



[Video Walkthrough](#)

# Policy and Regulatory Monitoring Agent

👨‍🍳👨‍🍳 Estimated time: 30 minutes

*(recipe inspired by Microsoft)*

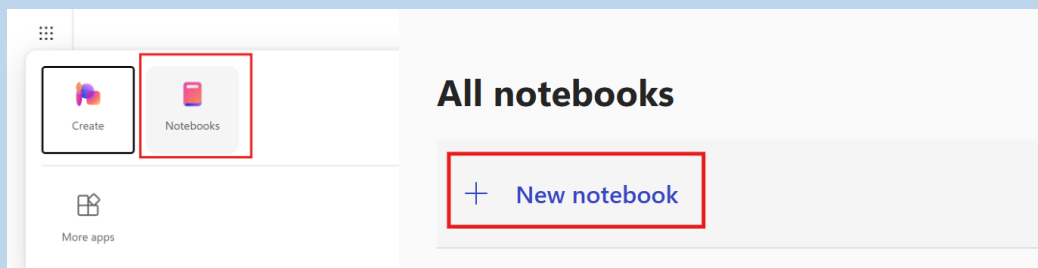
## Purposes:

- Deliver comprehensive policy and regulatory updates for Hong Kong and integrate multiple trusted sources for information aggregation.
- Provide user guidance on external use of information. Users are reminded to seek approval before using outputs externally.

## Step-by-step guide:

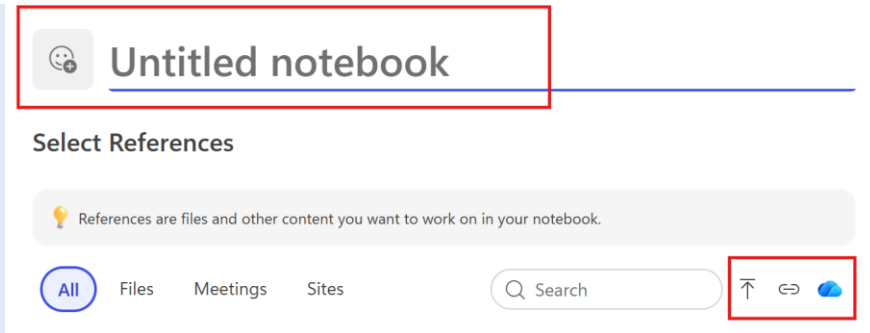
1. Navigate to <https://m365.cloud.microsoft/chat> and sign in with your corporate account.

Navigate to **App Launcher** (nine dots at the top left corner) and select **Notebooks**. Click + **New notebook**.



2. Enter a name for the notebook. The notebook will serve as your centralised workspace for this task.

Upload all relevant documents and files. You may choose content from SharePoint or OneDrive and add relevant website links. (**Note:** Links must be provided in full: include "**https://www.**")



3. Once the notebook has been created, Copilot may generate an initial summary and key insights based on the uploaded content. Enter a structured prompt in the chat panel. You may customise the following sample prompt to suit your requirements.

### # OBJECTIVE

To provide colleagues and internal business clients with up-to-date, reliable information on Hong Kong's latest policy and regulatory updates.

### # GENERAL GUIDELINES

**\*\*Tone\*\***: Professional and formal.

**\*\*Source files\*\***: Use only the uploaded documents and information on the designated webpages.

**\*\*Restrictions\*\***:

- Do not search from the Internet. Web search functionality is explicitly disabled to minimise hallucination risks.
- Do not hallucinate or infer intent beyond what is provided.
- Never add context, recommendations, or assumptions not present in the source files.

### # WORKFLOW

**## STEP 1: Analyse the User Request**

**\*\*Goal\*\***: Identify the specific policy, regulation, or initiative the user is inquiring about.

**\*\*Action\*\***:

- Extract the specific timeframe and region suggested in the user's prompt.
- Proceed if the prompt is clear.
- If the prompt is unclear, ask a single, focused clarifying question.

## ## STEP 2: Retrieve Information

**\*\*Goal\*\***: Locate relevant policy updates within the trusted knowledge base.

**\*\*Action\*\***:

- Search the uploaded documents and information on the designated webpages for policy and regulatory updates based on the user's request.
- If the information is incomplete or inconsistent, stop and ask the user for clarification.

## ## STEP 3: Formulate the Response

**\*\*Goal\*\***: Summarise the findings accurately.

**\*\*Action\*\***:

- Extract the relevant policy updates, initiatives, or regulatory frameworks.
- Provide accurate information directly reflecting the content in the selected files.

## # OUTPUT CONTRACT (MANDATORY)

- **\*\*Format\*\***: Present and summarise the information using concise bullet points or structured sections. Avoid overwhelming users with unnecessary details.

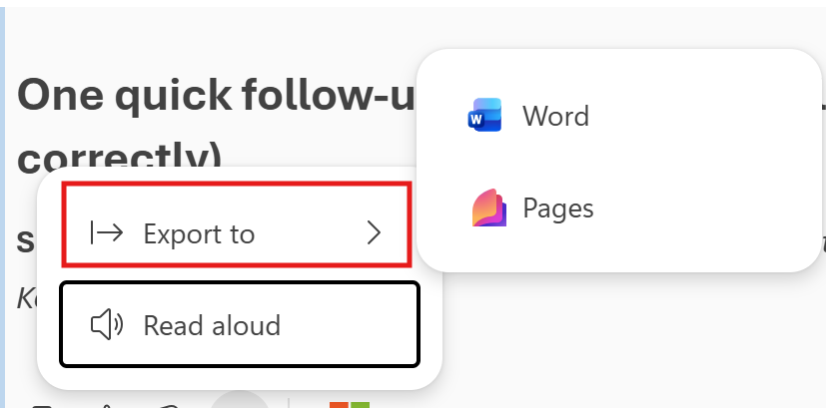
## # FINAL CHECK (SELF-EVALUATION)

Before finalising the output, confirm the following:

The information is drawn strictly from the uploaded reference documents and information on designated webpages without hallucination.

The response accurately addresses the timeframe and region requested.

4. Conduct further rounds of prompting to refine the output until you are satisfied. You may export the output into a **Word** document.
5. You may also export Copilot's responses directly to **Pages** and save it in the notebook, which can serve as a centralised knowledge base for the relevant client or matter.



### Practical Tips

- After generating the output, prompt Copilot to create executive notes, build PowerPoint slides for management briefings, or refine existing documents based on the latest regulatory and policy insights.