HANDS-ON WORKSHEET

Build Your Own Copilot Agent

Identify your pain points. Design your agent. Build it live.

Name: ________________________________ **Department:** ______________________

My agent name: ____

📋 **PURPOSE**

This worksheet guides you through THREE things:
(1) Identify a real pain point in your work that Copilot Agent can solve,
(2) Design your agent before building it,
(3) Follow the trainer step-by-step using the Configure tab in Agent Builder.

PART 1

Identify Your Pain Point — What Will Your Agent Solve?

The best Copilot Agents solve one specific, recurring problem. Before building anything, identify exactly what frustrates you or slows you down every week.

1.1 My biggest time wasters each week

Think about tasks you do repeatedly that feel manual, slow, or frustrating. Tick all that apply:

- ☐ Chasing team members for updates
- ☐ Searching for information in long documents
- ☐ Summarising reports for my manager
- ☐ Tracking project status across multiple files
- ☐ Drafting briefs or reports from scratch
- ☐ Writing the same type of email repeatedly
- ☐ Preparing meeting recaps and action lists
- ☐ Answering the same questions from my team
- ☐ Consolidating updates from different people
- ☐ Finding relevant HSE / compliance information

✏️ **Other pain points specific to my role (add your own):**

1.2 My chosen pain point — the one I will solve today

Pick the ONE pain point that is most repetitive, most time-consuming, and where getting information faster would make the biggest difference.

✏️ **My pain point in one sentence (e.g. 'I spend 30 minutes every Monday chasing my team for weekly updates'):**

How often does this happen?	How much time does it take?
☐ Daily ☐ Several times a week ☐ Weekly ☐ Monthly	☐ Less than 15 minutes ☐ 15–30 minutes ☐ 30–60 minutes ☐ More than 1 hour

✏️ **What information or files does this task involve? (e.g. emails from team, SharePoint reports, Teams chats):**

✏️ **Who else in my team has the same problem?**

PART 2

Design Your Agent — Before You Touch the Screen

The best agents are designed on paper first. Answer these questions now — you will copy your answers directly into the Agent Builder Configure tab in Part 3.

📺 TRAINER	The Configure tab in Agent Builder has these fields: Name, Description, Instructions, Knowledge, Capabilities, Suggested Prompts. Design them here first.

2.1 Name & Description

Give your agent a name that tells anyone who opens it exactly what it does. Keep the description to one clear sentence.

Agent Name (Configure tab → Details → Name)

e.g. My Team Update Agent

ℹ️ Keep it short, specific, and professional. It appears in your Copilot left panel.

Description (Configure tab → Details → Description)

e.g. Summarises weekly updates from my team and helps me send communications.

ℹ️ One sentence. What does the agent do and who is it for?

2.2 Instructions — The Brain of Your Agent

Instructions tell the agent HOW to behave. This is the most important field. Use the template below to write yours:

Instruction element	Write your version here
Who I am	*You are a [job title] assistant for [your name] at PETRONAS. Your role is to...*
When getting updates	*When I ask for an update, read [sources] and summarise by [person/topic/app]. Highlight...*
Format rules	*Always present as: [structure you want]. Keep responses under [length]. Use [tone].*
When sending to team	*When I ask you to send a message, help me draft [type of message]. Always ask me to confirm before sending.*
What to avoid	*Never make up information. If you don't have data, say so clearly. Do not include updates from people outside my team.*

2.3 Knowledge Sources — What Your Agent Will Read

Tick the sources your agent needs. These match the icons you will see in the Knowledge section of Agent Builder:

Source	What to note down (URL, folder name, channel name)		
□	SharePoint site or folder	My pick: □ Yes □ No	*F6, F7, F8 HSE docs OR your team's project folder URL* My value: ____________________
□	Microsoft Teams channel	My pick: □ Yes □ No	*Which Teams channel? (e.g. Project Alpha — General)* My value: ____________________
□	Outlook emails	My pick: □ Yes □ No	*Emails from your team are included automatically* My value: ____________________
□	Public website	My pick: □ Yes □ No	*URL of any public site (e.g. petronas.com, industry news)* My value: ____________________

TOGGLE	In Agent Builder, turn ON 'Only use specified sources' if you want the agent to ONLY read the sources you listed above. Leave it OFF if you want it to also search your general M365 content.

2.4 Capabilities — What Else Can My Agent Do?

Agent Builder has two capability toggles. Decide now which ones your agent needs:

Tick	Capability	When to turn ON	My decision
□	**Create documents, charts, and code**	When you want the agent to produce Word reports, Excel charts, or PowerPoint files as output	I need this: □ Yes □ No
□	**Create images**	When you want the agent to generate visual aids or diagrams	I need this: □ Yes □ No

2.5 Suggested Prompts — Your Agent's Quick-Launch Buttons

Suggested Prompts appear as clickable buttons when you open your agent. Each has a Title (short label) and a Message (the full prompt that runs). Write 3–4 here:

Title (short label on the button)	Message (the full prompt that runs when clicked)

PART 3

Build It Live — Follow the Trainer Step by Step

Open Agent Builder now: m365.cloud.microsoft → left panel → Agents → New agent → click 'Configure' tab. Copy your answers from Part 2 into each field as the trainer walks through it.

SCREEN

Keep this worksheet open alongside Agent Builder. You will copy from your Part 2 answers directly into the fields shown on screen.

STEP 1 ▸ Name field

Type your agent name from Part 2.1 into the Name field.

Trainer tip: The name appears in your Copilot left panel. Keep it under 42 characters.

STEP 2 ▸ Description field

Type your one-sentence description from Part 2.1.

Trainer tip: This is what others see when they find your agent in the store.

STEP 3 ▸ Instructions field

This is the most important step. Copy your completed instruction template from Part 2.2 into this field. Edit any placeholder text in [ ] brackets.

Trainer tip: Read it aloud after pasting. If it sounds like instructions to a new employee, it's good.

STEP 4 ▸ Knowledge section → Add your sources

Click each source icon (SharePoint, Teams, Outlook, Web) to connect the knowledge sources you ticked in Part 2.3.

Trainer tip: For SharePoint: paste the exact site/folder URL. For Teams: search for the channel by name. For emails: this is added automatically with your Copilot licence.

STEP 5 ▸ Knowledge section → Toggles

Set the two toggles based on your Part 2.3 decision: • 'Only use specified sources' — ON if you want strict filtering, OFF for broader search • 'Reference org chart and profile info' — ON if you want the agent to know who people are in your org

Trainer tip: Most team update agents work best with 'Only use specified sources' turned ON.

STEP 6 ▸ Capabilities section

Toggle ON/OFF based on your Part 2.4 decisions. Most team update agents do NOT need Create images. Turn on 'Create documents, charts, and code' if you want the agent to output Word or Excel files.

Trainer tip: Don't overthink this. You can always come back and change toggles after testing.

STEP 7 ▸ Suggested Prompts

Add each prompt from Part 2.5. Click '+ Add a suggested prompt', fill in Title and Message for each row.

💡 **Trainer tip:** The Message field is the actual prompt that runs. Make it a full C.G.S.E prompt, not just a label.

STEP 8 ▸ Test it → Try it tab

Click the 'Try it' tab on the right. Run one of your suggested prompts. Check the response.

💡 **Trainer tip:** If the agent says it doesn't have information, go back to Knowledge and check your sources are connected with a green tick.

STEP 9 ▸ Publish

When you are satisfied with the test, click 'Publish'. Choose: Just me / Specific people / Organisation.

💡 **Trainer tip:** Start with 'Just me'. You can always re-publish later to share with your team.

My Test Results

✏️ **Test prompt I ran:**

✏️ **What the agent responded with (summarise):**

✏️ **What I need to fix or improve:**

✅ My agent is live if...

- ☐ Name and description are filled in
- ☐ Instructions are clear and complete
- ☐ At least one knowledge source is connected
- ☐ Try it tab returned a relevant response
- ☐ At least one suggested prompt works
- ☐ Published (even to just me)

🚀 After the session, I will:

Share my agent with:

Agent Builder · m365.cloud.microsoft → Left panel → Agents → New agent → Configure tab · Petronas Copilot Training 2026