



How to Create Agents with Copilot

Quick Reference Guide



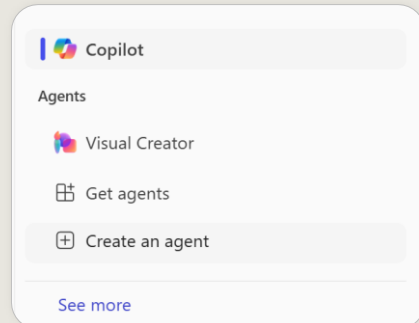
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Navigating through complex company policies can often leave one confused about next steps. Luckily, Copilot is here to help with its feature of creating custom agents. Once trained on selected set of knowledge sources, Copilot Agent can be a powerful ally when it comes to comprehend internal procedures and guidelines, helping employees understand the process and save time. This feature allows you to build your own AI agent – all with using few simple textual prompts and no-code approach.

Launching Copilot Studio

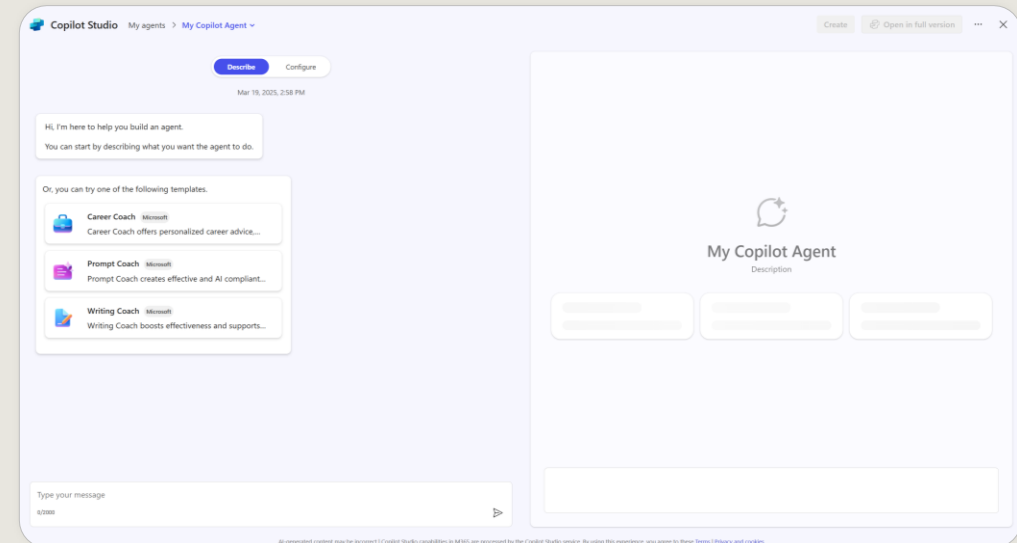
1. **Access Copilot Chat:** You can access Copilot Chat on copilot.microsoft.com. from the web browser of your choice.
2. **Sign in:** Sign in with your username and password Once you are signed in, Copilot Chat interface will be displayed.
3. **Launch Agent Builder:** In the top right corner of the screen, click on “**Create an agent**” .



This action launches an Agent Builder window in which you will customise your agent.

Agent Builder

Once Agent Builder window opens, use the pane on the left to describe your agent, its main purpose and give it a name. The pane on the right will adjust accordingly, and here you can test your agent by writing prompts and analysing the answers.



Customise Your Agent

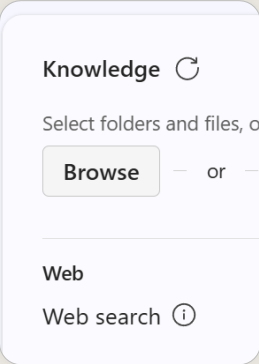
On top of the Agent Builder, click on “**Configure**” to switch from “**Describe**” to “**Configure**” tab.



Here, you can view and edit details of the agent, select an icon or change the name of the agent. You can also add various knowledge sources the agent will use.

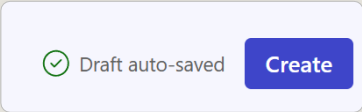
Add a Knowledge Source

In Knowledge tab, click on “**Browse**” button to choose the desired document. The document you wish to use should be uploaded to SharePoint document library and you should have access to it.



Set Up the Agent

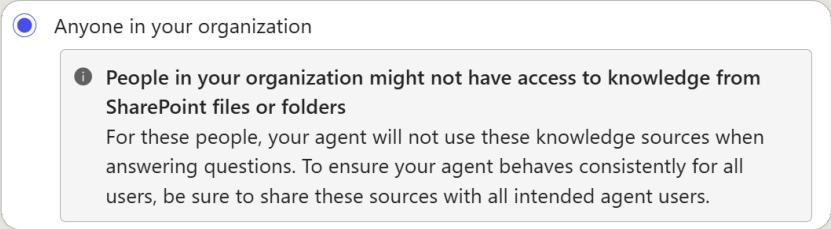
Once the agent is customised to your needs, click on “**Create**” button in the top right corner of the Agent Builder.



Another windows opens saying your agent is created successfully. Click on “**Change sharing settings**” to share the agent with others in your organisation.

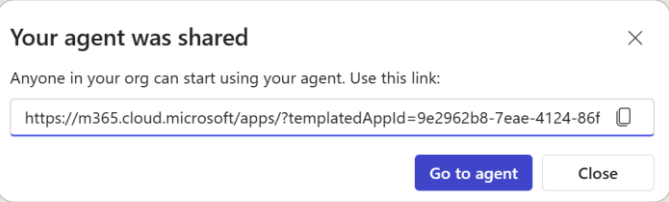


When prompted, click “**Anyone in your organisation**” so the others can access the agent you created. Click “**Save**” to apply the changes.

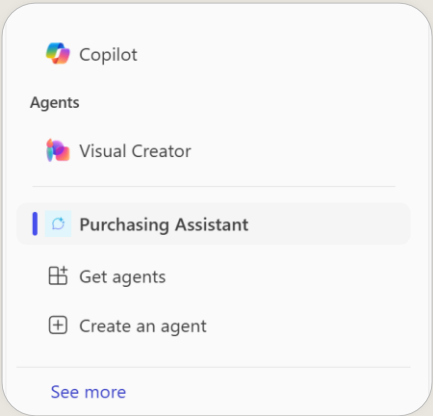


Using Your Agent

Once the previous step is completed, a window opens that allows you to go view your agent. Click on “Go to agent” button.



An agent appears in the top right corner of the screen and you can click on it to open chat with the agent.



Completely new interface opens, and you can see the suggested prompts are relate to agent’s area of expertise. You can choose one of the suggested prompts or ask something related the topic and check does agent work as intended.

