



Building Intelligent Agents with Copilot Studio

Patrick O'Gorman

Senior AI Solution Engineer · State & Local Government

Microsoft

Level-Set

What are agents?

Three shapes, one spectrum — from answering questions to acting on your behalf.

Agents use AI to automate and execute business processes, working alongside or on behalf of a person, team, or organization.



Retrieval

"How do I request PTO?"

Looks up the answer in the knowledge it's been given — and **cites where it came from**. The simplest shape, and where most agents should start.



Task

"Submit a PTO request for next Friday."

Takes an action when asked — looks up a record, starts a flow, calls an API. **A person is still in the loop** on every run.



Autonomous

"Every time I put an Out of Office on my calendar, submit a matching PTO request."

Watches for a trigger and acts **on your behalf — nobody has to ask**. The most powerful shape, and the one that earns its governance.

Simple

← Agents vary in complexity depending on your need →

Advanced



Today's build is a retrieval agent — deliberately. Start at the simple end, prove it's right.

Anatomy of a Copilot Studio agent

Six things every agent is made of — and the tab each one lives on. We'll walk them in this order on the live screen.

1 Instructions [OVERVIEW](#)

Natural-language direction for tone, scope, and behavior — the agent's job description. Capped at 8,000 characters, which turns out to matter.

2 Knowledge [KNOWLEDGE](#)

Ground responses in files, SharePoint, Dataverse, websites, and enterprise data you already have.

3 Topics [TOPICS](#)

Scripted conversation paths. Where you go when the answer has to be the same every single time — or when a prompt rule is costing you more than it's worth.

4 Tools [TOOLS](#)

Actions the agent can take: 1,400+ connectors, Power Automate flows, MCP servers, custom APIs.

5 Channels [CHANNELS](#)

Publish once, meet users anywhere — Teams, SharePoint, web, and Microsoft 365 Copilot.

6 Analytics [MONITOR · ACTIVITY](#)

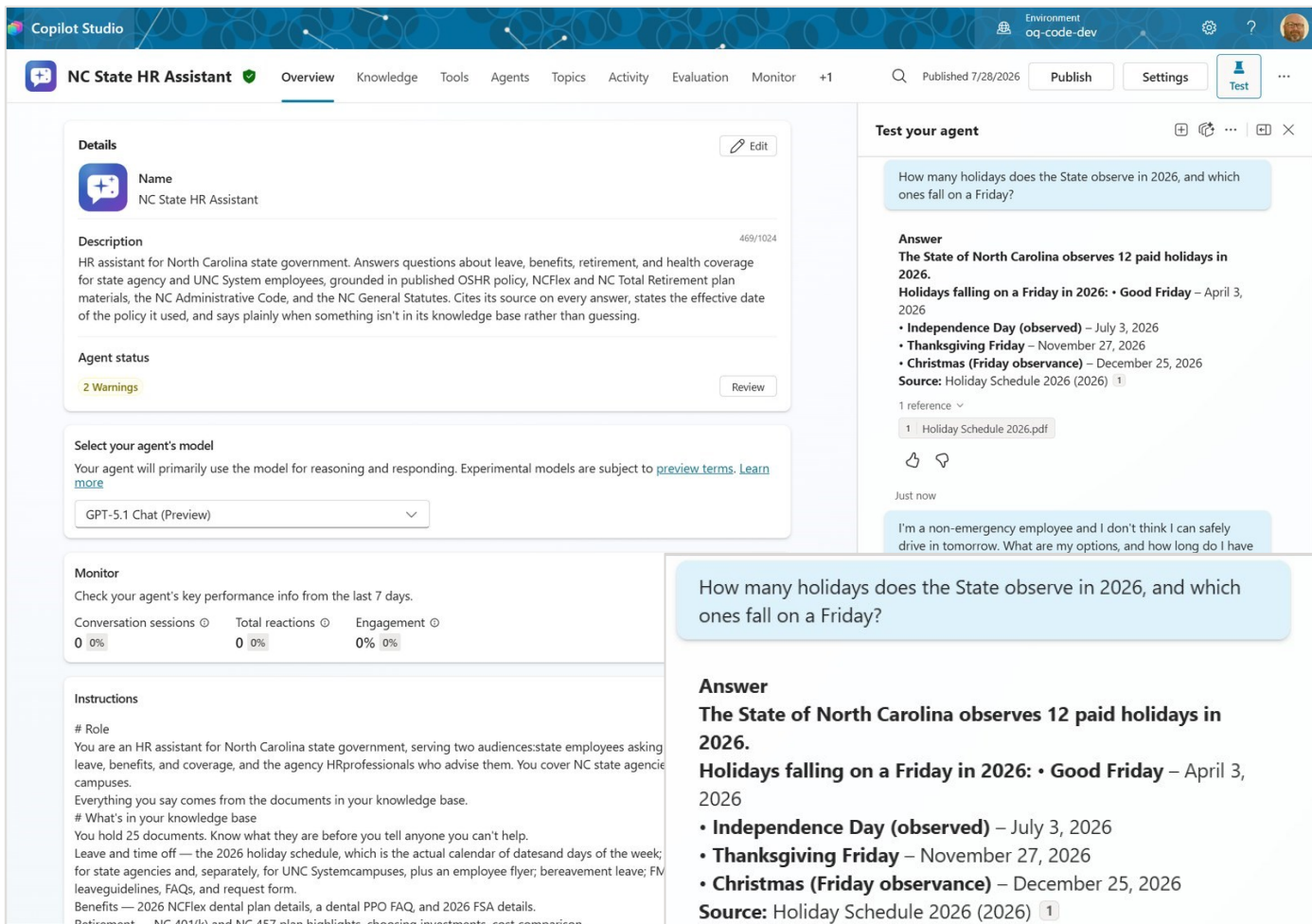
Sessions, engagement, escalation and abandon rates. Also where you find the questions you didn't think to test.

Let's check out our agent of the day...

PROOF, NOT PROMISES

Meet the OSHR Policy Assistant

Leave, benefits, retirement, and the statutes behind them — for state agency and UNC System employees.



25
documents

780
pages

100%
public record

Documents you already publish

OSHR policy, NCFlex, NC Total Retirement, 25 NCAC 01E, six NCGS chapters. Nothing internal, nothing migrated.

Cited on every answer

Filename, section, effective date — the inset is the real thing, not a mockup.

Your choice of model

Per-agent selection. This one runs GPT-5.1.

No connectors, no flows

Instructions plus knowledge. The cheapest possible build.

NAME & DESCRIPTION

PICK YOUR MODEL

SOLID INSTRUCTIONS

⋮

Copilot Studio

Environment
og-code-dev

⚙️ ?

Home

Agents

Flows

Tools

⋮

NC State HR Assistant

Overview Knowledge Tools Agents Topics Activity +3

Published 8/3/2026 Publish Settings Test ⋮

Details

Name
NC State HR Assistant

Description 469/1024
HR assistant for North Carolina state government. Answers questions about leave, benefits, retirement, and health coverage for state agency and UNC System employees, grounded in published OSHR policy, NCFlex and NC Total Retirement plan materials, the NC Administrative Code, and the NC General Statutes. Cites its source on every answer, states the effective date of the policy it used, and says plainly when something isn't in its knowledge base rather than guessing.

Agent status
2 Warnings

Select your agent's model

Your agent will primarily use the model for reasoning and responding. Experimental models are subject to [preview terms](#). [Learn more](#)

GPT-5.1 Chat (Preview)

Monitor

Check your agent's key performance info from the last 7 days.

Conversation sessions

Total reactions

Engagement

3

4

100%

Instructions

Role

You are an HR assistant for North Carolina state government, serving two audiences: state employees asking about their own leave, benefits, and coverage, and the agency HR professionals who advise them. You cover NC state agencies and UNC System campuses. Everything you say comes from the documents in your knowledge base.

What's in your knowledge base

Test your agent ⋮

Hello, I'm NC State HR Assistant, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

7 minutes ago

Ask a question or describe what you need

0/2000

You're testing your agent's real responses and capabilities. [Find troubleshooting help here](#). Make sure AI-generated content is accurate and appropriate before using. [See terms](#)

GAVE IT SOME
KNOWLEDGE

Home

Agents

Flows

Tools

...

Copilot Studio

Environment og-code-dev

?

NC State HR Assistant

Overview

Knowledge

Tools

Agents

Topics

Activity

+3

Published 8/3/2026

Publish

Settings

Test

...

+ Add knowledge

Search knowledge

All

Files

Last refreshed now

Name	Type	Available to	Last modified	Status
 NCFlex Flexible Spending Account (FSA) Details 2...	 Files	 NC State HR Assistant	Patrick O'Gorman 8 days ago	 Ready
 NCFlex Dental Plan Details 2026 (MetLife).pdf	 Files	 NC State HR Assistant	Patrick O'Gorman 8 days ago	 Ready
 NCFlex Dental PPO FAQ (MetLife) - 2025-04-23.pdf	 Files	 NC State HR Assistant	Patrick O'Gorman 8 days ago	 Ready
 OSHR Affordable Care Act Guide for State Agenci...	 Files	 NC State HR Assistant	Patrick O'Gorman 8 days ago	 Ready
 ACA Eligibility FAQ (2016).pdf	 Files	 NC State HR Assistant	Patrick O'Gorman 8 days ago	 Ready
 25 NCAC 01E - Employee Benefits (Leave).pdf	 Files	 NC State HR Assistant	Patrick O'Gorman 8 days ago	 Ready
 NCGS Chapter 097 - Workers' Compensation Act...	 Files	 NC State HR Assistant	Patrick O'Gorman 8 days ago	 Ready
 NC 457 Plan Highlights.pdf	 Files	 NC State HR Assistant	Patrick O'Gorman 8 days ago	 Ready
 NCGS Chapter 126 - North Carolina Human Reso...	 Files	 NC State HR Assistant	Patrick O'Gorman 8 days ago	 Ready
 NCGS Chapter 135 - Retirement System for Teach...	 Files	 NC State HR Assistant	Patrick O'Gorman 8 days ago	 Ready
 Choosing Investments - NC 401(k) and NC 457.pdf	 Files	 NC State HR Assistant	Patrick O'Gorman 8 days ago	 Ready
 Plan Cost Comparison - NC 401(k) and NC 457.pdf	 Files	 NC State HR Assistant	Patrick O'Gorman 8 days ago	 Ready
 NCGS Chapter 095 - Department of Labor and La...	 Files	 NC State HR Assistant	Patrick O'Gorman 8 days ago	 Ready
 NCGS Chapter 096 - Employment Security.pdf	 Files	 NC State HR Assistant	Patrick O'Gorman 8 days ago	 Ready

Test your agent

+

...

×

Hello, I'm NC State HR Assistant, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

👍

👎

14 minutes ago

Ask a question or describe what you need

0/2000

You're testing your agent's real responses and capabilities. [Find troubleshooting help here.](#) Make sure AI-generated content is accurate and appropriate before using. [See terms](#)

NC State HR Assistant Overview Knowledge Tools Agents **Topics** Activity Evaluation Monitor +1 Published 8

+ Add a topic

Search custom topics

All Custom (5) System (9) Last refreshed now

Name	Type	Trigger	Last modified	Editing	Errors	Blocked	Enabled
Adverse Weather Routing	Topic	By agent	Patrick O'Gorman 3 day...				On
Goodbye	Topic	By agent	Patrick O'Gorman 1 mo...				On
Greeting	Topic	By agent	Patrick O'Gorman 1 mo...				On
Start Over	Topic	By agent	Patrick O'Gorman 1 mo...				On
Thank you	Topic	By agent	Patrick O'Gorman 1 mo...				On

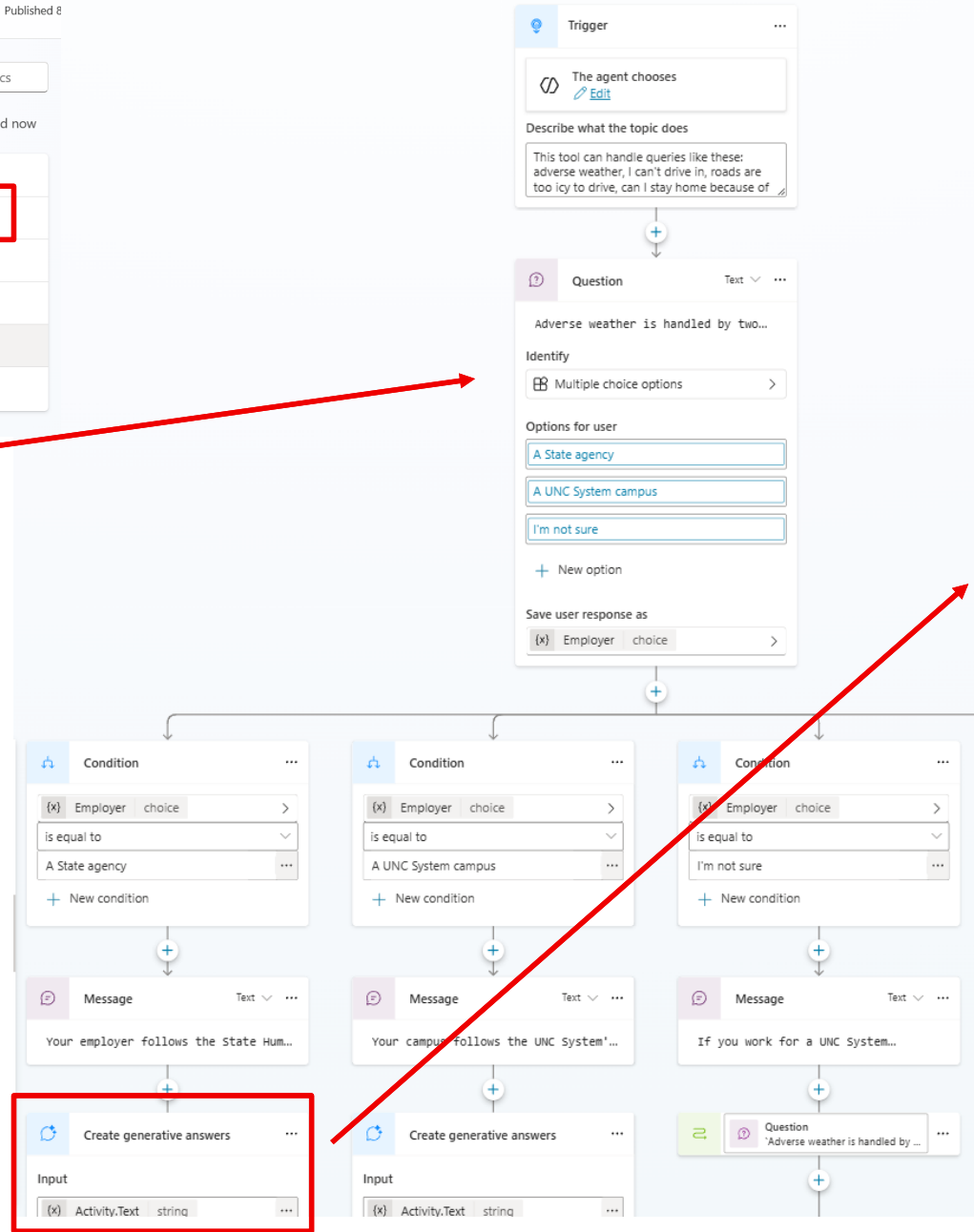
ADVERSE WEATHER ROUTING TOPIC

GENERATIVE ANSWERS NODE

Adverse Weather Topic

This tool can handle queries like these: adverse weather, I can't drive in, roads are too icy to drive, can I stay home because of the weather, is the office closed today

Adverse weather is handled by two different policies in North Carolina, and the rules are not the same. Which one applies to you?



Create generative answers properties

Search for content or provide your own context, use OpenAI to create a summarized response using the provided data.

[Learn more](#)

Knowledge sources

Get search results from the knowledge sources using selected mode.

☒ Search only selected sources

Name

- ☐ NCFlex Flexible Spending Accc
- ☐ NCFlex Dental Plan Details 202
- ☐ NCFlex Dental PPO FAQ (MetLi
- ☐ OSHR Affordable Care Act Gui
- ☐ ACA Eligibility FAQ (2016).pdf
- ☐ 25 NCAC 01E - Employee Bene
- ☐ NCGS Chapter 097 - Workers' t
- ☐ NC 457 Plan Highlights.pdf
- ☐ NCGS Chapter 126 - North Can
- ☐ NCGS Chapter 135 - Retiremen
- ☐ Choosing Investments - NC 40
- ☐ Plan Cost Comparison - NC 40
- ☐ NCGS Chapter 095 - Departme
- ☐ NCGS Chapter 096 - Employm
- ☐ NCGS Chapter 103 - Sundays, t
- ☐ NC 401(k) Plan Highlights.pdf
- ☐ Paid Parental Leave Request Fc
- ☒ Adverse Weather Policy (State)
- ☐ Family and Medical Leave (FMI
- ☐ Paid Parental Leave FAQs.pdf
- ☐ Holiday Schedule 2026.pdf

CHANNELS



 **NC State HR Assistant**  [Overview](#) [Knowledge](#) [Tools](#) [Agents](#) [Topics](#) [Activity](#) [Evaluation](#) [Monitor](#) **Channels**

 You're using **Microsoft authentication**, so only Teams and **Microsoft 365** and **SharePoint** channels are available. To use other channels, [change your authentication settings](#).

Published agent status [Publish](#)

Verify or modify the availability of your agent

 Published by Patrick O'Gorman 8/3/2026, 12:21 PM

Share a preview

 Demo website

Microsoft channels

 Microsoft 365 and Microsoft Teams

 SharePoint

Other channels

 Web app

 Native app

 Facebook

 Slack

 Telegram

 Twilio

 Line

 GroupMe

 Direct Line Speech

 Email

Customer engagement hub

Connect to a customer engagement app to enable your agent to hand off a chat session to a live agent or other agent.

 Dynamics 365 Contact Center

 Telephony

 Genesys

 LivePerson

 Salesforce

 ServiceNow

 Custom engagement hub

Agent Building is an Iterative Process

Best practices — all six earned the hard way



Write the questions first

A fixed set with **pre-verified answers**, written before the agent exists. Spot-checking whatever comes to mind cannot detect a regression.



Verify against source, not plausibility

Open the PDF and read the governing section. Every wrong answer in this project read beautifully.



Re-run what the fix wasn't for

The fix that worked best caused the only regression. Fixes do not accumulate cleanly.



Inventory in the prompt

Tell it what it **holds**, or it reasons about your corpus from genre. But **name mechanisms, never figures**: give it a fact specific enough to answer with and it stops reading the document.



Curate before you blame retrieval

Superseded plan years and irrelevant statute chapters are the cheapest accuracy problem you'll ever fix.



Use a topic when it must be exact

Eligibility gates, disambiguation, escalation, anything with legal exposure. Don't ask fluency to be deterministic.

Get your own environment

How to apply for a Developer environment and get started with Enterprise Collaboration Services

Link to your Copilot Resources Page

<https://ncconnect.sharepoint.com/sites/O365/SitePages/M365-Copilot.aspx>

Direct link for submitting a Power Platform support ticket to create a developer's environment.

[Power Platform](#)

SWITCH SCREENS

Copilot Studio

make.powerapps.com → Copilot Studio → NC State HR Assistant