

Build agents and extend agent experiences with
Copilot Studio



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Version history.....Error! Bookmark not defined.

Overview

This document will step you through how to setup and deliver the demos for the “Build agents and extend agent experiences with Copilot Studio” breakout to be delivered at the AI Tour stops

There are 4 demo segments to be delivered in this session;

- 1. The first is focused on creating a new copilot with templates in Copilot Studio and how those templates can be customized during setup
- 2. The second segment focuses on how you can build a new agent with a conversational approach and how this agent can be configured to chat over your data with custom data sources, both public and internal (SharePoint)
- 3. The third segment focuses on how agents can be extended further with custom actions, focusing on using the SharePoint – Get Items action as a connector action to extend the agent
- 4. The final is a pre-recorded demo showcasing the new Agents capability

BOM

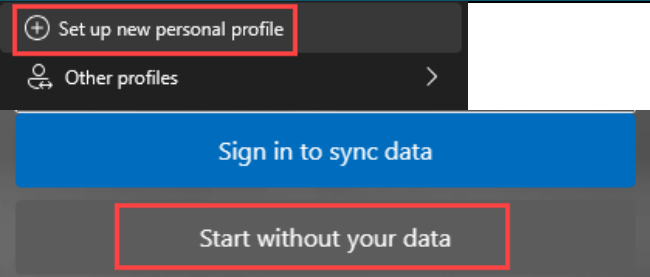
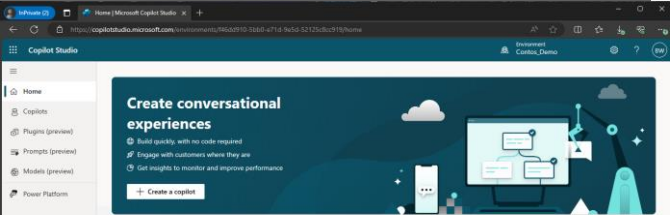
| Item | Description | Location |
|------------------|--|----------|
| Live Environment | You are responsible for your own account to do the demos | |

Preparation

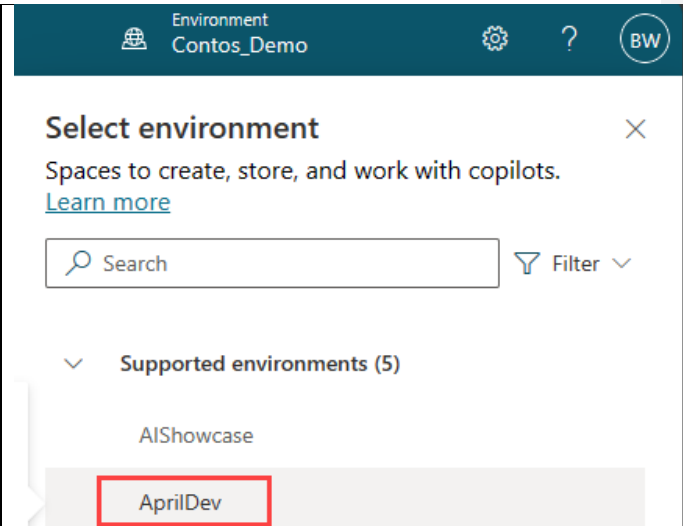
Before delivering your session it’s a good idea to complete the setup steps below and familiarize yourself with the flow of the demo.

Setup Steps

You will need to complete the following steps prior to delivering your demo

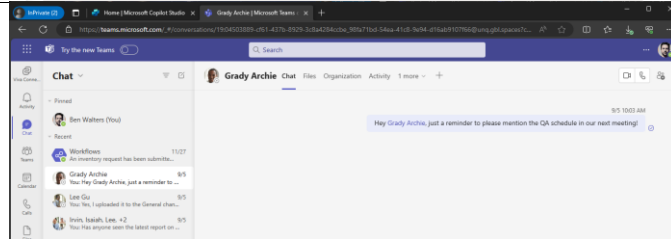
| Steps | Reference/Visuals |
|---|---|
| <div>1. Open Edge and create a new profile to use for your demo</div> <div>2. Select Start without your data</div> <div>3. Click Confirm and start browsing</div> | <div></div> |
| <div>4. Navigate to https://CopilotStudio.Microsoft.com</div> <div>5. Login with your credentials</div> | <div></div> |

6. Switch to your developer environment for your account



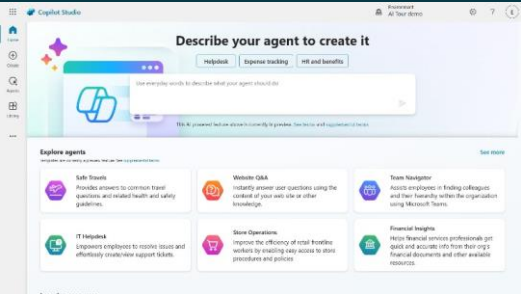
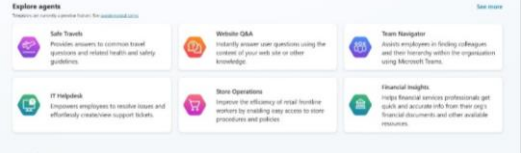
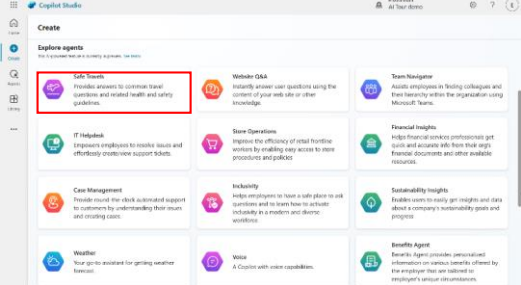
7. Open a second Tab

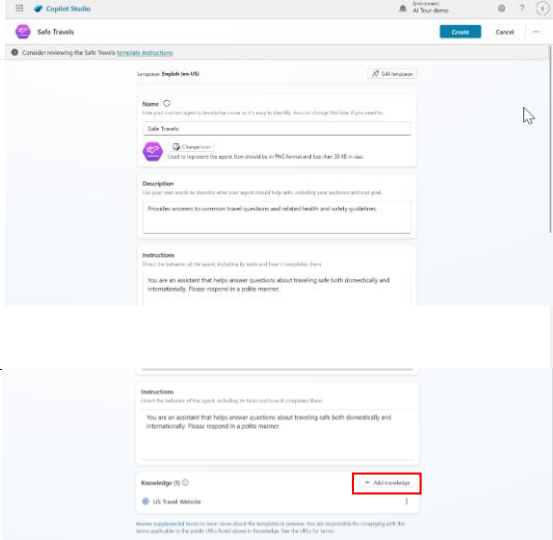
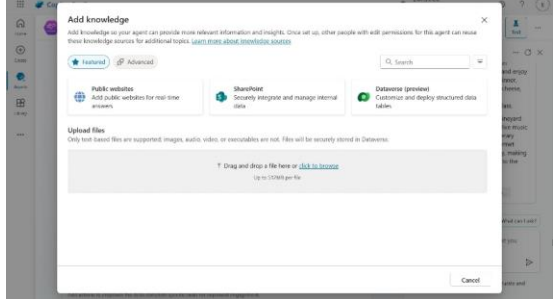
8. Navigate to <https://teams.microsoft.com>



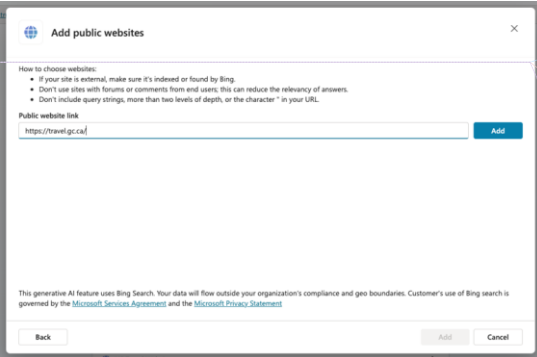
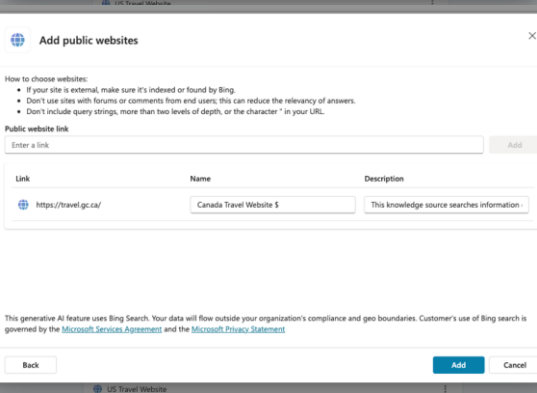

Demo scripts

1: Get started with an agent that's pre-built for you

| Steps | Talk Track | Reference/Visuals |
|--|--|--|
| | Let's start by showing you how quickly you can get started with agents that are pre-built for you in Microsoft Copilot Studio. |  |
| 1. Scroll down to the "Explore agents" section and select "See more" | On the Copilot Studio home page, if you scroll down, you'll see a section that lists agents that you can start with. If you select "See more" then you can browse all of the available agents. |  |
| 2. Select the "Safe Travels" agent | To get started you can choose any one of these agents which are fully setup with the data you need to get started but are also customizable. Let's choose the "Safe Travels" agent which assists us in getting travel related information. |  |

| | | |
|---|--|--|
| <p>3. Show the Safe Travels Config Screen</p> <p>a. **Optional: Point out the Template Instructions Link at the top which points to Learn and has more details about the template setup</p> | <p>Here we can make changes to the template before we create it. You'll notice this template provides custom instructions for what the agent is supposed to do, "You are an assistant that helps answer questions about traveling safe both domestically and internationally. Please respond in a polite manner."</p> <p>And it includes a knowledge source for us to the US travel website. All of this is customizable though</p> <p>**You'll see a link at the top with template instructions that goes to a Learn page with more information about how to use and configure this template.</p> |  |
| <p>4. Scroll down and select the "Add Knowledge" button</p> | <p>For example, we can add additional knowledge to the safe travels agent by selecting the "Add Knowledge" button.</p> | |
| <p>5. Select "Public Website"</p> | <p>In the dialog box, you can select the type of knowledge that you want to add, whether that be public websites or SharePoint or OneDrive sites.</p> <p>Since this is a travel agent, I want to give it knowledge of other locations so I'm going to select "Public Website" here.</p> |  |

Commented [DL1]: Might be good to also add a short comment about the template instructions at the top: "Consider reviewing the Safe Travels template instructions"

| | | |
|---|--|---|
| 6. Enter another travel site URL and select "Add" | <p>Now I can put in a URL to another public website, and I'll put in the link to the Canada travel website (https://travel.gc.ca) and then click "Add"</p> <p>**Please feel free to replace this extra website with the travel website for the region that you are delivering the session from. For example, if you are delivering from Europe, you can use this website (https://europa.eu/youreurope/citizens/)</p> |  |
| 7. Change the Name of the website | <p>Now we'll just confirm the settings for this new public website knowledge source. It suggests a name and a description for what the website is which will be used for generative answers to know how to route conversations. You can change the name here to something more descriptive like "Canada Travel Site" and then click "Add" to make that site available as a knowledge source</p> |  |
| 8. Click Create to provision the agent | <p>Now we can see that the additional knowledge source has been added, we can create the agent.</p> <p>Copilot Studio will then setup and provision the pre-built agent.</p> |  |
| 9. Test the US data source | <p>We can now test the Safe Travels agent. In the Test pane on the right-hand side, we can type a question: "What is the US Visa Policy?"</p> | |

Commented [EB2]: @April Dunnan Can we include what the URL values is of the Canada travel website?

Commented [DL3R2]: I think this depends on the location. For EU, I would use this URL: <https://europa.eu/youreurope/citizens/>

Commented [AD4R2]: Good points. I updated the talk track with the canada website and put a note in to feel free to use the travel site for whatever place you're presenting from

Commented [EB5]: @April Dunnan is this screenshot meant to be in this row of the table?

Commented [AD6R5]: It was not. Thanks for the catch!

And the agent will return an answer with a link to the site that it got it from.

The image displays the Copilot Studio interface for configuring an AI agent named 'Safe Travels'.

Safe Travels Configuration:

- Description:** Provides answers to common travel questions and related health and safety guidelines.
- Instructions:** You are an assistant that helps answer questions about traveling safe both domestically and internationally. Please respond in a polite manner.
- Orchestration:** Use generative AI to determine how best to respond to users and events (preview). [Learn more](#). ☐ Disabled
- Knowledge:** Add text, files, and other resources to inform and improve AI-generated responses.
 - Allow the AI to use its own general knowledge. [Learn more](#). ☒ Enabled
 - [Australia Travel Site](#)
 - [US Travel Website](#)
 - [See all](#)
- Actions:** Add actions to empower the AI to complete specific tasks for improved engagement. [+ Add action](#)

Test your agent:

Hi! I'm the Safe Travels Agent, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. I'm here to assist you with all your safe travel inquiries. Whether you need information about travel documents, visa requirements, local regulations, consulate details, or travel insurance options, I've got you covered.

Note: You can now customize this agent's topics and knowledge for your own needs. For more information about this template and how to modify it, visit the template documentation.

Just now: What is the US Visa Policy?

Ask a question or discover what you need

Test your agent:

International travelers may be eligible to travel to the United States without a visa if they meet the requirements for visa-free travel. The type of visa you must obtain is defined by U.S. immigration law and relates to the purpose of your travel. [Learn more](#)

2 references

- 1 [U.S. Visa Law & Policy](#)
- 2 [U.S. Visa](#)

I helped with [Acme Corp](#)

Is there anything else I can help you with?

Just now: What can I ask?

Ask a question or discover what you need

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

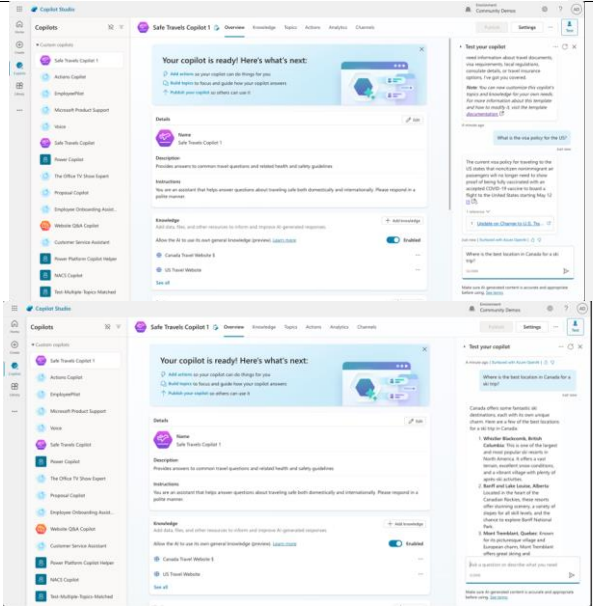
10. Test the Canada data source
11. Click Create to provision the agent

We can do one more test to see if it's also getting data from the Canada travel site that we added by asking:

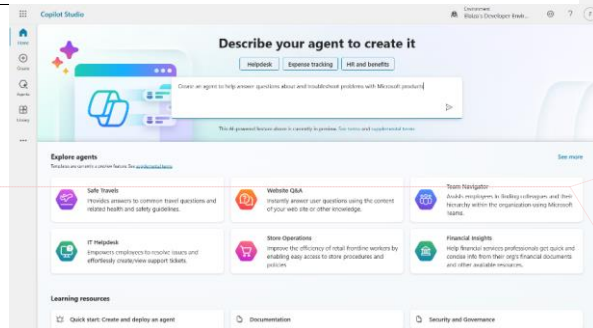
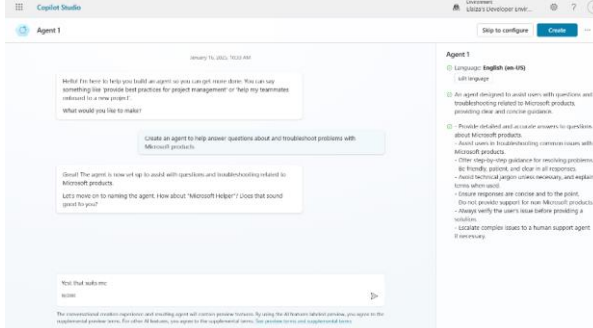
"What is the best location in Canada for a ski trip?"

And it will come back with an answer

Now that we know everything is working, we can create the agent by clicking the Create button in the upper right hand corner



2: Create an agent that can chat over your data

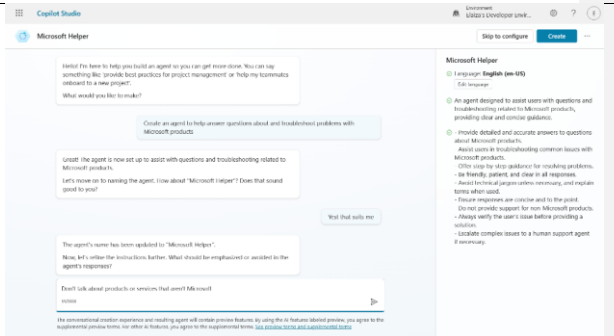
| Steps | Talk Track | Reference/Visuals |
|--|--|---|
| | We've seen how fast it is to configure a pre-built agent, but now let's look at how we can create an agent from scratch using the conversation agent creation approach. We'll create a new agent that can help answer questions about Microsoft products and offer troubleshooting assistance | |
| 1. In Copilot Studio home page prompt text box, enter the prompt in the talk track 2. Press enter | On the home page, you'll see we have a text box where we can type in a prompt of what type of agent we want to build. We can put in: "Create an agent to help answer questions about and troubleshoot problems with Microsoft products" and press enter and copilot will start having a conversation with us to get more information |  |
| 3. Type "Yes that suits me" and submit | Now it's recognized our initial prompt and on the right hand side pane, it's generated a description along with instructions on what the agent is tasked with, how it should respond, and what it should not talk about. A name has also been suggested by copilot. I'll confirm the name is suitable: "Yes that suits me" and press enter. |  |

Commented [DL7]: Maybe we can add some instructions for demotype & zoomit? That way the people delivering the session don't have to type but just use short keys to type.

Commented [DL8R7]: The above is a nice to have for me!

4. Type “Don’t talk about products or services that aren’t Microsoft” and submit

The agent’s name has now been updated. Next, copilot is asking if there are any constraints or things that the agent should NOT talk about. Here we’ll put: “Don’t talk about products or services that aren’t Microsoft” and press enter.

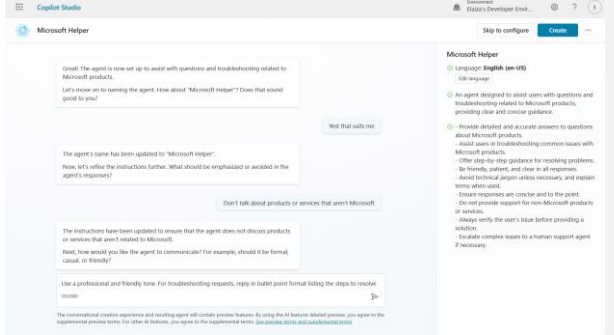


5. Type “Use a professional and friendly tone. For troubleshooting requests, reply in bullet point format listing the steps to resolve” and submit

The instructions are now updated in the right-hand side panel. Next you have the opportunity to give your agent a little more personality and to customize the type of responses it gives. We can tell copilot if we want the agent to respond casually like you’re talking to a friend or professionally for example and dictate things like how we want the responses to be perhaps more verbose versus short and concise.

For our agent we’ll type:
“Use a professional and friendly tone. For troubleshooting requests, reply in bullet point format listing the steps to resolve”

Press enter.



6. Type www.microsoft.com, www.learn.microsoft.com and www.developer.microsoft.com as knowledge sources, and submit

Notice again how the instructions have been updated in the right-hand side pane. Copilot is now asking us where it should get the data or knowledge that it needs to answer these questions so it's asking us to provide any publicly accessible websites that the agent will need.

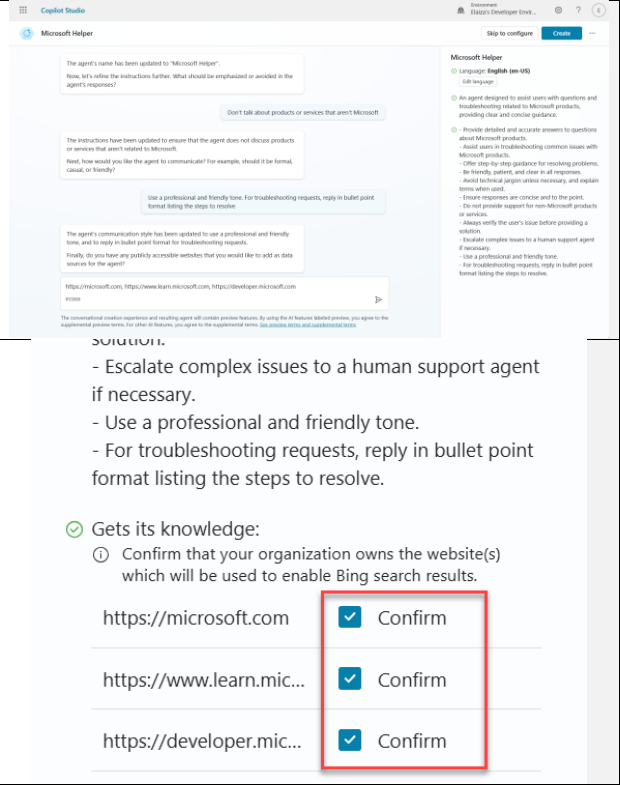
Here, we'll reference three different Microsoft websites to use as knowledge:

<https://microsoft.com>, <https://www.learn.microsoft.com>, <https://developer.microsoft.com>

7. Scroll down on the right-hand side pane and tick the three checkboxes.

Copilot has confirmed the websites have been added as data sources for knowledge. Our agent will now search any user query input on Bing, and will only return results from these provided websites.

For websites, you need to confirm which website(s) your organization owns that Bing will search through Copilot Studio so I'll tick these three checkboxes on the right-hand side pane.



The screenshot shows the Copilot Studio interface. The main pane displays the 'Microsoft Helper' configuration. The instructions on the left are updated to include the three websites. The right-hand side pane shows the 'Microsoft Helper' configuration section. The 'Language' is set to 'English (en-US)'. Below this, there are three checkboxes for confirming ownership of the websites: 'https://microsoft.com', 'https://www.learn.microsoft.com', and 'https://developer.microsoft.com'. Each checkbox is checked, and the word 'Confirm' is next to it. A red box highlights these three items.

Microsoft Helper

Language: English (en-US)

Instructions:

- Don't talk about products or services that aren't Microsoft.
- Use a professional and friendly tone. For troubleshooting requests, reply in bullet point format listing the steps to resolve.

Microsoft Helper

Instructions:

- Escalate complex issues to a human support agent if necessary.
- Use a professional and friendly tone.
- For troubleshooting requests, reply in bullet point format listing the steps to resolve.

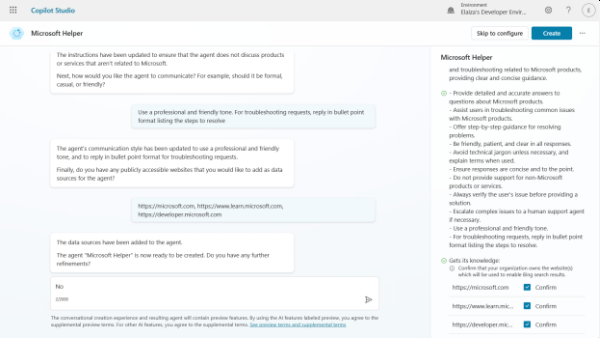
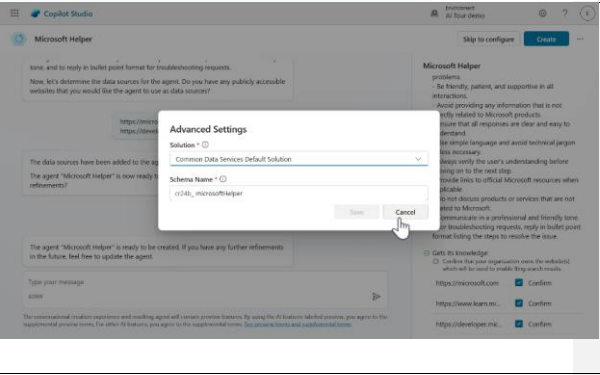
Get its knowledge:

- Confirm that your organization owns the website(s) which will be used to enable Bing search results.

https://microsoft.com ☒ Confirm

https://www.learn.microsoft.com ☒ Confirm

https://developer.microsoft.com ☒ Confirm

| | | |
|--|--|--|
| <p>8. Type “No” and submit.</p> | <p>Now, copilot is asking if I’d like to make any more refinements. I’ll enter “No”</p> |  |
| <p>9. Select the ellipsis to who</p> <p>10. Select the three “...” in the upper right hand corner.</p> <p>11. Select “edit advanced settings”</p> <p>12. Click Cancel</p> <p>13. Select Create on the upper-right corner</p> | <p>Copilot has now confirmed that my agent is ready to be created.</p> <p>Before we do though, let’s click on the three dots in the upper right-hand corner and go to the advanced settings for this copilot. The agents that we build in copilot studio are added into a solution so that we can deploy across environments. This is where you can go if you want to change the solution that this agent will be created in. I just wanted to point that out, so you know where to access it.</p> <p>I’ll now select “Create” to create my agent.</p> |  |

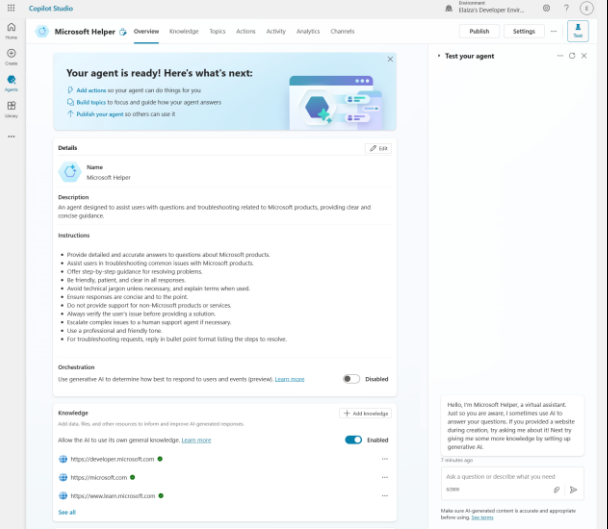
| | | |
|--|--|--|
| | | <div><div>Environment Elaiza's Developer Envir...</div><div><div>Skip to configure</div><div>Create</div><div>...</div></div><div><div>Microsoft Helper</div><div>and troubleshooting related to Microsoft products, providing clear and concise guidance.</div><div><div>✔</div><div><div>- Provide detailed and accurate answers to questions about Microsoft products.</div><div>- Assist users in troubleshooting common issues with Microsoft products.</div><div>- Offer step-by-step guidance for resolving problems.</div><div>- Be friendly, patient, and clear in all responses.</div></div></div></div></div> |
|--|--|--|

14. Agent provisioned with name, description, instructions and websites

Now let's review the agent that it created for us.

We see that it's created our agent with a name, description and instructions for our agent based on the questions that it asked and answers we provided.

Scroll down and we'll see all the websites have been added as knowledge sources we provided earlier. But we can extend this even more!



- 15. Click **Add knowledge** button
- 16. Click **SharePoint and OneDrive** button
- 17. Paste in IT site template SharePoint URL (setup instructions are in the appendix)
- 18. Click **Add**

If we select the Add knowledge button, we can give the agent even more knowledge to reference. And this isn't limited to public websites, you'll notice we can upload files and even reference data from Dataverse and SharePoint.

I have an IT site on SharePoint that has some relevant information about our IT policies and procedures that I'd like to use in this agent so I can copy this site URL, select the SharePoint option, paste that link in and click Add.



Commented [EB9]: [@April Dunnan](#) I noticed the Setup section of the document is missing steps to create a site in SharePoint to use for the demo.

Is there also a document that needs to be shared that the presenter needs to upload into the site they created?

| | | |
|---|--|---|
| 21. Show the SharePoint site added as a knowledge source. | The SharePoint site will now be added a knowledge source for our agent. | <div><div><div>Knowledge</div><div>Add data, files, and other resources to inform and improve AI-generated responses.</div><div>Allow the AI to use its own general knowledge. Learn more</div><div><div>IT Help Desk</div><div>https://developer.microsoft.com</div><div>https://microsoft.com</div><div>https://www.learn.microsoft.com</div></div><div><div>See all</div></div></div></div> |
| 22. Type “What are autonomous agents?” in test pane and submit 23. Hover your mouse cursor over the reference and show that the website address URL is from one of the websites provided earlier as a knowledge source | We can now test our agent using the test pane on the right-hand side. First let’s check our agent will respond using data from the websites we previously provided. I’ll put in a prompt and ask the agent: “What are autonomous agents?” and press enter, and it will return an answer. Notice how the response from our agent includes a reference to indicate where it sourced the information used in its response. This allows you to verify the information is current. | <div><div><div>Test your agent</div><div>setting up generative AI.</div><div>34 minutes ago</div><div>What are autonomous agents?</div><div>Just now</div><div>Autonomous agents are AI-driven tools designed to execute and orchestrate business processes on behalf of individuals, teams, or functions. They range from simple prompt-and-response interactions to fully autonomous operations. These agents can support various tasks such as accelerating lead generation, processing sales orders, and automating supply chains. They draw on the context of work data in Microsoft 365 Graph, systems of record, Dataverse, and Fabric, and can be created, managed, and connected through Copilot Studio .</div><div>1 reference</div><div>1 New autonomous agents ...</div><div>Just now Surfaced with Azure OpenAI </div><div>Ask a question or describe what you need</div><div>0/2000</div><div>Make sure AI-generated content is accurate and appropriate before using. See terms</div></div></div> |

24. Type “I get a delegation error in Power Apps. How do I resolve this?” in test pane and submit

Let’s do another test to see if it’s using the tone instructions we gave it where we asked it to provide bullet point instructions for trouble shooting inquiries. We’ll use this prompt:

“I get a delegation error in Power Apps. How do I resolve this?”

I’ll press enter and see that it responds as we requested in a bullet point format, and once again provides references in the response.

• Test your agent



I get a delegation error in Power Apps. How do I resolve this?

Just now

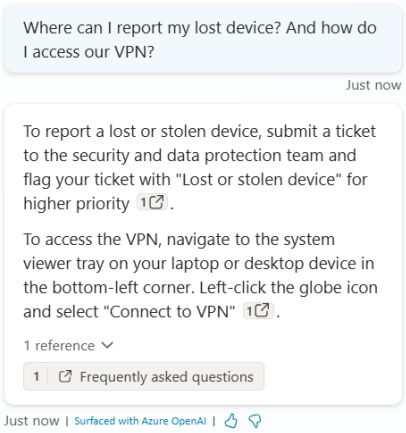
- To resolve the delegation error in Power Apps, you can follow these steps:
- 1. **Understand Delegation:** Delegation refers to the process where Power Apps offloads data processing to the data source rather than processing it locally. This is crucial for handling large datasets efficiently. Refer to the documentation on understanding delegation in a canvas app [1](#).
 - 2. **Check Data Source Limitations:** Power Apps can only access the first 500 records of a data source by default. Ensure your operations can be delegated to the data source. For more information, see the Delegation overview [1](#).
 - 3. **Modify Formulas:** Adjust your formulas to ensure they are delegable. For example, avoid using functions that

Ask a question or describe what you need

0/2000

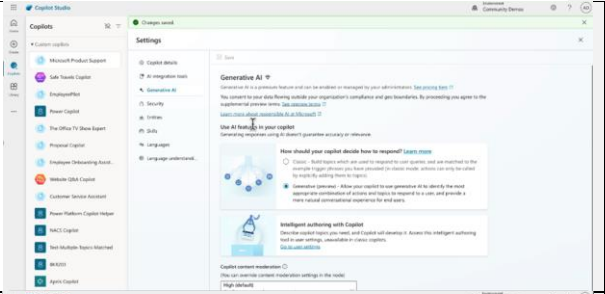
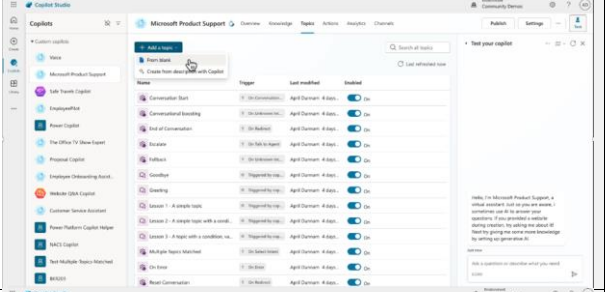
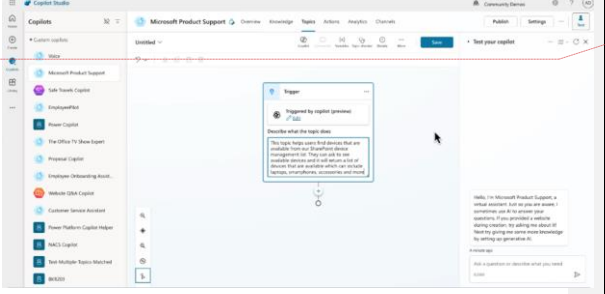
 

| | | |
|--|--|---|
| <div>25. Type “Can you please tell me about playstation 4?” in test pane and submit</div> <div>NOTE: Sometimes this prompt does not work. So enter something such as, can you tell me the weather forecast for today?</div> | <div>We'll next test to confirm our agent will not respond to questions about non-Microsoft products or services as per our instruction. We'll use this prompt:</div> <div>“Can you please tell me about playstation 4?”</div> <div>I'll press enter and we'll see that it responds as we requested in a bullet point format, and once again provides a reference in the response.</div> | <div><div><div>Test your agent</div><div>resolve the delegation error in your Power Apps application 2 1 .</div><div>2 references</div><div>1 Common issues and resol...</div><div>2 Remove Delegation Error f...</div><div>2 minutes ago Surfaced with Azure OpenAI </div><div>Can you please tell me about playstation 4?</div><div>Just now</div><div>I specialize in providing support and information about Microsoft products. For detailed information about the PlayStation 4, I recommend visiting the official PlayStation website or contacting PlayStation support. They will be able to provide you with the most accurate and comprehensive information. If you have any questions about Microsoft products, feel free to ask!</div><div>AI-generated content may be incorrect</div><div>Just now Surfaced with Azure OpenAI </div><div>Ask a question or describe what you need</div><div>0/2000</div></div></div> |
|--|--|---|

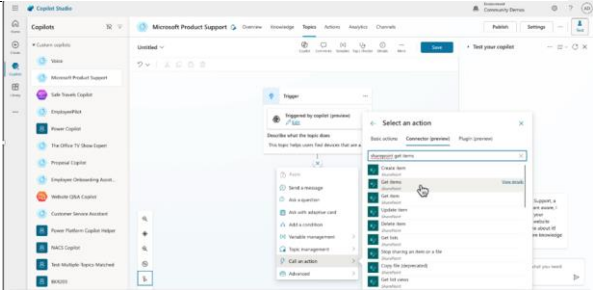
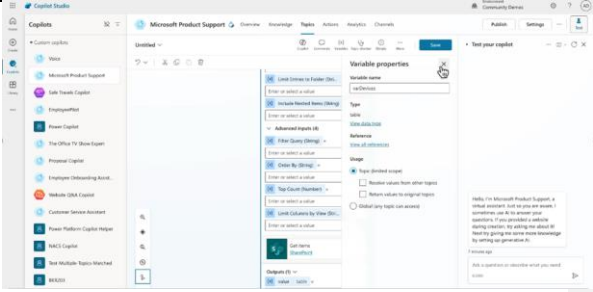
| | | |
|---|--|---|
| 26. Type "Where can I report my lost device? And how do I access our VPN?" in test pane and submit | Lastly, let's test our SharePoint site as a knowledge source. This time I'll combine two questions in my prompts. We'll use this prompt" |  |
| 27. Hover your mouse cursor over the reference and show that it's the SharePoint site URL as the source | "Where can I report my lost device? And how do I access our VPN? I'll press enter and we'll see that it responds by answering both questions and provides a reference to the SharePoint site. | |
| | In the next demo, we'll see how we can extend this same agent with additional knowledge | |

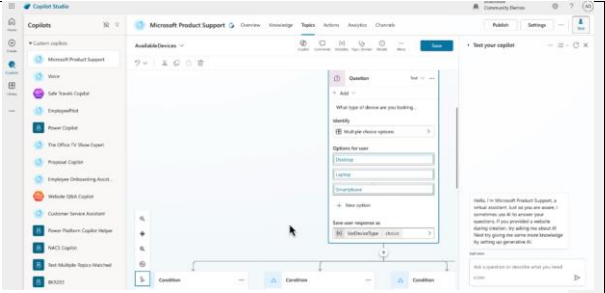
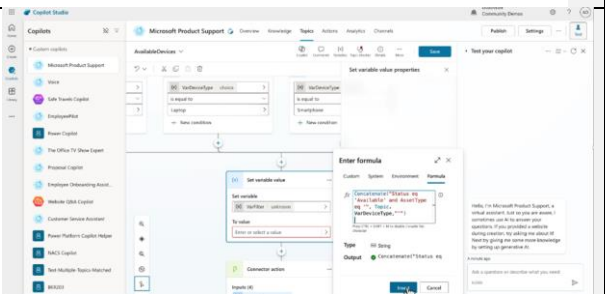
3: Create a topic and extending with actions

| Steps | Talk Track | Reference/Visuals |
|-------|---|-------------------|
| | Earlier we created an agent that can chat over our data to answer questions about Microsoft products. Now let's see how we can extend this by creating a custom topic that we can add an action in. | |

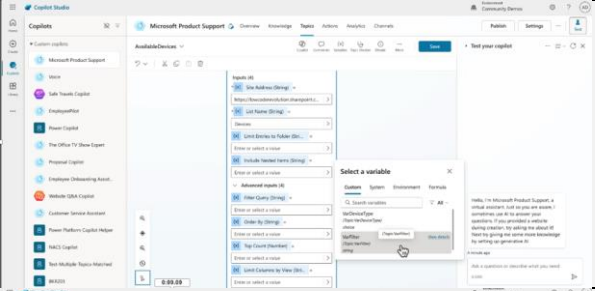
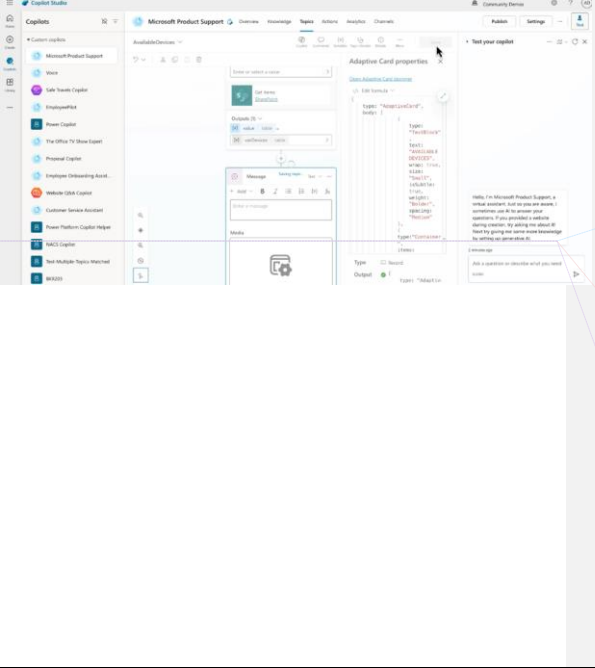
| | | |
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| <div>1. Open the support copilot you created in the demo above</div> <div>2. Click Settings</div> <div>3. Select the Generative AI tab</div> <div>4. Select the Generative (preview) radio button</div> <div>5. Click Save</div> <div>6. Select X to exit settings</div> | <div>We're going to be using something called actions to extend the capability of our agent. To use this feature, we must enable a setting in our agent.</div> <div>To do that, we need to go into the settings for our agent and go to the Generative AI section and enable the Generative AI feature and click save to apply this. This may or may not be enabled by default in your agent.</div> |  |
| <div>7. Go to the Topics tab</div> <div>8. Click the Add a topic button</div> <div>9. Select From Blank</div> | <div>We want to extend our agent by adding a custom topic that can return a list of approved devices for a user looking to replace their device. To do this we need to go to the topics section of our agent. We'll select "Add a topic" and choose the "From blank" option, although, depending on what you are wanting to do, you can also have agent help you create a topic from a description.</div> |  |
| <div>10. Enter the prompt in the description</div> | <div>Every topic has a trigger which describes what should cause this topic to be started. To define this, we need to put in a description in the "describe what this agent topic does" section so that the generative AI can look at that and know when it should execute this topic. It's important to be detailed here so we'll put this description:</div> <div>"This topic helps users find devices that are available from our SharePoint device management list. They can ask to see available devices and it will return a list of devices that are available which can include laptops, smartphones, accessories and more."</div> |  |

Commented [DL10]: Maybe we should also name our topic "Available Devices" here?

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| <div><div>11. Click the plus button below the trigger</div><div>12. Select call an action</div><div>13. Select the Connector (preview) tab</div><div>14. Search for SharePoint get items</div><div>15. Select the Get items – SharePoint action</div><div>16. If you do not have a connection here add one, otherwise select your connection and click Submit</div></div> | <div>Now that we have defined our trigger, we can extend this agent by adding an action. We have a SharePoint list that has a list of approved devices which we want to reference in this topic. To do that we can click the plus button below to add a new node. Then we can choose the call an action option and the Connector tab. Here we can do a search for the SharePoint get items action which will let us return information from a SharePoint list and we can select that option from the search results. Next, it will ask us to authenticate into this action. I've already authenticated so I will select this connection and submit.</div> |  |
| <div><div>17. Click the Site Address dropdown and select your site</div><div>18. Click the List Name dropdown and select the devices list</div><div>19. Click the Select a variable option in the Output</div><div>20. Select Create New</div><div>21. Give the variable a name of VarDevices</div></div> | <div>Now we'll see the connector action on the screen and all we have to do is fill out some of the properties, starting with the site address. This is a dropdown where we can choose from a list of sites. I'll select our IT site. We need to do the same for the List Name which is also a dropdown that shows all the lists in that site and I'll select the "Devices" list.</div> <div>If we scroll down you see that we need to output the data somewhere so we can select this option and choose create new to create a new variable to store this data. We'll call this to "VarDevices"</div> |  |

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| <div>22. Select the add button between the trigger and action.</div> <div>23. Choose Ask a Question</div> <div>24. Enter “what type of devices are you looking for” in the question text</div> <div>25. Select multiple choice in the Identify dropdown</div> <div>26. Enter Laptop, Desktop and Smartphone in the choice option</div> <div>27. Click the Save user response as</div> <div>28. Rename this variable to VarDeviceType</div> | <div>Next, we want to have this topic be conversational where we will ask the user what type of device they are wanting to find. To do that, we can add a new node above the action and choose Ask a question.</div> <div>For the question text, we'll put “What type of device are you looking for?” and we'll have that be a multiple-choice question with the following options: Desktop, Laptop and Smartphone.</div> <div>We need to output this selection to a variable as well, so we'll choose the “Var1” option in the “Save user response as” and rename this to “VarDeviceType”.</div> <div>Note: This will give you several condition branches which you don't need. You can call this out and delete them if you want or leave them and move on.</div> |  |
| <div>29. Click the add button before the connector action</div> <div>30. Select Variable Management</div> <div>31. Select Set a variable value</div> <div>32. Choose the Select a variable dropdown</div> <div>33. Click Create a new variable</div> <div>34. Name this variable “VarFilter”</div> <div>35. Choose the to value</div> <div>36. Select the Formula tab</div> <div>37. Paste in Power FX code reference in the talk track</div> <div>38. Select Insert</div> | <div>Now we need to do some more configuring on the connector action to have it return the correct data. To do that, we need a filter. We'll click on the add button before we call the connector action and go into variable management and create a new variable called VarFilter.</div> <div>For the value of this variable, we're going to use the ability to write Power Fx in Copilot Studio by selecting the Formula tab and putting in the following Power Fx code to filter the list by the selected device type:</div> <div><div>Concatenate("Status eq 'Available' and AssetType eq ", Topic.VarDeviceType, "")</div></div> <div>Then we'll select insert to apply that</div> |  |

Commented [DL11]: Updated the code here because I got issues due to formatting issues.

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| <div>39. Go to the connector action and expand advanced inputs</div> <div>40. Select the dropdown next to Filter Query</div> <div>41. Select VarFilter</div> | <div>Now that we have this filter logic, we can wire it up to our action. We'll expand out the advanced inputs section and choose the VarFilter value</div> |  |
| <div>42. Select the add button below the connector action</div> <div>43. Select send a message</div> <div>44. Click the Add button in the message</div> <div>45. Choose Adaptive Card</div> <div>46. Change the type to Formula</div> <div>47. Paste provided code</div> <div>48. Click Save</div> | <div>The last step is to show a message to the user with their device options, so we'll add one more node below our connector action and choose the send a message option. For this, we can send text, or we can send an adaptive card which is what we're going to do so we can customize how the data is returned.</div> <div>We'll change the type here to formula and we'll paste in some code that is taking the table values from the SharePoint Get items action and formatting them in a list format with pictures.</div> <div>Adaptive card formula:</div> <pre>{ type: "AdaptiveCard", body: [{ type: "TextBlock", text: "AVAILABLE DEVICES", wrap: true,</pre> |  |

Commented [EB12]: @April Dunnam is there meant to be code provided in a section in this document or in this row of the table?

Commented [DL13R12]: I added the adaptive card I found in the bot in community demos. @April Dunnam can you verify if this is the correct one?

Commented [AD14R12]: That's the correct one. Thanks!


```
size: "Small",
isSubtle: true,
weight: "Bolder",
spacing: "Medium"
},
{
type: "Container",
items:
  ForAll(Topic.VarDevices,
  {

type: "ColumnSet",
columns: [
  {
type: "Column",
width: "80px",
minHeight: "80px",
items: [
  {
type: "Container",
backgroundImage: {
url: Image,
horizontalAlignment: "Center",
```

| | | |
|--|---|--|
| | <div>"Center"</div> <pre> verticalAlignment: "Center" }, minHeight: "80px", horizontalAlignment: "Center", verticalContentAlignment: }], verticalContentAlignment: "Center", horizontalAlignment: "Left" }, { type: "Column", width: "auto", items: [{ type: "TextBlock", text: Model, wrap: true, weight: "Bolder", size: "Medium" }, {</pre> | |
|--|---|--|

| | | |
|--|---|--|
| | <pre>type: "TextBlock", text: Manufacturer.Value, isSubtle: true, wrap: true, spacing: "Small", maxLines: 1 }, { type: "TextBlock", text: "Color: " & Color.Value, isSubtle: true, wrap: true, spacing: "Small", maxLines: 1 }], verticalContentAlignment: "Center" }, { type: "Column", width: "20px", items: [{</pre> | |
|--|---|--|

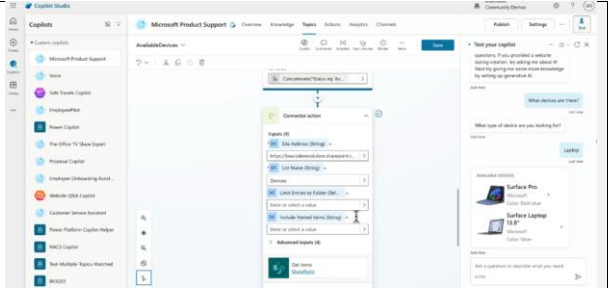
```
        type: "Image",
        url:
"https://raw.githubusercontent.com/pnp/AdaptiveCards-
Templates/main/samples/visual-list/assets/arrow-
right.png",

        horizontalAlignment: "Right",
        width: "20px",
        height: "20px",
        selectAction: {
            type:"Action.OpenUrl",
            url:'{Link}'
        }
    },
    verticalContentAlignment: "Center"
}
]
}
)
}
]
}
```

We'll click save and now we're ready to test

Commented [DL15]: Should we close off with a "End current topic" action at the end of the topic before we test?

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| 49. In the test window, type “What devices are there?” | <p>In the test window, we can ask “What devices are there?” and you’ll see it comes back with our multiple-choice value we added asking us what type of device we’re looking for. I’ll select Laptop here and it will come back with this nicely formatted view of all the available devices which are clickable hyperlinks to see more information about the device.</p> <p>And just like that, we’ve built and extended an agent that can chat over our data and utilized a custom topic and connector action to get formatted data from a SharePoint list!</p> |
| 50. Press enter | |
| 51. Select Laptop from list of options | |



4: Autonomous agents

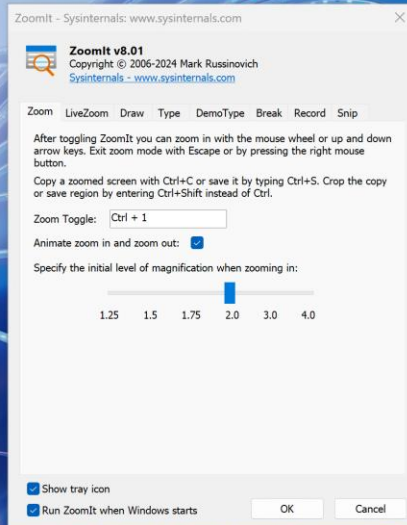
| Steps | Talk Track | Reference/Visuals |
|-------|---|-------------------|
| | This is a pre-recorded demo with voice over included so all you need to do is play the video. | |

Appendix

1: ZoomIt Setup

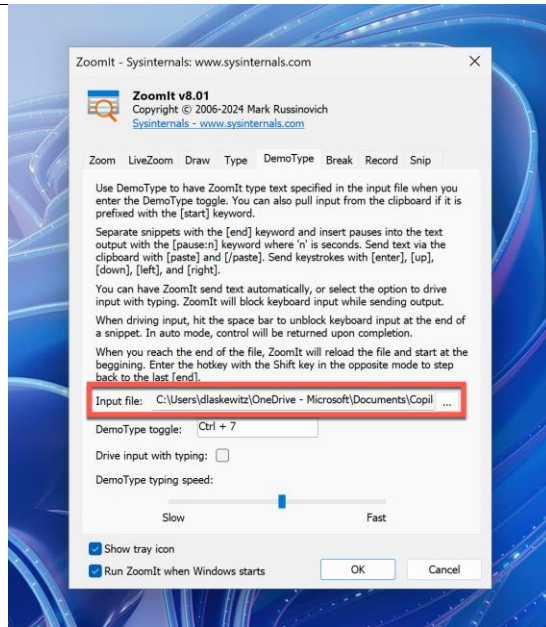
| Steps | Description | Reference/Visuals |
|-------|--|-------------------|
| | If you are on a PC, you can make the demos go more smoothly by using the DemoType feature in ZoomIt. | |

| | | |
|-------------------------|---|--|
| | Review the instructions below for how to install and use this feature | |
| 1. Setup DemoType on PC | <p>You need to install ZoomIt on your PC to use DemoType. DemoType enables you to paste all text in the demo script with a shortcut while it looks like you're typing. We prepared a file for you which you can use as an input for DemoType.</p> <p>First, go to the Microsoft Store on your device and install Sysinternals Suite. ZoomIt is part of the Sysinternals Suite.</p> <p>When installed, search for ZoomIt and open it. Make sure that both "Show tray icon" and "Run ZoomIt when Windows starts" are checked.</p> | |



Download the input file for DemoType [here](#) (Microsoft only). Review the file and make sure to replace the URLs if needed.

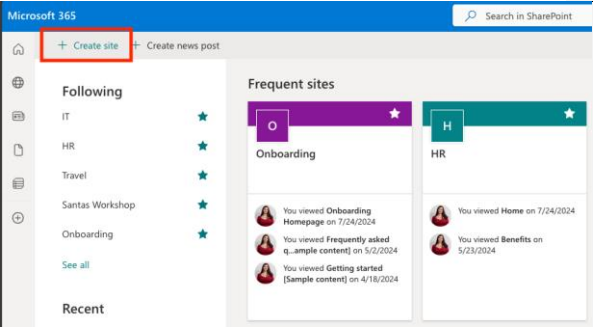
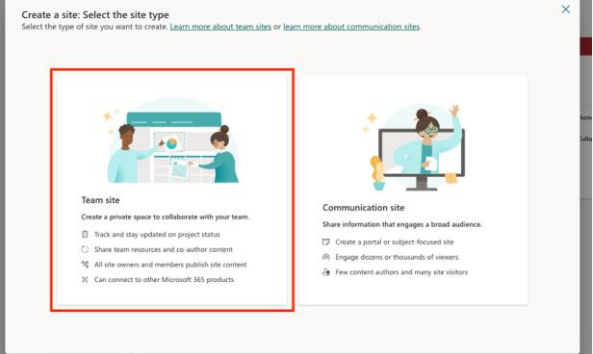
Select the DemoType tab in ZoomIt and select the input file you just reviewed.



Remember the DemoType toggle (Ctrl+7), because this is the shortcut you have to use for pasting the texts.

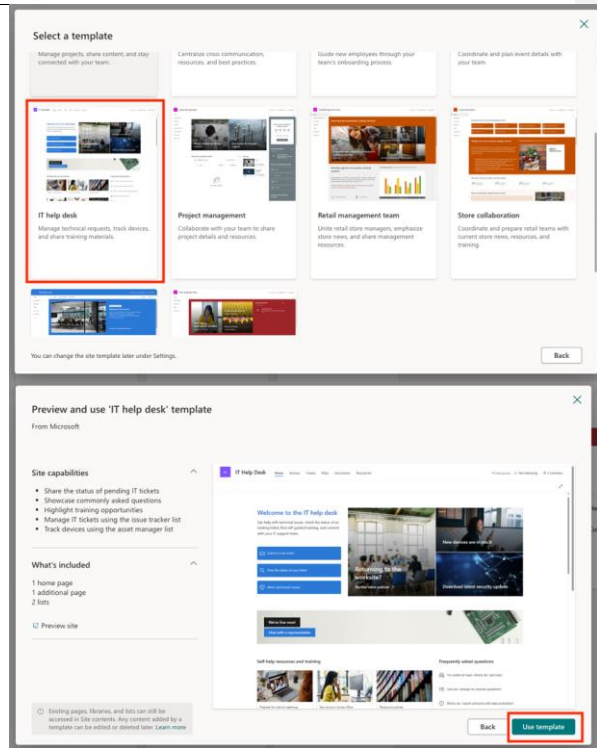
2: SharePoint Setup

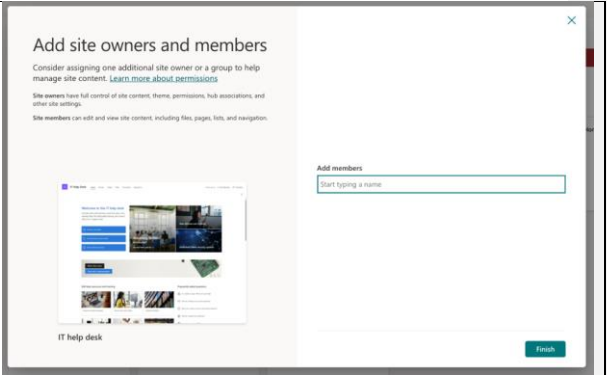
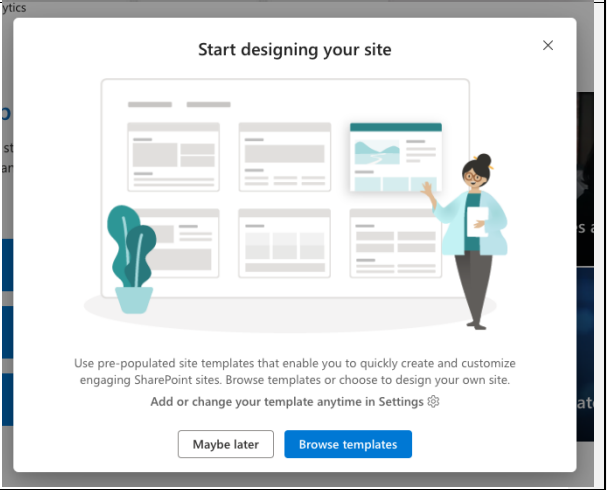
| Steps | Description | Reference/Visuals |
|-------|--|-------------------|
| | These demos leverage SharePoint for a knowledge source and a connector action. You will need to ensure | |

| | | |
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| | that you have the required SharePoint site and list setup. Please follow these instructions for setup | |
| 1. Open up your SharePoint portal 2. Select Create Site | You will need to create a new SharePoint site for this demo. Go to your SharePoint portal and select Create site |  |
| 3. Select Team Site | You will be creating a Team site so select that option in the dialog |  |

4. Select the IT help desk template
5. Select Use template

Scroll down on the dialog and select the IT Help Desk template from the list of templates. This has everything you need for the demos included. Select use template



| | | |
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| 11. Select Finish | It will now ask if you want to add additional members to the site. If you are demoing everything from the account that you are creating the site with then you don't need to add anything here. If you'll be using a different account, then make sure that account is added as a member here and select Finish |  |
| 12. Select Maybe Later | A pop-up box will appear asking to start designing your site. Just select maybe later here |  |

13. Select the Devices list
14. Select Add Column
15. Choose Hyperlink as the column Type
16. Select Next
17. Enter Image for the name
18. Select Save
19. Select New Item
20. Add a minimum of 4 items to the list. At least 2 of these should be laptops. See notes for required fields

This template provides pages with sample data about various IT policies and two sample lists (Tickets and Devices). We will use the Devices list for one of the demos. You need to make sure you fill in this list with at least 4 sample data items and add one additional column to this list.

Scroll to the far right in the list and select the Add Column button. Choose the hyperlink type and use the name Image for the column name and select add.

When adding sample data, make sure that the following fields are filled out: Title, Status, Manufacturer, Model, Asset Type, Color, Serial Number, Purchase Date, Image, Purchase Price, Order # and Condition

Make sure to have a mixture of asset types. The demo asks to pull laptops so ensure that there are a minimum of two laptop items in there. Stick to Microsoft devices and copy image URL's directly from the Microsoft website for those to fill in the Image hyperlink column. Working images are a must for the demo to work. You should have something that looks like this:

| Name | Image | Status | Manufacturer | Model | Asset Type | Color | Serial Number | Purchase Date | Image | Purchase Price | Order # | Condition |
|-----------|-------|--------|--------------|---------------|------------|-----------|---------------|---------------|-------|----------------|-----------|-----------|
| Dark Blue | | New | Microsoft | Surface Pro 7 | Laptop | Dark Blue | 123456789 | 1/1/2024 | | \$1,200.00 | 100-12345 | Good |
| Blue | | New | Microsoft | Surface Pro 7 | Laptop | Blue | 987654321 | 1/1/2024 | | \$1,200.00 | 100-12345 | Good |
| Pink | | New | Microsoft | Surface Pro 7 | Laptop | Pink | 456789012 | 1/1/2024 | | \$1,200.00 | 100-12345 | Good |
| Dark Blue | | New | Microsoft | Surface Pro 7 | Laptop | Dark Blue | 234567890 | 1/1/2024 | | \$1,200.00 | 100-12345 | Good |

Home + New Page details Analytics

Devices FAQs Tickets Documents Recycle bin

Welcome to the IT help desk

Get help with technical issues, check the status of an existing ticket, find self-guided training, and connect with your IT support team.

Devices All available assets All items Asset gallery Grouped by asset type Grouped by manufacturer Purchase information

Devices ph... type... Color... Serial nu... Purchase... Purchase... Order #... Condition... One date... Condition... Add column

Condition... + Add column

Yes/No
Hyperlink
Currency
Location
Image
Managed metadata
Lookup

Create a column

Learn more about column creation

Name *
Image

Description

Type
Hyperlink

More options

Next Cancel