Copilot Studio Agent Builder

The Copilot Agent Builder is a feature within Copilot Studio that allows you to create custom agents to automate and execute business processes. This tool provides a simple interface where you can build agents either by using natural language or manually configuring their behavior.

Here are some key aspects of the Copilot Agent Builder:

- **Natural Language Authoring:** You can describe your agent's capabilities and behavior using plain language. The builder will progressively update the agent based on your inputs
- **Manual Configuration:** If you prefer more control, you can manually configure the agent's settings, such as its name, description, and the knowledge sources it should reference
- **Integration with BizChat:** You can create and interact with agents directly within Business Chat (BizChat) in Microsoft Teams
- **Knowledge Sources:** You can add SharePoint sites and documents that your agent should reference to provide accurate and relevant responses

Create an agent
In Copilot Studio Agent Builder

1. Go to Bizchat (in Teams, Office.com/chat. At the right, select **Create agents**.

2. In the **Describe** tab, explain what kind of agent you want to create, and add any further description you like

Copilot

Agents

Visual Creator

Copilot for Helpdesk

Get Copilot agents

Create agents

1

Copilot Studio   Onboarding Assistant ⌄

Describe   Configure

Oct 12, 2024, 2:28 PM

Hi! I'm here to help you be more productive. Just describe what you want the copilot agent to do, like "Show me best practices for project management" or "Help my teammates onboard to a new project", and I'll help you make an agent to do it.

What would you like it to do?

I need an onboarding agent to help answer questions from new team members about to join our team.

Great, your copilot will serve as an onboarding agent to help answer questions from new team members about to join your team.

Do you have any instructions for how your copilot should assist, for example a specific tone?

2

Create an agent
In Copilot Studio Agent Builder

3. At the top of the **Configure** tab, you can optionally:
   - Edit the agent name
   - Edit the description
   - Edit the instructions
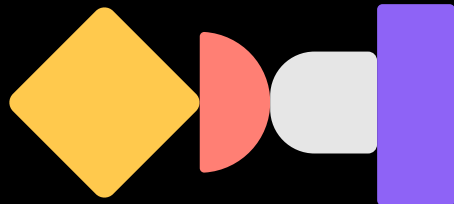
Copilot Studio   Readiness Team Onboarding Assistant ⌄

3

Describe   **Configure**

Details

Name *

Readiness Team |Onboarding Assistant

Only 30 characters are allowed

Description *

Serves as an onboarding agent to help answer questions from new team members about to join the team.

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Instructions *   ⓘ

Your name is Onboarding Assistant. You serve as an onboarding agent to help answer questions from new team members about joining the team.

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Knowledge ↻   ⓘ

SharePoint

Create an agent
In Copilot Studio Agent Builder

4. In the **Knowledge** section, add any SharePoint sites and documents that your agent should reference
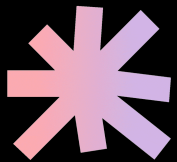
5. In the **Starter prompts** section, add or delete any starter prompts

Create an agent
In Copilot Studio Agent Builder

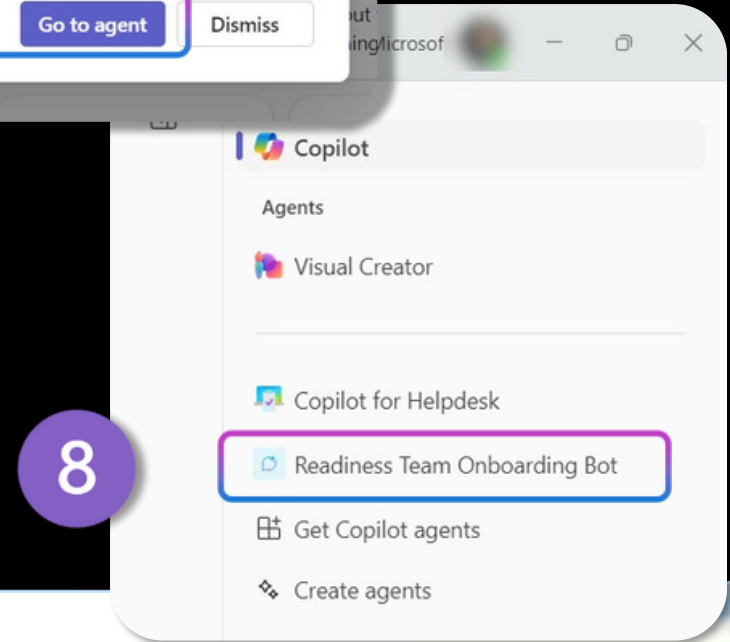6. When your finished with your instructions, select **Create**

7. Once created, select **Go to agent**
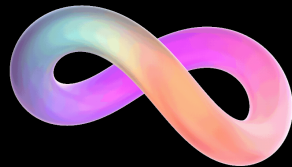
8. Your agent will display in the right pane, in Bizchat

6

⊘ Draft auto-saved **Create** ⊡ Open in full version ••• ✕

⊕ New chat

7

Your agent was created successfully!

https://m365.cloud.microsoft/apps/?templatedAppId=9e2962b8-7eae-4124-8... ⧉

The link works for **only you** Change sharing settings

Go to agent **Dismiss**

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8 Readiness Team Onboarding Bot

Get Copilot agents
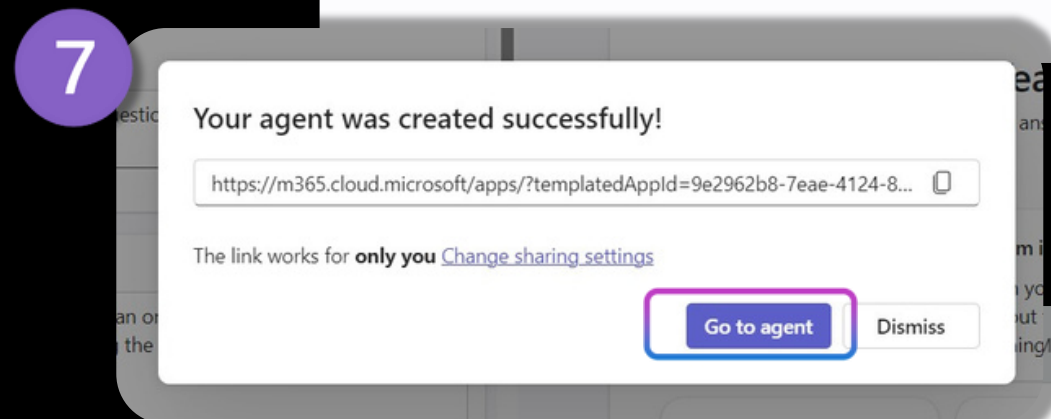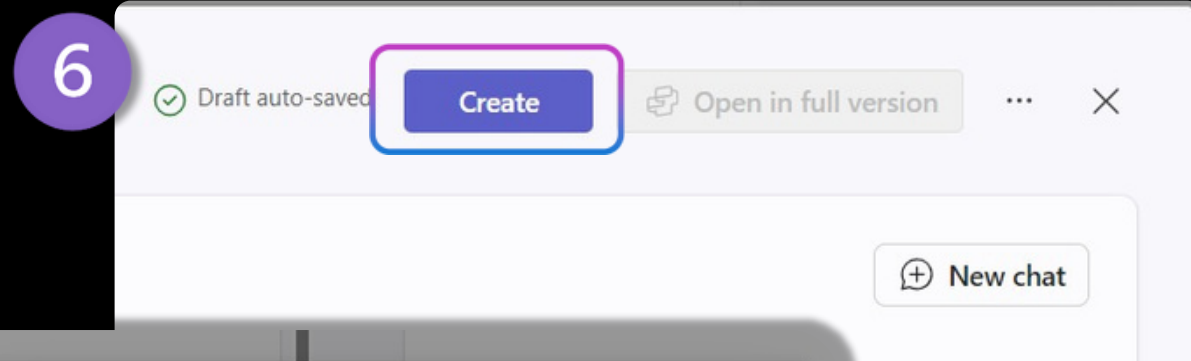
Create agents
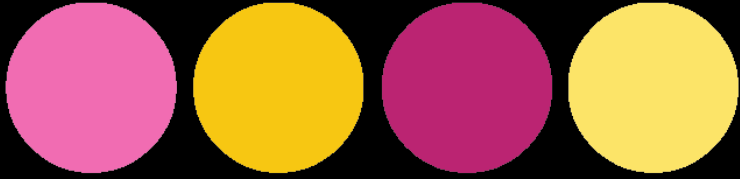
Share your agent

To share your agent:

1 In Bizchat, select **Create agents**

2 Select the **My Copilot Agent** dropdown arrow, then select your agent

3 Select **Share**

4 Choose one of the three sharing options (if prompted select **Save**), then copy the link and share

1

Copilot
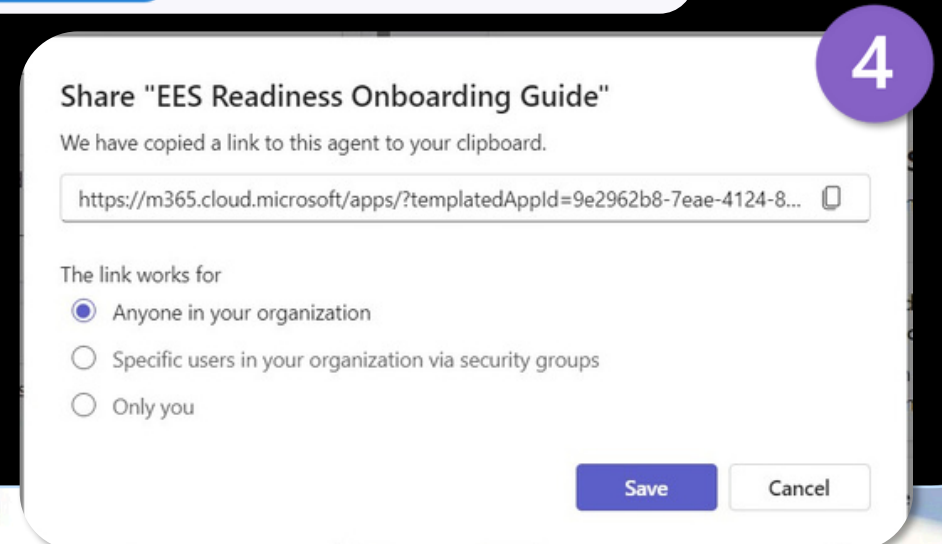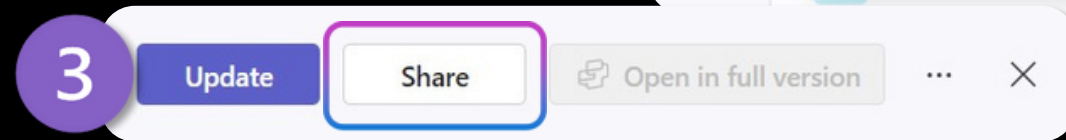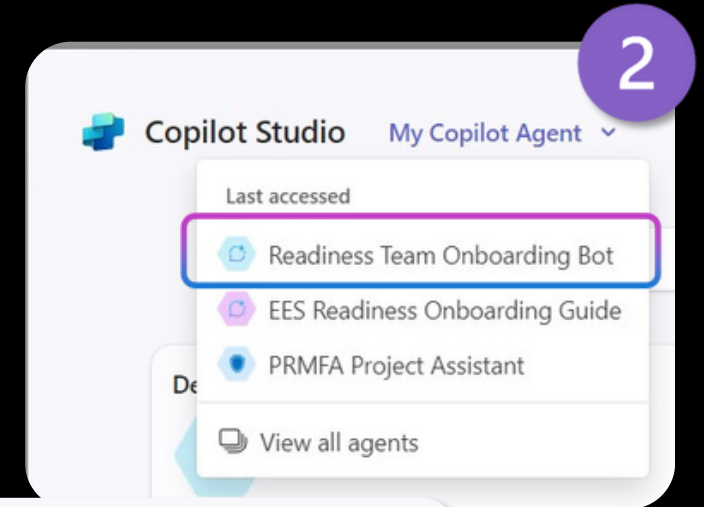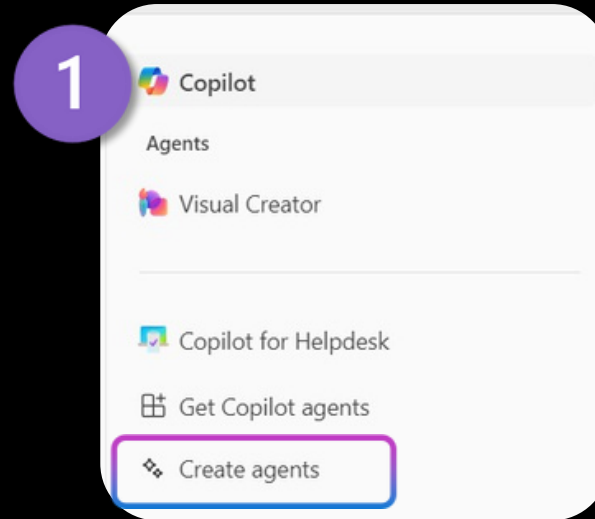
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Copilot Studio   My Copilot Agent ∨

Last accessed

Readiness Team Onboarding Bot

EES Readiness Onboarding Guide

PRMFA Project Assistant

View all agents

3

Update   Share   Open in full version   ···   ✕

4

Share "EES Readiness Onboarding Guide"

We have copied a link to this agent to your clipboard.

https://m365.cloud.microsoft/apps/?templatedAppId=9e2962b8-7eae-4124-8...

The link works for

◉ Anyone in your organization

◯ Specific users in your organization via security groups

◯ Only you

Save   Cancel

Learn More

What are Agents ?

Web: Copilot extensions developer website

Extend Copilot with Agents

Custom engine Copilots

Video: Copilot Studio agent builder

Online Copilot Reference Guide

November 2024