

# Checklist - Intake criteria for a Copilot Agent

## Functional Requirements

- ✓ Clearly define the primary purpose of the Agent
- ✓ Identify specific tasks or problems the Agent will address
- ✓ Define the Happy Flow (standard user interaction path)
- ✓ Identify Other Flows (alternative interactions)
- ✓ Outline Error Handling procedures

## Knowledge Sources

- ✓ Identify Data Location (where is the data stored?)
- ✓ Specify Data Type (structured/unstructured)
- ✓ Determine the Platform (Dataverse, SharePoint, Azure, AWS, etc.)
- ✓ Define Data Format (DOCX, JSON, BLOB, etc.)
- ✓ Assess Data Quality:
  - Are there ambiguities in questions or answers?
  - Is there duplicate data that needs to be cleaned?
- ✓ Ensure the development knowledge base includes 20% of the production data

## Large Language Model Expectations

- ✓ Define Generative Capabilities:
  - Should answers include references to sources?
  - Should responses contain quotes or be paraphrased?
- ✓ Define Question Interpretation:
  - Should questions be used exactly as asked?
  - Is prompt engineering allowed?

## Technical Requirements

- ✓ Identify Third-Party Connections (Mainframe, ServiceNow, APIs, etc.)
- ✓ Define Security Measures:

- Is the knowledge source restricted or generally available?
- Are UAC or RBAC implemented?

## Feedback Mechanism

- ✓ Determine if user feedback is required
- ✓ Define how feedback will be stored and processed

## Test Information

- ✓ Validate test scenarios with business input
- ✓ Ensure test interactions match expected user communication styles
- ✓ Define the Test Data Set:
  - 20% of the initial training data set
  - 2 days' worth of production scenarios
  - If 2,000 weekly interactions, test set should have 400 scenarios