Amplify Actions & Action Sets Documentation

What are Actions and Action Sets?

Actions enable Amplify to access your Outlook Email and Outlook Calendar. Each action performs a specific task, such as reading emails or creating calendar events. Actions allow the AI model to interact with your data and perform operations on your behalf when you explicitly request them.

Action Sets are saved collections of multiple actions that work together to accomplish common workflows. Action Sets streamline the process of selecting the actions you want, saving you time by allowing you to add multiple related actions at once instead of selecting them individually each time.

Getting Started with Actions and Action Sets

Before you can use actions in Amplify, you need to connect your Microsoft integrations. Follow these steps:

Step 1: Connect Microsoft Integrations

1. Click your user icon in the top right corner of your screen and select **"Settings"**

2. Navigate to the **"Integrations"** tab

3. Click **"Connect"** on both the **Microsoft Calendar** and **Microsoft Outlook** items

4. A popup will open in a new tab. Select your Vanderbilt account and click accept on the "Permissions requested" page

5. Click **"Close"** when you reach the "Authentication Successful" page

6. You should now see the Microsoft Calendar and Microsoft Outlook integrations as "Connected"

Important: These integrations simply establish the connection needed for subsequent steps. Amplify will never take actions on your behalf unless you explicitly request them.

Step 2: Add Actions to Your Conversation

1. Below the chat input bar, click the **"Add Action"** button

2. Browse the available operations by scrolling through the list

3. Click the action you want to add

4. Click the **"Add Action"** button that appears

5. The action will now be listed in the chat input bar

6. Send your prompt, and the AI model will use the action as directed

You can add multiple actions to a single prompt by repeating this process.

Step 3: Create and Use Action Sets (Optional)

To save time when using the same combinations of actions repeatedly:

Creating an Action Set:

1. Add the desired actions to your conversation using the steps above

2. Click the **"Save Actions"** button

3. Provide a name in the popup (e.g., "Read Emails" or "Manage Calendar")

4. Click **"Save"**

Using a Saved Action Set:

1. Click the **"Add Action"** button beneath the chat input bar

2. Navigate to the **"Action Sets"** tab

3. Click the action set you want to use

4. Click **"Add Action Set"**

5. Send your prompt, and the AI model will use all actions in the set as directed

---

Recommended Action Sets

Below are suggested action sets that you can create to streamline common workflows. These are examples of useful combinations - you'll need to create them yourself following the steps in the "Getting Started" section above.

Email Action Sets

1. Read Emails

Use this when you want to: Review and analyze your email messages without making any changes.

Included Actions:

- **microsoft.listMessages** - Retrieves a list of email messages from your mailbox, allowing the AI to see your emails based on criteria like date range, sender, or folder

- **microsoft.GetMessageDetails** - Fetches the complete content and metadata of specific email messages, including subject, body, sender, recipients, and attachments

Example Use Cases:

- "Summarize my unread emails from this week"

- "Find all emails from John about the Q4 project"

- "Show me emails with attachments received today"

---

2. Read & Draft Emails

Use this when you want to: Review emails and create draft responses without sending them immediately.

Included Actions:

- **microsoft.listMessages** - Retrieves email messages from your mailbox

- **microsoft.GetMessageDetails** - Fetches complete email content and details

- **microsoft.CreateDraft** - Creates a draft email message that is saved but not sent, allowing you to review and edit before sending

Example Use Cases:

- "Draft a reply to Sarah's latest email thanking her for the update"

- "Create a draft email to the team summarizing today's meeting notes"

- "Read my emails from the vendor and draft a response requesting more information"

---

3. Read, Draft & Send Emails

Use this when you want to: Fully automate email workflows including reading, composing, and sending messages.

Included Actions:

- **microsoft.listMessages** - Retrieves email messages from your mailbox

- **microsoft.GetMessageDetails** - Fetches complete email content and details

- **microsoft.CreateDraft** - Creates a draft email message

- **microsoft.SendDraft** - Sends a previously created draft email directly from your mailbox

Example Use Cases:

- "Read the meeting request from Alex and send a confirmation reply"

- "Find emails about the budget proposal and send a summary to my manager"

- "Reply to all unread messages from yesterday with appropriate responses"

⚠️**Important:** This action set allows the AI to send emails on your behalf. Always review what you're asking the AI to do to ensure messages are sent appropriately.

Calendar Action Sets

4. Read Calendar

Use this when you want to: View and analyze your calendar events without making any modifications.

Included Actions:

- **microsoft.listCalendars** - Retrieves a list of your available calendars

- **microsoft.GetEventsBetweenDates** - Fetches calendar events within a specified date range

- **microsoft.GetEventDetails** - Retrieves complete details about specific calendar events, including title, time, location, attendees, and description

Example Use Cases:

- "What meetings do I have this week?"

- "Show me my schedule for tomorrow"

- "Find all events with the marketing team this month"

- "When is my next meeting with Janet?"

---

5. Read & Create Calendar Events

Use this when you want to: View your calendar and add new events or meetings.

Included Actions:

- **microsoft.listCalendars** - Retrieves your available calendars

- **microsoft.GetEventsBetweenDates** - Fetches events within a date range

- **microsoft.GetEventDetails** - Retrieves complete event details

- **microsoft.CreateEvent** - Creates a new calendar event with specified details such as title, date, time, duration, location, and attendees

Example Use Cases:

- "Check my calendar for next Tuesday and schedule a 1-hour team meeting at 2pm"

- "Create a calendar event for the client presentation on Friday at 10am"

- "Find a free slot this week and schedule a 30-minute check-in with David"

---

6. Create Calendar Event & Notify Me By Email

Use this when you want to: Create calendar events and automatically send yourself email notifications or reminders.

Included Actions:

- **microsoft.listCalendars** - Retrieves your available calendars

- **microsoft.GetEventsBetweenDates** - Fetches events within a date range

- **microsoft.GetEventDetails** - Retrieves complete event details

- **microsoft.CreateEvent** - Creates a new calendar event

- **microsoft.CreateDraft** - Creates a draft email message

- **microsoft.SendDraft** - Sends the draft email

Example Use Cases:

- "Schedule a follow-up meeting for next Monday and send me an email notification with the details"

- "Create a calendar reminder for the project deadline and email me a notification with the action items"

- "Book a 2-hour working session for Thursday and send me an email with what I need to prepare"

How to Use Action Sets in Amplify

Follow the steps in the "Getting Started" section above to connect your integrations and add actions or action sets to your conversations.

Choosing the Right Action Set

For email tasks:

- Use **Read Emails** for reviewing and analysis only

- Use **Read & Draft Emails** when you want to compose messages but review them first

- Use **Read, Draft & Send Emails** for fully automated email workflows

For calendar tasks:

- Use **Read Calendar** for viewing your schedule only

- Use **Read & Create Calendar Events** for scheduling new meetings

- Use **Create Calendar Event & Email Me** when you want email confirmation of scheduled events

Security and Permissions

All actions operate within your Microsoft 365 permissions and security policies. The AI can only access and modify data that you have permission to access. Amplify will never take actions on your behalf unless you explicitly request them. Actions are performed securely through your authenticated Vanderbilt account via the Microsoft Graph API.

Need help or have questions? Contact amplify@vanderbilt.edu