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 (Dataverse, 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