



Microsoft 365 Copilot

Reimagining how work gets done
with AI Agents & Microsoft Copilot



Welcome

Rosemary Shaker

Head of Digital Employee Experience
Generation-e



Ben Teoh

Senior Change Manager
Generation-e



Why build a Copilot agent?

Microsoft 365 Copilot offers robust AI-powered support, yet it may not completely meet your organisation's specific workflows, data integrations, or automation requirements.

Creating agents enables you to:

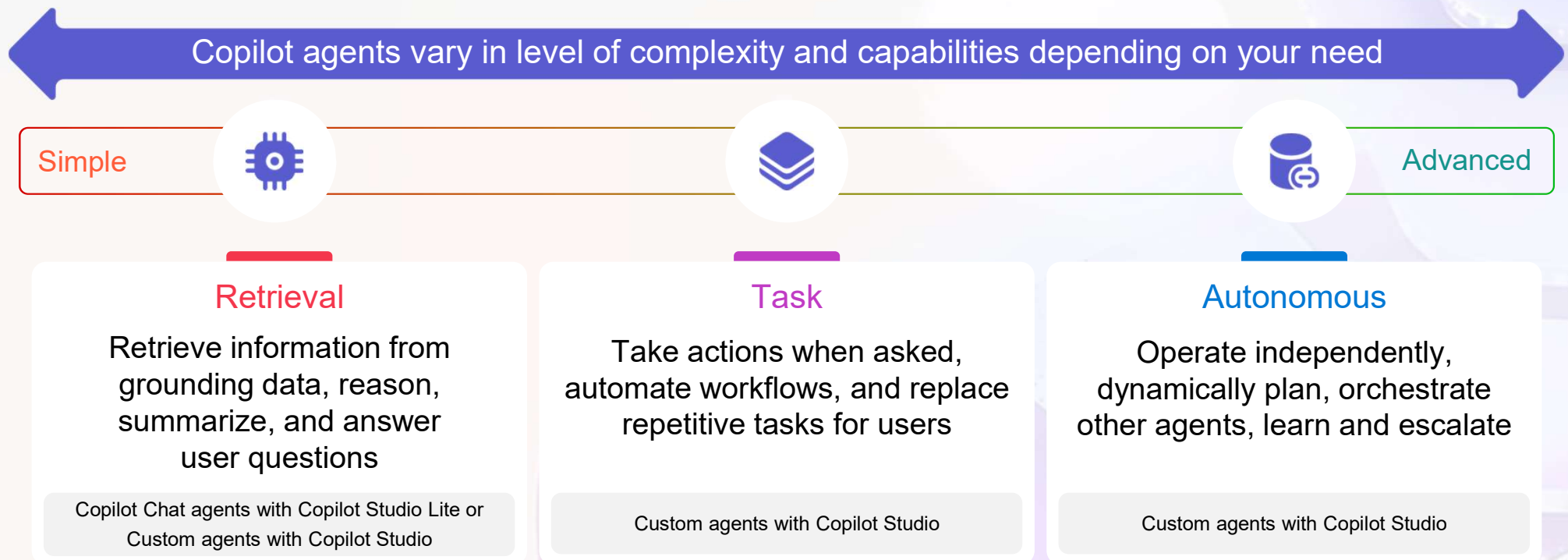
Enhance Copilot's capabilities by connecting with third-party systems and data sources.

Streamline complex, multi-stage processes across Microsoft 365 and other external applications.

Provide customised user experiences that appear where your users operate—whether in Teams chats, Outlook, SharePoint, or bespoke apps.

Spectrum of agent types

Copilot agents are AI assistants that can help optimize business processes and enhance productivity



A range of tools for agent creation

No code



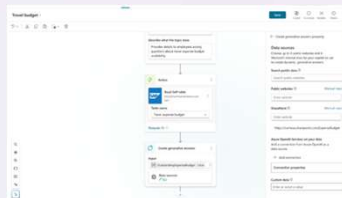
Pro code

For end users



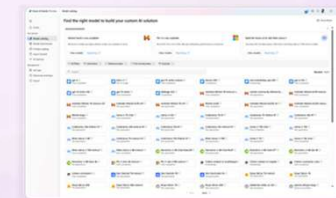
Copilot Studio Lite
(formerly Agent Builder)
*Declarative agents**

For makers



Copilot Studio Full
*Declarative or custom-engine agents**

For developers



VS Code, Copilot Studio, Azure AI Foundry
*Custom-engine agents**

Knowledge
Actions
Channels

Microsoft Graph & connectors

Retrieval Only

Microsoft 365 Only

Custom RAG on any data

Task / Autonomous

Multiple Internal & External Channels

* Declarative = prompts handled by Microsoft 365 Copilot; Custom-engine = prompts handled by custom AI engine (i.e., orchestrator and foundation models)

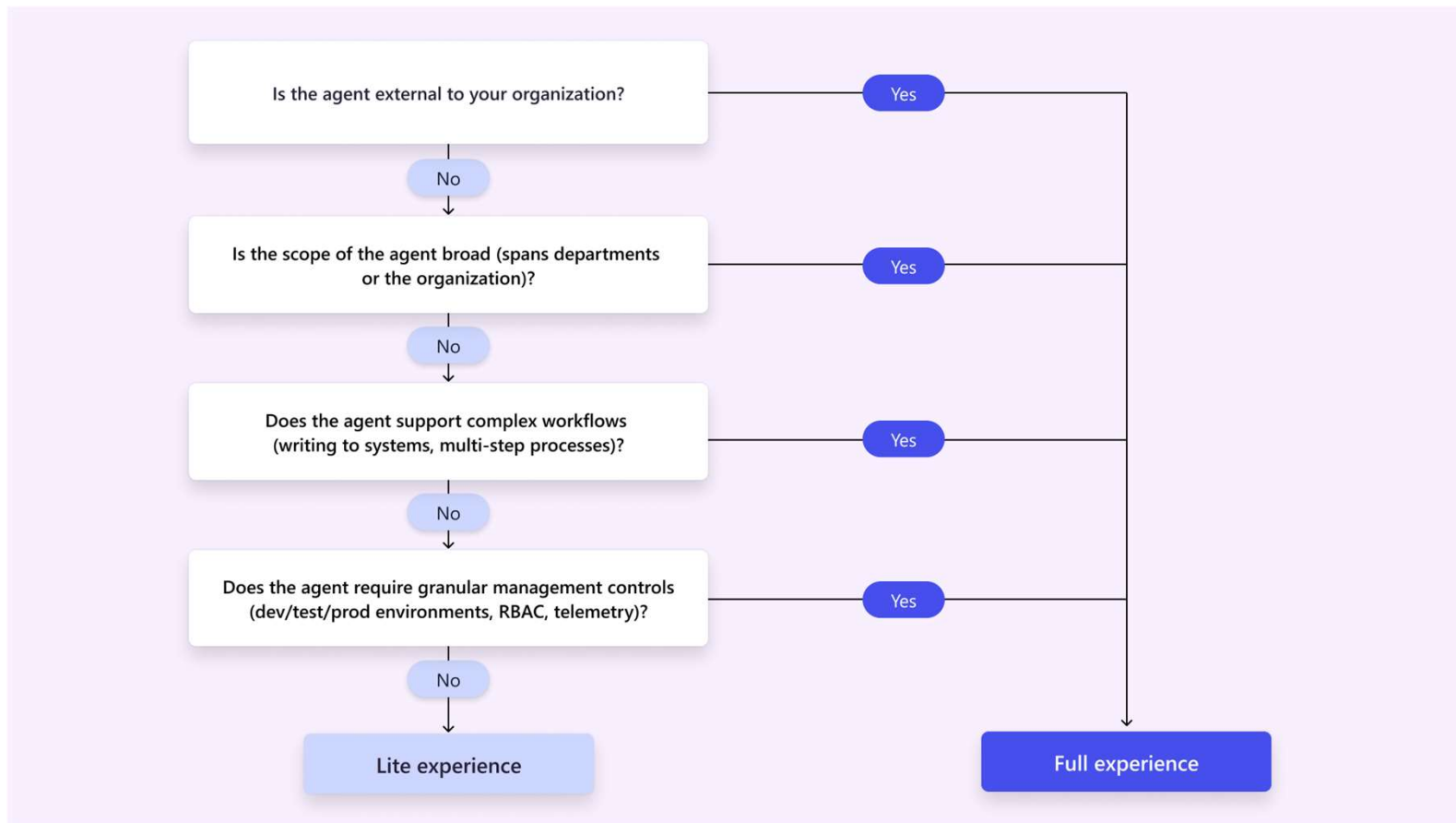


Microsoft 365



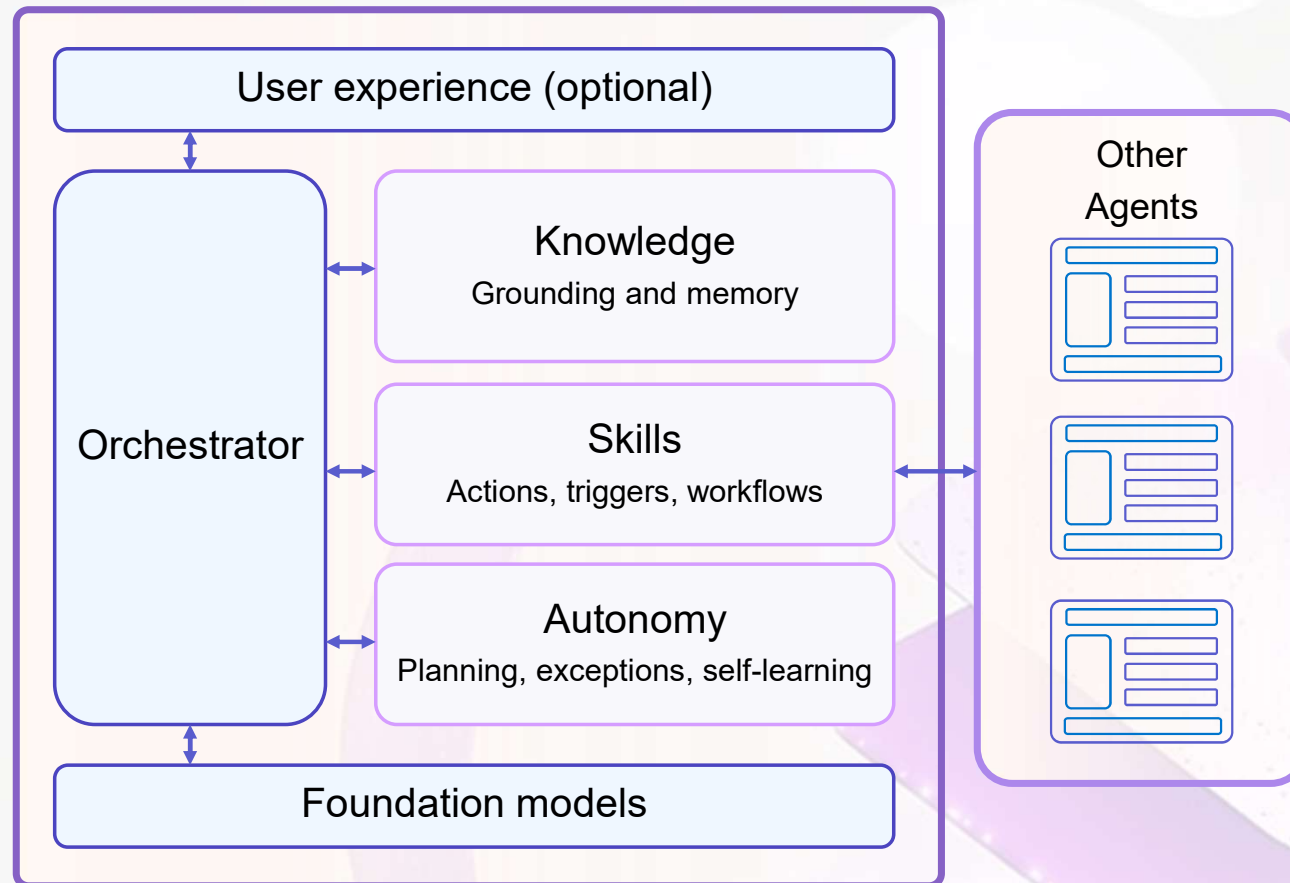
generation-e

Guidelines for choosing the appropriate tool.



What are Copilot agents?

AI assistants designed to automate and execute business processes, working with or for a human.



Out-of-the-box agents

Streamline business processes seamlessly across Microsoft 365 apps



Analyst agent



Facilitator



Employee
self-service



Interpreter



Project
manager



Researcher



Sales agent



Sales chat



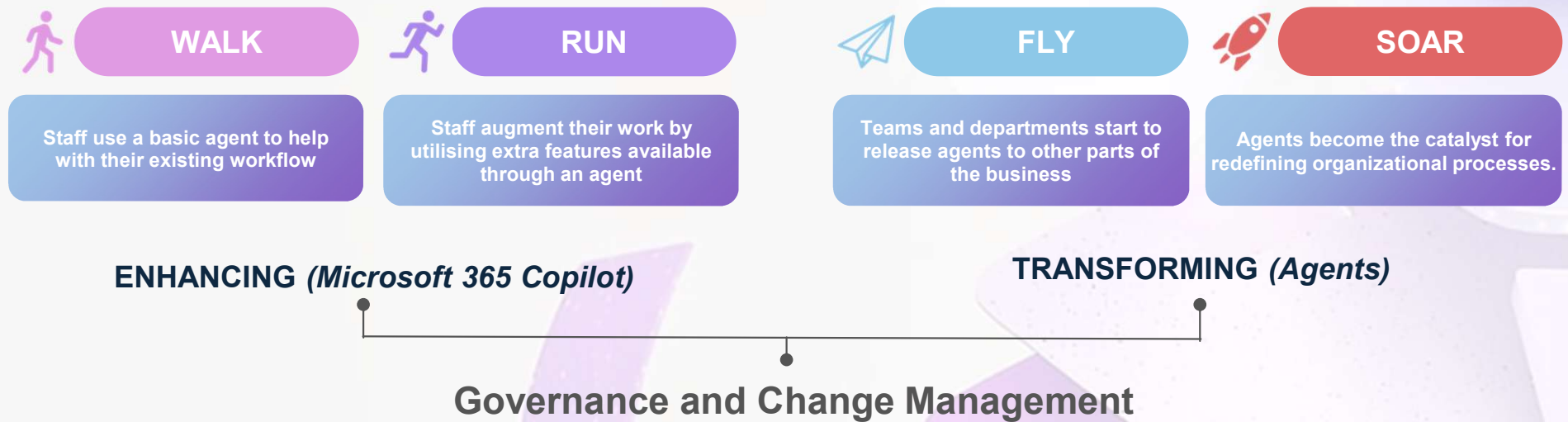
SharePoint
agents

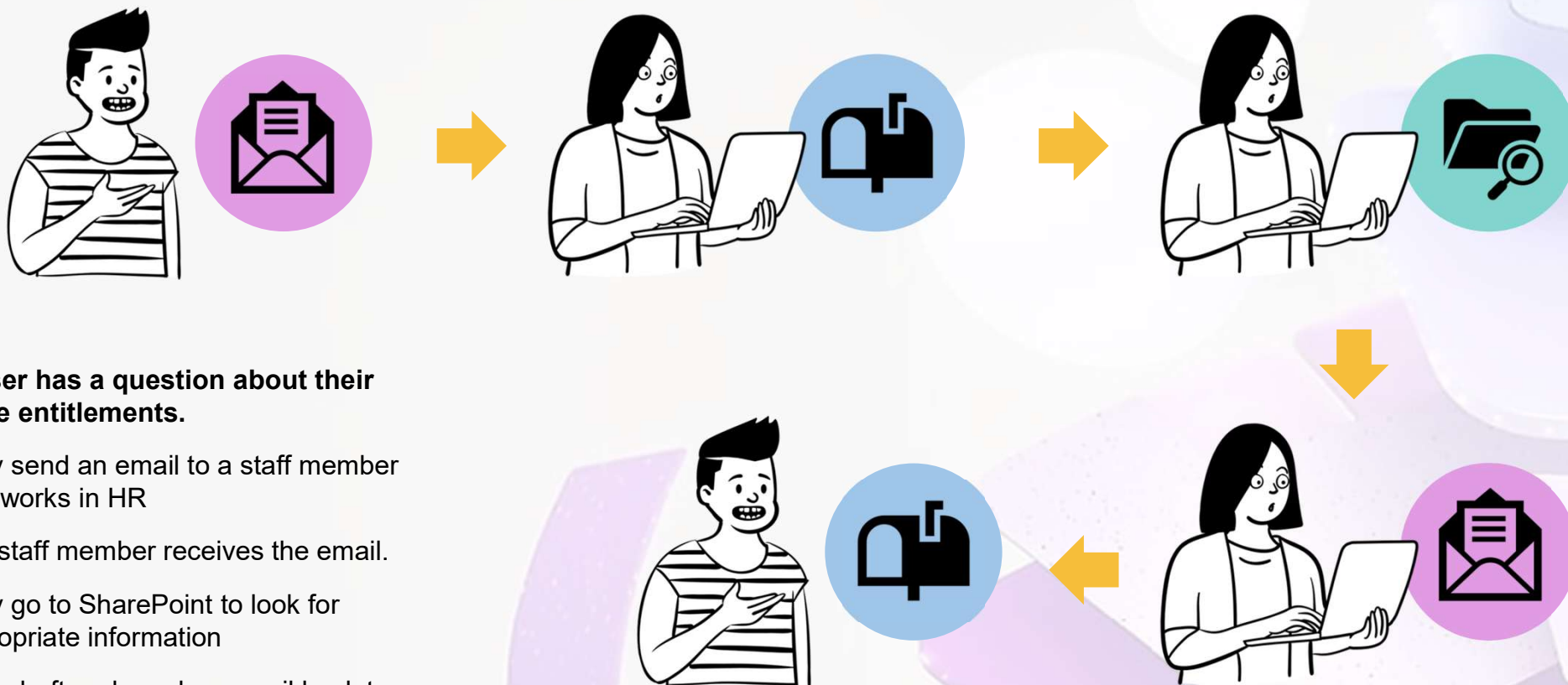


Skills agent



What it looks like in reality?





A user has a question about their leave entitlements.

They send an email to a staff member who works in HR

The staff member receives the email.

They go to SharePoint to look for appropriate information

They draft and send an email back to the user with the relevant information.

Pizza Time - Pizza Time Policies

https://generatione.sharepoint.com/sites/PizzaTime/Pizza%20Time%20Policies

SharePoint Search this library

Pizza Time Private group Not following 8 members

Home Conversations Documents Notebook Pages query Test List - Learning Filter Code test Work progress tracker de... Pizza Time Policies Site contents Recycle bin Edit

+ New Upload Edit in grid view Sync Add shortcut to OneDrive Create an agent All Documents Details

Pizza Time Policies

Name	Modified	Modified By	+ Add column
Current Policies	Yesterday at 7:00 PM	Ben Teoh	
Draft Policies	Yesterday at 7:00 PM	Ben Teoh	

Return to classic SharePoint

Pizza Time - Pizza Time Policies

https://generatione.sharepoint.com/sites/PizzaTime/Pizza%20Time%20Policies?id=%2Fsites%2FPizzaTime%2FPizza%20Ti...

SharePoint Search this library Ben Teoh

Pizza Time Private group Not following 8 members

Home Conversations Documents Notebook Pages query Test List - Learning Filter Code test Work progress tracker de... Pizza Time Policies Site contents Recycle bin Edit

+ New Upload Edit in grid view Share Sync Copy link All Documents Details

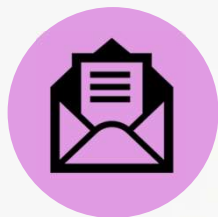
Pizza Time Policies > Current Policies

Name	Modified	Modified By	+ Add column
Pizza Company Onboarding Policy.docx	March 11	Ben Teoh	
Pizza Time Code of Conduct.docx	March 11	Ben Teoh	
Pizza Time IT Support and Escalation Policy.docx	March 11	Ben Teoh	
Pizza Time Learning and Development Policy.docx	21 hours ago	Ben Teoh	
Pizza Time Leave Policy.docx	21 hours ago	Ben Teoh	
Pizza Time Mandatory Training Program.docx	March 11	Ben Teoh	

Return to classic SharePoint



WALK



A user has a question about their leave entitlements.

They send an email to a staff member who works in HR

The staff member receives the email.

To save time looking for files, they use a SharePoint agent

They draft and send an email back to the user with the relevant information.



SharePoint

Pizza Time - Pizza Time Policies

https://generatione.sharepoint.com/sites/PizzaTime/Pizza%20Time%20Policies?viewid=d5f91a53-2436-4bf4-a04e-4d1c8...

Search this library

Pizza Time Private group

Not following 8 members

Home Conversations Documents Notebook Pages query Test List - Learning Filter Code test Work progress tracker de... Pizza Time Policies Site contents Recycle bin Edit

+ New Edit in grid view Share Copy link Delete Pin to top Favorite All Documents 1 selected Details

Pizza Time Policies

Name

Current Policies

Draft Policies

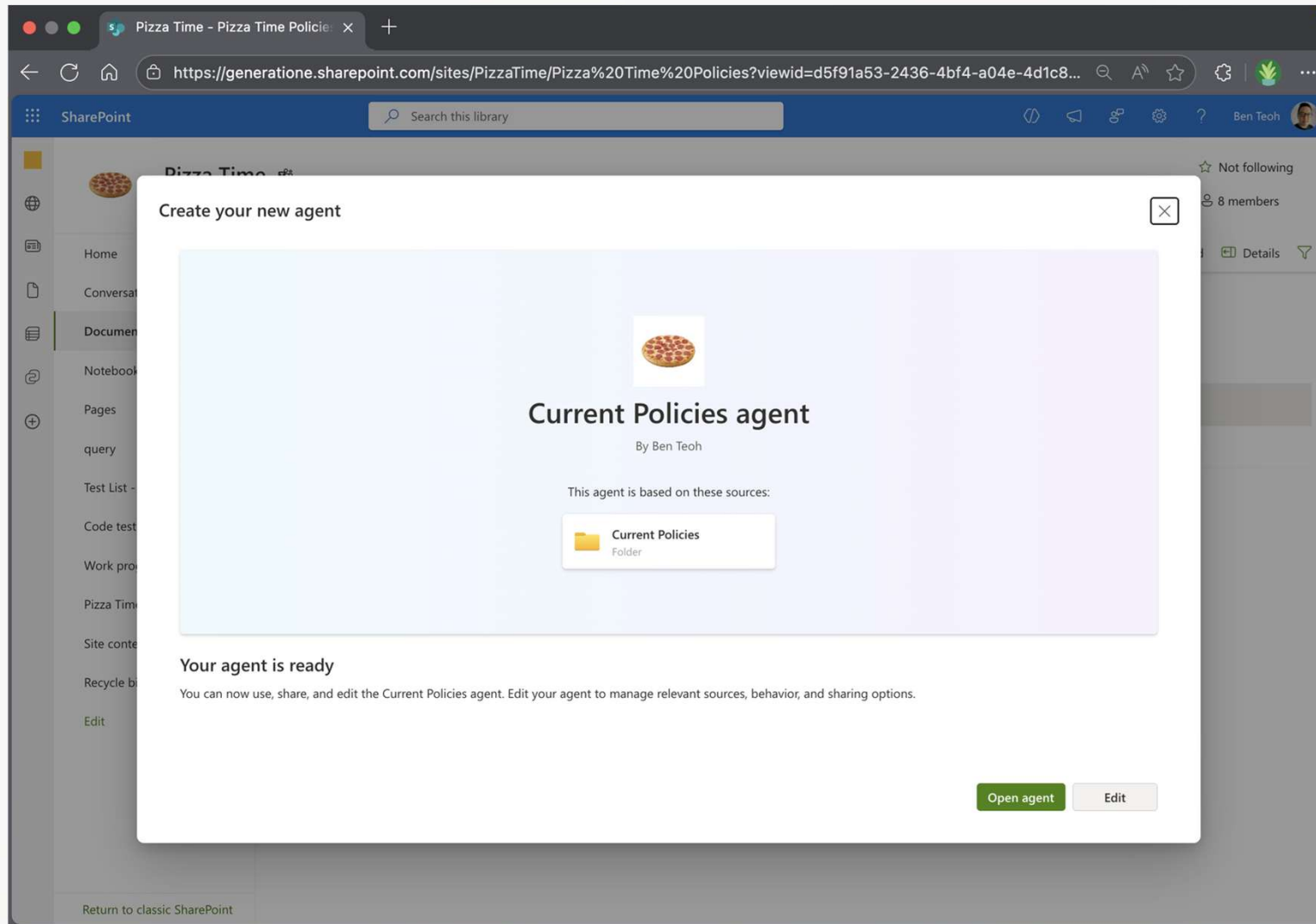
Share Copy link Manage access Delete Favorite Download Rename Pin to top Create an agent Move to Copy to Folder color Add shortcut to OneDrive Automate Edit in grid view Alert me Manage my alerts Details More

Modified By + Add column

Ben Teoh

Ben Teoh

Return to classic SharePoint



Pizza Time - Pizza Time Policies

https://generationone.sharepoint.com/sites/PizzaTime/Pizza%20Time%20Policies?viewid=d5f91a53-2436-4bf4-a04e-4d1c8...

SharePoint Search this library Ben Teoh

Edit agent

Overview Sources **Behavior**

Welcome messaging
Help users understand how to best use this agent

Welcome! Ask a question or get started with one of these prompts:

Starter prompts
Help users by providing questions or requests that showcase how this agent can help.

Help me understand leave policies

What's the onboarding process?

Summarise our Code of Conduct

Agent instructions
Define the agent's role, tone, and limitations. Be specific about what responses you'd like and give examples if needed.

Provide accurate information about the content in the selected files and reply in a formal tone.

Agent preview Give Feedback

Current Policies agent

Hello Ben!
Welcome! Ask a question or get started with one of these prompts:

Help me understand leave policies

What's the onboarding process?

Summarise our Code of Conduct

+ Ask questions or type / to add file

Agent file location [Pizza Time Policies](#)

Save and close

Return to classic SharePoint

+ Ask Current Policies agent a question

Pizza Time - Pizza Time Policies

https://generatione.sharepoint.com/sites/PizzaTime/Pizza%20Time%20Policies?viewid=d5f91a53-2436-4bf4-a04e-4d1c8...

SharePoint Search this library

Pizza Time Private group

Home Conversations Documents Notebook Pages query Test List - Learning Filter Code test Work progress tracker de... Pizza Time Policies Site contents Recycle bin Edit

+ New Edit in grid view All Documents 1 selected Details

Pizza Time Policies

Name	Modified	Modified By
Current Policies agent.agent	A few seconds ago	Ben Teoh
Current Policies	Yesterday at 7:00 PM	Ben Teoh
Draft Policies	Yesterday at 7:00 PM	Ben Teoh

Current Policies agent

Can you tell me about leave policies?

Copilot AI-generated content may be incorrect.

The Pizza Time Leave Policy (Australia) outlines the entitlements and procedures for employee leave, ensuring compliance with the Australian National Employment Standards (NES) and supporting a healthy work-life balance.

Who It Applies To

- All permanent, part-time, and casual employees at Pizza Time locations across Australia.

Types of Leave

Annual Leave

- Full-time: 4 weeks paid leave per year.
- Part-time: Accrues on a pro-rata basis.
- Leave accrues progressively and is cumulative.
- Requests must be submitted 4 weeks in advance.
- Annual leave loading (minimum 17.5%) applies per relevant Award or agreement.

Personal/Carer's Leave

+ Ask Current Policies agent a question

A user has a question about their leave entitlements.

They send an email to a staff member who works in HR

The staff member receives the email.

To save time looking for files, they use a declarative agent in Outlook to find

- Find information
- Draft an email response



Chat | M365 Copilot

https://m365.cloud.microsoft/chat/

Copilot Studio My agents > New Agent

Create ...

Describe Configure

You can start by describing what you want the agent to do.

Or, you can try one of the following templates.

- Career Coach** Microsoft
Career Coach offers personalized career advice,...
- Customer Insights Assistant** Microsoft
An agent designed to help the team get to know...
- Idea Coach** Microsoft
Idea Coach enhances brainstorming with fun and...

[View all templates](#)

Type your message
0/2000

New Agent
Description

AI-generated content may be incorrect | Copilot Studio capabilities in M365 are processed by the Copilot Studio service. By using this experience, you agree to these [Terms](#) | [Privacy and cookies](#)

Chat | M365 Copilot

https://m365.cloud.microsoft/chat/

Copilot Studio My agents > My Personal HR Helper

Last updated September 9, 2025 at 1:41:08 PM Update Share

Describe Configure

It should be my Personal HR Helper

The agent's name has been updated to "My Personal HR Helper."

Now, let's refine what your agent will do. Could you describe any specific tasks or types of questions you want My Personal HR Helper to handle, or any particular way you want it to interact with users? For example, should it provide step-by-step guidance, offer templates, or handle sensitive topics in a certain way?

It should not give advice, only provide information from its knowledge source. It shouldn't use its general knowledge

My Personal HR Helper will only provide information directly from its HR policy knowledge source and will not give advice or use general knowledge.

Would you like to add any publicly accessible websites as knowledge sources for My Personal HR Helper? This step is optional. If you have specific URLs, please provide them now.

Type your message 0/2000

New chat

An agent designed to answer questions based on HR policy knowledge sources and draft supportive, professional emails in the style of a professional HR partner.

Answer HR Policy Question
What is the company's leave policy?

Draft Supportive Email
Can you draft an email to an employee about their performance review?

Clarify HR Process
How do I apply for parental leave?

Professional Tone Email
Write a professional email to address a workplace concern.

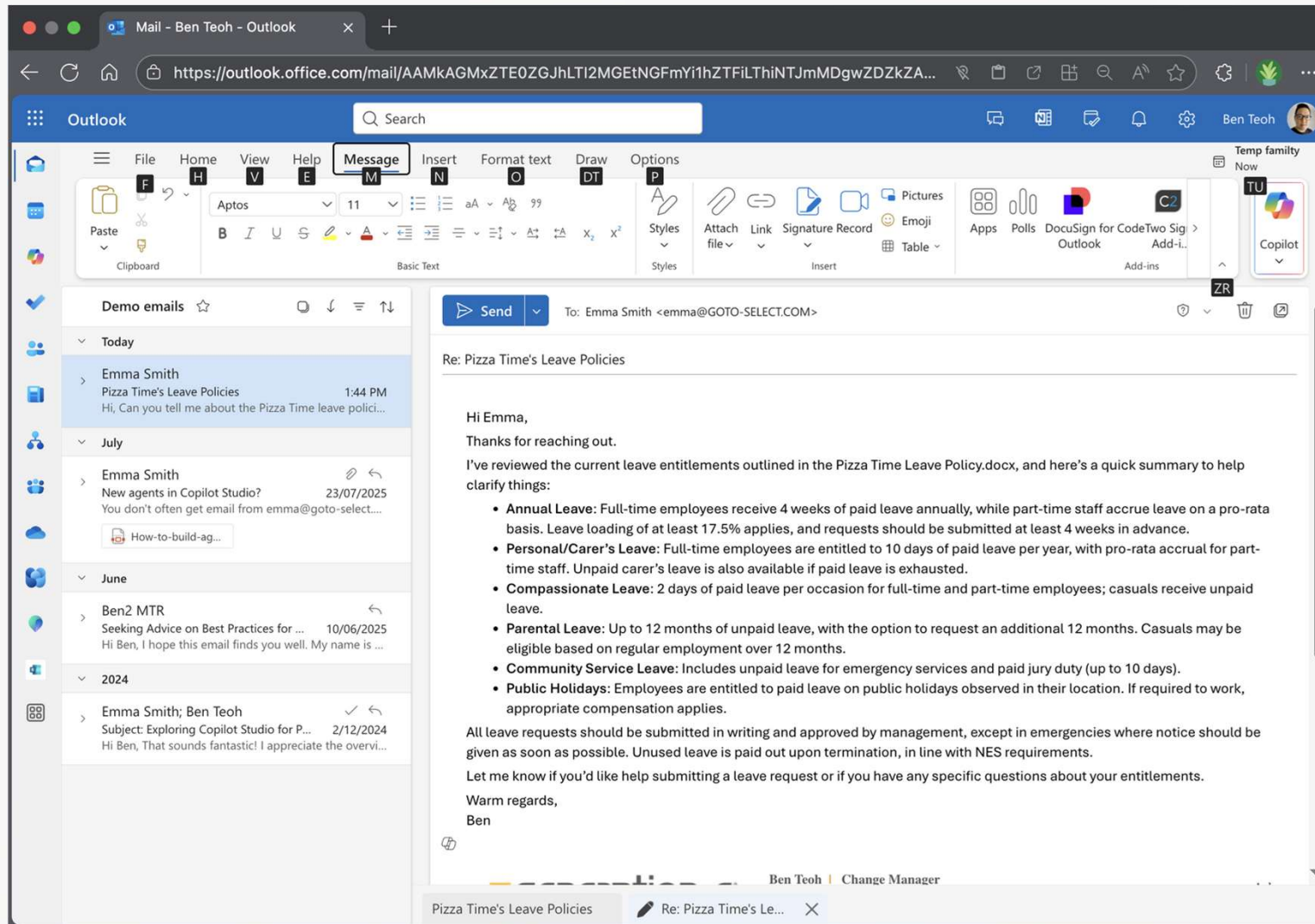
Explain HR Policy
Can you explain the remote work policy?

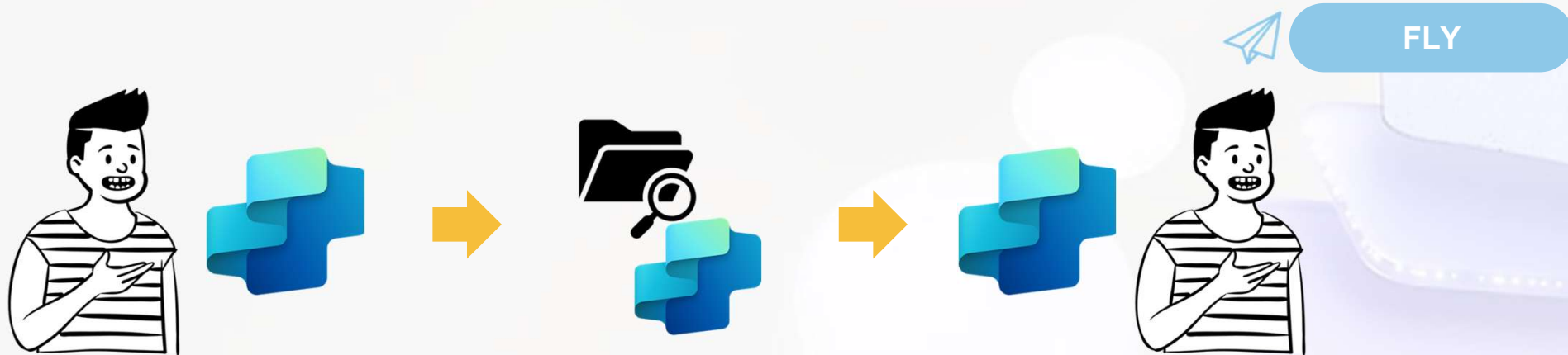
Supportive Response
How should I respond to an employee's request for flexible hours?

Type your message

AI-generated content may be incorrect | Copilot Studio capabilities in M365 are processed by the Copilot Studio service. By using this experience, you agree to these [Terms](#) | [Privacy and cookies](#)

The screenshot shows the Microsoft Outlook web interface. The top navigation bar includes the Outlook logo, a search bar, and user profile information for Ben Teoh. The left sidebar displays a list of emails, with the selected email from Emma Smith (subject: Pizza Time's Leave Policies) highlighted. The main content area shows the email details, including the sender's name, email address, and the subject. The email body contains a draft response generated by Copilot, which starts with "Hi, Can you tell me about the Pizza Time leave policies? I want to plan for my holidays." and "Thanks! Emma". The right sidebar features the Copilot interface, which includes a "My Personal HR Helper" section with a draft response and several suggested actions like "Make it more concise", "Add info about unpaid leave", and "Personalize for Emma's role".





A user has a question about their leave entitlements.

The chat with the HR Agent.

If the agent can't find an answer, it escalates to the HR mailbox and sends an email on behalf of the user.

HR staff manage the email with their toolset.



Home - Microsoft Copilot Studio

[https://copilotstudio.microsoft.com/environments/68c19ba1-f27b-efe1-9c3e-fe152c846ecc/home](#)

Copilot Studio

Environment Pizza Time

Ben Teoh BT

Home

Create

Agents

Flows

Tools

Describe your agent to create it

Helpdesk

Expense tracking

HR and benefits

Use everyday words to describe what your agent should do

Features labeled as 'preview' are subject to supplemental terms. [See terms.](#)

Recent

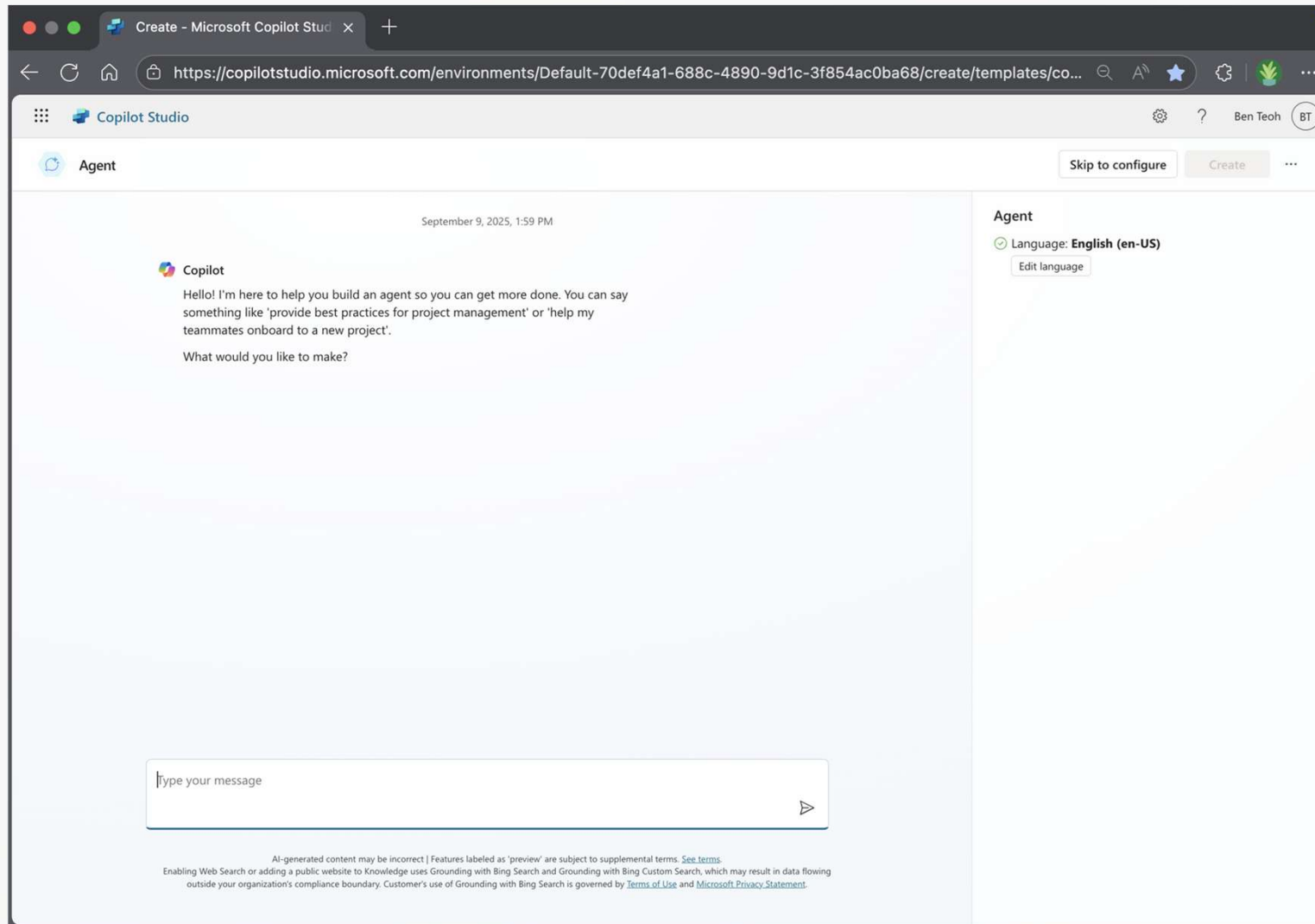
Name	Type	Last modified	Last published	Owner	Protection status	Engaged sessions
Copilot for Microsoft 365	Microsoft		Never		--	--
Safe Travels	Agent	# Microsoft Copilot S...	11 days ago	Ben Teoh	Protected	0
Microsoft Engineer	Agent	Ben Teoh 4 hours ago	Never	Ben Teoh	--	--
Employee Engagement Assistant	Agent	# Microsoft Copilot S...	Never	Ben Teoh	--	--
HR Self-Service agent (Ben)	Agent	Ben Teoh 1 month ago	1 month ago	Ben Teoh	Protected	0

Explore agents

Website Q&A
Agent template
Instantly answer user questions using the content of your website or other knowledge.

Voice
Agent template
An agent with voice capabilities.

Safe Travels
Agent template
Provides answers to common travel questions and related health and safety guidelines.



Configure - HR Self-Service agent x

https://copilotstudio.microsoft.com/environments/Default-70def4a1-688c-4890-9d1c-3f854ac0ba68/copilots/2b00bc76-...

Copilot Studio

Environment: Generation-e Productivi... Ben Teoh BT

Tools > HR Self-Service agent (Declarative)

Publish Test

Details

Agent name * 35/42

HR Self-Service agent (Declarative)

Change icon

Icon should be in PNG format. Images larger than 30 KB will be resized.

Description * 106/1000

This is an HR Self-service agent. It will answer questions asked by employees based on internal documents.

Instructions * 788/8000

GOAL
Help the user find answers to HR related questions from the official knowledge base. If needed, they can also send an email to HR if they need to escalate.

GUIDELINES

Knowledge

+ Add knowledge

Add data, files, and other resources to inform and improve AI-generated responses.

HR Policies Ready

See all

Tools

+ Add tool

Add tools to empower the AI to complete specific tasks for improved engagement.

Send an email- connector

Test your agent

HR Self-Service agent (Declarative)

Welcome to HR Self-Service agent (Declarative). Ask me something or select a prompt to get started.

Ask a question

Can you tell me about [POLICY]

Just now

Ask a question or describe what you need

0/2000

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

Configure - HR Self-Service BU x

https://copilotstudio.microsoft.com/environments/Default-70def4a1-688c-4890-9d1c-3f854ac0ba68/copilots/2b00bc76-...

Copilot Studio

Environment: Generation-e Productivi... Ben Teoh BT

Tools > HR Self-Service Buddy > Tools

Enabled ☒ Save

Details

What it is, how it operates, and how the orchestrator identifies it. [Learn more](#)

Name *

Send an email 13/64

Description *

This operation sends an email message to HR 43/1024

Tool

Office 365 Outlook Send an email (V2)

Connection

ben.teoh@generation-e.com.au

Available to

HR Self-Service Buddy

> Additional details

Inputs

What the tool accepts in order to run. Inputs will be filled in the order shown.

Input name	Fill using	Value
To *	Custom value	pizzatime@generation-e.com...
Subject *		

Display name

How the input will be presented to the user.

Test your agent

HR Self-Service Buddy

Welcome to HR Self-Service Buddy. Ask me something or select a prompt to get started.

Ask a question

Can you tell me about [POLICY]

Just now

Ask a question or describe what you need

0/2000

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

Configure - HR Self-Service BU x

https://copilotstudio.microsoft.com/environments/Default-70def4a1-688c-4890-9d1c-3f854ac0ba68/copilots/2b00bc76-...

Copilot Studio

Environment: Generation-e Productivi... Ben Teoh BT

Tools > HR Self-Service Buddy > Tools

Enabled ☒ Save

Details

Inputs

Completion

Inputs

What the tool accepts in order to run. Inputs will be filled in the order shown.

Input name	Fill using	Value
To *	Custom value	pizzatime@generation-e.com...
Subject *		
Display name		
Description		
Identify as		
Body *	Dynamically fill with AI	

Completion

Specify what your agent does when it finishes using this tool.

Test your agent

Can you tell me about [POLICY]

A minute ago

Can you tell me about long service leave?

It seems that the document I found does not contain specific information about long service leave 1. However, I can help you with other types of leave mentioned in the document, such as annual leave, personal/carer's leave, compassionate leave, parental leave, and community service leave 1.

Would you like me to send an email to HR to get more details about long service leave for you?

1 reference

1 Pizza Time Leave Policy

Just now

Yes please email HR for me

I've sent an email to HR requesting details about long service leave for you. They should get back to you soon with the necessary information.

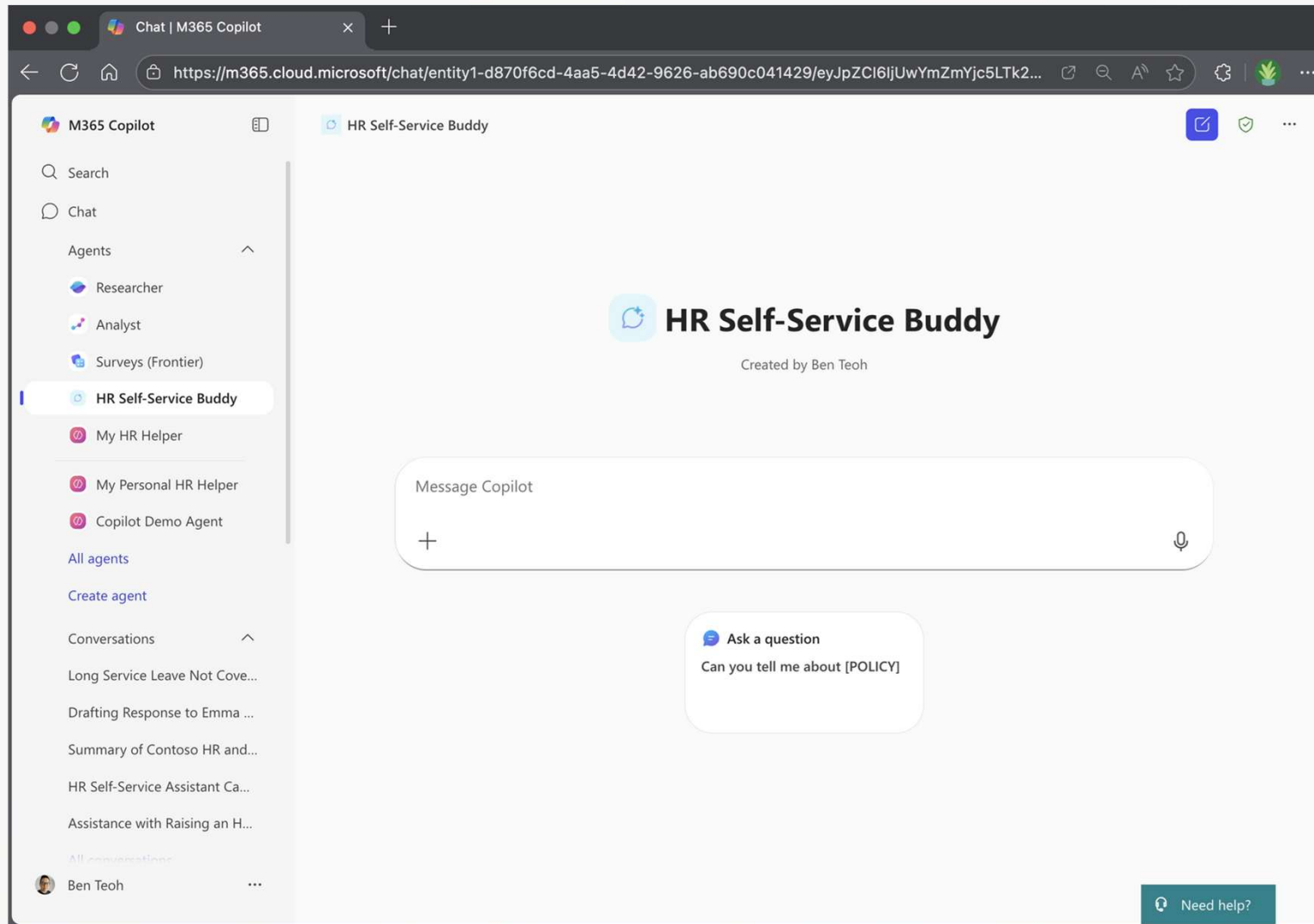
Is there anything else I can assist you with in the meantime?

Just now

Ask a question or describe what you need

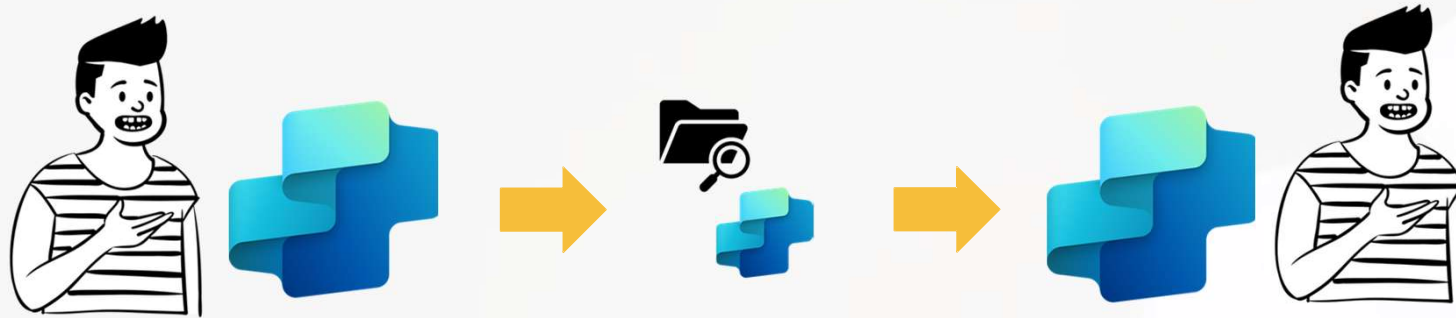
0/2000

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





SOAR



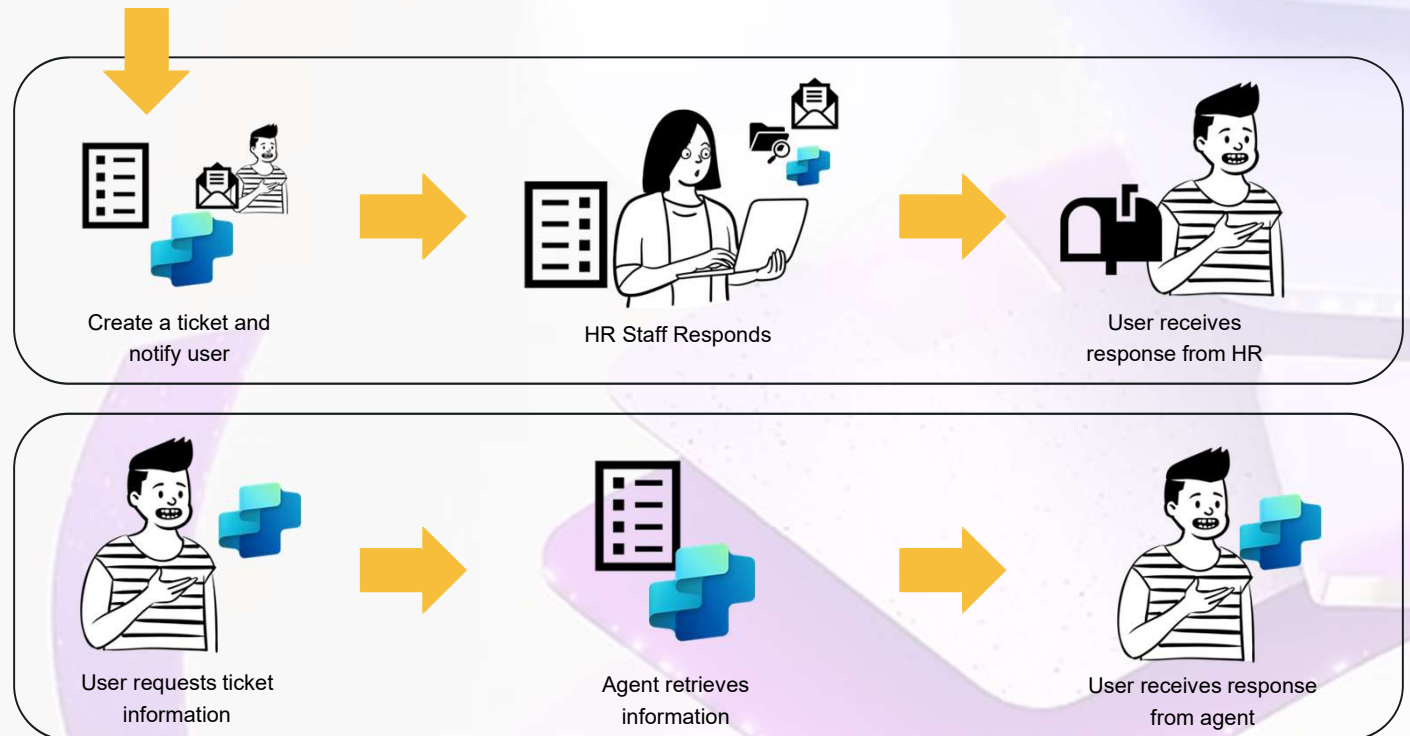
A user has a question about their leave entitlements.

They chat with the HR Agent

If the agent can't find an answer, it escalates to the HR ticketing system and notifies user.

HR staff manage the tickets with their toolset.

Users can also request to see their open tickets



Pizza Time - HR Employee Questions

https://generatione.sharepoint.com/sites/PizzaTime/Lists/HR%20Employee%20Questions/AllItems.aspx?viewid=29e1fdaa...

Microsoft Lists

+ Add new item | Edit in grid view | Undo | Share | Copy link | Export | Forms | Automate | Integrate | Details

Pizza Time
HR Employee Questions

All Items | Ticket Status | Add view

Unassigned items (0)	Closed (7)	Open (6)	Pending (1)	Backlog (2)
<p>Drag and drop items here or select the add symbol above</p>	<p>Title Question about Spider-Man</p> <p>Employee Name Ben Teoh</p> <p>Issue Description Who is Spider-Man?</p> <p>Assigned To HR Support Team</p>	<p>Title HR Support Request</p> <p>Employee Name Tanya Turtle</p> <p>Issue Description User has requested to raise a ticket for HR support.</p> <p>Assigned To HR Support Team</p>	<p>Title Parental Leave Inquiry</p> <p>Employee Name Millie Mouse</p> <p>Issue Description The user, Ben Teoh, is inquiring about the company's parental leave policies ...</p>	<p>Title Parental Leave Policy</p> <p>Employee Name Samuel Sheep</p> <p>Issue Description ben.teoh@generation-</p>
	<p>Title Inquiry about Superman</p> <p>Employee Name Ben Teoh</p> <p>Issue Description The user wants to know who Superman is.</p>	<p>Title Parental Leave Information Request</p> <p>Employee Name Ben Teoh</p> <p>Issue Description The user wants to learn about parental leave policies and requires detailed...</p>		<p>Title Accessing Long Service</p> <p>Employee Name Harry Hippo</p> <p>Issue Description The user needs assistance accessing their long service...</p>
	<p>Title Parental Leave Information Request</p> <p>Employee Name Ben Teoh</p> <p>Issue Description The user wants to learn about parental leave policies and requires detailed...</p>	<p>Title Long Service Leave Entitlements</p> <p>Employee Name Ben Teoh</p> <p>Issue Description The user is requesting information about their Long Service Leave...</p>		



Overview - HR Self Service Agent x

https://copilotstudio.microsoft.com/environments/Default-70def4a1-688c-4890-9d1c-3f854ac0ba68/bots/b10b3df2-1f73...

Copilot Studio

Environment: Generation-e Productivi... Ben Teoh BT

HR Self Service Agent

Overview Knowledge Tools Agents Topics Activity Analytics Channels

Published 9/9/2025 Publish Settings Test

Knowledge + Add knowledge

Add data, files, and other resources to inform and improve AI-generated responses.

Current Policies Ready

[See all](#)

Web Search

Enable your agent to search all public websites. [Learn more](#) Disabled

Tools + Add tool

Add tools to empower the AI to complete specific tasks for improved engagement. [Learn more](#).

Get items

Create HR Ticket

Triggers + Add trigger

Set up your agent to activate when certain events happen. [Learn more](#).

Add trigger

Agents + Add agent

Connect your agent with another agent, dedicated to handling steps of your workflow. [Learn more](#)

Add agent

Test your agent

Hello, I'm HR Self Service Agent, 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.

Just now

Ask a question or describe what you need

0/2000

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

Tools - HR Self Service Agent | x +

https://copilotstudio.microsoft.com/environments/Default-70def4a1-688c-4890-9d1c-3f854ac0ba68/bots/b10b3df2-1f73...

Copilot Studio Environment: Generation-e Productivi... Ben Teoh BT

HR Self Service Agent Overview Knowledge Tools Agents Topics Activity Analytics Channels Published 9/9/2025 Publish Settings Test

Get items Enabled Save

Details

What it is, how it operates, and how the orchestrator identifies it. [Learn more](#)

Name * Get items 9/64

Description * ① Gets items from a SharePoint list. 34/1024

Tool SharePoint Get items Connection ben.teoh@generation-e.com.au

Available to HR Self Service Agent

> Additional details

Inputs

What the tool accepts in order to run. Inputs will be filled in the order shown. + Add input

Input name	Fill using ①	Value
Site Address * dataset	Custom value	Pizza Time - https://gener... ⋮
List Name * table	Custom value	HR Employee Questions ⋮

Test your agent

Hello, I'm HR Self Service Agent, 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.

12 minutes ago

Ask a question or describe what you need

0/2000

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

Tools - HR Self Service Agent | x +

https://copilotstudio.microsoft.com/environments/Default-70def4a1-688c-4890-9d1c-3f854ac0ba68/bots/b10b3df2...

Copilot Studio

Environment: Generation-e Productivi... Ben Teoh BT

HR Self Service Agent Overview Knowledge Tools Agents Topics Activity Analytics Channels Published 9/9/2025 Publish Settings Test

Activity map Track between topics

Get items Connector Action 0.91s. Complete

Get items Complete Connector Action

Description: Gets items from a SharePoint list.

Inputs:

- Site Address (String): https://generatione.sharepoint.com/sites/PizzaTime
- List Name (String): 50de2f69-d977-4bdf-a817-7b3f1f9fa5
- Filter Query (String): field_4 eq 'Ben Teoh'

Outputs:

value (Table)

```

1  [
2  {
3    "ContentType": {
4      "@odata.type": "#Microsoft.Azure.Connectors.SharePoint.SPListExpandedContentType",
5      "Id": "0x01006EB5B1305221C9438CD6208B43716FA6",
6      "Name": "Item"
7    },
8    "{ContentType}#Id":

```

Edit tool Documentation

Test your agent

Just now

Can you get my open tickets

Here are your open tickets:

- 1. Ticket ID: 5**
 - Ticket Title:** Inquiry about Leave Options
 - Issue Description:** The user wants to know the options available for leave, including parental leave and leave without pay, as their wife is pregnant. Detailed information is required to understand the policies and procedures.
 - Action Required:** HR Self-Service Agent
 - Status:** Open
 - Priority:** 3
- 2. Ticket ID: 8**
 - Ticket Title:** Long Service Leave Entitlements
 - Issue Description:** The user is requesting information about their Long Service Leave entitlements.
 - Action Required:** HR Agent
 - Status:** Open
 - Priority:** 3
- 3. Ticket ID: 14**
 - Ticket Title:** Parental Leave Information Request
 - Issue Description:** The user wants to learn about parental leave policies and requires detailed information from an HR representative.
 - Action Required:** HR Self-Service Agent

Ask a question or describe what you need

0/2000

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

Designer - Microsoft Copilot Studio

https://copilotstudio.microsoft.com/environments/Default-70def4a1-688c-4890-9d1c-3f854ac0ba68/flows/d4ad39b...

Copilot Studio

Environment: Generation-e Productivi...

Ben Teoh

Home

Create

Agents

Flows

Tools

...

Create HR Ticket

Overview Designer Activity Analytics

When an agent calls the flow

Parameters Settings Code view About

TicketTitle Please enter your input

TicketDescrip Please enter your input

TicketUser Please enter your input

TicketUserEnr Please enter your input

+ Add an input

Copilot

Version history

Flow checker

Test

Save draft

Publish

When an agent calls the flow

Create item

Send an email notification (V3)

Respond to the agent

Designer - Microsoft Copilot Studio

https://copilotstudio.microsoft.com/environments/Default-70def4a1-688c-4890-9d1c-3f854ac0ba68/flows/d4ad39b...

Copilot Studio

Environment: Generation-e Productivi...

Ben Teoh BT

Create HR Ticket Overview Designer Activity Analytics

Home Create Agents Flows Tools

Create item

Parameters Settings Code view Testing About

Site Address *
https://generatione.sharepoint.com/sites/PizzaTime

List Name *
HR Employee Questions

Advanced parameters
Showing 5 of 12 Show all Clear all

Title
TicketTitle

Employee Name
TicketUser

Employee Email
TicketUserEmail

Issue Description
TicketDescription

Ticket Source
HR Self-Service Agent

Connected to SharePoint. Change connection reference

Copilot Version history Flow checker Test Save draft Publish

When an agent calls the flow

Create item

Send an email notification (V3)

Respond to the agent

Designer - Microsoft Copilot Studio

https://copilotstudio.microsoft.com/environments/Default-70def4a1-688c-4890-9d1c-3f854ac0ba68/flows/d4ad39b...

Copilot Studio

Environment: Generation-e Productivi...

Ben Teoh BT

Create HR Ticket

Overview Designer Activity Analytics

Send an email notification (V3)

Parameters Settings Code view Testing About

To *
Employee Email

Subject *
Your ticket has been submitted to HR

Body *
Hi Employee Name ,
Your ticket has been submitted to the HR team who will get back to you within 24 hours.
Here's the details provided to HR:
Ticket ID: ID
Ticket Title: Title
Ticket Information:
Issue Description

Advanced parameters
Showing 0 of 7

Copilot Version history Flow checker Test Save draft Publish

When an agent calls the flow

Create item

Send an email notification (V3)

Respond to the agent

Designer - Microsoft Copilot Studio

https://copilotstudio.microsoft.com/environments/Default-70def4a1-688c-4890-9d1c-3f854ac0ba68/flows/d4ad39b...

Copilot Studio

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Create HR Ticket Overview Designer Activity Analytics

Respond to the agent

Parameters Settings Code view About

CreatedTicke body/ID ID of the ticket created

CreatedTicke body/Title Title of the created ticket

CreatedTicke body/field_8 Description that was used for the ticket

+ Add an output

When an agent calls the flow

Create item

Send an email notification (V3)

Respond to the agent

Tools - HR Self Service Agent | x +

https://copilotstudio.microsoft.com/environments/Default-70def4a1-688c-4890-9d1c-3f854ac0ba68/bots/b10b3df2...

Copilot Studio

Environment: Generation-e Productivi... Ben Teoh BT

HR Self Service Agent Overview Knowledge Tools Agents Topics Activity Analytics Channels

Published 9/9/2025 Publish Settings Test

← Create HR Ticket ▾ Enabled ☒ Save

Agents

Flows

Tools

...

Details

Inputs

Completion

Details

What it is, how it operates, and how the orchestrator identifies it. [Learn more](#)

Name *

Create HR Ticket 16/64

Description * ⓘ

Creates an HR ticket and sends confirmation to user via email 61/1024

Agent flow

Create HR Ticket

Available to

HR Self Service Agent

> Additional details

Inputs

What the tool accepts in order to run. Inputs will be filled in the order shown. + Add input

Input name	Fill using ⓘ	Value
TicketTitle * text	Dynamically fill with AI ▾	Customize
TicketDescription * text_1	Dynamically fill with AI ▾	Customize
TicketUser * text_2	Custom value ▾	Customize

Test your agent

Hello, I'm HR Self Service Agent, 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.

Just now

Ask a question or describe what you need

0/2000

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

Tools - HR Self Service Agent | x +

https://copilotstudio.microsoft.com/environments/Default-70def4a1-688c-4890-9d1c-3f854ac0ba68/bots/b10b3df2...

Copilot Studio

Environment: Generation-e Productivi... Ben Teoh BT

HR Self Service Agent Overview Knowledge Tools Agents Topics Activity Analytics Channels

Published 9/9/2025 Publish Settings Test

← Create HR Ticket ▾ Enabled ☒ Save

Agents

Details

Inputs

Completion

Available to

HR Self Service Agent

> Additional details

Inputs

What the tool accepts in order to run. Inputs will be filled in the order shown.

Input name	Fill using	Value
TicketTitle * text	Dynamically fill with AI	Customize
TicketDescription * text_1	Dynamically fill with AI	Customize
TicketUser * text_2	Custom value	(x) User.DisplayName string
TicketUserEmail * text_3	Custom value	(x) User.Email string

Completion

Specify what your agent does when it finishes using this tool.

After running:

Write the response with generative AI

> Advanced

Test your agent

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0/2000

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Topics - HR Self Service Agent

https://copilotstudio.microsoft.com/environments/Default-70def4a1-688c-4890-9d1c-3f854ac0ba68/bots/b10b3df2...

Copilot Studio

Environment: Generation-e Productivi... Ben Teoh BT

HR Self Service Agent Overview Knowledge Tools Agents Topics Activity Analytics Channels

Published 9/9/2025 Publish Settings Test

+ Add a topic

Search custom topic

All Custom (5) System (8) Last refreshed now

Name	Type	Trigger	Last modified	Editing	Errors	Enabled
Escalate	Topic	By agent	Ben Teoh 1 month ago			On
Goodbye	Topic	By agent	Ben Teoh 1 month ago			On
Greeting	Topic	By agent	Ben Teoh 1 month ago			On
Start Over	Topic	By agent	Ben Teoh 1 month ago			On
Thank you	Topic	By agent	Ben Teoh 1 month ago			On

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0/2000

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Topics - HR Self Service Agent

https://copilotstudio.microsoft.com/environments/Default-70def4a1-688c-4890-9d1c-3f854ac0ba68/bots/b10b3df2...

Copilot Studio

Environment: Generation-e Productivi... Ben Teoh BT

HR Self Service Agent Overview Knowledge Tools Agents Topics Activity Analytics Channels

Escalate

Test your agent

Trigger

The agent chooses

Describe what the topic does

This topic can be used when a question can't be answered.

Message

Sorry, I can't help with this. Would yo...

Hello, I'm HR Self Service Agent, 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.

8 minutes ago

Ask a question or describe what you need

0/2000

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

Topics - HR Self Service Agent

https://copilotstudio.microsoft.com/environments/Default-70def4a1-688c-4890-9d1c-3f854ac0ba68/bots/b10b3df2...

Copilot Studio

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HR Self Service Agent Overview Knowledge Tools Agents Topics Activity Analytics Channels

Escalate

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Test your agent

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7 minutes ago

Ask a question or describe what you need

0/2000

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

Topics - HR Self Service Agent

https://copilotstudio.microsoft.com/environments/Default-70def4a1-688c-4890-9d1c-3f854ac0ba68/bots/b10b3df2...

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HR Self Service Agent Overview Knowledge Tools Agents Topics Activity Analytics Channels

Published 9/9/2025 Publish Settings Test

Conversational boosting

Agents Flows Tools

Trigger

On Unknown Intent

Create generative answers

Input: Activity.Text string

Data sources

Condition

Answer string is not Blank

New condition

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

Current Policies

Add knowledge

Web search

Enable your agent to search all public websites. Learn more

Web search

Classic data

Allow the AI to use its own general knowledge (preview)

Content moderation level

Customize

Test your agent

Hello, I'm HR Self Service Agent, 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.

5 minutes ago

Ask a question or describe what you need

0/2000

Make sure AI-generated content is accurate and appropriate before using. See terms

Topics - HR Self Service Agent

https://copilotstudio.microsoft.com/environments/Default-70def4a1-688c-4890-9d1c-3f854ac0ba68/bots/b10b3df2...

Copilot Studio

Environment: Generation-e Productivi... Ben Teoh BT

HR Self Service Agent Overview Knowledge Tools Agents Topics Activity Analytics Channels

Published 9/9/2025 Publish Settings Test

← Fallback

Copilot Comments Variables Topic checker Details More Save

Agents Flows Tools

Trigger

On Unknown Intent Edit

Condition

{x} FallbackCount number >

is less than

1

+ New condition

All other conditions

Topic

Escalate View topic

Message Text

I'm sorry, I'm not sure how to help with that....

Test your agent

Hello, I'm HR Self Service Agent, 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.

4 minutes ago

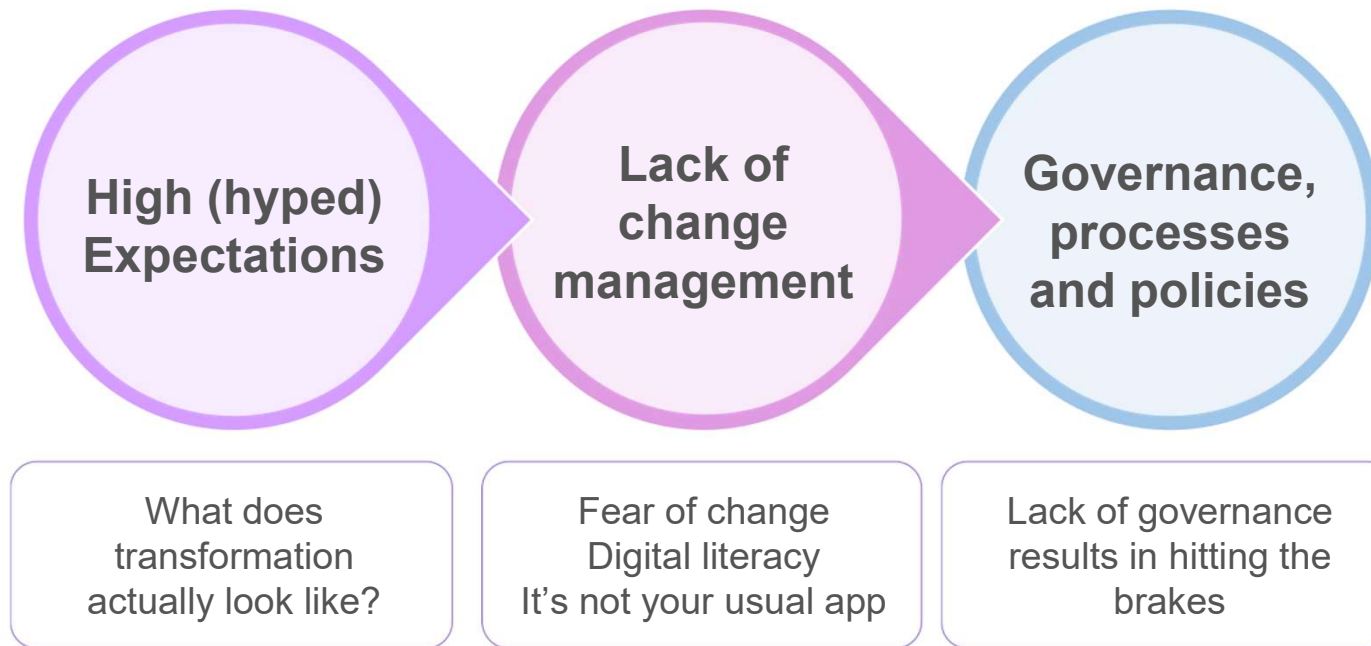
Ask a question or describe what you need

0/2000

Make sure AI-generated content is accurate and appropriate before using. See terms

Copilot agent adoption blockers

What's holding us back?



Q&A



Contact Us

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Learn essential security architecture, governance practices, and compliance frameworks to safely deploy Copilot across your organisation while meeting privacy and regulatory requirements.

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Email: sales@generation-e.com.au

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The deck and recording will be available after this session on our website

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How to get started

- **Read the announcement blog:** [Introducing new agents in Microsoft 365](#)
- **Learn how to deploy these agents:**
 - [Set up Facilitator in Microsoft Teams for collaborate AI-generated notes](#)
 - [Turn off Project Manager in Planner for your organization](#)
- **Help end-users get started with support resources**
 - [Agents in SharePoint](#)
 - **Facilitator in Teams** [meetings](#) **and** [chats](#)
 - [Project Manager in Planner](#)
- **Check out the [adoption page](#)**

Thank you

