



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

The screenshot displays the Copilot Studio interface. At the top, it shows 'Copilot Studio' and 'Onboarding Assistant'. Below this, there are two tabs: 'Describe' (highlighted with a purple circle '2') and 'Configure'. The 'Describe' tab contains a chat window with the following text:

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?

On the right side, there is a sidebar with the Copilot logo and a purple circle '1'. The sidebar contains the following items:

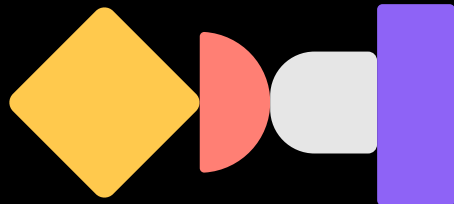
- Agents
- Visual Creator
- Copilot for Helpdesk
- Get Copilot agents
- Create agents (highlighted with a purple box)

Create an agent

In Copilot Studio Agent Builder

3. At the top of the **Configure** tab, you can optionally:

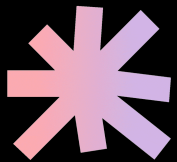
- Edit the agent name
- Edit the description
- Edit the instructions



The screenshot displays the Copilot Studio interface for configuring an agent. At the top, the Copilot Studio logo and the agent name 'Readiness Team Onboarding Assistant' are visible. Below this, there are two tabs: 'Describe' and 'Configure', with the 'Configure' tab highlighted and circled in blue. The main content area is divided into three sections: 'Details', 'Instructions', and 'Knowledge'. The 'Details' section includes a profile icon, an edit icon, a 'Name' field containing 'Readiness Team Onboarding Assistant' (with a note that only 30 characters are allowed), and a 'Description' field containing 'Serves as an onboarding agent to help answer questions from new team members about to join the team.' The 'Instructions' section contains the text 'Your name is Onboarding Assistant. You serve as an onboarding agent to help answer questions from new team members about joining the team.' The 'Knowledge' section is currently empty, showing only the 'Knowledge' label and a refresh icon.

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

4

5

The screenshot shows the Copilot Studio interface for configuring an agent named "Readiness Team Onboarding Assistant". The "Configure" button is highlighted with a purple box. The interface is divided into several sections:

- Knowledge:** This section is highlighted with a purple circle and the number "4". It includes a "SharePoint" section with a "Browse" button and a text input field for "Enter URL of a SharePoint site". Below this is a "Web content" section with a toggle switch. Underneath, there are two items listed: "EESReadiness" and "General", each with a three-dot menu icon. A "From your organization" link is also visible.
- Actions (coming soon):** This section includes a link to "Go to full Copilot Studio to create agents with actions".
- Starter prompts:** This section is highlighted with a purple circle and the number "5". It contains a table with columns for "Title" and "Message". The table lists four prompts: "First day procedures" (message: "What should I expect on my first day?"), "Team introduction" (message: "Can you tell me more about the team I'll be joining"), "Required documents" (message: "What documents do I need to bring on my first day?"), and "Work hours" (message: "What are the standard work hours?"). Each prompt has a trash icon to its right.

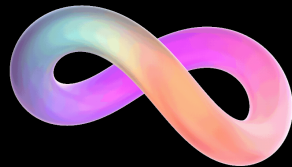
On the right side of the interface, a preview of the agent's chat interface is visible, showing the agent's name "Readiness" and its role "Serves as an onboarding agent". Below this, there are two chat bubbles: "First day procedures" with the question "What should I expect on my first day?" and "Work hours" with the question "What are the standard work hours?". At the bottom right, there is a text input field labeled "Type your message" with a character count of "0/2000".

At the bottom of the screenshot, a small disclaimer reads: "AI-generated content may be incorrect | Copilot Studio capabilities in M365 are processed by the Copilot Studio service. By using this experience, yo

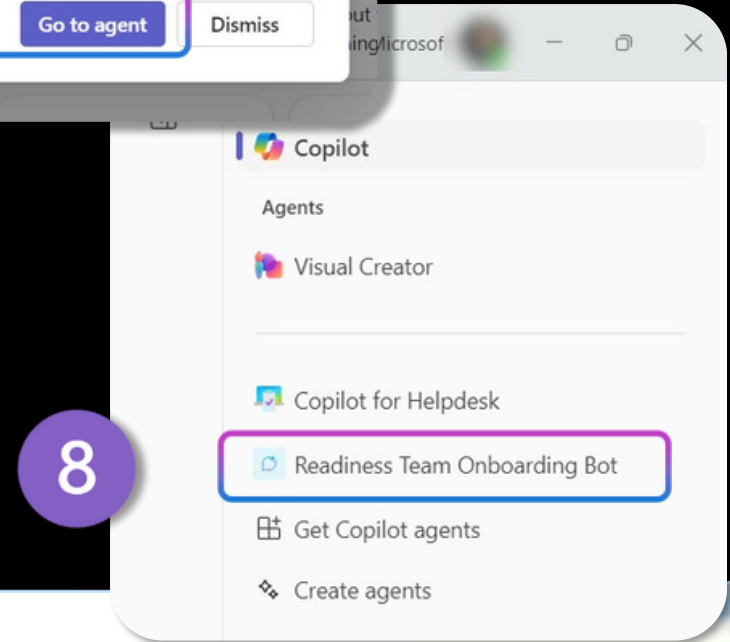
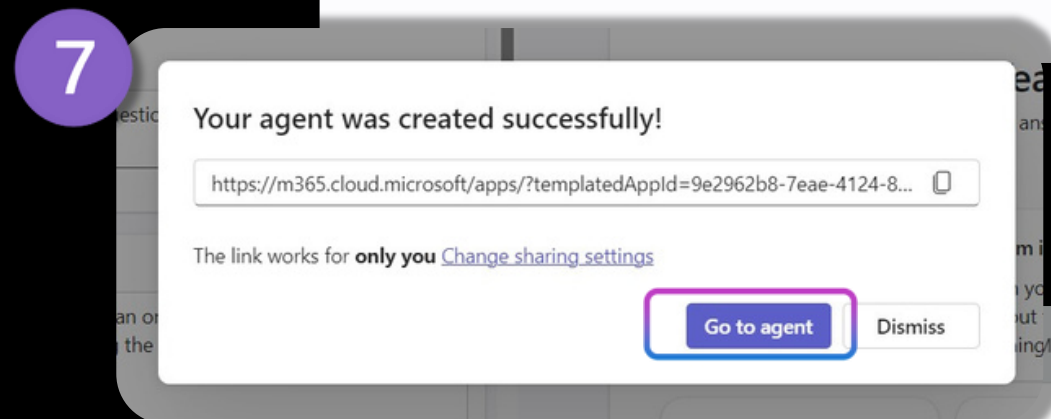
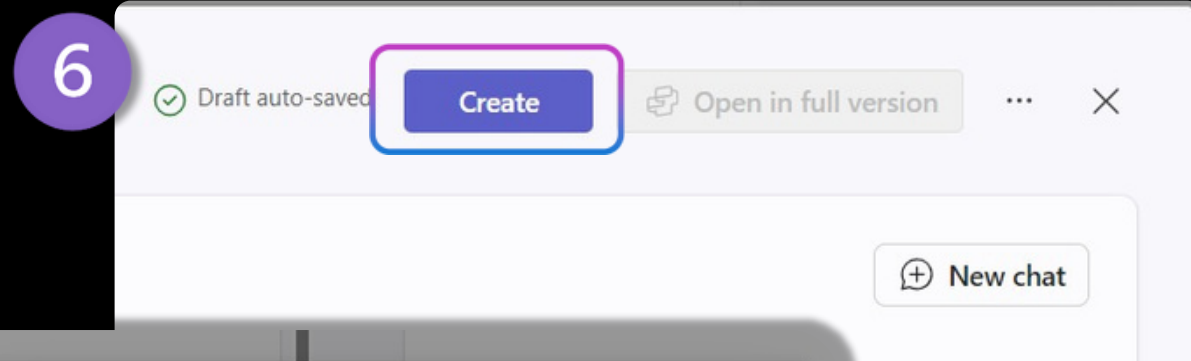
Create an agent In Copilot Studio Agent Builder

6. When you're finished with your instructions, select **Create**

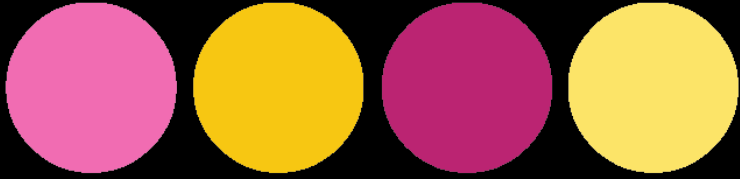
7. Once created, select **Go to agent**



8. Your agent will display in the right pane, in Bizchat

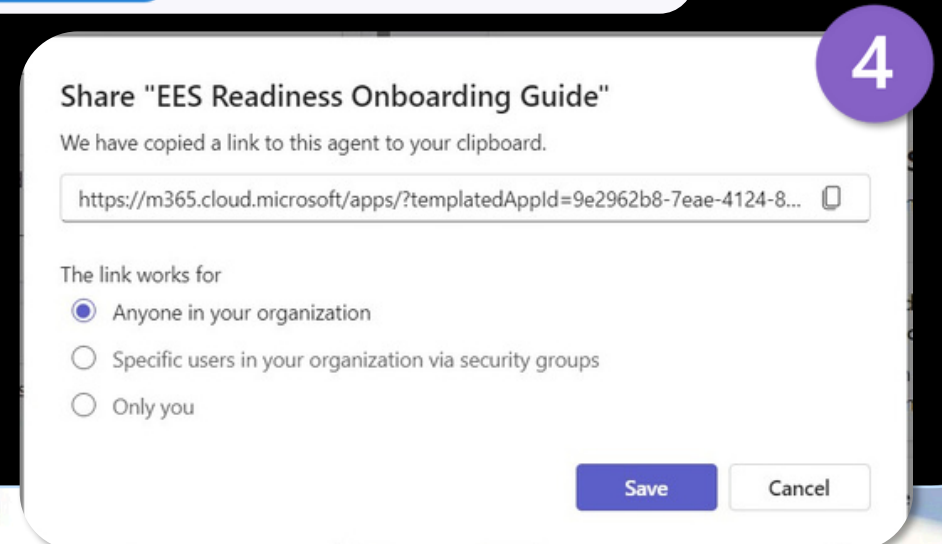
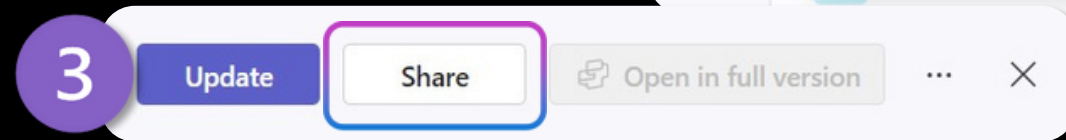
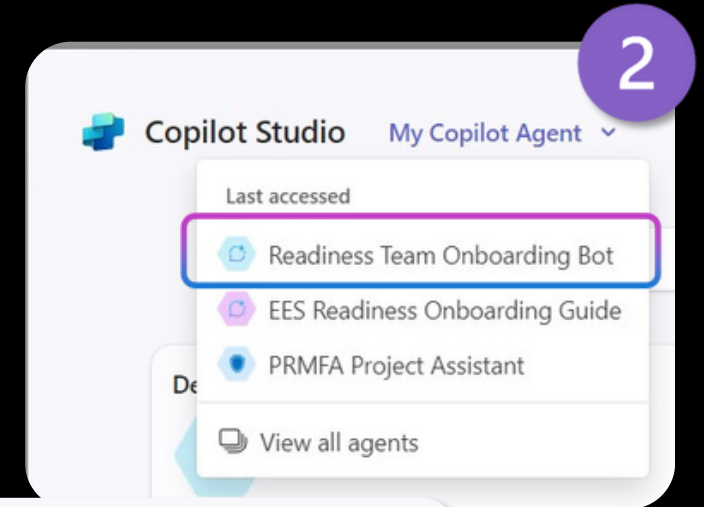
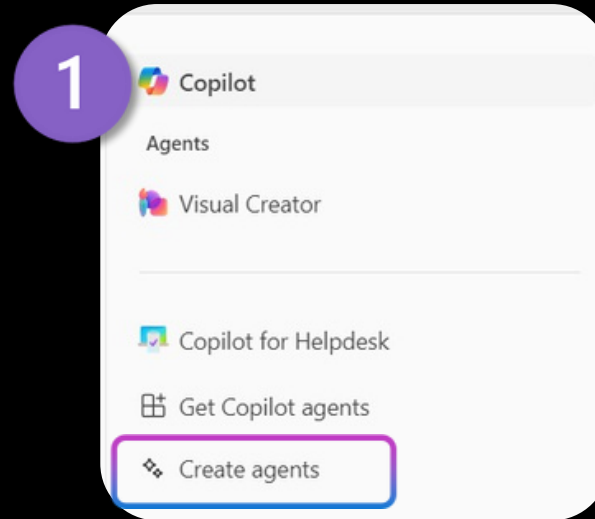


Share your agent



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



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

