Project Delta Digest

Setup & Configuration Guide

A Declarative Agent for Microsoft 365 Copilot

Developer: Power CAT | Version 1.0.0

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1. What Is Project Delta Digest?

Project Delta Digest delivers concise, executive-ready summaries of project activity — what shipped, what's moving, what's stuck, and what's risky — across emails, files, Teams chats, and meetings. It works for any project with a name and a paper trail: software, marketing, construction, consulting, ops, or research.

What It Pulls Together

Source	What You'll See
📅 Calendar	Today's meetings, conflicts, and open focus-time slots
📧 Email	Urgent or flagged messages that need your attention
💬 Teams	Mentions, DMs, and important channel activity
📂 Files	Documents changed, shared with you, or awaiting approval

Built-in Suggested Prompts

When you open the agent you'll see clickable prompt buttons at the bottom of the chat. Just click one to get started — no typing needed:

Button	What It Does
📊 Daily Change Digest	A complete daily snapshot — TL;DR, completed work, in-progress items, blockers, and risks from the last 24 hours.
🏆 This Week's Wins	Everything shipped this week, grouped by milestone, with dates and source links.
🛡 Current Risks	High-priority risks, escalations, and compliance/budget flags grouped by workstream.
💧 Project Blockers	Active blockers with owners and how long they've been stuck.
📋 Leadership Weekly Recap	A leadership-ready weekly digest — milestones, risks, and momentum signals (no item-level detail).
📧 Stakeholder Update	A drafted stakeholder update you can review and send — TL;DR, milestones, risks, and asks.

How the Digest Is Organized

- **TL;DR** — Three lines at the top — biggest progress, biggest risk, biggest blocker — so leaders can absorb the state of the project in seconds.
- 🚢 **Shipped / ☑ Done** — Completed deliverables, milestones, tasks, approvals, sign-offs, and release notes.
- ◍ **In Progress** — Active items, threads, draft docs, and work-in-flight with owner and last-touched date.
- 📅 **Planned / Due Soon** — Upcoming milestones, due tasks, calendar events, and deadlines landing in the next 7 days.

- **Blockers & Stale —** Items labeled blocked or on-hold, dependencies waiting on someone, overdue tasks, and items idle for more than 5 days — with owner and days stuck.
- **Risks & Impact —** High-priority items with a 1–5 risk score (priority + age + impact), plus escalation hints based on language and tags.
- **Discussions & Decisions —** Chat posts that mark decisions, high-volume email threads, meeting outcomes, and page updates.
- **Files & Documents —** Recently modified or shared files relevant to the project.
- **Delivery Signals —** Domain-specific signals — open PRs and CI status for software, campaign launches for marketing, permits or inspections for construction — linked back to work items.
- **Reference —** Pinned pages, charters, plans, status reports, and wiki entries the audience can drill into.

2. Before You Start

Make sure the items below are in place. If any are missing, contact your IT administrator.

Checklist

✓	What You Need	Why
☐	Microsoft 365 account	Required to sign in
☐	Microsoft 365 Copilot license	Gives the agent access to your email, calendar, Teams, and files

> ⚠ **Note:** These are the only universal prerequisites. Each option section below has its own "Before You Begin" checklist with option-specific requirements.

Which Option Should I Choose?

Pick the path that matches how you want to install and roll out this agent.

Option	Best For	You'll Need	Time
Option A – Microsoft Marketplace	Easiest install, ready-to-use experience, no admin needed	Microsoft 365 work account + Power Platform environment + permission to install marketplace apps (**System Administrator** or **System Customizer** in target environment)	~10 min
Option B – Import into Teams	Fastest local install, non-technical users	Teams + admin-enabled custom app uploading + the agent .zip	~5 min
Option C – Build in Agent Builder	Full control, no zip needed, no admin permissions required	Agent Builder access via M365 Copilot	~15 min
Option D – Clone & Deploy with VS Code	Developers who want source-code control, ALM, and CI/CD	VS Code + Microsoft 365 Agents Toolkit + access to the source repo	~20 min

3. Option A – Install from the Microsoft Marketplace (Agent Library)

The Agent Library on Microsoft Marketplace offers a curated collection of ready-to-use agent templates you can install directly into your Power Platform environment. Browse by category and deploy in minutes. For more information, visit our documentation on Microsoft Learn.

What's Included in the Library

- **Agent templates for real business scenarios.** Each one follows Microsoft best practices and is ready to customize.
- **Two agent types supported.** Copilot Studio Agents and Declarative Agents - pick the right fit for your use case.
- **Guided configuration.** Customize behavior, knowledge sources, and connected services before you deploy.
- **Version tracking.** Know when updates are available and keep your deployed agents current.

Before You Begin

✓	What You Need	Why
☐	Microsoft 365 work account	Required to sign in to Microsoft Marketplace
☐	A target Power Platform environment	The marketplace app installs into a specific environment
☐	Permission to install marketplace apps in that environment	You need **System Administrator** or **System Customizer** security role in target environment
☐	Acceptance of the Marketplace terms of service	Required during the "Get it now" flow

How to Install

1. Go to the **Agent Library** on Microsoft Marketplace and **ensure you're signed in** with your Microsoft 365 account.
2. Select **Get it now.**
3. Select **Get it now** to confirm.

4. Select the environment where you will install the solution, review and accept the terms of use and privacy statements, then select **Install**.
5. You'll be redirected to Power Platform Admin Center. If not redirected, to monitor installation progress, navigate to: **Environments → your environment → Dynamics 365 apps → Agent Library**.
6. Once installed, go to **make.powerapps.com** and switch to the environment where you installed the Agent Library.
7. Navigate to **Apps → Agent Library.**
8. Browse the available templates and deploy your first agent.

> 🛑 **Important:** This solution enables code components in your environment. This is a standard Power Platform feature for custom UI experiences and requires no additional licensing beyond your existing entitlements.

Deploy Project Delta Digest from the Library

1. Open the Agent Library app from **make.powerapps.com → Apps → Agent Library**.
2. Browse or search for **Project Delta Digest**.
3. Select the template, then click **Configure** (or **Download** if no configuration is required).
4. Configure the template – edit instructions, set knowledge sources, connected services, capabilities and starter prompts.
5. Click **Download** and then follow the side-loading instructions.

> 💡 **Tip:** If you don't see the Agent Library or the Get it now button, ask your tenant admin to enable Marketplace apps for your environment.

Troubleshooting

Problem	Fix
"Get it now" button is greyed out	Sign in with a work or school account that has Marketplace access (personal Microsoft accounts are not supported)
No environments listed in the install dialog	Confirm you have admin permissions on at least one Power Platform environment
Install stuck in "Installing"	Check Power Platform admin center under Resources → Dynamics 365 apps; allow up to 15 minutes
"Code components not allowed in this environment"	Have a Power Platform admin enable code components for the target environment
Agent Library app doesn't appear in make.powerapps.com → Apps	Confirm install completed and that you're viewing the same environment

Project Delta Digest template not visible in the library	Confirm the agent has been published to the Marketplace catalog

4. Option B – Import the Agent into Teams

This is a fast way to get started locally. You'll upload the pre-built agent package directly into Teams.

> 🛑 **Important:** Do not unzip or rename the file. Teams needs the original .zip as-is.

How to Check if Custom App Uploading Is Enabled

This step matters for Option B (importing the zip). Your IT admin controls this setting.

1. Open Teams and click Apps in the left sidebar.
2. Click Manage your apps at the bottom.
3. Look for an Upload an app button.

See the button? ✅ You're good. **Don't see it?** Ask your IT admin to enable Upload custom apps in the Teams Admin Center under Teams apps → Setup policies.

Upload the Agent

1. Open Microsoft Teams (desktop app or teams.microsoft.com).
2. Click Apps in the left sidebar.
3. Click Manage your apps (bottom of the page).
4. Click Upload an app → Upload a custom app.
5. Select the Project Delta Digest.zip file from your computer.
6. Click Add when the app details appear.

✅ **The agent is now installed!**

Open the Agent After Uploading

Once uploaded, you can access Project Delta Digest in two ways:

From Microsoft 365 Copilot (Web)

1. Go to m365.cloud.microsoft/chat in your browser and sign in.
2. Click the side-panel icon next to the New Chat button (top-left area).
3. Browse the agent list and select Project Delta Digest.

From Microsoft Teams

1. Open Teams and click the Copilot icon in the left sidebar.
2. Click the side-panel icon to browse available agents.

3. Select Project Delta Digest from the list.

Using @Mention (Either App)

In any Copilot chat window, type **@Project Delta Digest** followed by your question. Select the agent from the dropdown that appears.

Pin the Agent for Quick Access

Pin Project Delta Digest to your sidebar so it's always one click away:

1. Open the agent list by clicking the side-panel icon next to New Chat.
2. Find Project Delta Digest in the list.
3. Right-click (or click the ⋯ menu) on the agent and select Pin.

The agent will now appear in your left sidebar for instant access — no searching needed.

Using Suggested Prompts

When you open Project Delta Digest, you'll see suggested prompt buttons at the bottom of the chat window. These are pre-written prompts designed to get you started quickly.

How to use them:

1. Open the agent (from the sidebar, agent list, or @mention).
2. Look at the prompt buttons displayed at the bottom of the chat. You'll see options like "📊 Daily Change Digest", "🏆 This Week's Wins", "🛡 Current Risks", and more.
3. Click any button to instantly send that prompt — no typing needed.
4. The agent will respond with a tailored briefing based on the prompt you chose.

> 💡 **Tip:** You can also type your own questions instead of using the buttons. Try something like "What changed on Project Delta in the last 48 hours?" or "Who's overloaded on the Delta workstream right now?"

Troubleshooting

Problem	Fix
"Upload an app" button missing	Custom app uploading is disabled. Ask your IT admin to enable it (see Section 2).
"Parsing has failed" error	The zip file may be corrupted. Re-download the original file and try again. Make sure you didn't extract or modify it.
App doesn't appear after upload	Wait 1–2 minutes, then refresh Teams. Check Manage your apps to confirm it's listed.
Agent not showing in Copilot	It can take a few minutes after upload for the agent to appear in the Copilot agent list. Refresh the page and check again.

5. Option C – Build the Agent Yourself

If you can't upload a zip — or prefer to build it yourself — use Agent Builder in Microsoft 365 Copilot. No coding required.

Open Agent Builder

1. Go to m365.cloud.microsoft/chat and sign in.
2. Click New agent in the left pane.
3. Click Skip to configure (top right).

Fill In the Configuration

Name & Description

At the top of the Configure tab, enter the agent's name and description:

Field	What to Enter
Name	Project Delta Digest
Description	Delivers a daily digest of shipped work, progress, changes, and risks.

Instructions

Scroll down to the Instructions box. Copy and paste everything in the box below into that field. This tells the agent how to behave:

```
# OBJECTIVE
You are Project Delta Digest and deliver concise, executive-ready summaries
of project activity using the knowledge sources already connected to this
agent: what shipped, what's moving, what's stuck, what's risky. Works for
software, marketing campaigns, construction, consulting engagements, ops
initiatives, research programs — any project with a name and a paper trail.

# FIRST MESSAGE RULE (non-negotiable)
**Confirm the project before searching anything.** If the user hasn't named
a project, ask:
> "👋 Which project should I track? Share a name, code, hashtag, or keyword
and I'll search across my knowledge sources."

1. Query every knowledge source for the project automatically.
2. If **zero** sources returned anything, stop and ask:
   > "I couldn't find **[project]** in my knowledge sources. Could you
confirm the exact name, tag, or code — or try an alternate spelling /
project alias?"

 - If the user names a project up front, proceed directly — no echo-back
required. Re-run this gate when the user says "switch project" or names a
different one.
```

```
 - If multiple candidates match, show a short numbered list and let the user pick.

# AUDIENCE TYPES (ask if unclear)
 - **leadership / exec** → outcomes, risks, milestones, dollars/dates; skip detail tables.
 - **participant** (engineer, marketer, analyst, designer, etc.) → full tables, technical/operational detail, links to items/files/threads.
 - **pm** (default: program manager, project manager, or product manager) → balanced.

# STEPS
 - **Do not start until a project has been named.**
 - For each step below, search using all available knowledge sources (emails, files, chats, and meetings). If a section has no data, say "No updates found" and offer a hint (e.g., "try a wider window").

## 1. TL;DR
biggest progress · biggest risk · biggest blocker.

## 2. 🚢 Shipped / ✅ Done
completed deliverables, milestones, tasks, approvals, sign-offs, release notes.

## 3. 🟡 In Progress
active items, threads, draft docs, work-in-flight. Show owner + last-touched date.

## 4. 📅 Planned / Due Soon
upcoming milestones, due tasks, calendar events, deadlines in the next 7 days.

## 5. 🔄 Recent Activity
status changes, modified files, recent posts, edited pages, new comments.

## 6. 🔥 Blockers & Stale
items labeled blocked/on-hold, dependencies waiting on someone, overdue tasks, threads without a reply, items idle >5 days. Show owner + days stuck.

## 7. 👥 Team Load
assignee/owner distribution. Flag anyone with 3+ high-priority or overdue items.

## 8. 🛡 Risks & Impact
high-priority items; tags/keywords like `risk`, `escalation`, `customer-impact`, `compliance`, `budget`, `scope-change`, `regression`, `#urgent`; flagged items; escalation language in chat. Assign **risk score 1–5** (priority + age + impact). Add escalation hints.

## 9. 💬 Discussions & Decisions
chat posts marking decisions, high-volume email threads, meeting outcomes, page updates.
```

```
## 10. 🗀 Files & Documents
recently modified or shared files.

## 11. 🔗 Delivery Signals
e.g., open PRs and CI status for software; campaign launches for marketing;
pipeline stage changes for sales; permits/inspections for construction. Link
signals back to work items where possible.

## 12. 🗐 Reference
pinned pages, charters, plans, status reports, wiki entries, links from
items.

# OUTPUT FORMAT
 - **Tables**: Item · Status · Owner · Risk · Source.
 - **Status**: ☑ Done · ▨ In Progress · ▨ In Review · ▧ Blocked · ◯
To Do.
 - **Priority**: 🚨 High · ⚠ Medium · ▧ Low.
 - Bullets, never walls of text.
 - **Cite every claim** with the source (file name, channel + date, email
subject + sender, item ID, page title).
 - Use ⚠ for partial/stale/unverifiable data.

# ACTIONS (require explicit "yes")
Draft any of the following — the user reviews and sends/saves:
 - A digest message to post in Teams or chat.
 - A follow-up email to an owner or stakeholder.
 - A status report for leadership.
 - A meeting agenda built from open blockers and decisions needed.

# GUARDRAILS
 - **Never produce a digest before a project has been named.**
 - Never invent IDs, dates, owners, file names, quotes, dollar amounts, or
status. If unknown, say "unknown" or "not found."
```

> 💡 **Tip:** Select all the text in the box above (Ctrl+A after clicking inside) and paste it directly into the Instructions field.

Knowledge Sources

Scroll down to the Knowledge section. You'll see a row of icons and a search bar that says "Enter a URL or name or drop files here". Add three knowledge sources by clicking the icons one at a time:

🗁 Add SharePoint & OneDrive Files

1. Click the SharePoint icon (the first icon — it looks like a teal/blue document icon).
2. A dropdown will appear with a search bar and filter tabs (All, Files, Sites, Chats, Meetings).
3. Select My SharePoint files, folders, and sites. This gives the agent access to your OneDrive and SharePoint content — project plans, status decks, charters, and anything stored in your project sites.

💬 Add Teams Chats and Meetings

4. Click the Teams icon (the second icon — it looks like a purple people/chat icon).
5. Select My Teams chats and meetings. This single selection covers both Teams messages (mentions, DMs, channel posts) and meetings (transcripts, recordings, calendar events).

🖂 Add Email

6. Click the Outlook icon (the third icon — it looks like a blue envelope icon).
7. Select My emails. This gives the agent access to your Outlook inbox so it can surface high-signal threads, escalations, and stakeholder updates.

After adding all sources, you should see them listed as active knowledge sources under the search bar with toggle switches turned on.

> ⚠ **Note:** The availability of these knowledge sources depends on your license. Users with a Microsoft 365 Copilot license get full access to all sources.

Starter Prompts

Scroll down to the Starter Prompts section. Add these prompts so users see clickable quick-start buttons when they open the agent:

Title	Prompt
📊 Daily Change Digest	Give me today's full digest - TL;DR, what is completed, what's in progress, blockers, and risks from the last 24 hours.
🏆 This Week's Wins	Show me everything completed this week, grouped by milestone or deliverable, with dates and links to the source items.
🛡 Current Risks	Surface high-priority open items, escalations, customer-impact issues, and compliance/budget flags, grouped by workstream.
🔥 Project Blockers	What's blocking the project? List active blockers, who owns them, and how long they've been stuck.
📋 Leadership Weekly Recap	Give me a leadership-ready weekly digest - TL;DR, milestones, key risks, and momentum signals. Skip item-level detail.
🖂 Stakeholder Update	Draft a stakeholder update that I can send to my team. Include TL;DR, milestones, top risks, and asks.

Test & Create

8. Click the Try it tab (top of the page, next to Configure) and test a few prompts to make sure the agent works.
9. When you're happy with it, click Create (top right).
10. Click Go to agent to start using it.

How to Access Your New Agent

After creating the agent, you can open it anytime:

Method	How
Copilot Web	Go to m365.cloud.microsoft/chat → click the side-panel icon next to New Chat → select Project Delta Digest
Teams	Open Teams → click Copilot in the sidebar → click the side-panel icon → select Project Delta Digest
@Mention	In any Copilot chat, type @Project Delta Digest followed by your question

Pin the Agent for Quick Access

Pin Project Delta Digest to your sidebar so it's always one click away:

1. Open the agent list by clicking the side-panel icon next to New Chat.
2. Find Project Delta Digest in the list.
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3. Click any button to instantly send that prompt — no typing needed.
4. The agent will respond with a tailored briefing based on the prompt you chose.

> 💡 **Tip:** You can also type your own questions instead of using the buttons. Try something like "What changed on Project Delta in the last 48 hours?" or "Who's overloaded on the Delta workstream right now?"

6. Option D – Clone & Deploy with Visual Studio Code

This path is for developers who want full control over Project Delta Digest — source-code editing, ALM, and CI/CD. You'll clone the agent's source repo and deploy it from VS Code using the Microsoft 365 Agents Toolkit.

> ⚠ **Note:** If you don't have access to the agent's source repository, ask the agent owner for the repo URL or use Option A / B / C instead.

Install the Microsoft 365 Agents Toolkit

1. Open Visual Studio Code.
2. Click the Extensions icon in the sidebar (or press Ctrl+Shift+X).
3. Search for "Microsoft 365 Agents Toolkit".
4. Click Install on the official Microsoft extension.

Clone the Project Delta Digest Repository

1. Open a terminal in VS Code (Terminal → New Terminal).
2. Run: git clone <repository-url-for-Project Delta Digest>
3. Open the cloned folder in VS Code (File → Open Folder).

Provision and Deploy

1. Open the Agents Toolkit sidebar (the Microsoft 365 icon).
2. Sign in to your Microsoft 365 account.
3. Click Provision to set up the cloud resources.
4. Click Deploy to upload the agent.
5. Wait for the success confirmation in the bottom panel.

Preview the Agent

1. In the Agents Toolkit sidebar, click Preview in Copilot.
2. The agent Project Delta Digest opens in M365 Copilot.
3. Try a suggested prompt to confirm everything works.

> 💡 **Tip:** After deploying, you can edit the agent's source files locally, commit your changes to git, and re-deploy with one click. This is the recommended workflow for teams that want versioned, reviewable changes.

Troubleshooting

Problem	Fix
"Agents Toolkit" extension not found	Make sure you searched for the official Microsoft extension. Sign in to VS Code with the same account you'll use for M365.
Provision fails	Check that your account has the right Microsoft 365 / Power Platform licenses and that you're targeting an environment where you have admin rights.
Deploy succeeds but agent doesn't show	Wait 1–2 minutes and refresh M365 Copilot. Confirm the agent's manifest deployed under your account.
Repo URL doesn't exist	Confirm with the agent owner that the source repo is shared with you, or fall back to Option A / B / C.

7. Make It Your Own

You can adjust the agent's behavior after setup.

If You Built It in Agent Builder

1. In Copilot, find Project Delta Digest in your agents list.
2. Click the ··· menu → Edit.
3. Make changes on the Configure tab and they save automatically.

If You Imported the Zip

1. Extract the zip file.
2. Open declarativeAgent_0.json in any text editor (e.g., Notepad).
3. Make your changes, save, and re-zip all files.
4. In Teams, remove the old version (Manage your apps → Remove) and upload the new zip.

> 🛑 **Important:** When re-zipping, make sure the files are at the root of the zip — not inside a subfolder.

What You Can Change

Customization	How
Change the agent's tone	Edit the Instructions — adjust wording like "warm, efficient" to match your style
Hide output sections	Remove sections (e.g., Deep Read) from the Instructions text
Add a VIP list	Add names to the Instructions so the agent always surfaces their messages first
Turn data sources on/off	Add or remove knowledge sources in Agent Builder, or edit the capabilities list in the JSON
Edit starter prompts	Update the Starter Prompts in Agent Builder, or edit conversation_starters in the JSON
Swap the icon	Replace color.png (192×192) and outline.png (32×32) in the zip with your own PNGs

8. Test That It Works

Run through these quick checks after setup to make sure everything is connected.

Quick Smoke Test

#	Try This Prompt	What to Look For
1	Give me today's full digest for [your project name] — TL;DR, what is completed, what's in progress, blockers, and risks from the last 24 hours.	A TL;DR with progress, risk, and blocker, followed by sections for Shipped / In Progress / Blockers / Risks. Each item should cite a source (file name, channel + date, or email subject).
2	Show me everything completed this week for [your project], grouped by milestone or deliverable, with dates and links to the source items.	A list or table grouped by milestone with completion dates and source links back to files, chats, or items.
3	Surface high-priority open items, escalations, customer-impact issues, and compliance/budget flags for [your project], grouped by workstream.	A risks view with items grouped by workstream and a 1–5 risk score on the highest-priority entries.
4	What's blocking [your project]? List active blockers, who owns them, and how long they've been stuck.	A blockers table with item, owner, and days stuck — only items that are actually labeled blocked, on-hold, overdue, or idle.
5	Draft a stakeholder update for [your project] that I can send to my team. Include TL;DR, milestones, top risks, and asks.	A drafted message (not just a digest) with a TL;DR, milestones, top risks, and explicit asks — ready for you to review, edit, and send.

> ⚠ **Note:** If the agent doesn't return data for a specific source (e.g., no Teams messages), that's OK — it only shows sections where data exists.

Full Evaluation

For a deeper test, a dedicated evaluation test plan is available alongside the agent package:

File	What It Is
Project Delta Digest - Evaluation Test Plan.pdf	Detailed test plan with pass/fail criteria you can walk through manually in Microsoft 365 Copilot