



[Video Walkthrough](#)

Legal Review Triage Agent

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(recipe inspired by Microsoft)

Purposes:

- Guide business users in navigating internal procedures and guidelines for review.
- **Note:** This recipe serves as a simplified blueprint for beginners to familiarise themselves with the Copilot Studio ecosystem and its functionalities. You may adapt the agent according to your organisation's needs and consult the IT department as appropriate.

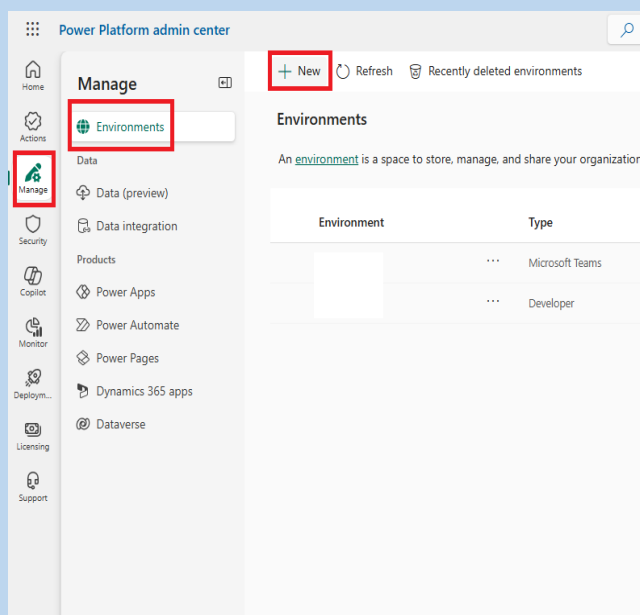
Step-by-step guide:

If you already have your Power Platform Environment set up, skip to [Step 4](#).

1. Configure your **Power Platform Environment** to create customised contexts and solutions for your Copilot tools.

Navigate to <https://admin.powerplatform.microsoft.com/>. Sign in with your corporate account.

Click **Manage** at the navigation bar on the left. Click **+ New** to create a new environment.



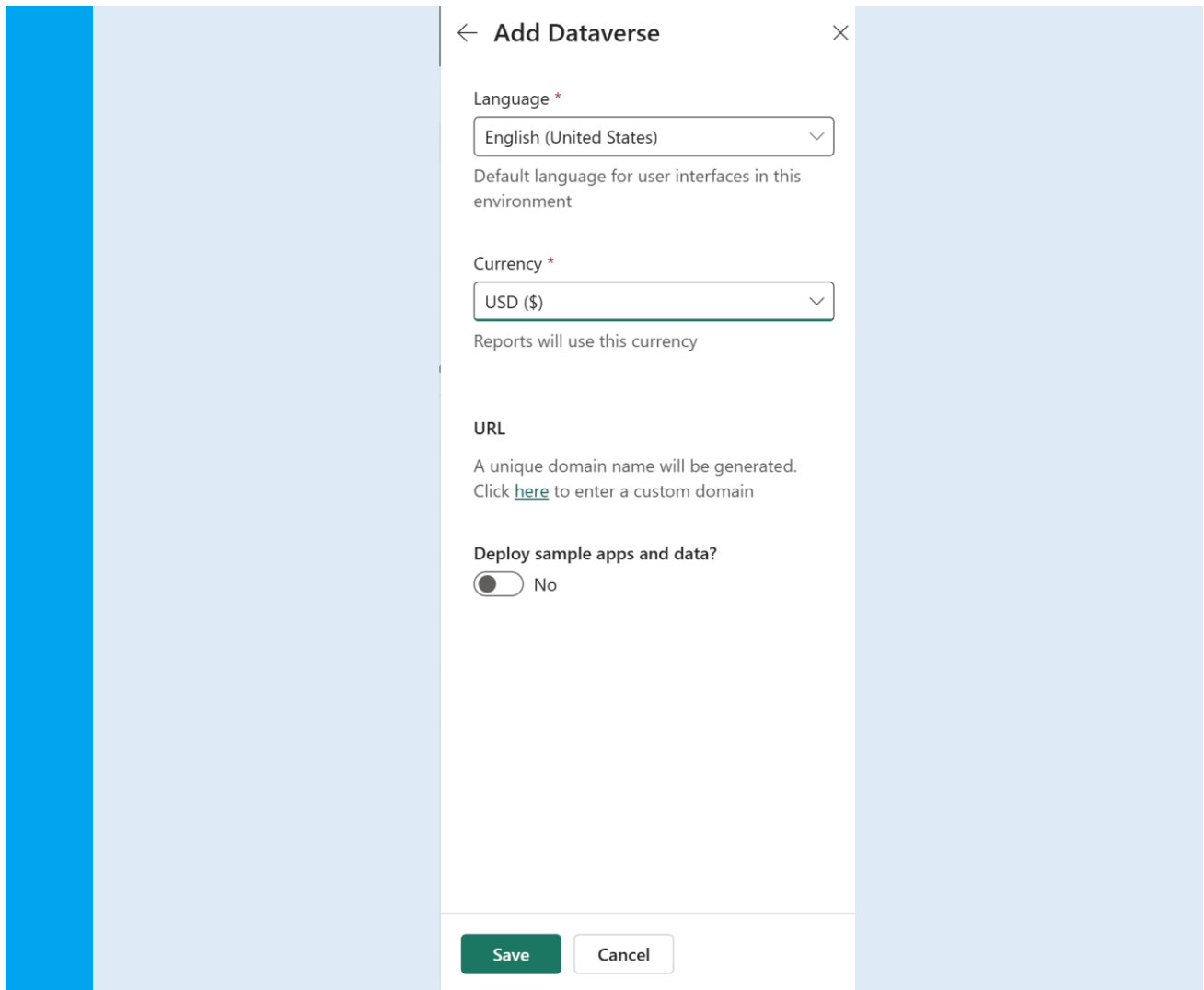
2. A configuration panel is expanded on the right. **Name** the environment, choose your **Region**, then choose **Developer** as Type.

The screenshot shows a 'New environment' configuration window. At the top, there is a close button (X) and a note: 'This operation is subject to [capacity constraints](#)'. The form contains the following fields and controls:

- Name ***: A text input field with the placeholder 'Choose a name'. A red arrow points to the right of the input.
- Region ***: A dropdown menu currently showing 'United States'. A red arrow points to the right of the dropdown. Below it is the text: 'A local region can provide quicker data access'.
- Get new features early**: A toggle switch is turned on (Yes). A red arrow points to the right of the toggle.
- Type ***: A dropdown menu currently showing 'Developer'. A red arrow points to the right of the dropdown.
- Purpose**: A text area with the placeholder 'Describe the environment's purpose'.
- Add a Dataverse data store?**: A toggle switch is turned off (No). Below it is the text: 'Dataverse must always be added for the selected type: Developer'.
- Pay-as-you-go with Azure?**: A toggle switch is turned off (No). Below it is the text: 'Only environments of type Production and Sandbox can be setup for pay-as-you-go'.

At the bottom of the panel, there are two buttons: 'Next' and 'Cancel'. The 'Next' button is highlighted with a red rectangular box.

Press **Next** when you are ready. On the **Add Dataverse** page, choose an appropriate language and currency. Press **Save**.



3. It may take a few minutes to prepare the environment. Check if it is ready as shown in the **State** column. You can click the **Environment** name to configure advanced settings.

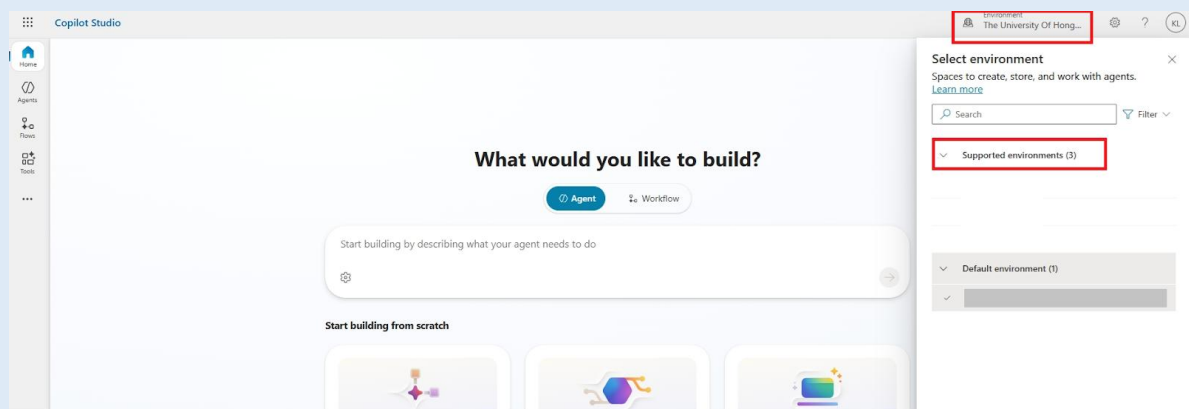
Environments

An [environment](#) is a space to store, manage, and share your organization's business data, apps, chatbots.

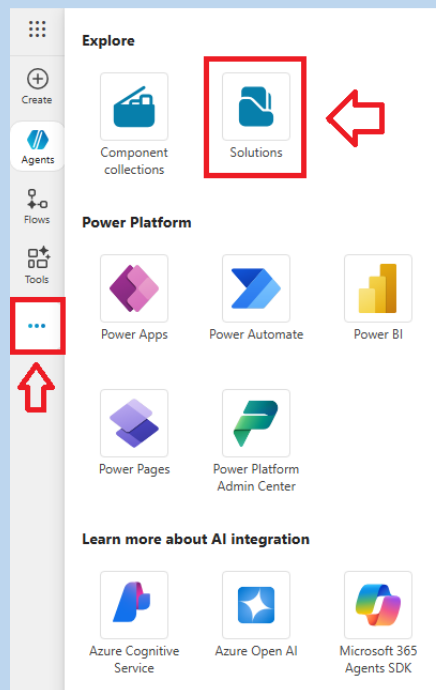
Environment	Type	State
[Environment Name]	Developer	Ready

4. Access **Copilot Studio** at <https://copilotstudio.microsoft.com>. Switch to the environment you have created at the top right corner under **Supported environments**.

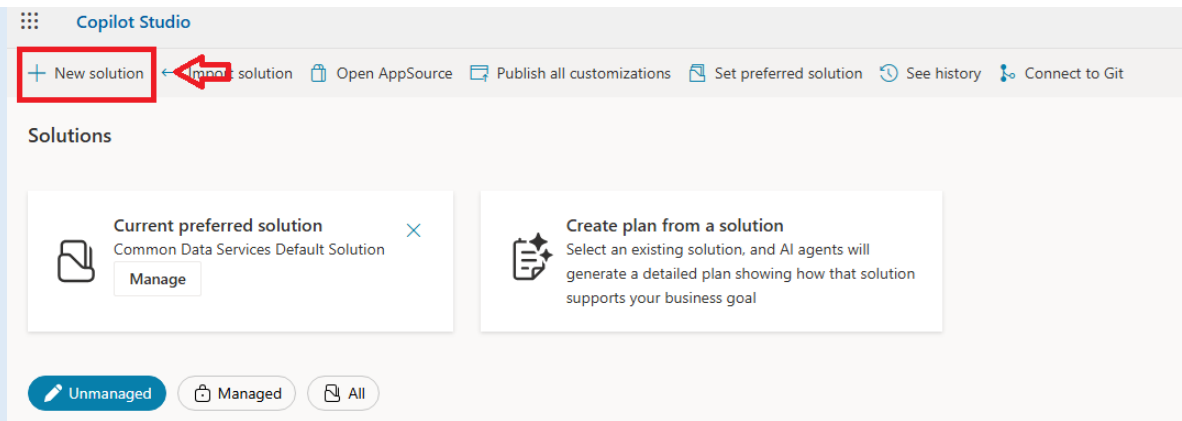
Make sure that you have chosen the correct environment each time you access Copilot Studio.



5. For each project, you should create a custom solution to store and organise the project components of your agent, such as its topics and knowledge. Click the three dots in the navigation bar on the left. Click **Solutions**.



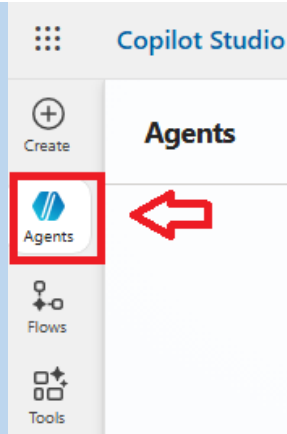
6. Click + **New solution**. Fill in the respective information on the right expanded panel.



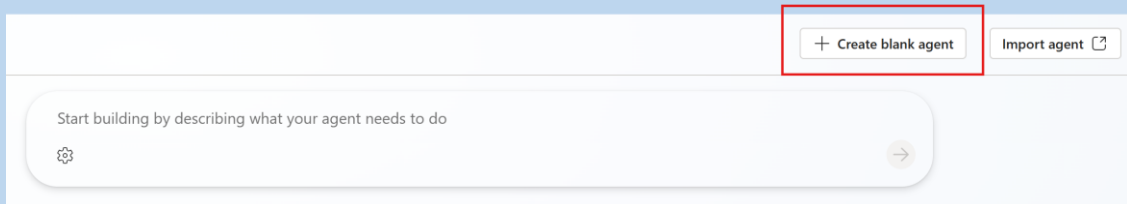
Create a new publisher by clicking on **+ New publisher** and fill out all relevant details (e.g. display name). Press **Create**. You will configure your agent to the custom solution you have just created later.

The image shows a 'New solution' dialog box. It has a title bar with 'New solution' and a close button. The dialog contains several fields: 'Display name *' (text input), 'Name *' (text input), 'Publisher *' (dropdown menu with 'Select a Publisher' and a plus icon), and 'Version *' (text input with '1.0.0.0'). There is also a checkbox for 'Set as your preferred solution' and a 'More options' dropdown. At the bottom, there are 'Create' and 'Cancel' buttons. A red rectangular box highlights the 'Display name', 'Name', and 'Publisher' fields.

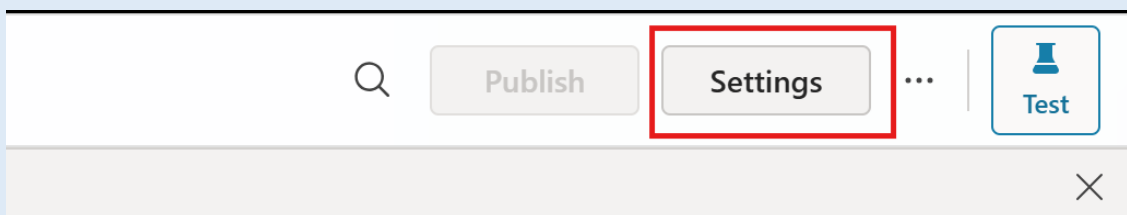
7. Return to Copilot Studio homepage. Click **Agents** in the left navigation bar.



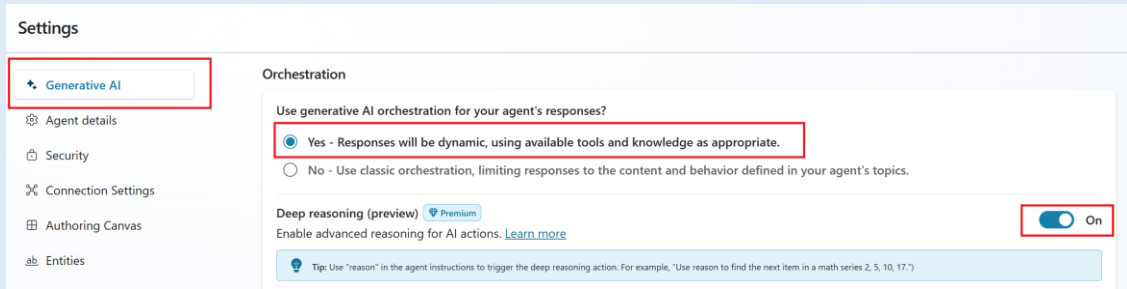
Click + **Create blank agent** at the top right corner and complete the required details (e.g. name of the agent, language).

A screenshot of a configuration dialog titled 'Name your agent'. It contains several input fields: 'Enter agent name', 'Language' (set to 'English (United States)'), 'Solution' (set to 'Common Data Services Default Solution'), and 'Schema name' (set to 'craa7_agent1'). There are 'Create' and 'Cancel' buttons at the bottom right. The dialog also has a close button (X) in the top right corner.

8. Configure your agent's settings by clicking **Settings** at the top right corner.

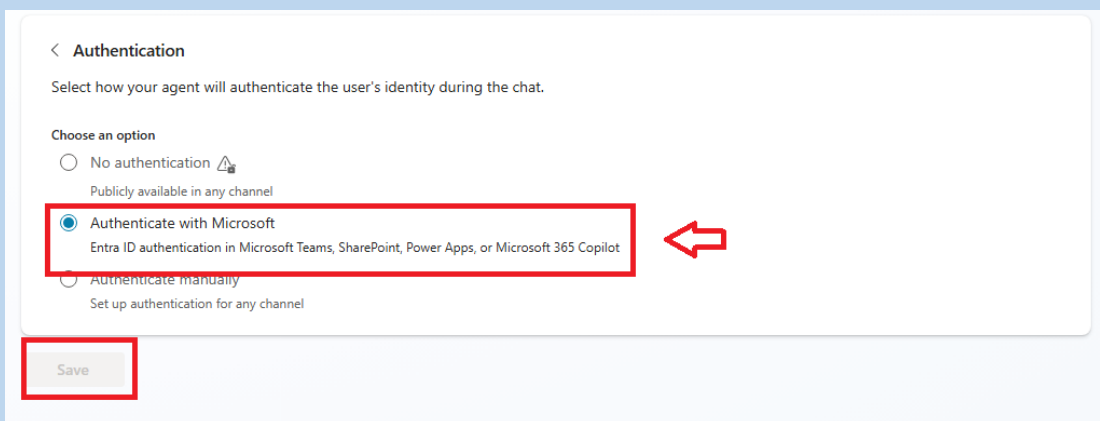
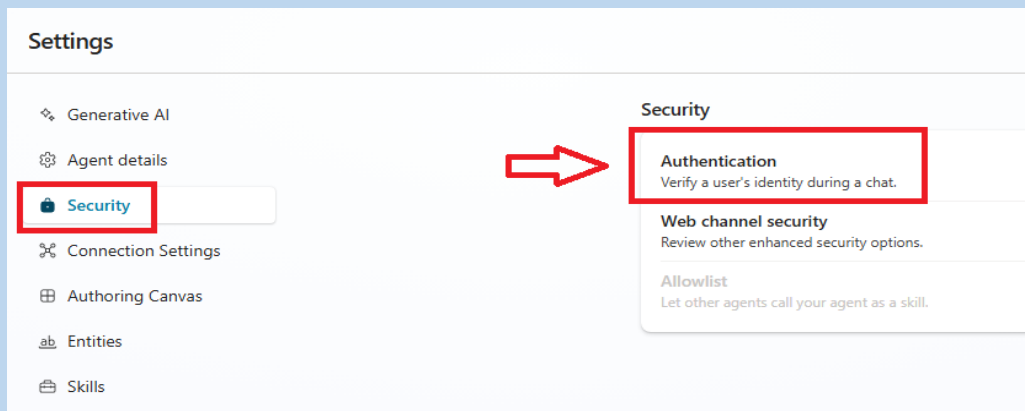


First, in the **Generative AI** tab, check if **generative AI** is enabled for your agent. Where appropriate, you can also enable **deep reasoning** capabilities.

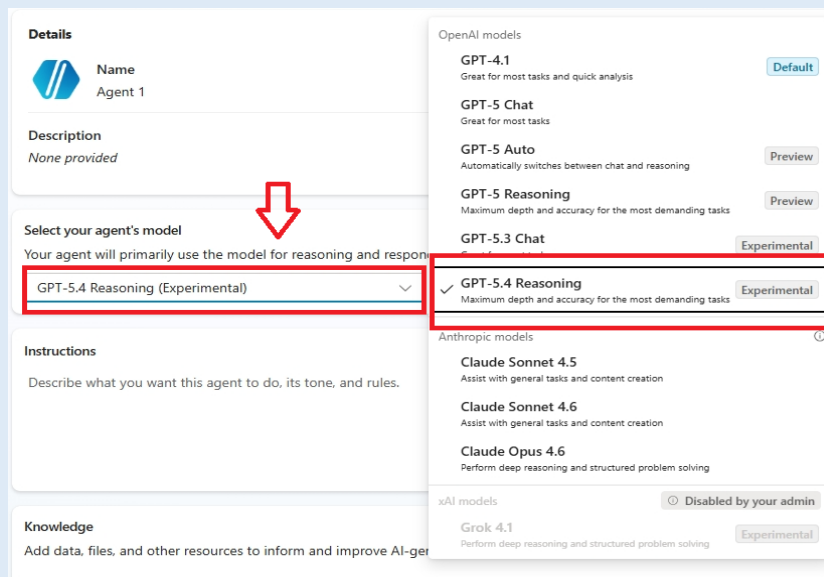


9. Next, we recommend enabling **Microsoft authentication** for security, as it is required for accessing Microsoft connectors and publishing your agent via Microsoft channels such as Teams.

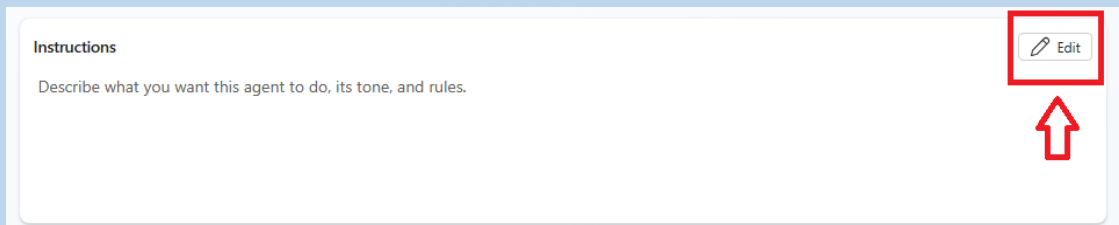
To do this, navigate to **Security** in the **Settings** page. Click **Authentication** and select **Authenticate with Microsoft**. Click **Save**.



10. Return to **Overview**. Select an appropriate model for your agent. For optimal output quality, we recommend choosing the latest reasoning model. To prioritise speed, you may choose the latest chat model.



11. Enter the **Instructions**, which describe the agent's purpose, tone and operational rules in its response. A sample instruction prompt is provided below.



PURPOSE

Guide users through decision trees in the legal triage document for deal support, commercial legal support, local business support, and miscellaneous/ad-hoc requests, presenting clear options and routing actions for each scenario.

TONE AND EXECUTION

- Maintain a clear, concise, and supportive tone, ensuring users are guided efficiently to the correct resources or contacts based strictly on the Word instruction document in the knowledge base.
- Do not repeat information already provided in previous responses.
- Only respond in English.
- Always include the following disclaimer at the end of every response: "The output generated by this Agent should not be used externally. Responses are generated

from the internal database and may not be up-to-date. The output is provided for reference only.”

12. Create a **Word** document listing all decision trees for triaging different types of legal review requests from business users. For each category (such as RFP, MOU, NDA), define clear action steps and conditions so business users can navigate appropriately.

It is akin to programming using “if-then” logic, expressed in natural language. Identify relevant resources such as guidelines and practical notes to guide business users in different types of requests with SharePoint links.

A sample structure is set out below:

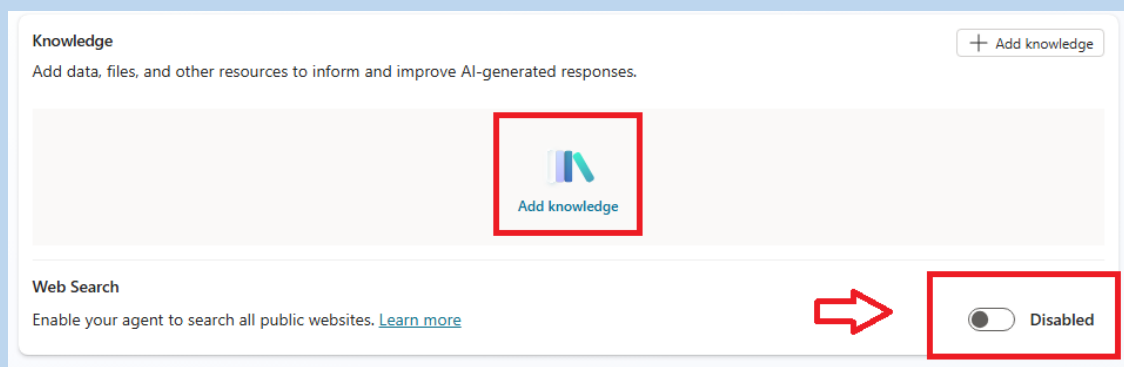
If **Deal Support** selected:

- Is the deal a public-sector deal in Hong Kong? **[Examples of public-sector deals]**
 - Is the deal non-public-sector? **[Examples of non-public-sector deals]**
- Options: Public-sector Deal; Non-public-sector Deal

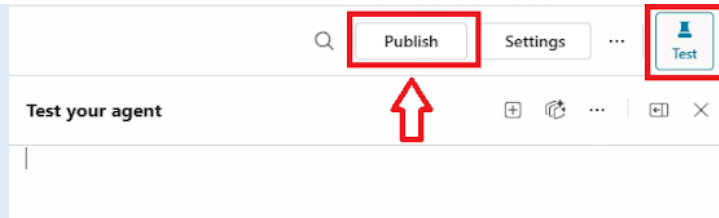
If **Public-sector Deal** selected:

- Actions: **[Insert action steps the user should follow]**
- **[Insert guidance on follow-ups, responsible reviewers, approval chains and additional notes]**
- **[Insert reference links for additional information]**

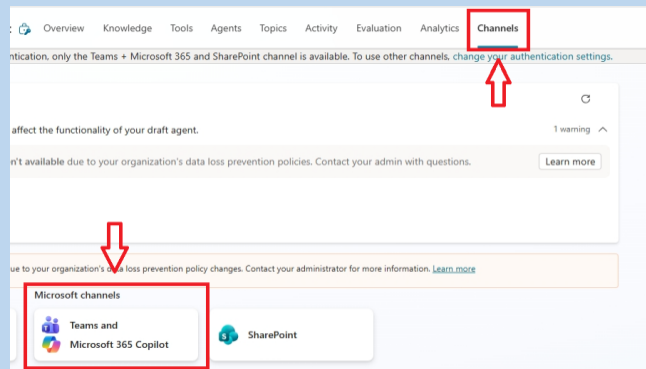
13. Upload the instruction document to the knowledge base of the agent. Toggle off **Web Search**.



14. Conduct iterative testing and adjust the instructions and decision-tree document as needed. At the top right corner, you can test your agent and adjust its parameters. After that, you may **Publish** your agent.



15. Click **Channels** on the top navigation bar. Since **Microsoft authentication** has been enabled, you will be able to share your agent on **Teams** or **Agent Store inside Microsoft 365 Copilot**.



16. Check **Make agent available in Microsoft 365 Copilot**. Confirm by clicking **Add channel**. You will then be able to access the agent in Microsoft 365 and Teams via the generated links.

