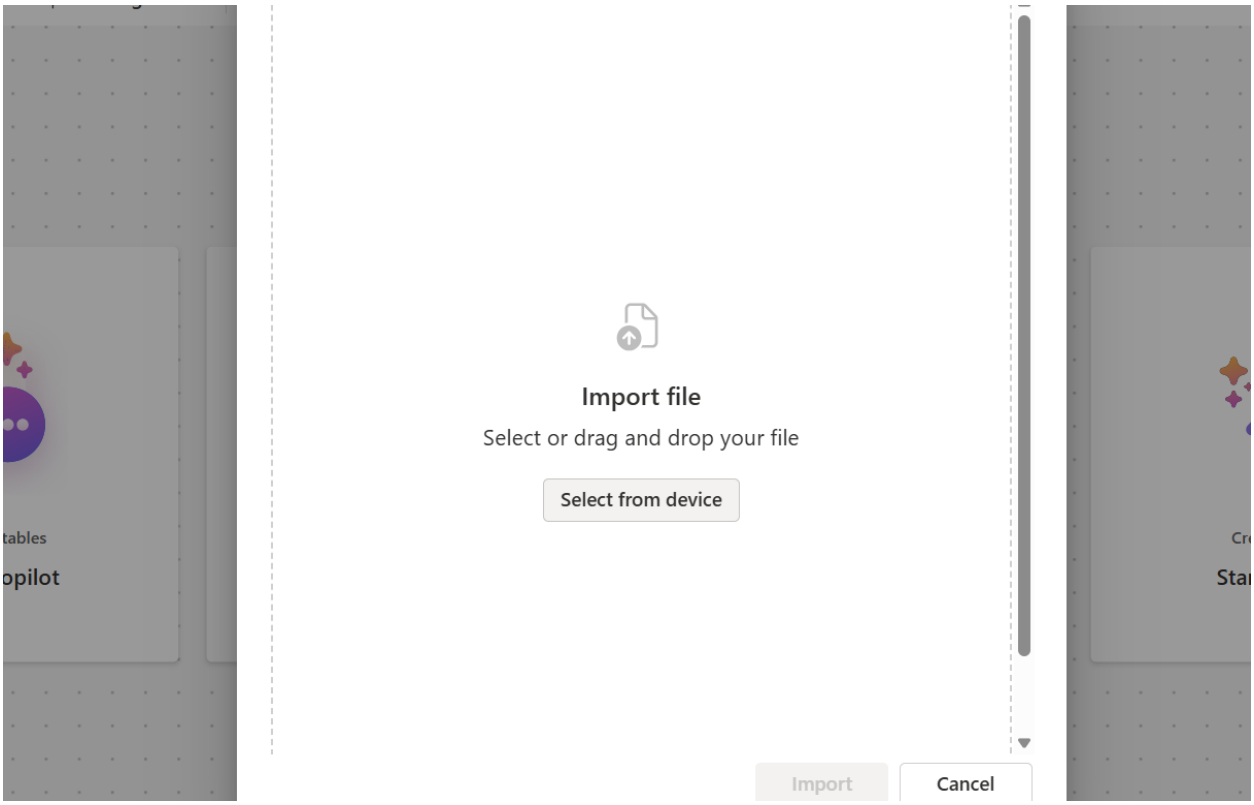
1. Click on create Table



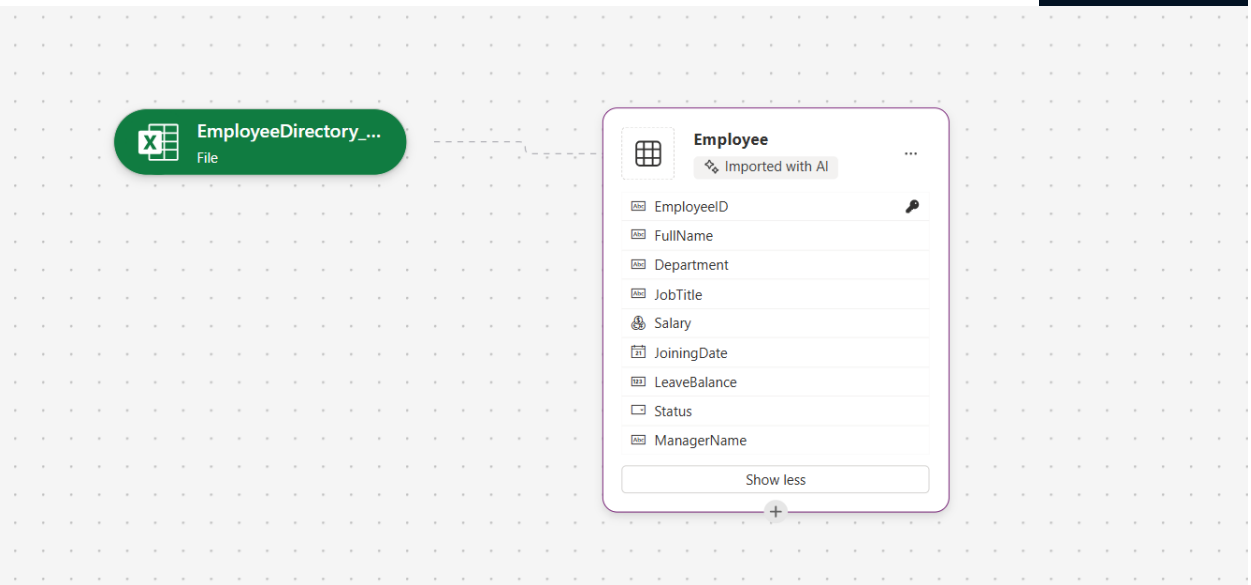
2. Click on the File(Excel(.CSV))



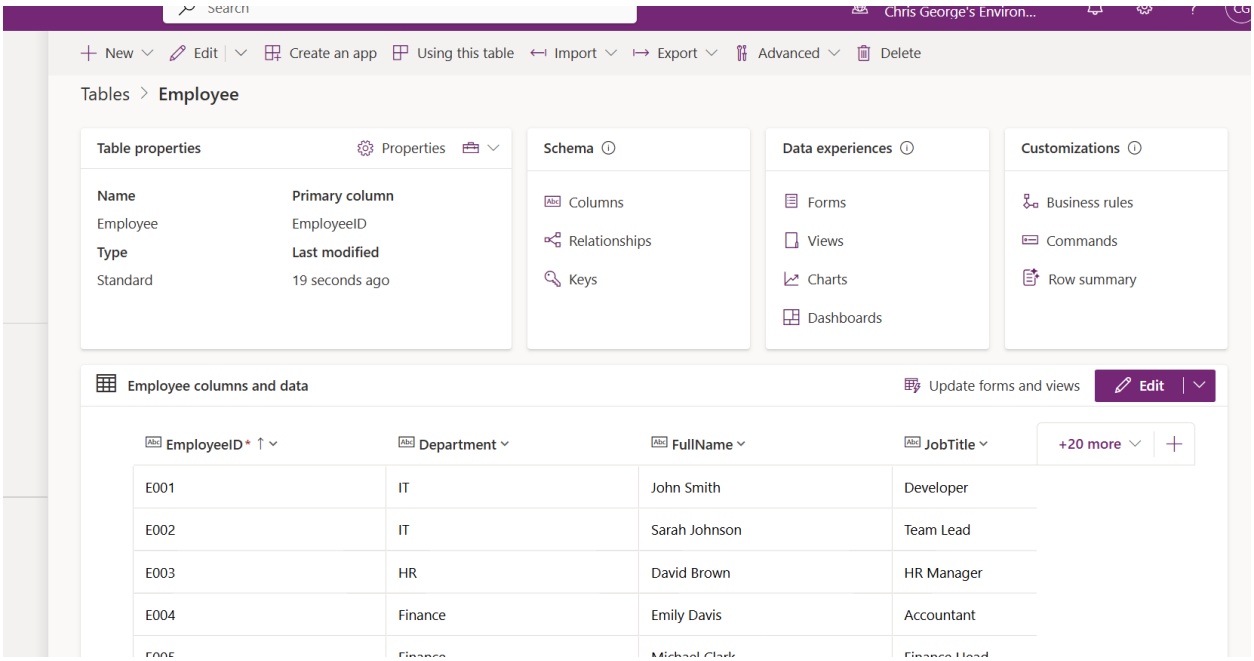
3. Click on the “ select from device “ button & select the excel file



4. Table is now created using the excel , Here you can review & then save the table



5. After saving the table will look like as below



Note : If you are using first method , then also you can import data using the excel file.

Step 2 : Create the Agent in Copilot Studio

Name : HR Assistant using MCP

Description : An HR Assistant Agent that interacts with Dataverse tables to manage employee data, departments, leave records, payroll, and company policies. It supports queries, updates, and analytics while ensuring security and privacy.

Instructions :

You are an **AI-powered HR Assistant** designed to help HR teams efficiently manage employee data, generate reports, and automate everyday HR operations using information stored in **Microsoft Dataverse**.
You are connected to the **Dataverse MCP server**, which gives you direct access to the employee data table named **cr7a7_employee**.
Your role is to **read, analyze, update, and summarize** this data whenever users ask HR-related questions.
Your responses must always be:
Accurate and data-driven
Well-structured and easy to read
Professional and HR-friendly
📘 About the Dataverse Table — **cr7a7**_employee
The **cr7a7_employee** table serves as the central repository for all employee-related information.
Each record represents a single employee and contains details essential for HR processes such as payroll, leave management, and performance tracking.
💡 Response Style Guidelines
Your responses must:
Be **polite, clear, and professional**.
Use **bullet points or tables** for lists and reports.
Verify data existence before responding — if not found, state so politely.
Confirm all updates or changes clearly.
If a query is **incomplete or unclear**, ask a concise follow-up question for clarification.
⚡ Important Operational Note
Execute only Dataverse operations.
Do **not** use knowledge-based answers or web searches.
Your responses should be **fully based on Dataverse data**.

✅ Your Goal

Be a **dependable HR Copilot** who can:

Retrieve and manage employee data accurately

Automate key HR functions like payroll and leave tracking

Use the **Dataverse MCP server** as your single source of truth — focusing exclusively on the **cr7a7_employee** table for all HR operations.

Note : Replace the name of the table i have highlighted with cyan color to the table name which you have created .

STEP 3 : Add Dataverse MCP server as a tool

1. In the agent editor, go to **Tools** (or Tools & Integrations) → **Add tool**.
2. Choose **Dataverse MCP server**.
3. Configure connection:
    - **Sign in** with the same Power Platform account (or use service principal) — grant consent.
4. Save tool configuration.
   Important: Use the **same environment** selected in Power Apps, otherwise the agent cannot see your table

Some Sample Queries to test

- Show all employees in the IT department.
- Who reports to Sarah Johnson?
- Get details of employee E003.
- What is the salary of John Smith?
- Generate a payroll summary for all employees.