Checklist- Intake criteria for a Copilot Agent

Functional Requirements

✅ Clearly define the primary purpose of the Agent
✅ Identify specific tasks or problems the Agent will address
✅ Define the **Happy Flow** (standard user interaction path)
✅ Identify **Other Flows** (alternative interactions)
✅ Outline **Error Handling** procedures

Knowledge Sources

✅ Identify **Data Location** (where is the data stored?)
✅ Specify **Data Type** (structured/unstructured)
✅ Determine the **Platform** (SharePoint, Azure, AWS, etc.)
✅ Define **Data Format** (DOCX, JSON, BLOB, etc.)
✅ Assess **Data Quality**:

- Are there ambiguities in questions or answers?
- Is there duplicate data that needs to be cleaned?
  - ✅ Ensure the development knowledge base includes 20% of the production data

Large Language Model Expectations

✅ Define **Generative Capabilities**:

- Should answers include **references** to sources?
- Should responses contain **quotes** or be **paraphrased**?
  - ✅ Define **Question Interpretation**:
- Should questions be used exactly as asked?
- Is **prompt engineering** allowed?

Technical Requirements

✅ Identify **Third-Party Connections** (Mainframe, ServiceNow, APIs, etc.)
✅ Define **Security Measures**:

- Is the knowledge source **restricted** or **generally available**?
- Are **UAC** or **RBAC** implemented?

Feedback Mechanism

✅ Determine if **user feedback** is required
✅ Define how **feedback will be stored and processed**

Test Information

✅ Validate **test scenarios** with business input
✅ Ensure test interactions match expected **user communication styles**
✅ Define the **Test Data Set**:

- 20% of the initial training data set
- 2 days' worth of production scenarios
- If 2,000 weekly interactions, test set should have **400 scenarios**

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