



Intelligent Apps Workshop

Built by: Power CAT Intelligent Application Solution Architecture Team

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Plan Designer Prerequisites (for Hands-On Lab)

1. Each user will be provided with an account and a **dedicated development type environment** to perform the hands-on lab
2. **Open Browser in Incognito Mode:**
 - a. Use a modern browser like  **Microsoft Edge** or **Google Chrome** for best compatibility.
 - b. Launch your preferred web browser.
 - c. Open a new window in **Incognito Mode** or **In Private** (Private Browsing Mode).
 - d. Go to <https://make.preview.powerapps.com>
 - e. Make sure to select the  "Developer Environment" already set up for your user account.

Note  : This workshop makes extensive use of Generative AI capabilities. When using Generative AI, the generated content is likely to be different from user to user, or from the workshop documentation to the hands-on experience. As you go through this workshop, when you encounter discrepancies, use your best judgement to participate in the activity based on the intent of the activity, and do it within the context of what you see in your plan.

Business Use Case

Scenario:

Your organization currently manages device ordering via email and spreadsheets, which leads to delays, miscommunication, and inventory tracking issues. The IT team often receives incomplete or duplicate requests, and there is no central way to view or manage order statuses.

Solution for simple Business case

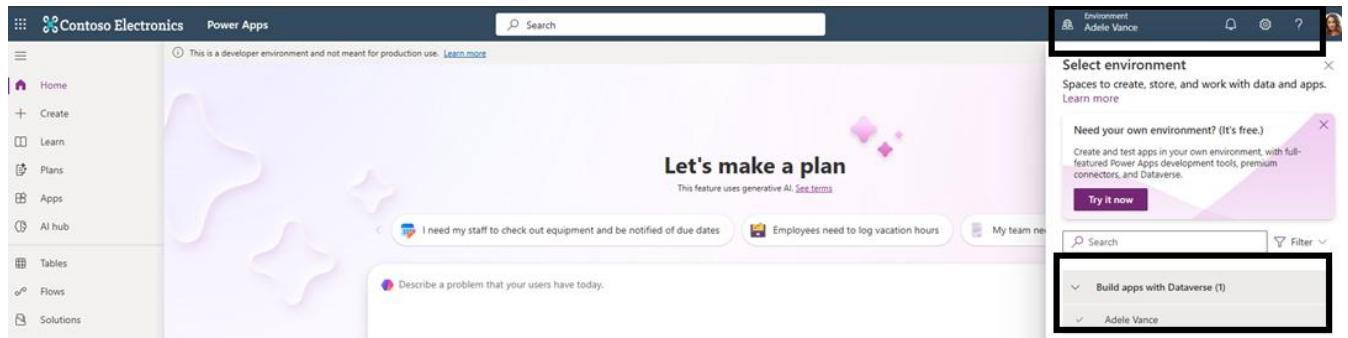
Create a centralized Device Ordering solution using Microsoft Power Platform, enabling:

- Employees to browse available devices and submit requests
- IT admins to approve/reject requests
- Automated email notifications and order tracking
- Real-time visibility into device inventory and request status

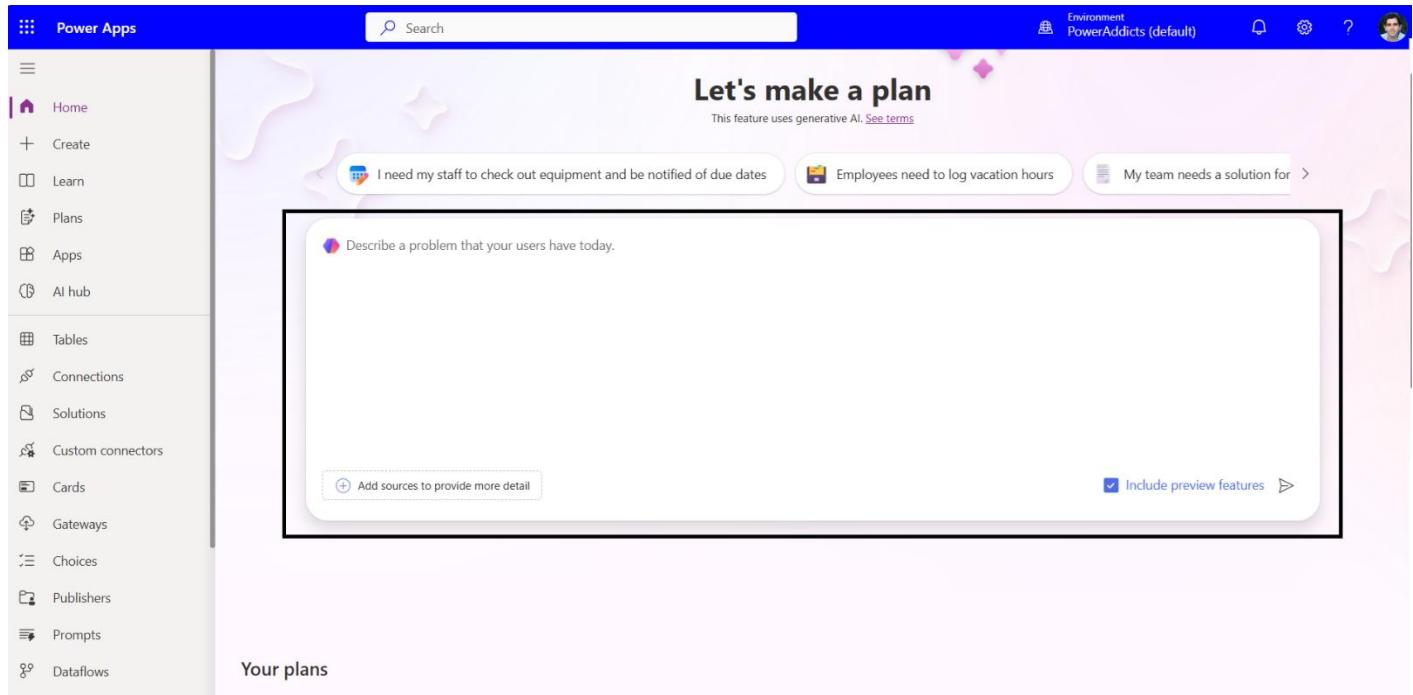
Let's Begin

Step 1: Start with the Plan Designer

1.1 Make sure you have opened the URL <https://make.preview.powerapps.com> and selected your development environment.



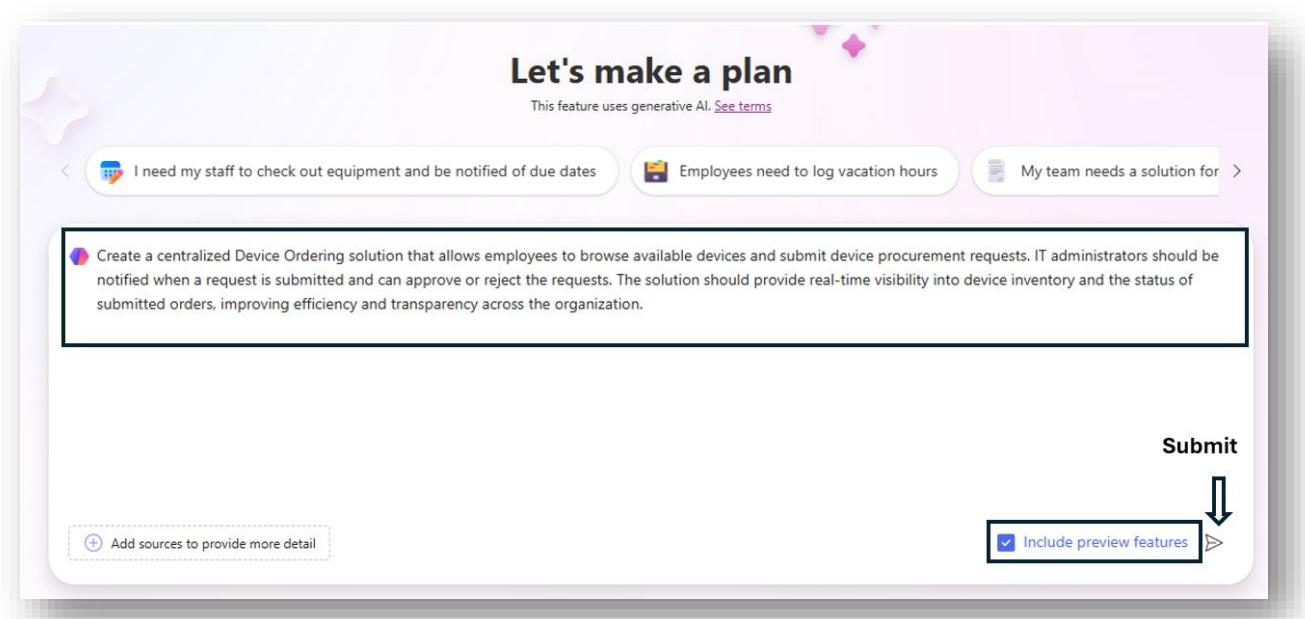
1.2 The home screen has the **NEW Plan Designer Interface** where you can describe your business problem using everyday words.



1.3 Enter the following business problem statement highlighted below in plan designer.

Create a centralized Device Ordering solution that allows employees to browse available devices and submit device procurement requests. IT administrators should be notified when a request is submitted and can approve or reject the requests. The solution should provide real-time visibility into device inventory and the status of submitted orders, improving efficiency and transparency across the organization.

Make sure to check the **Include preview features** checkbox & select the **Submit/Go Icon*



Step 2: Requirements agent

The **Requirements Agent** analyzes the business problem stated and generates user requirements. It begins by defining user personas.

For each identified role (user persona), it creates a bulleted list of tasks and responsibilities that users in that role must perform.

In the below snapshot – “Employee” and “IT Administrator” are the 2 user personas identified based on the business problem stated

The screenshot shows a web-based requirements document for the "Device Ordering System". The document is titled "Device Ordering System" and is described as an AI-generated plan. It includes sections for the "Business problem" and the "Purpose of this plan". The "User requirements" section is highlighted and contains two entries: "Employee" and "IT Administrator".

Employee

Employee who browses and requests devices

As a user, I need to:

- Browse available devices so that I can choose the appropriate one for my needs.
- Submit a device procurement request so that I can obtain the necessary device for my work.
- View the status of my device request so that I know when I will receive it.
- Receive notifications when my device request is approved or rejected so that I am informed.
- View real-time device inventory so that I know what devices are currently available.

IT Administrator

Person responsible for managing device requests and inventory

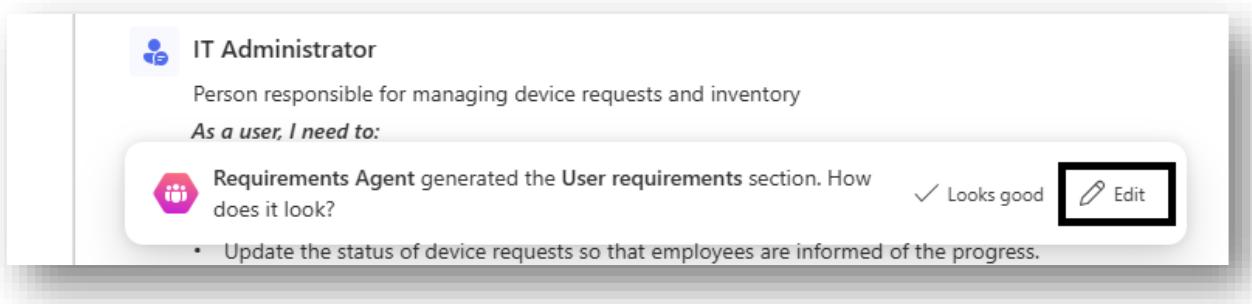
As a user, I need to:

- Requirements Agent generated the User requirements section. How does it look? Looks good Edit
- Update the status of device requests so that employees are informed of the progress.

Note: The Plan Designer will soon be using AI models fine-tuned with real-world examples and customer success stories. No private or sensitive company data is used as part of the training process. The quality and completeness of the generated solutions depend on the specific requirements, and process, of the business problem. As a result, outcomes for a given requirement may vary. Users must collaborate with the agent to tailor the plan to suit their organization's needs.

You can choose to **"Add these roles"** or **"Edit"** with Copilot to modify or add new roles. Similarly, you can use Copilot to add or modify the generated requirements.

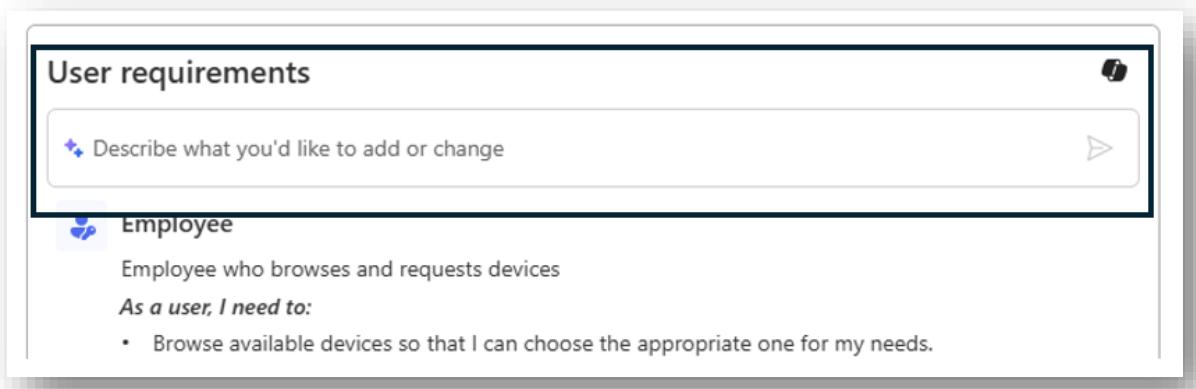
2.1 Click **"Edit"**



The screenshot shows a requirement card for an **IT Administrator**. The card includes the following details:

- Role:** IT Administrator
- Description:** Person responsible for managing device requests and inventory
- As a user, I need to:**
- Requirement:** Requirements Agent generated the **User requirements** section. How does it look?
- Feedback:** ✓ Looks good
- Action:** **Edit** (button)
- List:** Update the status of device requests so that employees are informed of the progress.

2.2 Next ➔ Add prompt to Copilot to modify the requirements and click Go icon



User requirements

Describe what you'd like to add or change

Employee

Employee who browses and requests devices

As a user, I need to:

- Browse available devices so that I can choose the appropriate one for my needs.

Copy and paste the following prompt in Copilot:

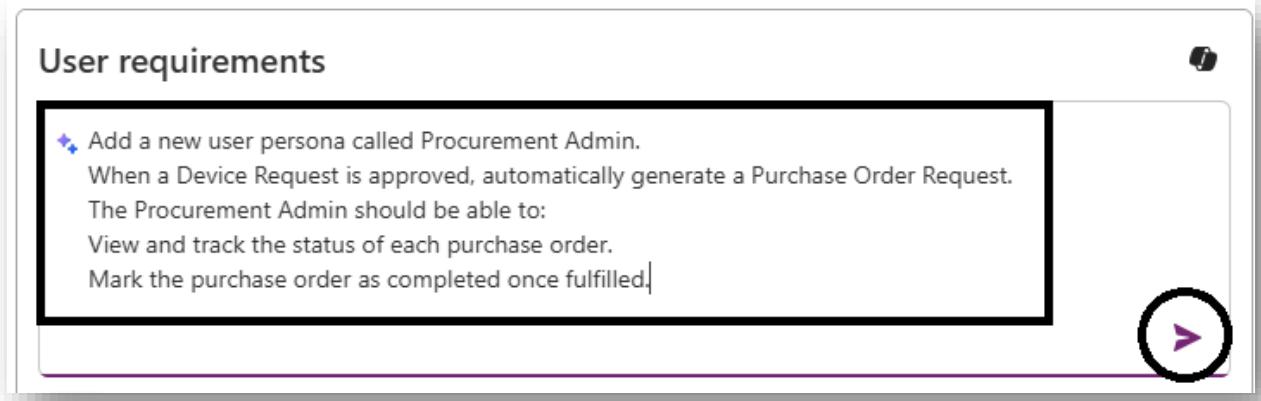
Add a new user persona called **Procurement Admin.**

When a **Device Request is approved, automatically generate a **Purchase Order Request**.**

The **Procurement Admin should be able to:**

View and track the status of each purchase order.

Mark the purchase order as completed once fulfilled.



User requirements

Add a new user persona called Procurement Admin.

When a Device Request is approved, automatically generate a Purchase Order Request.

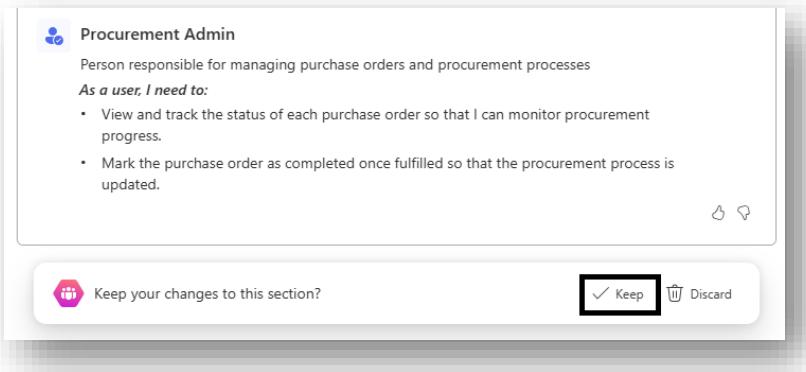
The Procurement Admin should be able to:

View and track the status of each purchase order.

Mark the purchase order as completed once fulfilled.

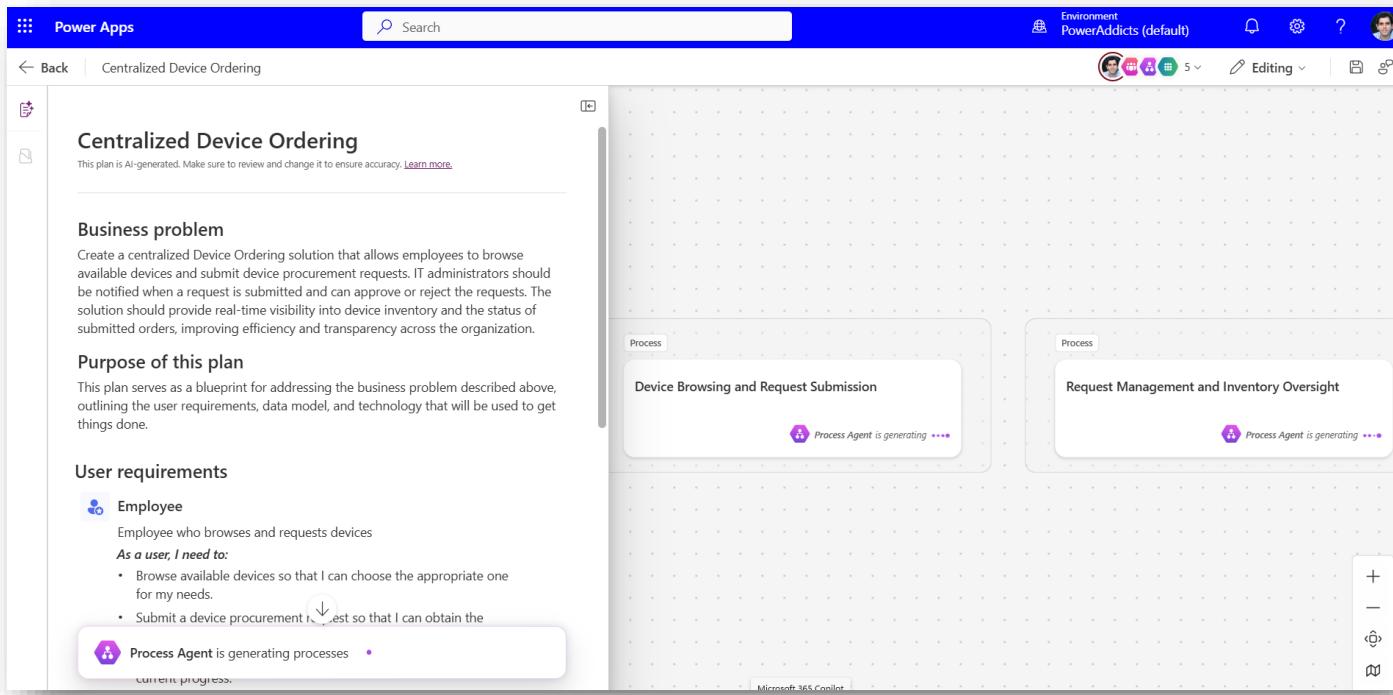
2.3 The "Procurement Admin" user persona is added to the plan as shown in image below.

Click on "**Keep**" and then  "**looks good**" to save the updates.



Step 3: Process Agent in action!

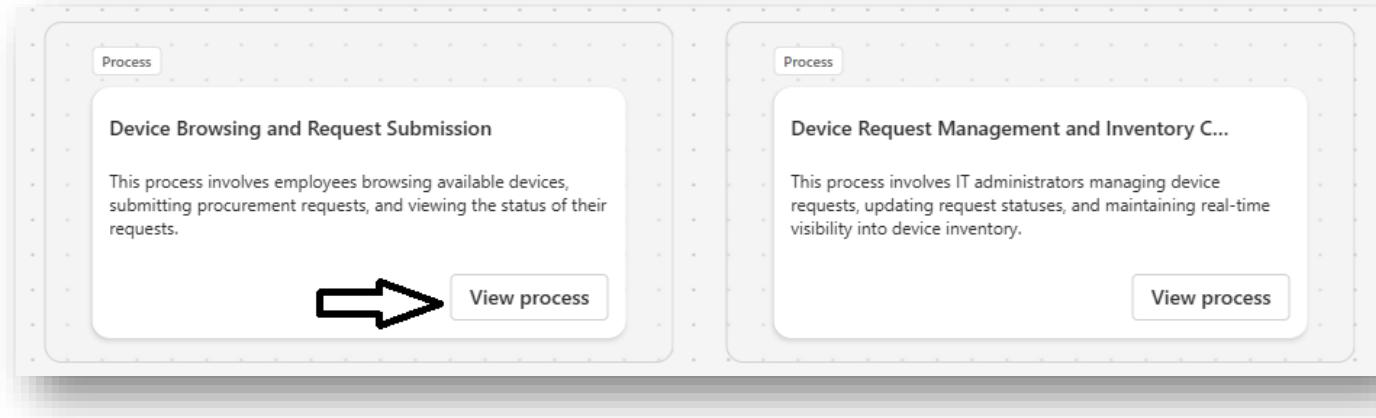
The **Process Agent** helps define and break down the use case into various processes, outlining the workflow for business requirements.



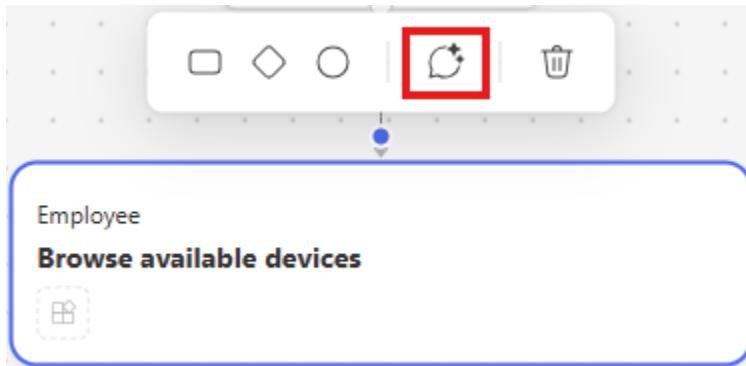
The screenshot shows the Microsoft Power Apps canvas editor interface. The title bar reads "Power Apps" and "Centralized Device Ordering". The main area displays a process map with two main boxes: "Device Browsing and Request Submission" and "Request Management and Inventory Oversight". Both boxes have a status message "Process Agent is generating ..." with a progress bar. The "Device Browsing and Request Submission" box contains a list of requirements for an "Employee" user role, including "Browse available devices so that I can choose the appropriate one for my needs." and "Submit a device procurement request so that I can obtain the ...". A progress bar at the bottom of this box indicates "current progress: 100%". The "Request Management and Inventory Oversight" box also contains a list of requirements for the "Employee" role. The top right of the screen shows the environment "PowerAddicts (default)" and various editing and collaboration icons.

The Process Agent uses AI to generate the process that users will follow. At the high level you see an overview of the processes that are part of the plan, and each process map can be viewed in greater detail.

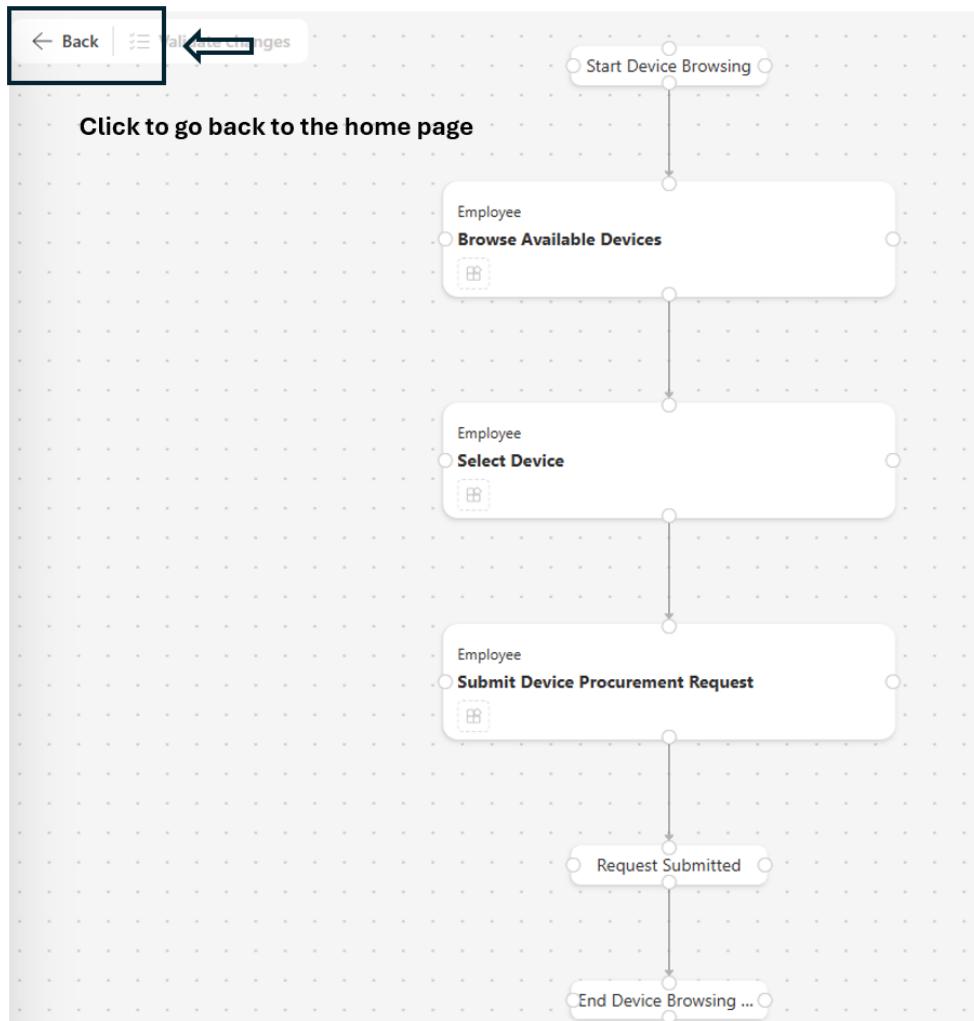
3.1 Click on “View Process” to see a particular process flowchart



Note: You can also add, update or delete nodes in the process flowchart, or use the Process Agent (highlighted below) to reconfigure the workflow. When manually making updates, the updates must be validated by the process agent to ensure a complete process flow is rendered.



3.2 Click on **Back** button to go back from the selected flowchart view (as shown in image below)



3.3 You should still have the Process Agent Dialogue showing from the prior section, so to continue building your plan, click “Looks good” to kick off the data agent.



Process Agent generated the **Process diagram** section.
How does it look?

 Looks good

Step 4: Data agent

Next, the Data Agent comes into play. This agent uses AI to propose a set of tables for storing business information. Each table includes suggested columns, data types, and relationships. Copilot also populates these tables with sample data.

The screenshot shows a 'Data model' section with five proposed tables:

- Device** (New): This table contains records of available devices for procurement.
- Device Request** (New): This table contains records of device procurement requests submitted by employees.
- Inventory** (New): This table contains records of device inventory and their status.
- Purchase Order** (New): This table contains records of purchase orders for device procurement.
- Employee** (New): This table contains records of employees who can submit device requests.

Each table entry includes a 'Show details' link in the top right corner.

The data agent only recommends tables as part of the plan, but the plan can use existing tables in the environment if the user desires.

4.1 Click on the ellipses on the Employee table and select Replace with Existing Table

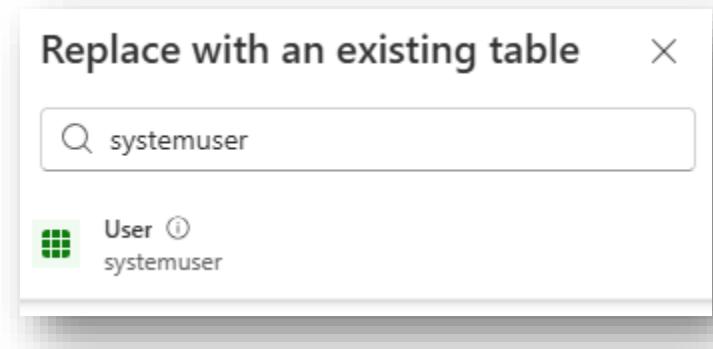
Note: If you do not have an Employee Table recommended for you, skip this step and follow along. The User table will be added in a later step.

The screenshot shows the 'Employee' table entry with a context menu open:

- Edit table**
- Replace with existing** (highlighted with a red box)
- Remove from plan**

The table entry text: 'This table contains records of employees who can submit device requests.'

Search for user or systemuser to locate the existing User table for the environment and select it.



Notice that the icon for the table has now turned green, which is an indication that the artifact represented by the plan exists in the environment compared to the gray icons that are merely proposed. This is a visual construct that is used throughout the plan.

Data model Show details

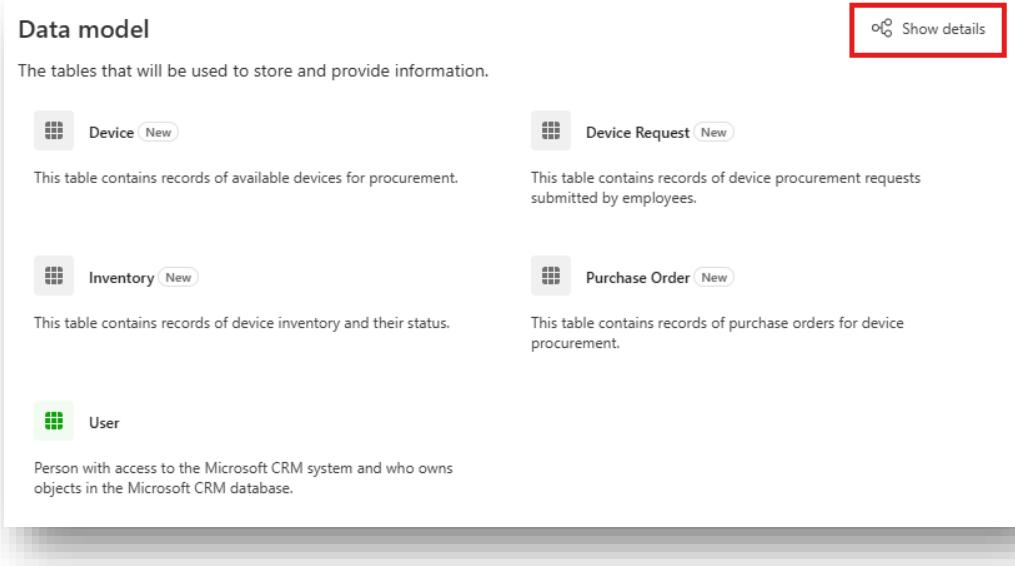
The tables that will be used to store and provide information.

 Device New	 Device Request New
This table contains records of available devices for procurement.	
 Inventory New	 Purchase Order New
This table contains records of device inventory and their status.	
 User	
Person with access to the Microsoft CRM system and who owns objects in the Microsoft CRM database.	

4.2 We will now click "**Show Details**" to view the table definitions and their relationships within the Data Workspace. This workspace is equipped with Copilot, allowing you to modify the data model using AI assistance or make changes manually.

Data model

The tables that will be used to store and provide information.



Device New

This table contains records of available devices for procurement.

Device Request New

This table contains records of device procurement requests submitted by employees.

Inventory New

This table contains records of device inventory and their status.

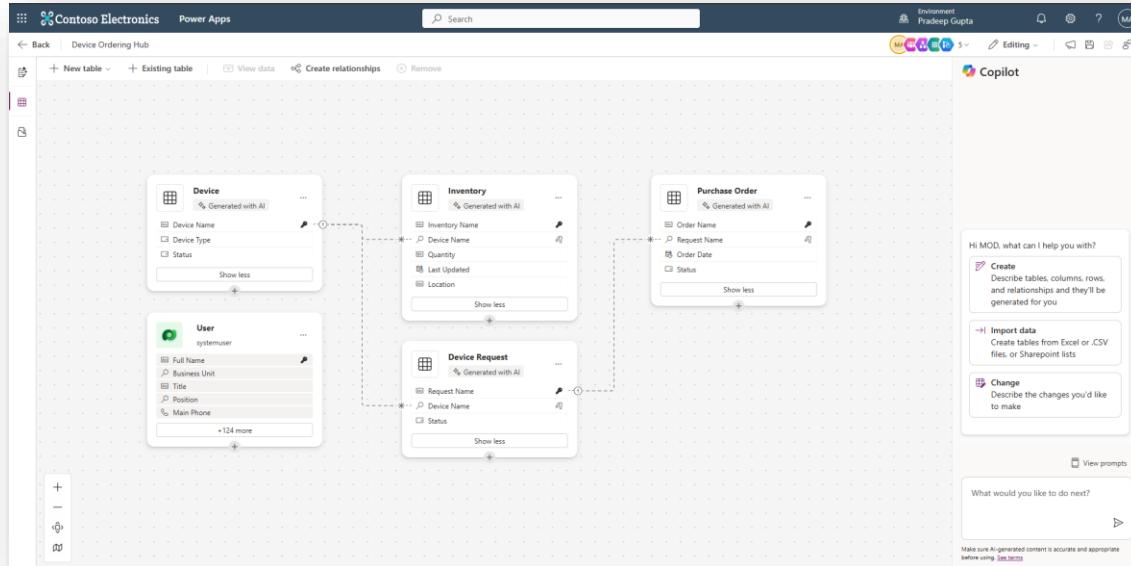
Purchase Order New

This table contains records of purchase orders for device procurement.

User

Person with access to the Microsoft CRM system and who owns objects in the Microsoft CRM database.

Show details



Data workspace diagram shown above

Note: The suggested data model is generated by AI, and its outcomes may vary. This may include differences in table names or number of tables or relationships.

4.3 Here is the general outline of the next steps we will be performing – details for each step are in the document below:

- Merge the Device and Inventory tables (assuming AI recommended both tables)
- Add a relationship between the User table and device request
- Remove the Notifications table (if the AI recommended it)

 **Note:** If you do not see the Copilot pane on right-hand side of data workspace, Exit the Data workspace (by clicking on back button and/or close the browser tab and Enter the data workspace again (Click on Show Details from the Plan Designer and/or open the plan again and click on show details) to bring up the Copilot pane.

4.4 In the Data workspace, give copilot chat the following command (**assuming AI recommended both tables**) –

Merge Inventory table with Device table

Note: Update commands based on the table names generated in your data workspace.

The image shows two screenshots of the Microsoft Copilot interface. The left screenshot shows the main Copilot dashboard with options for 'Create', 'Import data', and 'Change'. The right screenshot shows the results of a command to 'Merge Inventory table with Device table', displaying the merged table structure with columns for 'Quantity Available', 'Last Updated', and 'Location'. A note at the bottom of the right screenshot states 'AI-generated content may be incorrect' with up and downvote buttons.

Hi Reza, what can I help you with?

Create
Describe tables, columns, rows, and relationships and they'll be generated for you

Import data
Create tables from Excel or .CSV files, or Sharepoint lists

Change
Describe the changes you'd like to make

View prompts

What would you like to do next?

Make sure AI-generated content is accurate and appropriate before using. [See terms](#)

Merge Inventory table with Device table

The Inventory table was merged with the Device table.

Quantity Available

Last Updated

Location

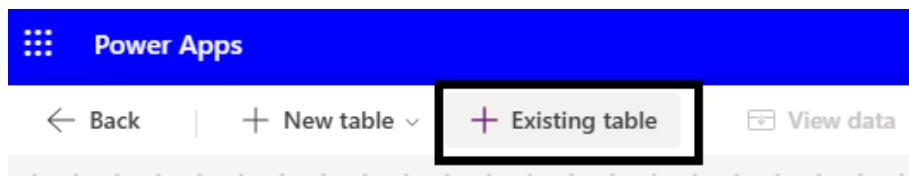
Undo

Show diagnostic

AI-generated content may be incorrect

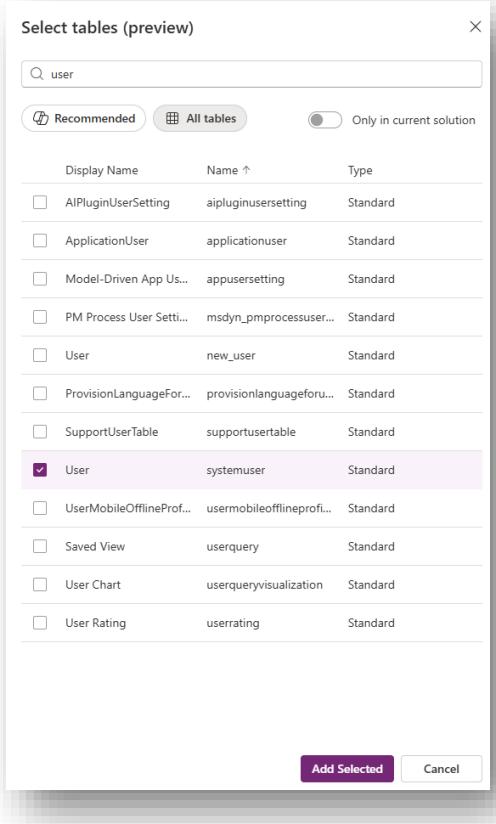
4.5 If you did not have an employee table to replace earlier, we will add that table now.
If you already have the user table represented in your data workspace, skip this step.

Click on **+ Existing Table** to add System User table.



- Search for “user” in select tables panel and make sure to select “All tables”.
- Select the table where name shows “systemuser” and click on the “Add Selected” button.

Note: Tables Display Name can be different than their Schema Name. Therefore, you may see multiple User Display Name. Therefore, Select the table where Name is “System User”



4.6 Next, Let's ask copilot to create the lookup from device request to the existing user table.

Give Command – *Add a direct one to many relationship between user and device request so that one user can have many requests, without using a join table*

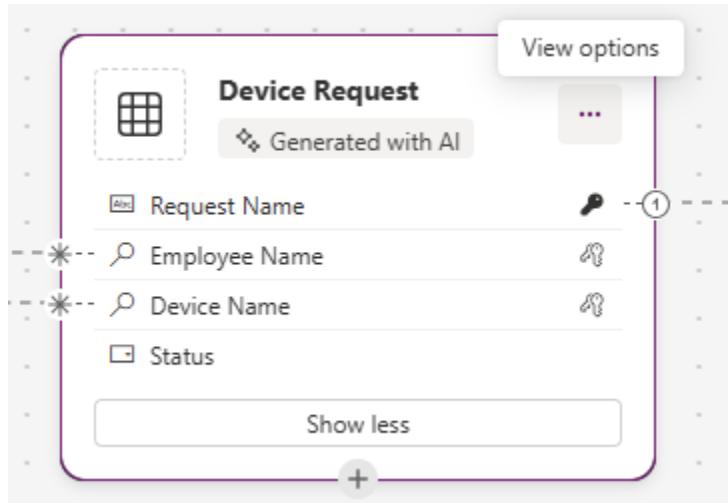
Add a direct one to many relationship between user and device request so that one user can have many requests, without using a join table



Make sure AI-generated content is accurate and appropriate before using. [See terms](#)

💡 Alternatively, you can manually add a relationship between the User and Device Request table.

4.7 Next, Select the Device Request table, go to ellipses and click on “View Data”. This will show existing sample data in the Device Request table.

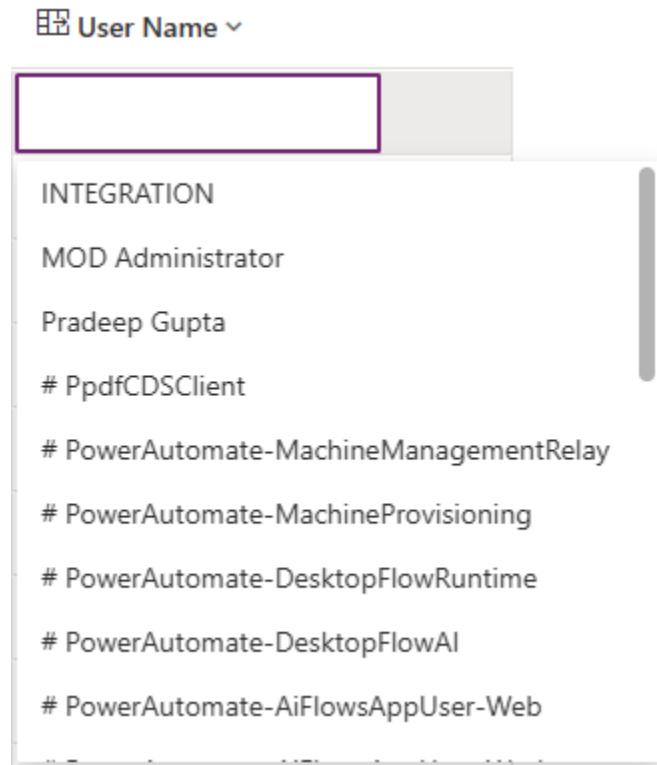


To improve sample data quality, we will use copilot to update the sample data for us

Give Command – *Update sample data in the Devices table to use actual device names, and update device request table with 20 sample records.*

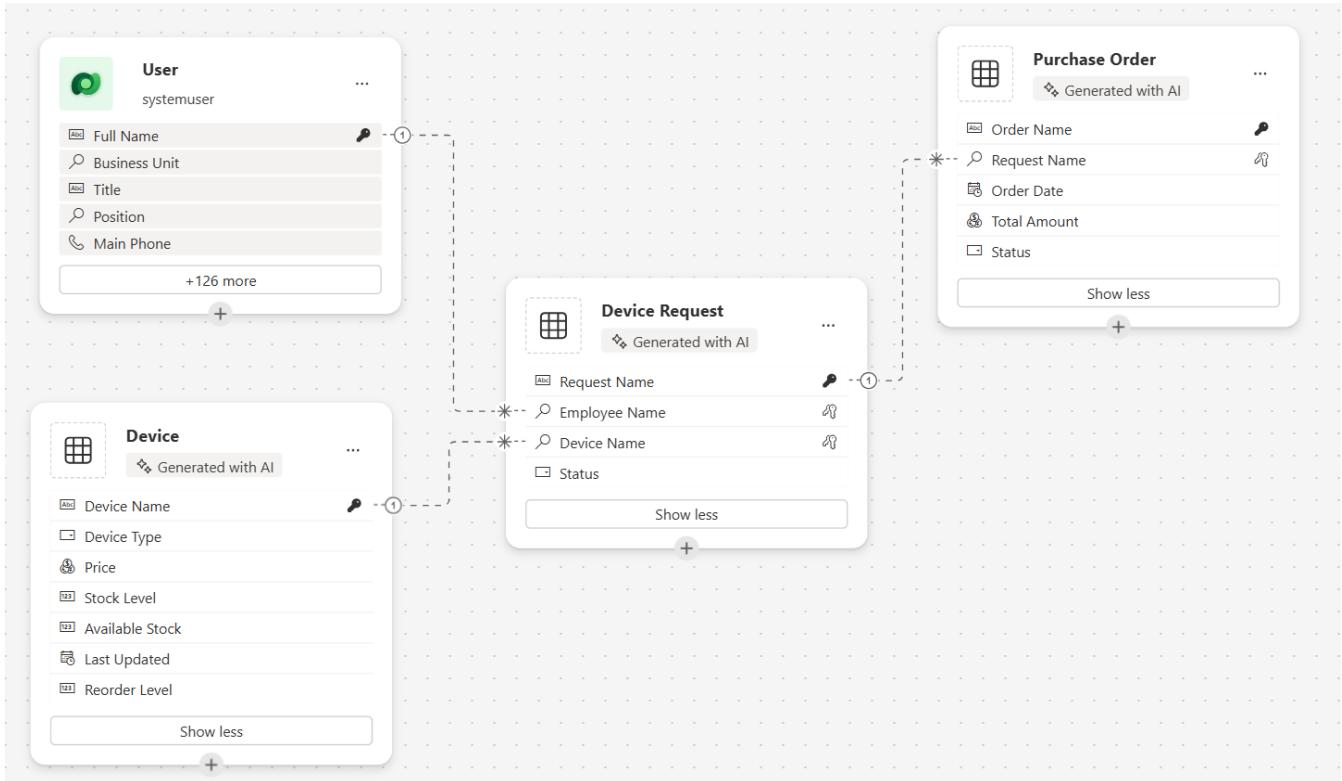
Device Request						New row	New column
	Request Name*	Device Name	Request Sta...	Submission ...	User Name		
<input type="radio"/>	Request for Dell XPS 13	Dell XPS 13	Pending	10/1/2023			
<input type="radio"/>	Request for HP Envy	HP Envy	Pending	10/2/2023			
<input type="radio"/>	Request for iPad Pro	iPad Pro	Approved	10/3/2023			
<input type="radio"/>	Request for MacBook Pro	MacBook Pro	Pending	10/4/2023			
<input type="radio"/>	Request for Lenovo ThinkPad	Lenovo ThinkPad	Pending	10/5/2023			
<input type="radio"/>	Request for Dell XPS 13	Dell XPS 13	Pending	10/6/2023			
<input type="radio"/>	Request for HP Envy	HP Envy	Pending	10/7/2023			
<input type="radio"/>	Request for iPad Pro	iPad Pro	Approved	10/8/2023			
<input type="radio"/>	Request for MacBook Pro	MacBook Pro	Pending	10/9/2023			
<input type="radio"/>	Request for Lenovo ThinkPad	Lenovo ThinkPad	Pending	10/10/2023			
<input type="radio"/>	Request for Dell XPS 13	Dell XPS 13	Pending	10/11/2023			
<input type="radio"/>	Request for HP Envy	HP Envy	Pending	10/12/2023			
<input type="radio"/>	Request for iPad Pro	iPad Pro	Approved	10/13/2023			
<input type="radio"/>	Request for MacBook Pro	MacBook Pro	Pending	10/14/2023			
<input type="radio"/>	Request for Lenovo ThinkPad	Lenovo ThinkPad	Pending	10/15/2023			
<input type="radio"/>	Request for Dell XPS 13	Dell XPS 13	Pending	10/16/2023			
<input type="radio"/>	Request for HP Envy	HP Envy	Pending	10/17/2023			
<input type="radio"/>	Request for iPad Pro	iPad Pro	Approved	10/18/2023			

4.8 After the above Updates – If you double click on the “User Name” table cell in “Device Request” table – the list of values will be showcased from the Users table. Select your user name as the requester for a few of the user requests.

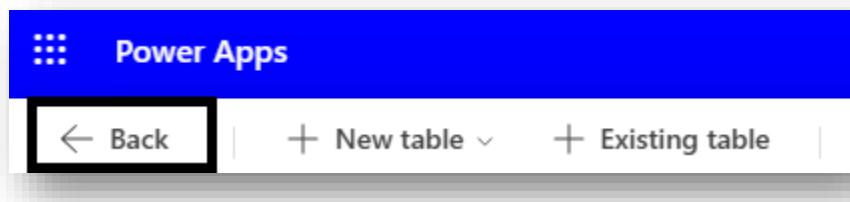


4.9 Next – work with Copilot to clean up and remove any other tables. Often, a “Notification” table is recommended that should be removed.

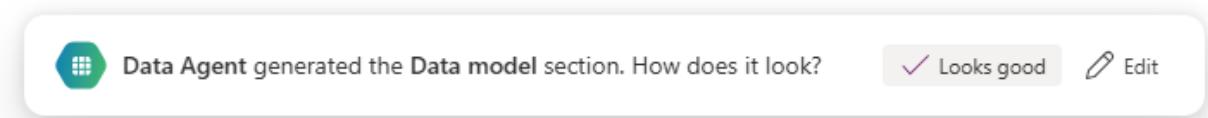
Once complete, your data model should look like below:



4.10 Now click on “Back” button to go back to “Plan designer”

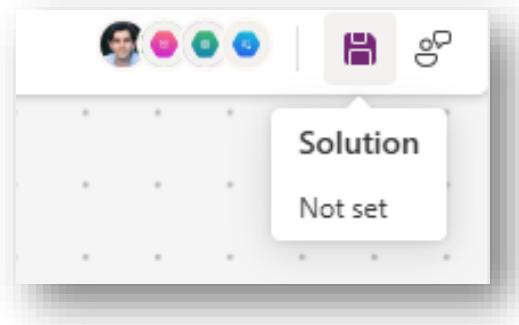


4.11 Now accept the data agent model – click on “looks good”



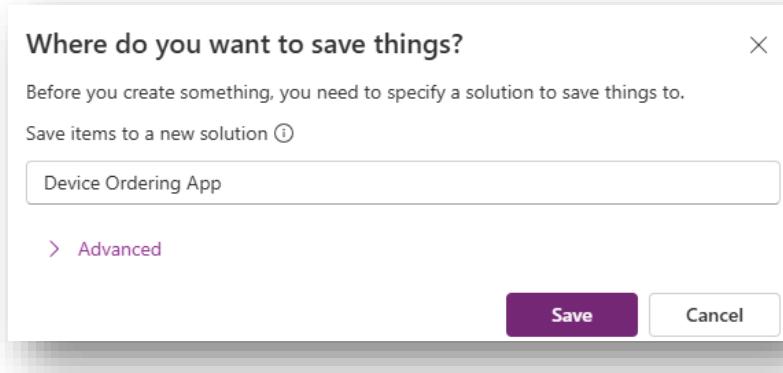
Step 5: Save the plan in Solution

Now, let's save our Plan by clicking on the Save icon



This opens the dialog to save in a Solution.

Note: Here you can also click “Advanced” to define custom publisher OR select an existing solution



Click on **Save** button

Step 6: Solutions agent

Next, the **solutions agent** will begin recommending the Technologies (Apps, flows and other objects) based on the business problem defined.

Solution agent will help you get started with different apps, flows and agents as required. You can also use an existing resource (app, flow etc.) or create a new one depending on your requirements.

Technology

The apps, flows, and other objects that will be used to solve the business problem.

 Device Ordering Canvas App ⓘ Canvas app (New) An app for employees to browse available devices, submit procurement requests, and track request statuses.	 Device Request Management ⓘ Model-driven app (New) An app for IT administrators to manage device requests, approve or reject them, and track inventory.
 Purchase Order Tracking ⓘ Model-driven app (New) An app for procurement admins to track the status of purchase orders and mark them as completed.	 Device Request Notification ⓘ Flow (New) A flow to notify IT administrators when a device request is submitted.
 Request Approval Notification ⓘ Flow (New) A flow to notify employees when their device request is approved or rejected.	 Purchase Order Generation ⓘ Flow (New) A flow to automatically generate a purchase order request when a device request is approved.
 Inventory Management Report ⓘ Report (New) A report for IT administrators to track device inventory and generate insights on stock levels.	 Device Request Approval Agent ⓘ Agent (New) An agent to assist IT administrators in reviewing and approving device requests efficiently.

 Solution Agent generated the Technology section. How does it look?  Looks good 

6.1 Click on "looks good"

 **Note:** The solutions agent is simply recommending the technologies that you could use. You have the power to decide which tech you would like to create in your solution and make it available for your end users.

6.2 Now, it's time to **save tables** before selecting which technologies to activate.



Now it's time to start creating objects. But before you do, you need to save the tables first.

Save tables

Click “**Save tables**”

The data agent will now begin saving the tables in Dataverse based on the data model defined.

Step 7: Create Canvas App

Now, let's begin creating apps, flows, agents, and more based on the technologies proposed by the Plan Designer.

Note: In case if you do not see “Create” Option, make sure that **Read Only option on the designer is not checked**. Click on Read Only prompt and **change the mode to Editing**.

The screenshot shows the Microsoft Power Apps Plan Designer interface. On the left, there is a list of tables and technologies. The tables include:

- Device: This table contains records of available devices for procurement.
- Device Request: This table contains records of device procurement requests submitted by employees.
- Employee: This table contains records of employees who can submit device requests.
- Notification: This table contains records of notifications sent to employees and IT administrators.
- Inventory: This table contains records of device inventory levels.
- Order Status: This table contains records of the status of submitted device orders.

The technologies listed are:

- Device Ordering App: Canvas app. An app for employees to browse available devices, submit procurement requests, and track the status of their orders.
- Device Request Management: Model-driven app. An app for IT administrators to manage device requests, approve or reject them, and view real-time inventory.
- Request Notification Flow: Flow. A flow to notify IT administrators when a device request is submitted.
- Request Status Notification: Flow. A flow to notify employees when their device request is approved or rejected.

The right side of the interface shows a flow diagram titled "Centralized Device Ordering". The flow starts with "Start Device Browsing", followed by "Employee Browse Available Devices", then "Employee Select Device", "Employee Submit Device Procurement Request", and finally "Request Submitted". The "Employee Select Device" step is highlighted with a yellow bar.

Canvas App

7.1 Start by selecting the "**Device Ordering**" Canvas App, then click the "+" icon to create a modern, responsive Canvas Power App. This app will allow end users to browse devices and submit device requests for procurement.

Technology

The apps, flows, and other objects that will be used to solve the business problem.

Device Ordering App (Canvas app, New)
An app for employees to browse available devices, submit procurement requests, and track device status.

Device Request Management (app, New)
A tool for IT administrators to manage device requests, and view real-time status.

Purchase Order Tracking (Model-driven app, New)
An app for procurement admins to track and manage purchase orders and update inventory status.

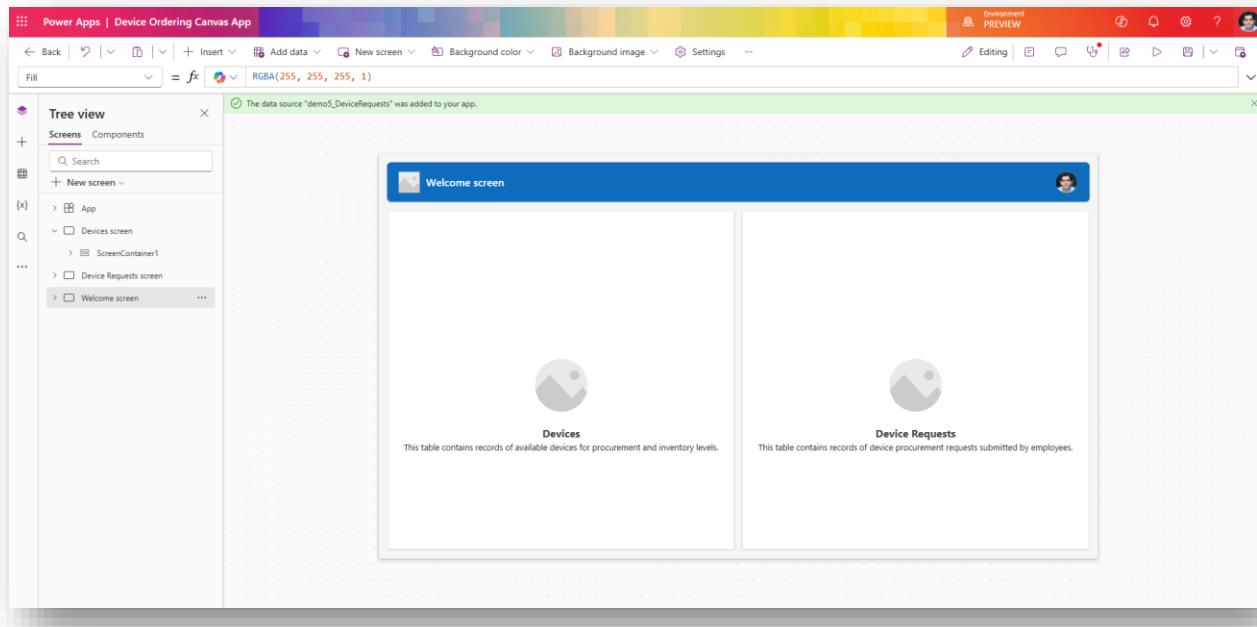
Device Request Notification Flow (Flow, New)
A flow to notify IT administrators when a device request is submitted.

Device Request Approval Agent (Agent, New)
An agent to assist IT administrators in approving or rejecting device requests based on predefined criteria.

Inventory Management Report (Report, New)
A report for IT administrators to generate insights on device inventory and procurement requests.

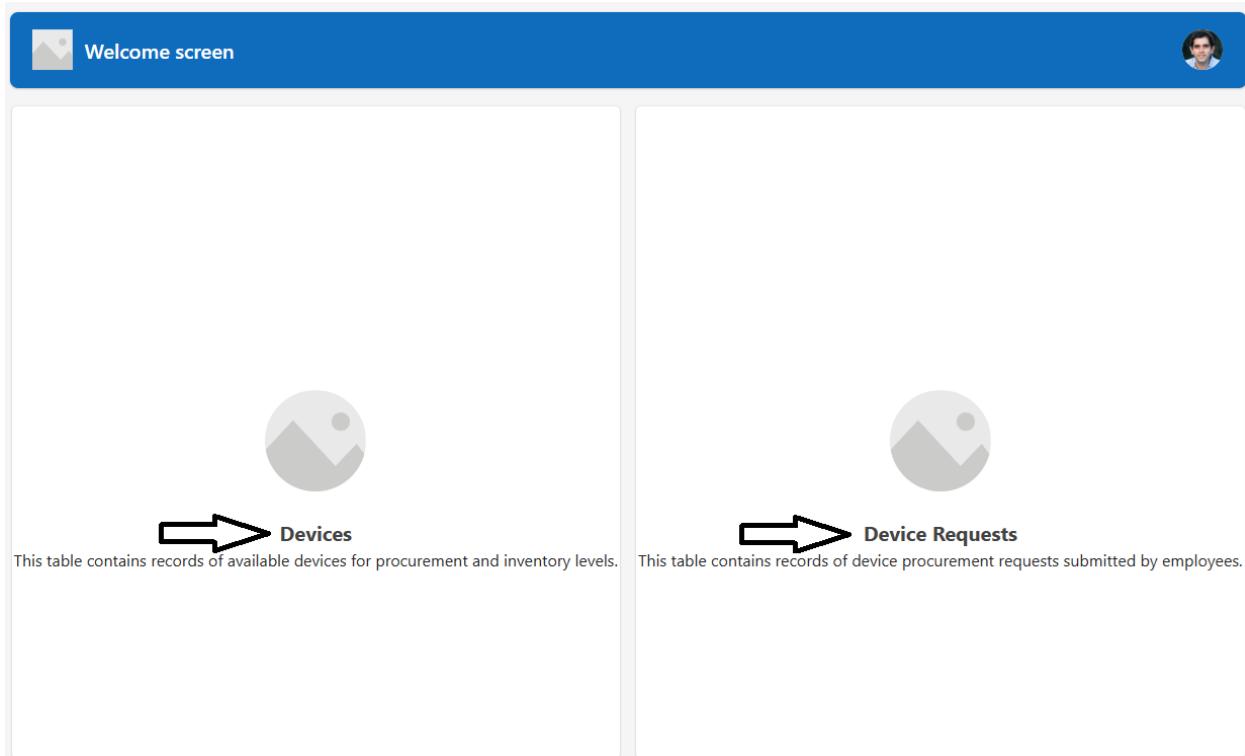
+ Add technology

7.2 Copilot will generate a fully functional Power App connected to both the "**Devices**" and "**Device Requests**" tables. This aligns with the business requirements and process workflow designed for the **Employee** persona.



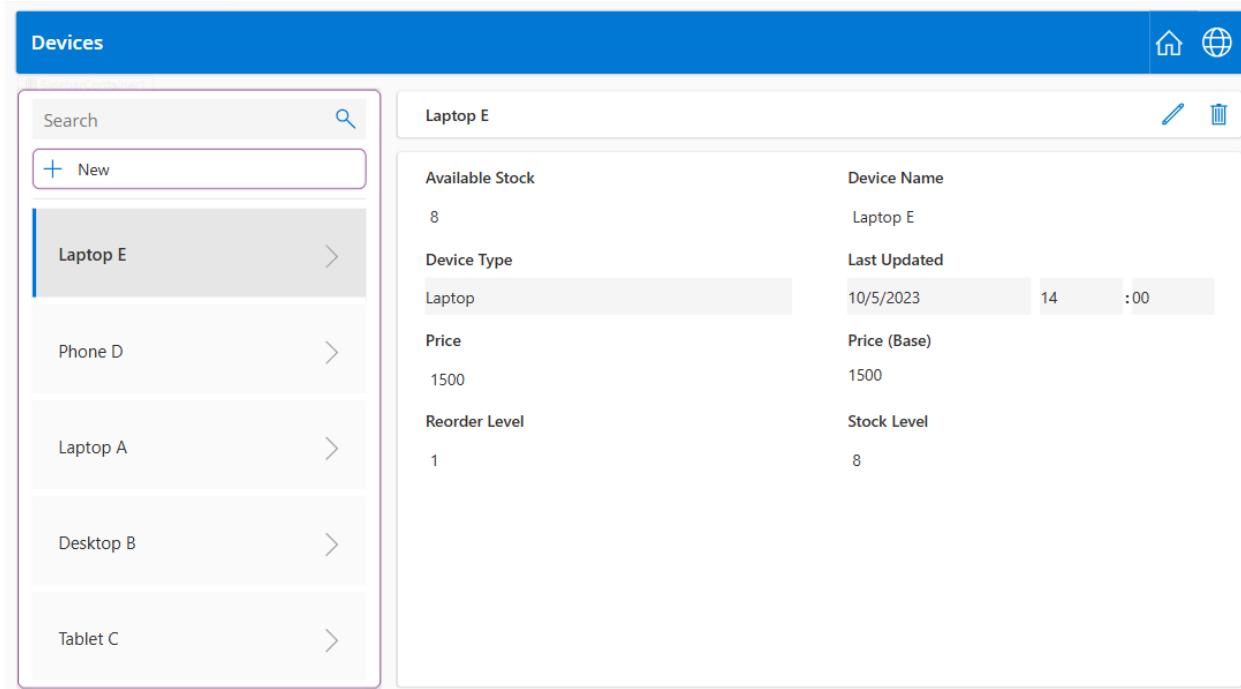
7.3 Welcome screen

The **Welcome screen** is ideal for the first screen of an app, where you can customize tiles such as an image, a title, and a description. You can change the number of tiles by adding or removing them in the main container. Use the tiles to navigate users to other parts of the app.



7.4 User can click on “Devices” or “Device Requests” which would in turn navigate them to the respective screens.

Hold alt key and click on “Devices” - you will be navigated to the Devices screen



Available Stock	Device Name
8	Laptop E

Device Type	Last Updated
Laptop	10/5/2023 14:00

Price	Price (Base)
1500	1500

Reorder Level	Stock Level
1	8

The Devices screen will display data from the Devices table in a gallery format.

Users can search for devices (browse devices), select a device, and view all its details in a connected form, as shown in the screenshot above.

Full CRUD operations are supported for both the “Devices” and “Device Request” screens

Note: At this stage, the app is fully customizable for the app maker. It can be tailored to create pixel-perfect apps.

7.5 Now go ahead and publish the App from the ribbon



7.6 Once published, close the browser tab.

7.7 The plan interface shows the Device Ordering App as generated and allows maker to edit the App as needed.

Technology

The apps, flows, and other objects that will be [Edit](#) to solve the business problem.

 Device Ordering Canvas App ⓘ
Canvas app

An app for employees to browse available devices, submit procurement requests, and track request statuses.

 Device Request Management ⓘ
Model-driven app [New](#)

An app for IT administrators to manage device requests, approve or reject them, and track inventory.

 Purchase Order Tracking ⓘ
Model-driven app [New](#)

An app for procurement admins to track the status of purchase orders and mark them as completed.

 Device Request Notification ⓘ
Flow [New](#)

A flow to notify IT administrators when a device request is submitted.

 Request Approval Notification ⓘ
Flow [New](#)

A flow to notify employees when their device request is approved or rejected.

 Purchase Order Generation ⓘ
Flow [New](#)

A flow to automatically generate a purchase order request when a device request is approved.

 Inventory Management Report ⓘ
Report [New](#)

A report for IT administrators to track device inventory and generate insights on stock levels.

 Device Request Approval Agent ⓘ
Agent [New](#)

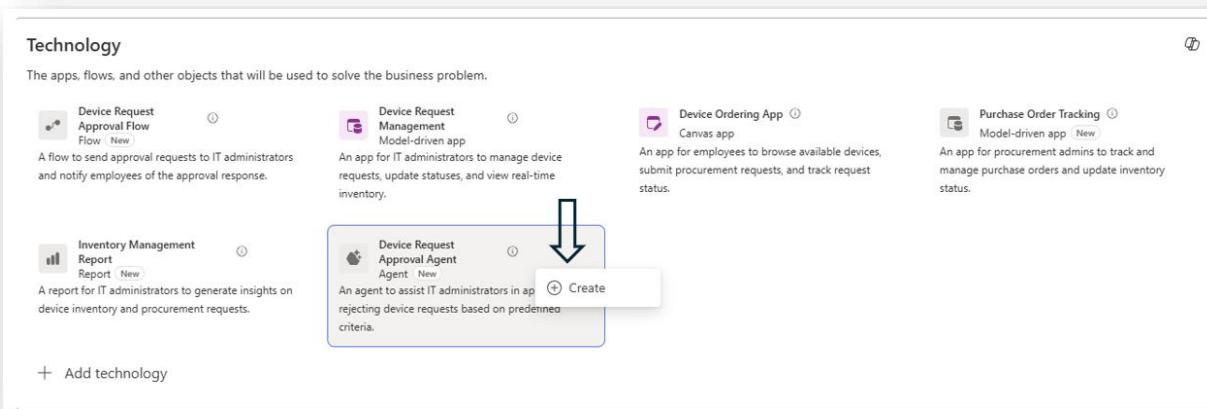
An agent to assist IT administrators in reviewing and approving device requests efficiently.

[+ Add technology](#)

Step 8: Create copilot agent

We will create a copilot agent to offer IT administrators assistance for managing device data, requests, and approvals.

8.1 Select the Device Request and click on Create.



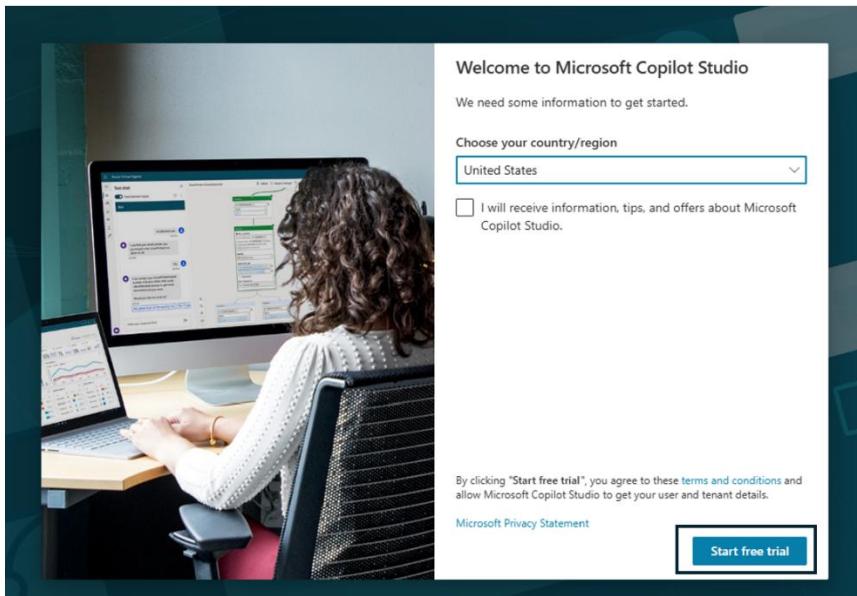
If you do not have a device approval agent, click on the copilot icon in the top right of the technology section and use the following prompt:

Add an agent to help administrators automatically approve device requests

Then proceed with the creation step.

When clicking create, the plan will redirect you to Copilot Studio and initiate the creation of an agent. Please note that, since this agent was created by the Plan designer, it already possesses the context regarding your business requirements and data knowledge.

Note: Since this is a demo tenant, [click on Start Free Trial](#) to use Copilot Studio



8.2 This will create an agent and lead us to the agent details screen

Details

 **Name**
Device Request Approval Agent

Description
An agent to assist IT administrators in approving or rejecting device requests based on predefined criteria.

Orchestration
Use generative AI to determine how best to respond to users and events. [Learn more](#)  **Enabled**

Instructions   

- Assist IT administrators in approving or rejecting device requests based on predefined criteria.
- Provide clear and concise information about each device request.
- Ensure that all decisions are logged and tracked for future reference.
- Maintain a user-friendly interface for IT administrators.
- Follow organizational policies and guidelines for device allocation.
- Respond promptly to IT administrators' queries and requests.
- Avoid making decisions without sufficient information.
- Ensure data privacy and security at all times.

538/8000

Topics 

Add conversation topics to focus and guide the way your agent answers.

 Goodbye 

 Greeting 

 Start Over 

[See all](#)

Knowledge 

Add data, files, and other resources to inform and improve AI-generated responses.

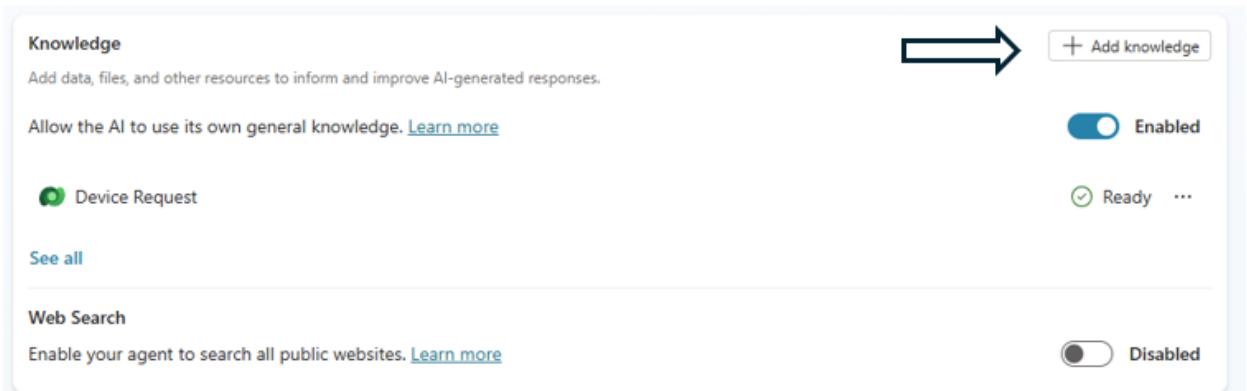
Allow the AI to use its own general knowledge. [Learn more](#)  **Enabled**

 Device  **Ready** 

8.3 The knowledge source “Device Request” table is already linked to the agent.

We can add additional knowledge sources as needed.

Click “Add Knowledge” in the Overview section.



Knowledge

Add data, files, and other resources to inform and improve AI-generated responses.

Allow the AI to use its own general knowledge. [Learn more](#)

Enabled

Device Request

Ready

See all

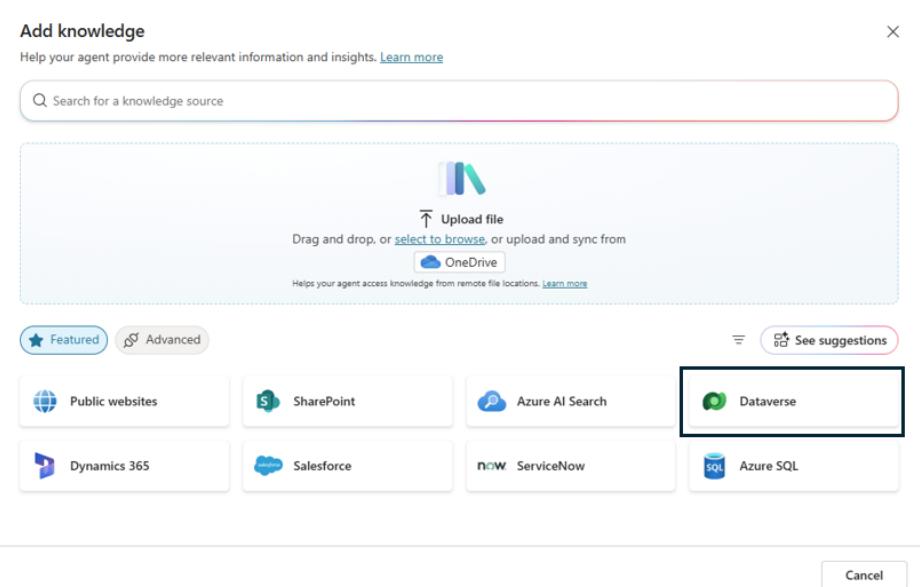
Web Search

Enable your agent to search all public websites. [Learn more](#)

Disabled

[+ Add knowledge](#)

8.4 Now **Select “Dataverse”** knowledge source.



Add knowledge

Help your agent provide more relevant information and insights. [Learn more](#)

Q Search for a knowledge source

Upload file

Drag and drop, or [select to browse](#), or upload and sync from

OneDrive

Helps your agent access knowledge from remote file locations. [Learn more](#)

Featured Advanced See suggestions

Public websites SharePoint Azure AI Search Dataverse

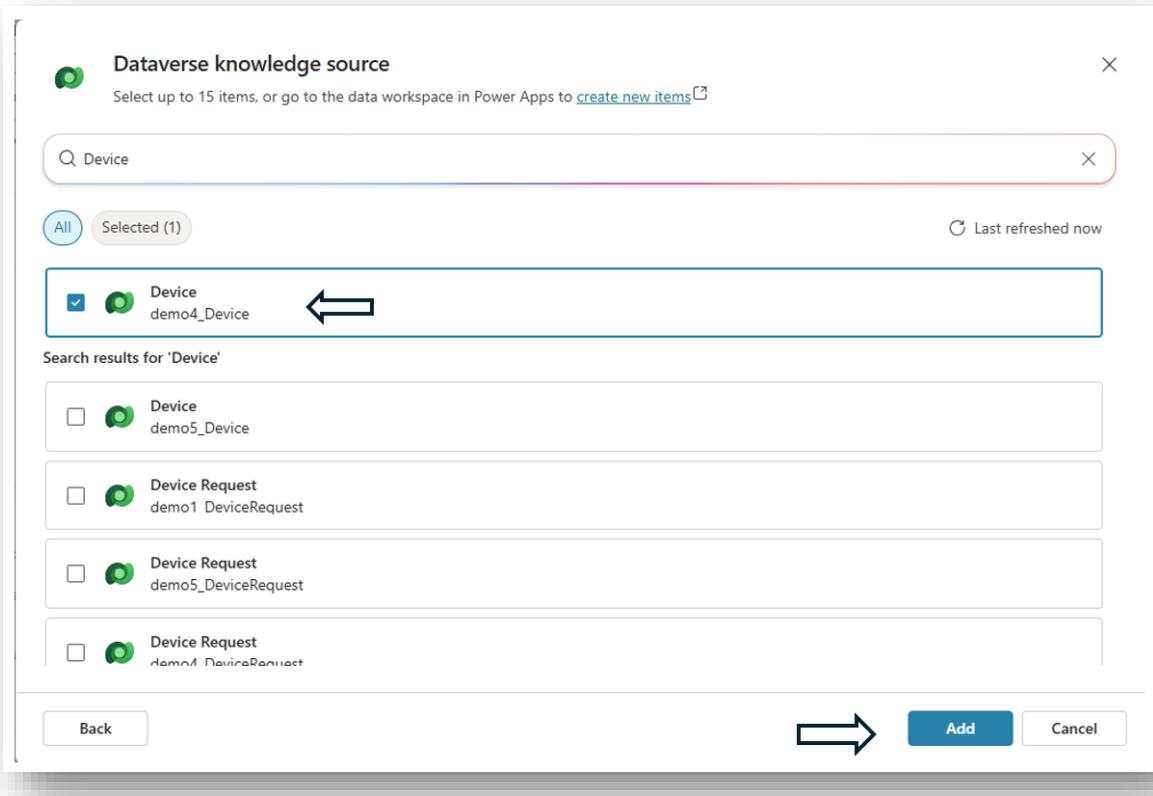
Dynamics 365 Salesforce ServiceNow Azure SQL

Cancel

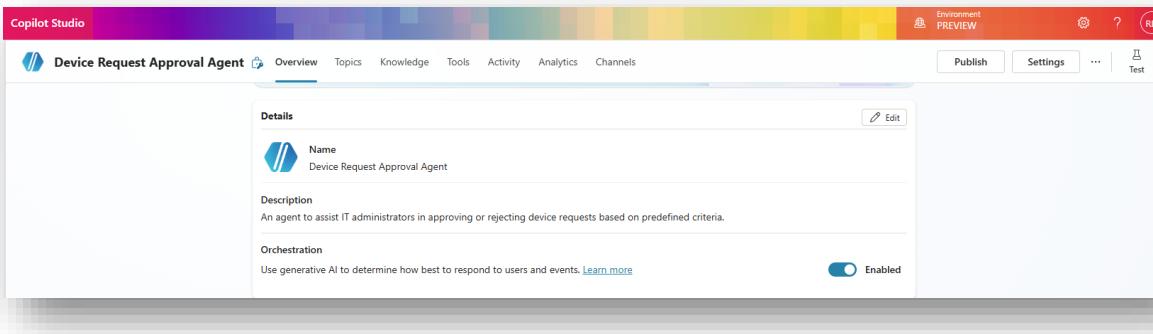
8.5 Add “Device” table to the knowledge source.

Search for the Table and then select the Table

Click **Next** and then the **Add** button (bottom of screen)

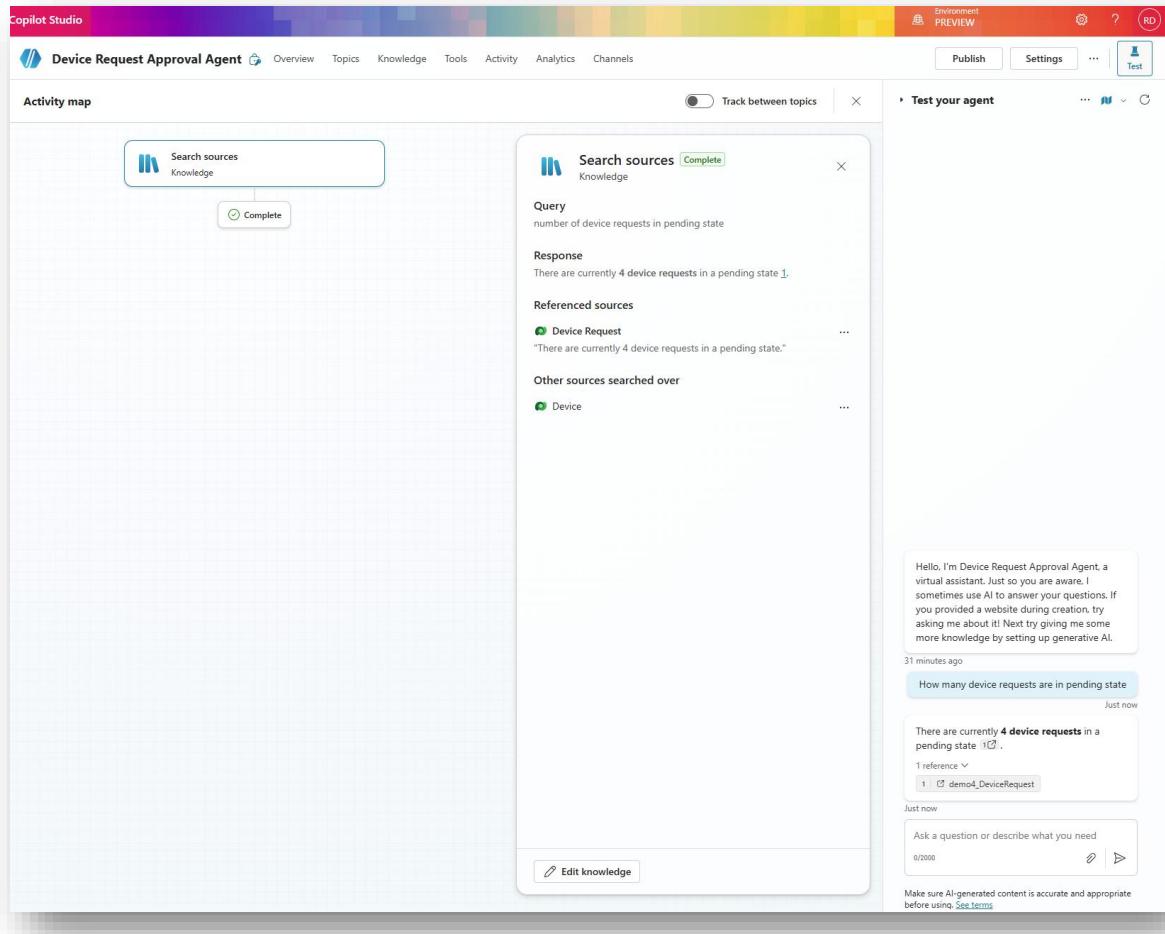


8.6 Click on “**Test**” button on top right and initiate a chat with the agent to validate the knowledge sources are operating correctly.



8.7 Give the following prompt to the agent

How many device requests are in pending state

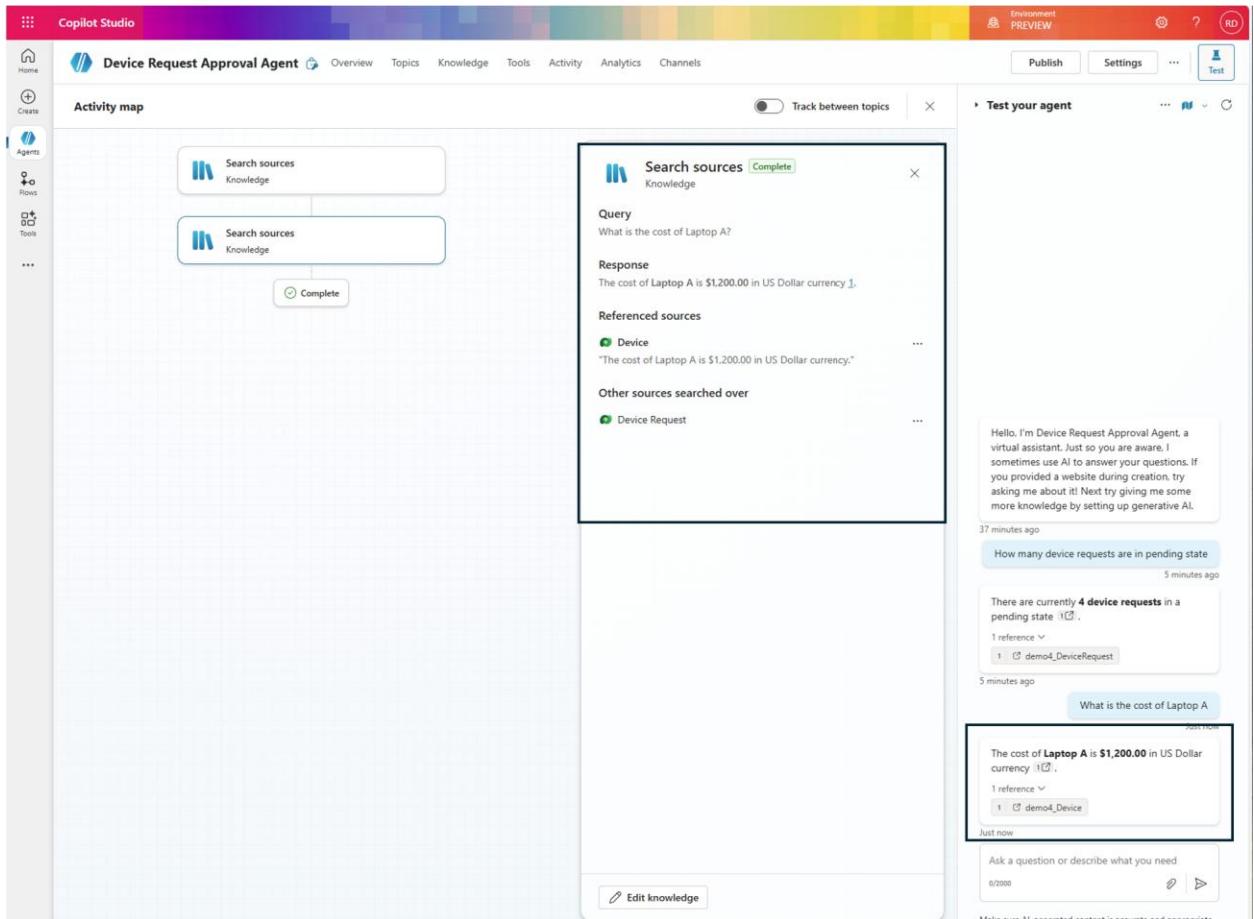


Note: As the agent processes the prompt, the Activity map displays the knowledge sources used to generate the reply.

8.8 Next test another prompt

What is the cost of <DeviceName>

Copilot agent will refer to the Device knowledge resource and return an appropriate reply.



8.9 Set up autonomous agent capabilities in this agent

8.9.1 Update the agent instructions with the following prompt:

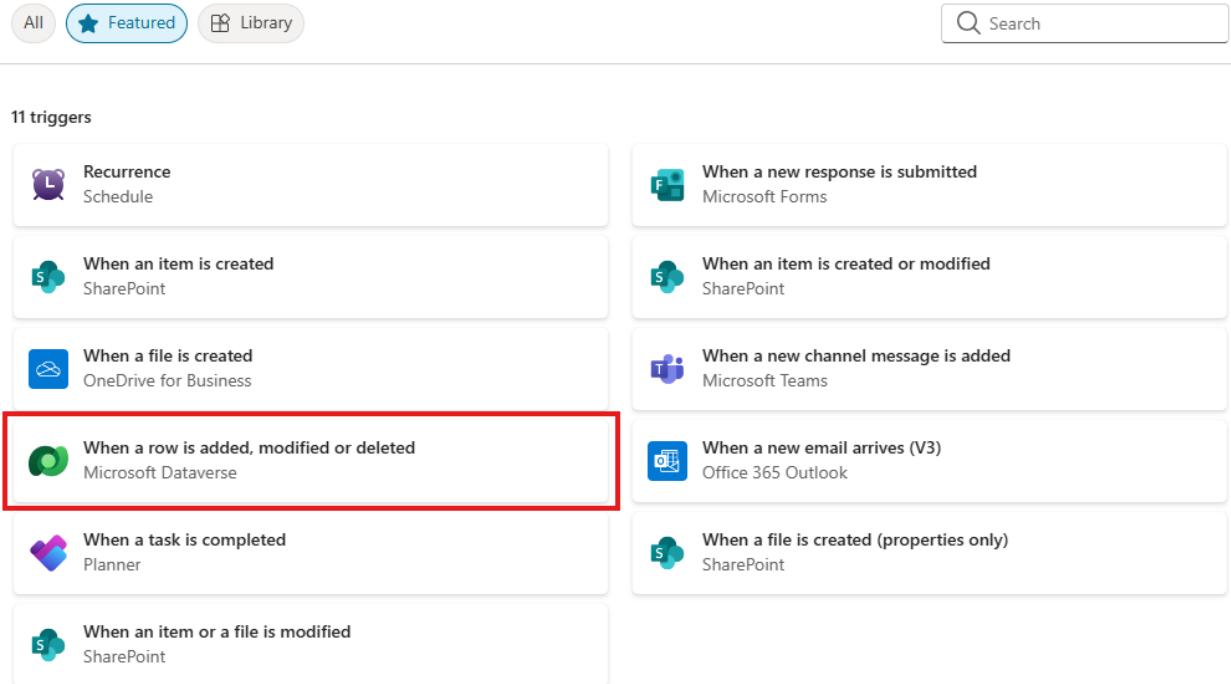
- *Goal: Assist IT administrators in automating the initial evaluation of device requests.*
- *First: Before processing any approval, you must lookup the price of the requested device from knowledge sources in the device table based on the GUID provided in the device request. If you are unable to determine a device price, respond with a message that no device was found.*
- *Second: If and only if the request price is under \$500 as documented in the Device table, approve the request. This approval is only to be done in the same environment that triggered the request and only update the device request table status name to Approved, do not update any other columns besides the approval status which will have a prefix followed by an underscore _. it should look like cr324_requeststatus. Do not confuse request status with statuscode or statecode, statuscode and statecode should not be updated.*

Add a trigger by clicking add trigger

Select When a row is added, modified or deleted from Dataverse

Add trigger

Manage how your agent responds to user input and external events. This is a billable feature and will consume messages. [Learn more.](#)



The screenshot shows the 'Add trigger' interface with a search bar and filter buttons for 'All', 'Featured' (which is selected), and 'Library'. Below is a list of 11 triggers:

- Recurrence Schedule
- When a new response is submitted Microsoft Forms
- When an item is created SharePoint
- When an item is created or modified SharePoint
- When a file is created OneDrive for Business
- When a new channel message is added Microsoft Teams
- When a new email arrives (V3) Office 365 Outlook
- When a file is created (properties only) SharePoint
- When a row is added, modified or deleted Microsoft Dataverse (highlighted with a red box)
- When a task is completed Planner
- When an item or a file is modified SharePoint

Add the trigger name: *New Device Request*

Validate that the connections have been validated by making sure each listed connection has a green check next to it, and then click “Next”

Set the following settings for the trigger, and then click “Create trigger”. Settings:

- Change type: Added
- Table name: Device Requests
- Scope: Organization

8.9.2 Next we will give the Agent a tool to update the record in question. Click Add tool.

Click on the Dataverse connector

Select “Update a row in selected environment”

Validate connection, and click “Add and configure”

Configure the tool with the following settings and then click “Save”. Settings:

- Details:
 - Name: Update Status Approval
 - Description: Update approval status based on instructions of agent
 - Additional Details -> Credentials to use -> Maker-provided credentials
- Inputs:
 - Environment: Custom value = (Current)
 - Table Name: Device Requests (or similar)

8.9.3 Finally, we will update settings for our agent, click on Settings in the top right-hand corner.

Validate that the Agent's model is set to GPT-5 Auto (should be set automatically)

Set content moderation to "Low" to ensure the agent doesn't cancel based on the user input

Set "Use general knowledge" to Off, to make sure the agent is making decisions based on knowledge from our Dataverse tables and not from public sources.

Click Save. Then return to Agent Screen

BUG NOTE: *If when returning to Agent Screen after saving, you are prompted that changes may not be saved, do not click the leave button. Instead, in your browser, navigate to copilotstudio.preview.microsoft.com and back to your environment. You will be prompted with a browser popup to leave, and may click on that one. Return to settings and validate that your changes were in fact saved.*

8.10 **Publish** the agent

Step 9: Create Model-driven App

The Device Request Management app for IT Admins is recommended as a Model-driven Power App.

9.1 To create the Model-driven App, click "**Create**." This will open a new tab and initiate the app creation process.

This Model-driven App is designed for the "**IT Administrator**" user persona. It allows users to view and update device requests and monitor device inventory.

Note: You have full flexibility to choose the type of app you want to make available for your user personas. You can also "**convert**" app types and bring your existing apps to the forefront.

The screenshot shows the Microsoft Power Platform canvas interface. The 'Technology' section is displayed, listing various apps and flows. A blue box highlights the 'Device Request Management' app, which is described as a 'Model-driven app' for IT administrators to manage device requests. A large black arrow points to the 'Create' button in the context menu that appears when the app is selected. The context menu also includes options for 'Replace with existing' and 'Convert to canvas app'.

Technology	Description
Device Ordering App Canvas app New	An app for employees to browse available devices, submit procurement requests, and track request status.
Device Request Management Model-driven app New	An app for IT administrators to manage requests, update statuses, and view device inventory.
Purchase Order Tracking Model-driven app New	An app for procurement admins to track and manage purchase orders and update inventory status.
Device Request Notification Flow New	A flow to notify IT administrators when a device request is submitted.
Device Request Approval Agent Agent New	An agent to assist IT administrators in approving or rejecting device requests based on predefined criteria.
Inventory Management Report Report New	A report for IT administrators to generate insights on device inventory and procurement requests.

+ Add technology

9.2 The two generated pages align with the defined business requirements, processes, and user roles as shown in the image below

The screenshot shows the Power Apps Device Request Management app interface. On the left, the 'Plan details' pane is open, providing an overview of the app's purpose (managing device requests for IT administrators) and its AI-generated nature. It lists 'Pages' and 'User roles' under the 'Device Requests' section. Below this, two tables are shown: 'Device Requests' and 'Devices'. Each table has a 'User can' and 'They will see or use' section. The 'Active Device Requests' table on the right lists six entries:

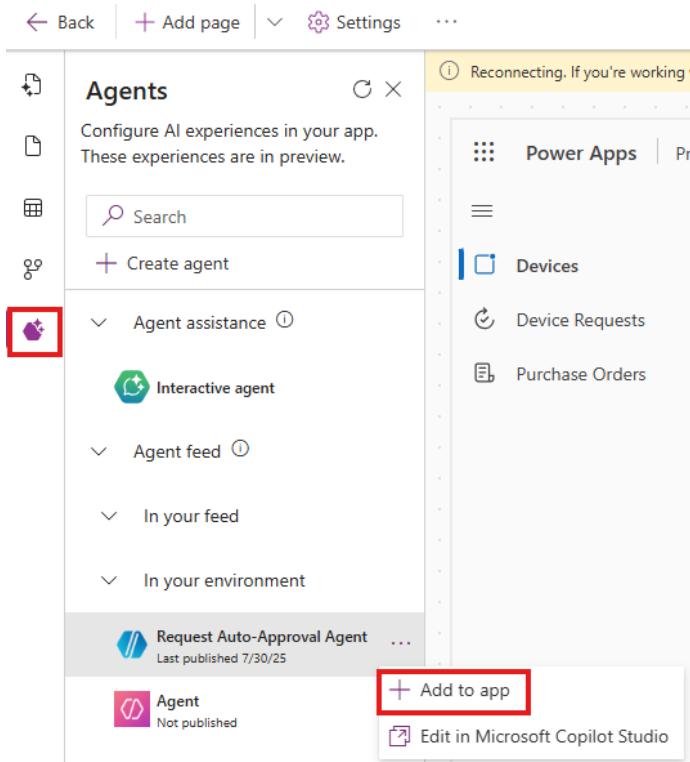
Request Name	Device Name	Status	Employee Name
Request for Desktop B	Desktop B	Approved	
Request for Laptop A	Laptop A	Pending	
Request for Laptop E	Laptop E	Pending	
Request for Phone D	Phone D	Pending	
Request for Tablet C	Tablet C	Pending	

9.3 Now we will add Agent Feed to the App

In the left nav, click on the Agents button.

Your created agent shows up under the “In your environment” section.

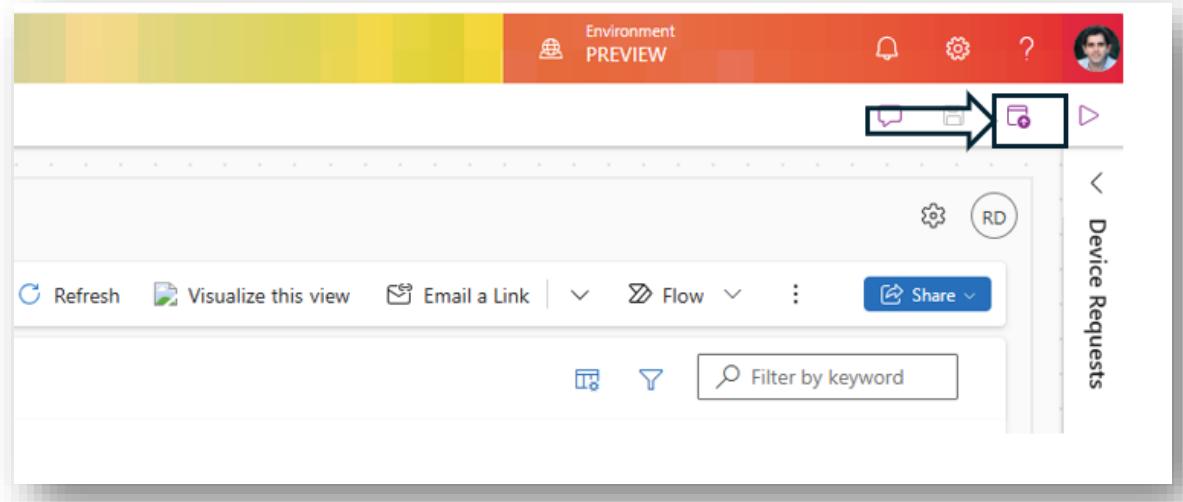
Click on the ellipsis next to the agent and select “Add to app”



The screenshot shows the 'Agents' page in the Microsoft Power Apps studio. On the left, a sidebar lists 'Agent assistance', 'Agent feed' (with 'In your feed' and 'In your environment' sub-options), and a card for 'Request Auto-Approval Agent' (Last published 7/30/25). At the bottom of the sidebar is an 'Agent' card (Not published). A red box highlights the 'Agent assistance' icon. A red box also highlights the 'Add to app' button in a context menu that appears when clicking on the 'Request Auto-Approval Agent' card. The main content area shows a 'Devices' section with 'Power Apps' and 'Purchase Orders'.

This agent is now part of the model driven app's Agent Feed.

9.4 Next, Click on Publish this App, and once published, close your browser tab.



The screenshot shows the 'Device Requests' page in the Microsoft Power Apps studio. The top navigation bar includes 'Environment PREVIEW', a user profile icon, and a 'RD' button highlighted with a red box. The main content area displays a list of device requests, with a red arrow pointing to the 'RD' button.

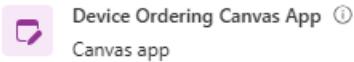
9.5 Back to the plan designer, you will note that both the “Canvas App” and the “Model-driven App” have been activated

Technology

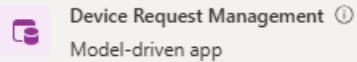
The apps, flows, and other objects that will be used to

solve the business problem.

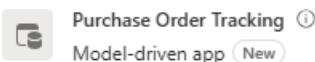
Edit



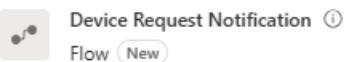
An app for employees to browse available devices, submit procurement requests, and track request statuses.



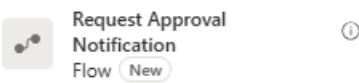
An app for IT administrators to manage device requests, approve or reject them, and track inventory.



An app for procurement admins to track the status of purchase orders and mark them as completed.



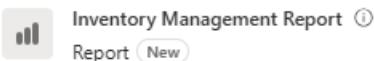
A flow to notify IT administrators when a device request is submitted.



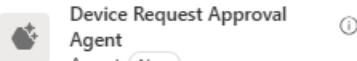
A flow to notify employees when their device request is approved or rejected.



A flow to automatically generate a purchase order request when a device request is approved.



A report for IT administrators to track device inventory and generate insights on stock levels.



An agent to assist IT administrators in reviewing and approving device requests efficiently.

+ Add technology

Step 10: Create cloud flows

10.1 Next, lets create the device request notification flow

Technology

The apps, flows, and other objects that will be used to solve the business problem.

Device Ordering Canvas App Canvas app
An app for employees to browse available devices, submit procurement requests, and track request statuses.

Device Request Management Model-driven app
An app for IT administrators to manage device requests, approve or reject them, and track inventory.

Purchase Order Tracking Model-driven app (New)
An app for procurement admins to track the status of purchase orders and mark them as completed.

Create

10.2 Copilot will suggest flow patterns based upon the business problem stated. Here we have full flexibility to work with copilot to frame our automation needs. For this scenario, I will pick the suggested flow shown in image below:

Power Automate

Describe it to design it

Step 1 of 2

What will your flow do?

Describe what you want to automate and AI will help you make it happen. [How it works](#)

***Business Problem: This solution will allow employees to request devices and IT administrators to manage inventory efficiently, improving transparency and efficiency.
***User Role: IT Administrator - Receive notifications when a device request is submitted so that I can review it promptly.

Suggested flow

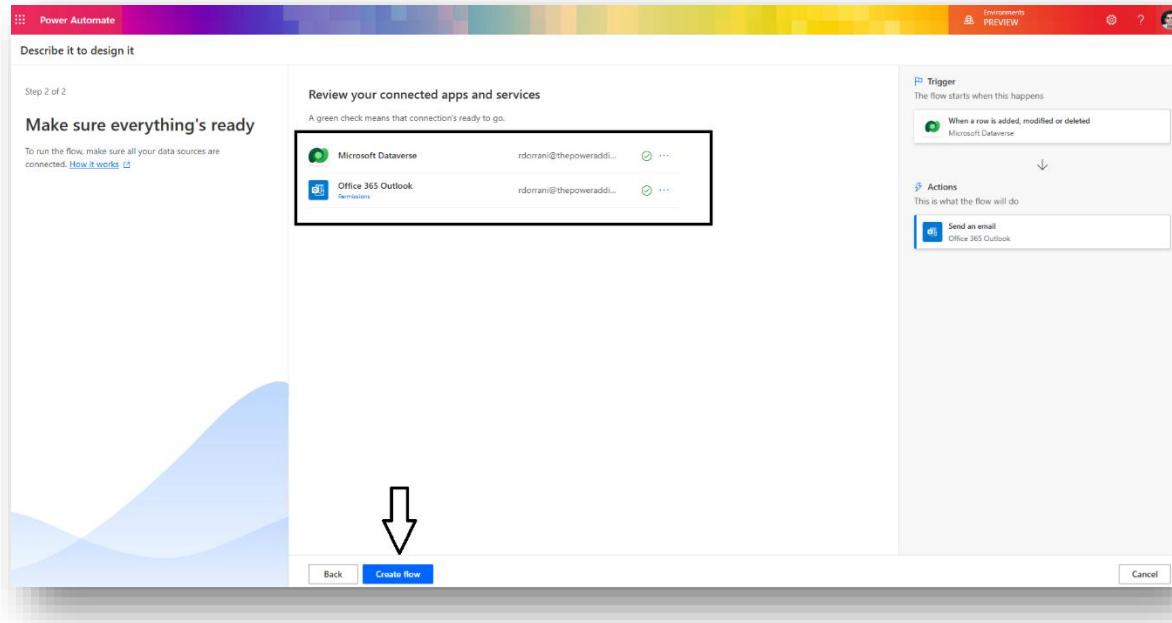
If you like this AI-generated suggestion, choose **Keep it and continue** to complete the configuration.

Trigger
The flow starts when this happens
When a row is added, modified or deleted
Microsoft Dataverse

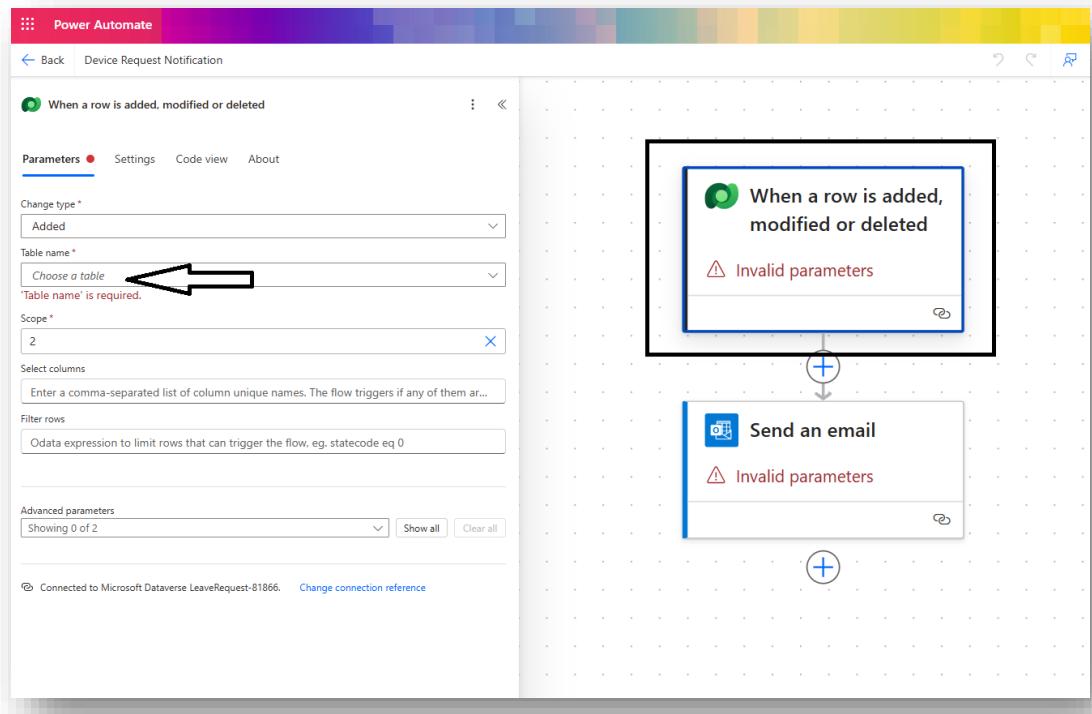
Actions
This is what the flow will do
Send an email
Office 365 Outlook

Keep it and continue Add more details for Copilot to work with

10.3 Setup the suggested connections for the flow and click create



10.4 Select the flow trigger action and choose the **Device Request** table



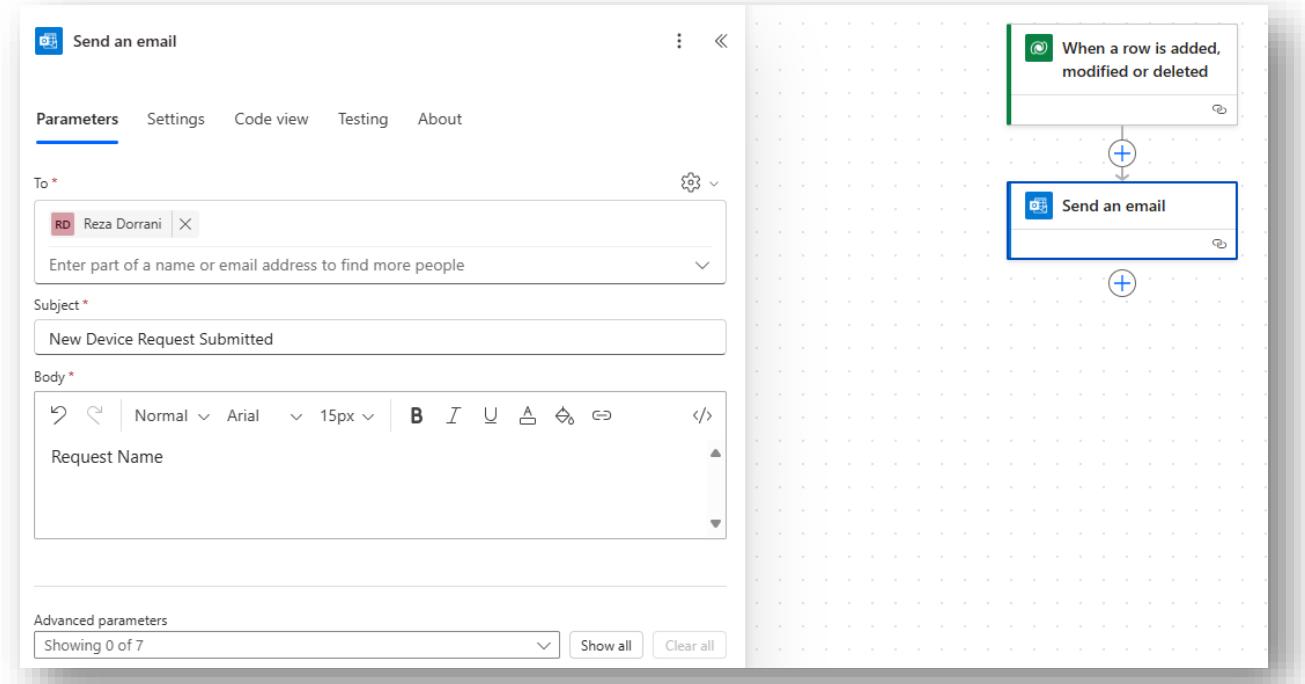
10.5 Next, select the send an email action and setup the properties as follows:

To - Use your own user account here

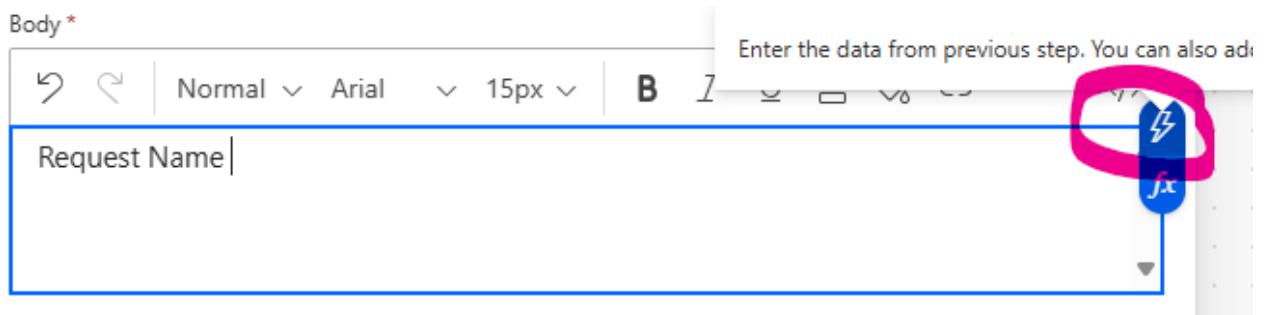
Subject - New Device Request Submitted

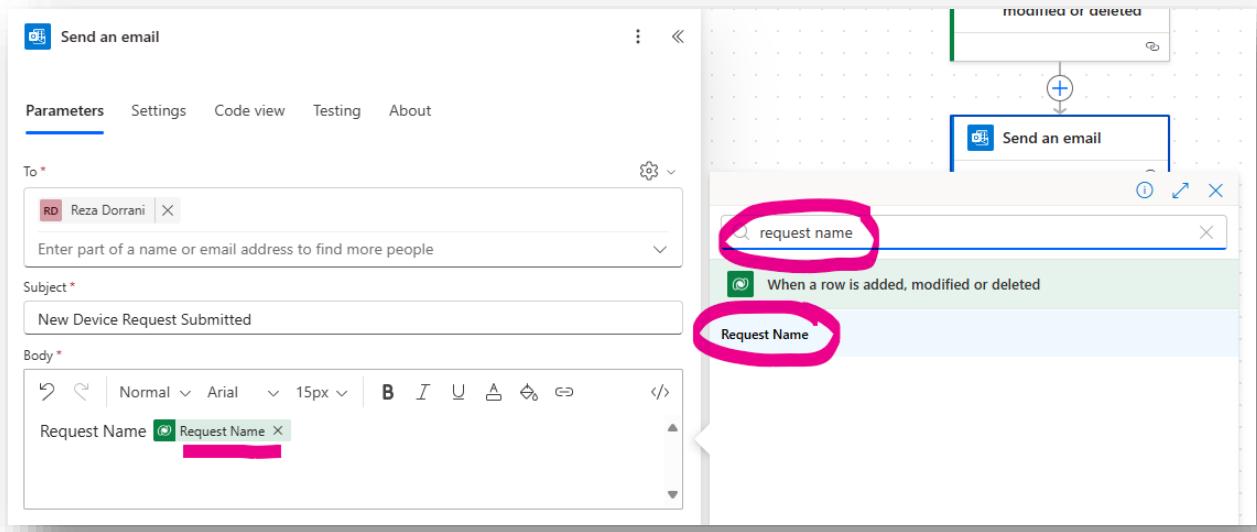
Body - Request Name

This is the notification email that will go out to your IT Admins whenever a new device order request is submitted.

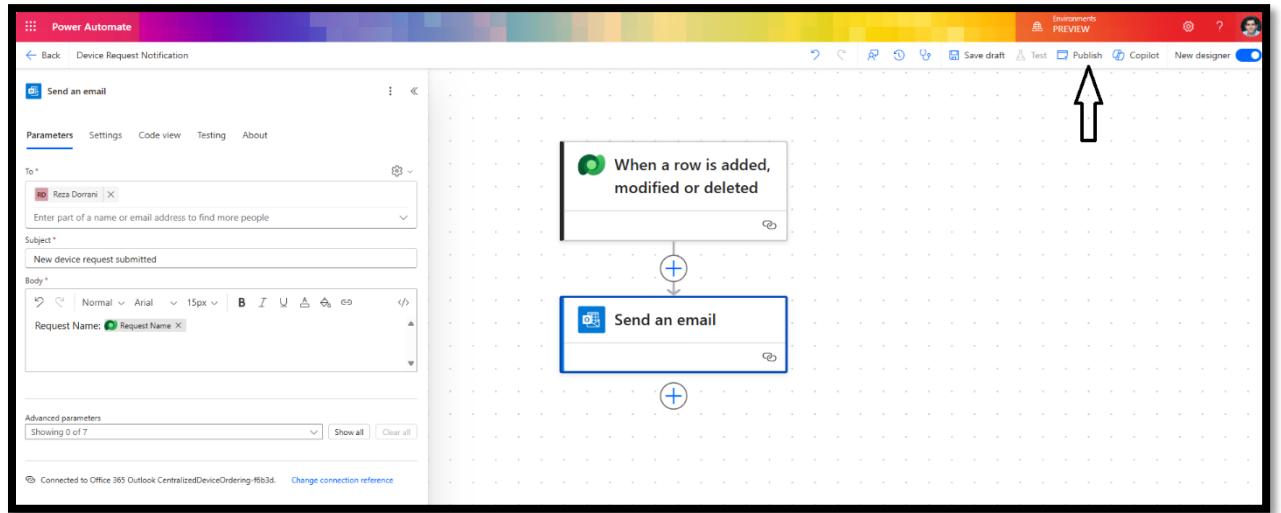


10.6 Now in Body – lets add dynamic content for Request Name





10.7 Next step: Publish the flow



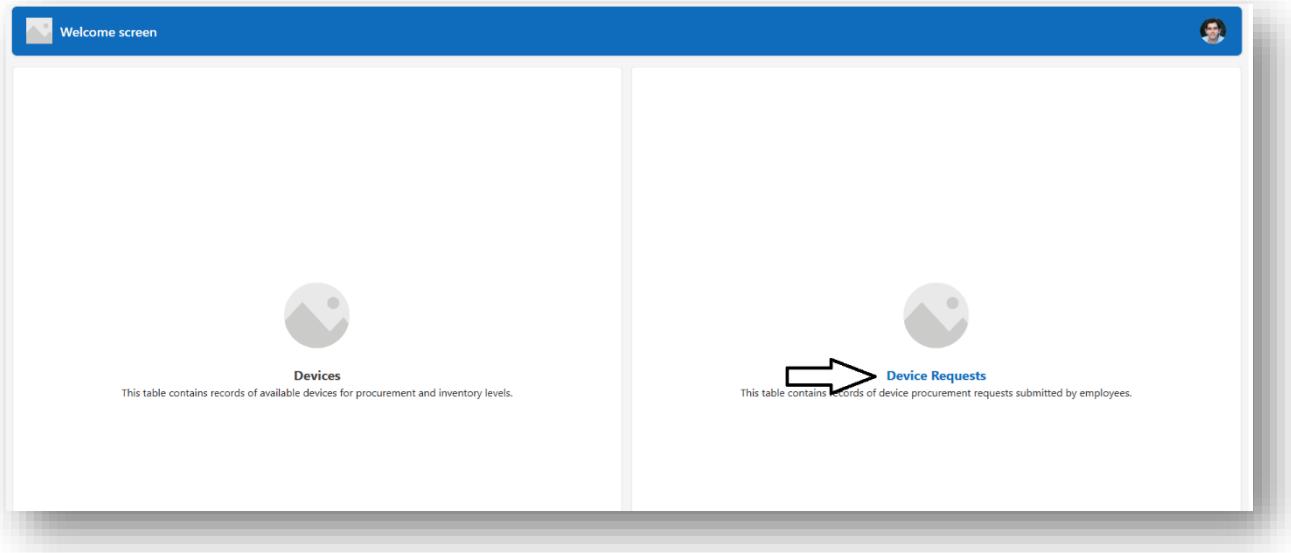
10.8 Close the browser tab

💡 Note: You can continue to create more artifacts using the technologies suggested by the Solutions Agent

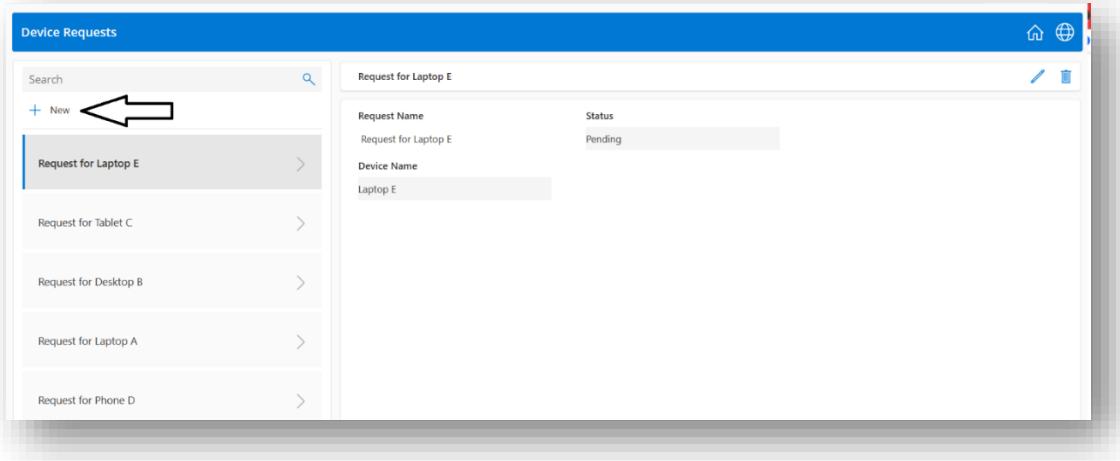
Step 11: Test and run the end-end Solution

Now, let's test the solution end-to-end (E2E)

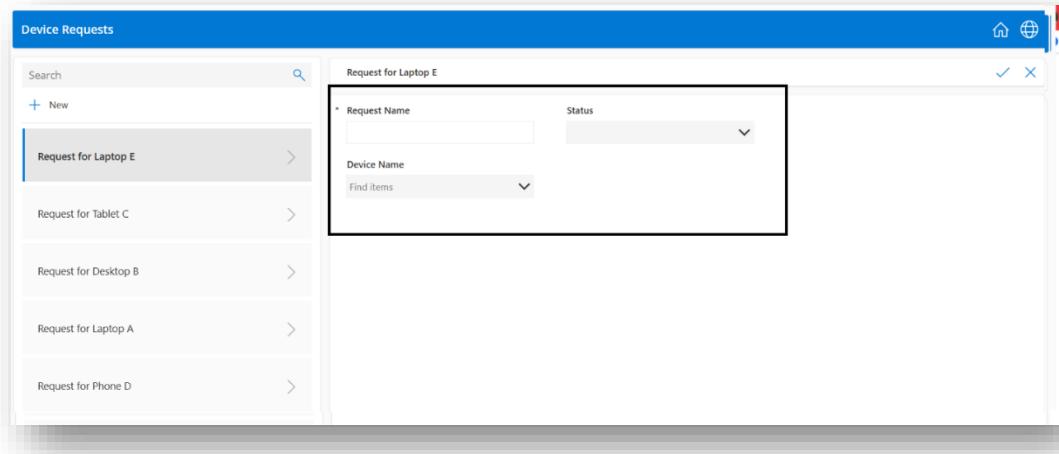
11. 1 The employee launches the "**Device Order App**" and clicks the "**Device Requests**" button.



11.2 The employee clicks the "**New**" button to create a new device request

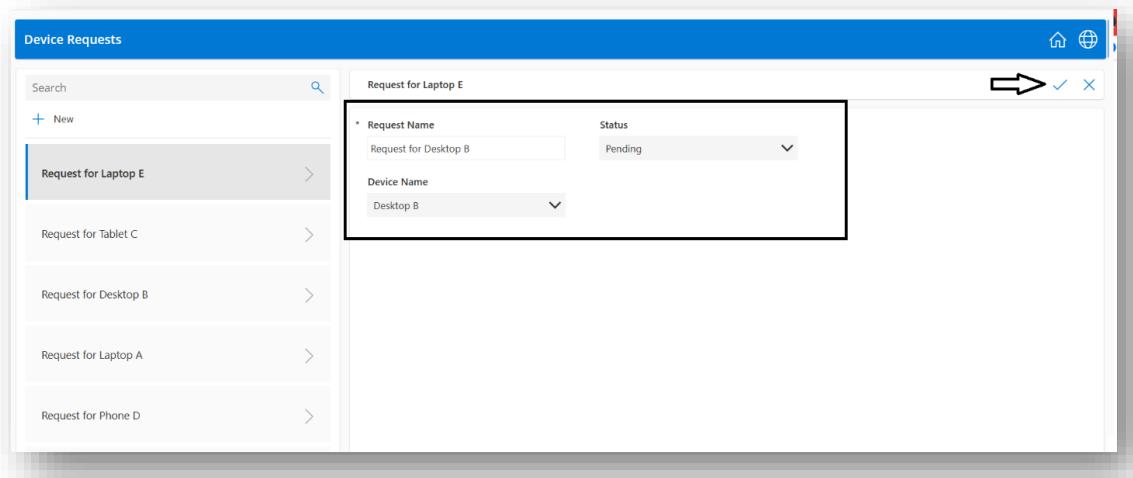


11.3 The form will allow the user to post a new device request.



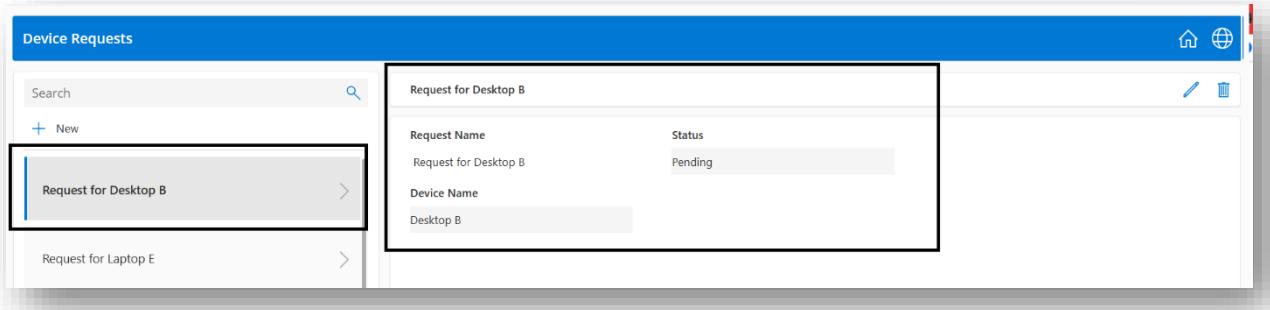
The screenshot shows a 'Device Requests' application interface. On the left, a list of requests is displayed: 'Request for Laptop E', 'Request for Tablet C', 'Request for Desktop B', 'Request for Laptop A', and 'Request for Phone D'. The 'Request for Laptop E' item is selected, and its details are shown in a modal window on the right. The modal window is titled 'Request for Laptop E'. It contains two fields: 'Request Name' (set to 'Request for Desktop B') and 'Status' (set to 'Pending'). Below these fields is a 'Device Name' dropdown menu with 'Desktop B' selected. The modal window has a standard Windows-style title bar with icons for minimize, maximize, and close.

11.4 The employee enters the required data in the form and clicks the submit icon



The screenshot shows the same 'Device Requests' application interface as the previous one. The 'Request for Laptop E' item is still selected. The modal window now shows the data has been submitted: 'Request Name' is 'Request for Desktop B', 'Status' is 'Pending', and 'Device Name' is 'Desktop B'. A red arrow points to the blue checkmark icon in the top right corner of the modal window, indicating the successful submission of the request.

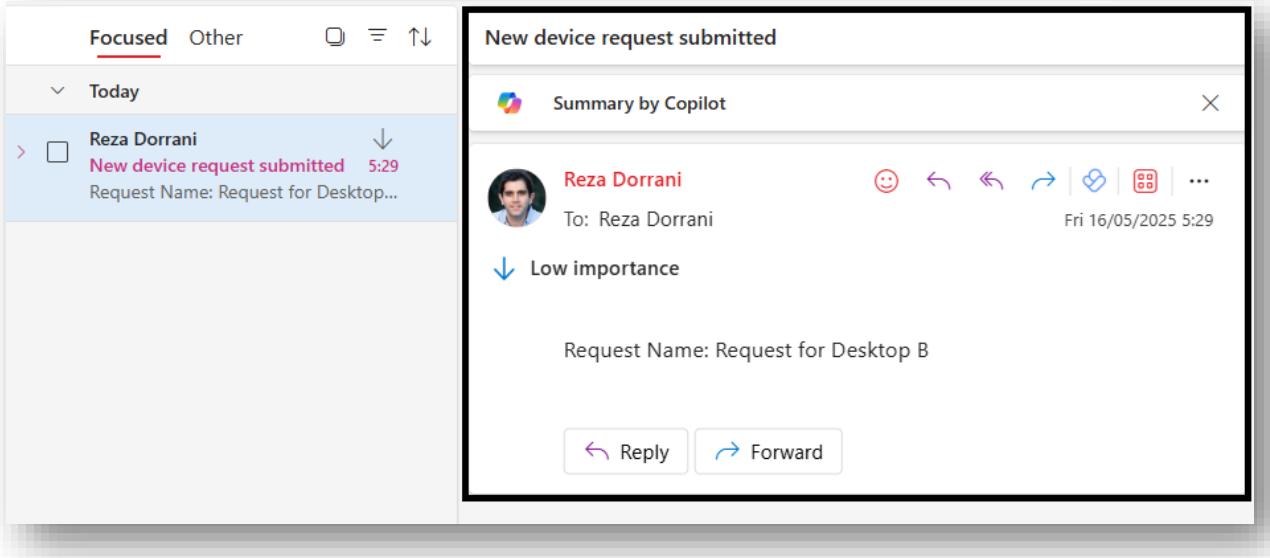
11.5 The request is submitted. The gallery displays the selected request, and the form shows the submitted data for that request.



The screenshot shows a Microsoft Dynamics 365 application window titled "Device Requests". On the left, a list of requests is displayed in a gallery view. The first item, "Request for Desktop B", is selected and highlighted with a blue border. On the right, a detailed view of this selected request is shown in a card format. The card contains the following data:

Request for Desktop B	
Request Name	Status
Request for Desktop B	Pending
Device Name	
Desktop B	

11.6 As part of the process, the IT Administrator is notified about the newly submitted request. This notification is triggered by the flow created in the previous steps.



The screenshot shows a Microsoft Outlook inbox. A new email notification is visible in the list, with the subject "New device request submitted" and the recipient "Reza Dorrani". The email content is summarized by Copilot, showing the request name "Request for Desktop B". A summary card for this notification is overlaid on the inbox. The card has the following details:

New device request submitted

Summary by Copilot

Reza Dorrani (Profile picture)

To: Reza Dorrani

Fri 16/05/2025 5:29

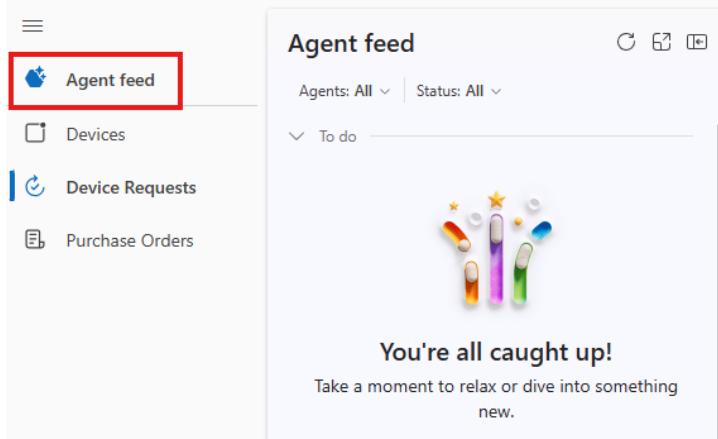
Low importance

Request Name: Request for Desktop B

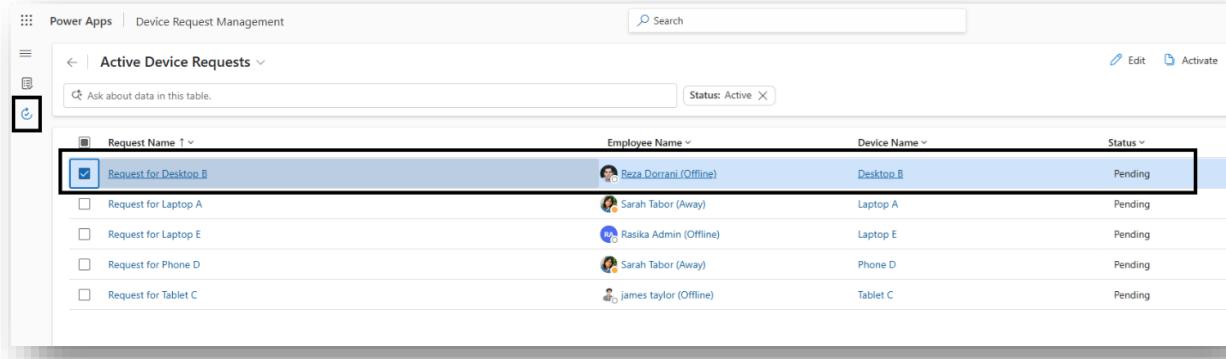
Buttons: Reply (purple arrow) and Forward (blue arrow)

11.7 The IT administrator can then use the Model-driven app to view/approve/reject the device request.

IT Admin signs into model-driven app, and makes sure to open Agent Feed by clicking on the Agent Feed Icon on the left. Depending on the device submitted and its price, the agent may have already approved the request for the administrator.

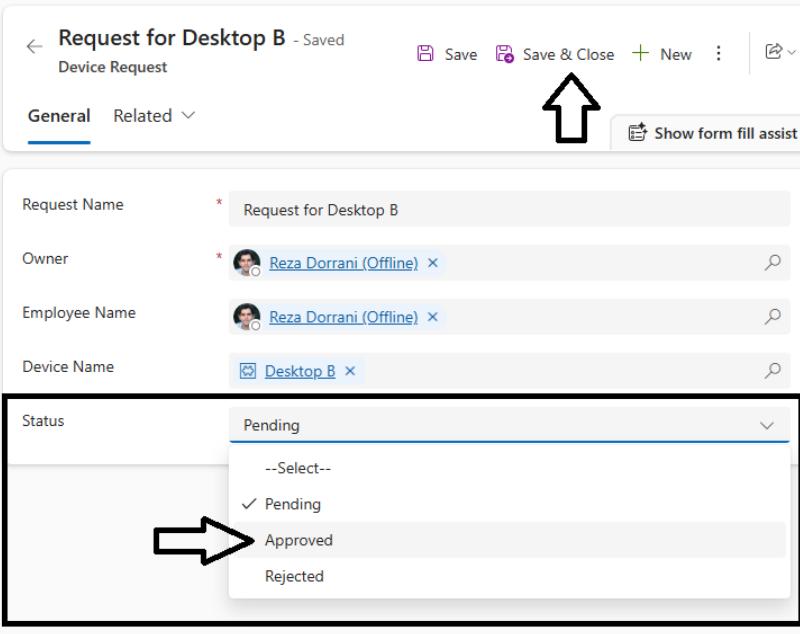


The “Device Requests” Page will show all the submitted device requests. The newly requested device entry will be listed. IT admin can select the device request to act.



11.8 Upon selection of a device request, the IT admin will be redirected to a form where they can update the Status (Approval decision)

IT admin sets the Status and Saves their response.



Request for Desktop B - Saved
Device Request

General Related

Request Name: Request for Desktop B

Owner: Reza Dorrani (Offline)

Employee Name: Reza Dorrani (Offline)

Device Name: Desktop B

Status: Pending

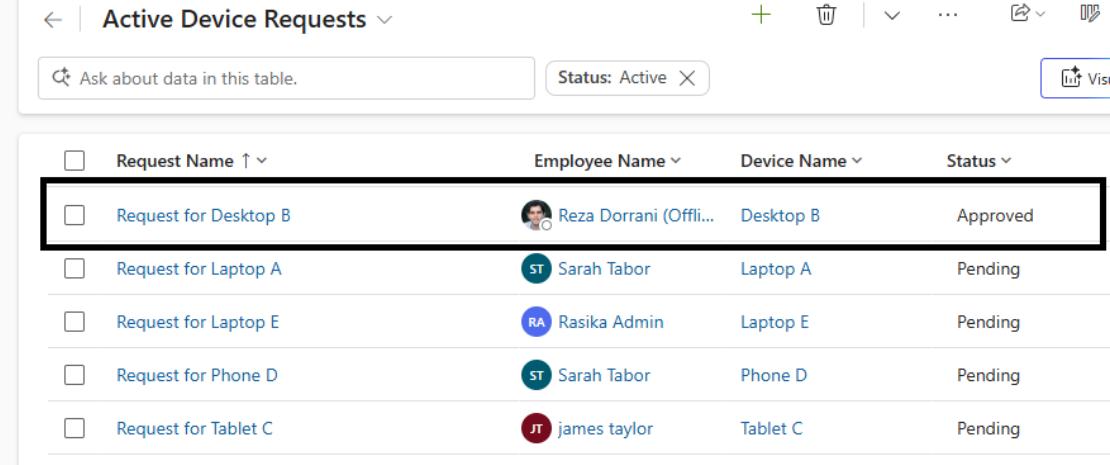
--Select--

✓ Pending

Approved

Rejected

11.9 The response update will be reflected in both the Apps (IT admin and employee)



Active Device Requests

Ask about data in this table. Status: Active

Request Name ↑ Employee Name Device Name Status

Request for Desktop B	Reza Dorrani (Offli...)	Desktop B	Approved
Request for Laptop A	Sarah Tabor	Laptop A	Pending
Request for Laptop E	Rasika Admin	Laptop E	Pending
Request for Phone D	Sarah Tabor	Phone D	Pending
Request for Tablet C	James Taylor	Tablet C	Pending

Device Requests

Search 

 New

Request for Desktop B 

Request for Desktop B

Request Name

Request for Desktop B

Status

Approved

Device Name

Desktop B

Congratulations 

You have successfully completed the
Hands-On Lab Module 1!