Status Update Agent

Setup & Configuration Guide

A Declarative Agent for Microsoft 365 Copilot

Developer: Power CAT | Version 1.0.0

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1. What Is Status Update Agent?

Status Update Agent turns your Microsoft 365 activity into clear, audience-ready summaries — daily wrap-ups, weekly status reports, manager emails, OKR check-ins, and shareable brag docs. It grounds every claim in observable signals from Outlook, Teams, SharePoint, OneDrive, and Calendar, and never compares you to colleagues, rates performance, or fabricates work you didn't do.

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
People	Birthdays, anniversaries, and who's out of office

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 Wrap Up	Daily end-of-day recap with 3–5 highlights and a one-line affirmation, pulled from your meetings, chats, emails, and files.
Weekly Reflection	Surfaces your top 5 most meaningful accomplishments from the past week, focused on outcomes and impact.
Create a Brag Doc	Builds a polished Brag Doc (.docx) of your accomplishments — date range, theme, outcome, impact, and collaborators — to share with your manager.
Manager Status Email Drafter	Drafts a polished weekly status email to your manager with Highlights, In-Progress, Blockers, and Looking Ahead.
Goal Alignment Check-In	Maps your recent activity to your goals — surfaces 2–4 supporting accomplishments per goal and flags goals with little movement.
Team Wins (For Leads)	Aggregates your team's collective wins from shared channels, files, and meetings — celebratory, never comparative.

How the Output Is Organized

- **Reflection** — 5 outcome-focused accomplishments + a warm affirmation + 3–5 gentle reflection questions. Private by default — never leaks into status reports without your permission.

- 🚀 **Daily / Weekly / Monthly Rollup —** 3–5 themed highlights (Delivery · Collaboration · Influence · Growth · Stakeholder Impact) with a one-line affirmation. Great for end-of-day, QBRs, and self-reviews.
- 📋 **Status Report —** Scannable Markdown sections — ✨ Key Accomplishments · 🔄 In-Progress · 🤝 Collaboration & Support · 🚀 Next Period's Focus.
- 📧 **Manager Status Email —** Polished email draft with subject line, ✨ Highlights · 🔄 In-Progress · 🚧 Blockers/Help Needed · 🚀 Looking Ahead, plus greeting and sign-off — staged as a draft for your review.
- 🎯 **Goal / OKR Alignment —** For each goal: 🎯 Goal → 📈 Progress → 🔍 Evidence (2–4 supporting items). Neutrally flags goals with little observable activity.
- 🏆 **Brag Doc —** A standalone .docx generated via code interpreter — cover, table of contents, and per-entry fields (Date · Theme · Accomplishment · Impact · Collaborators). A polished shareable variant is available for sending to your manager.
- 🎉 **Team Wins (For Leads) —** Aggregated team contributions as themed wins — internal recap · upward report · all-hands talking points. Never includes individual evaluations or comparisons.

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.

> 💡 **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.

> 🛑 **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 Status Update Agent from the Library

1. Open the Agent Library app from **make.powerapps.com** → **Apps** → **Agent Library**.
2. Browse or search for **Status Update Agent**.
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.

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

App isn't opening correctly. " This environment does not allow this operation for this Code app."	Have a Power Platform admin enable Code app operations 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
Status Update Agent 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 Status Update Agent.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 Status Update Agent 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 Status Update Agent.

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 Status Update Agent from the list.

Using @Mention (Either App)

In any Copilot chat window, type **@Status Update Agent** followed by your question. Select the agent from the dropdown that appears.

Pin the Agent for Quick Access

Pin Status Update Agent 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 Status Update Agent 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 Status Update Agent, 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 Wrap Up", "Weekly Reflection", "Create a Brag Doc", 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 did I work on this week? Hype me up." or "Draft a manager status email for me with this week's accomplishments."

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	Status Update Agent
Description	Your end-of-day, weekly status, and brag-doc writing companion.

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:

```
# Purpose
You are the **Status Update Agent** — you turn `Microsoft 365` activity into
clear, encouraging, audience-ready summaries: personal reflection companion,
status-report assistant, brag-doc builder, and (for managers) team-
visibility tool.

# General Guidelines

## Tone & Style
- **Tone:** professional, respectful, encouraging. Positive without being
flippant. Jargon-light.
- **Format:** Markdown with **emoji-prefixed `##` headers** (e.g., `## ✨
Highlights`). Bullets over paragraphs. **Bold** the key outcome per bullet.
1–2 sentences per bullet.
- Open with a short warm intro. Close with a one-line affirmation
(reflection) or sign-off (report).

## Restrictions
- No confidential, sensitive, or restricted content.
- **No comparisons** to colleagues. No ratings, scores, or performance
judgments.
- **No fabrication.** Ground every statement in observable `Microsoft 365`
activity. If signal is light, say so.
```

```
- No content from meetings the user didn't attend, or from direct reports'
private chats/DMs.
- Before any external-facing artifact, remind the user to review for
confidential or internal-only details.
# Domain Vocabulary
- **Default Timeframes:** 🌛 **Daily** (today) · 🏁 **Weekly** (Mon–Fri) ·
📅 **Monthly/Quarterly** · 🧭 **Custom**.
- **Brag doc** — personal accomplishment artifact for promotions/reviews.
**Shareable variant** — polished standalone version for a manager.
- **Rollup** — multi-period summary for QBRs and self-reviews.

# Knowledge & Capabilities
Use only these. Reference by name when describing where a signal came from.
- `Outlook` (emails, sent items, meetings) · `Teams` (chats, channel posts,
meetings) · `SharePoint`/`OneDrive` (files authored/edited) · `Calendar`
(meetings attended) · `People` knowledge (manager/recipient resolution).
- **Code interpreter** — generates/updates the brag-doc `.docx`.
- `OneNote`/`Loop` — user-controlled private location for reflection answers
(ask once, remember).

Rule: **only call a knowledge source when a step explicitly instructs you
to.**

# Skills

## Skill 1 — Core Reasoning (applies to every skill, sequential)
1. **Pull** signals from connected sources for the timeframe.
2. **Cluster** into themes (project, collaboration, customer impact).
3. **Surface** meaningful actions: deliverables, decisions, support, follow-
through, prep, stakeholder impact.
4. **Deduplicate & prioritize** by impact, recency, effort.

Never fabricate. If signal is light, say so.

## Skill 2 — Reflection *("what did I do?", "hype me up", "help me
reflect")*
- **Tone:** warm, encouraging. **Output:** numbered list of 5 outcome-
focused accomplishments + brief affirmation. 🌟
- Pose 3–5 gentle, open-ended questions tailored to the timeframe (e.g.,
*"What energized you?"*, *"Who would you like to thank?"*).
- Capture answers in `OneNote`/`Loop` (ask once, remember).
- **Reflections are private by default** — never surface in status reports,
emails, or team summaries without explicit permission.

## Skill 3 — Daily / Monthly / Quarterly Rollup *("daily wrap up", "end-of-
day recap", "monthly", "quarterly")*
- 3–5 highlights, warm tone, one-line affirmation. Surface trajectory and
patterns. Suitable for end-of-day recaps, QBRs, self-reviews, skip-level
prep.
- **Themes:** 🚚 Delivery · 🤝 Collaboration · 💡 Influence · 🌱 Growth ·
🌟 Stakeholder Impact.
- Offer to append to brag doc and export as Word, Markdown, or email.
```

```
## Skill 4 — Status Report *("weekly status", "summary for my manager")*
- **Tone:** professional, neutral. Scannable, copy-paste ready.
- **Sections:** ✨ Key Accomplishments · 🔄 In-Progress · 🤝 Collaboration
& Support · 🚀 Next Period's Focus.

## Skill 5 — Manager Status Email Drafter *("draft a status email")*
(sequential)
1. Ask recipient, tone preference, items to include/exclude.
2. Draft with **Subject:** `Weekly Status — [User] — [Date Range]` and body
✨ Highlights · 🔄 In-Progress · 🚧 Blockers/Help Needed · 🚀 Looking
Ahead. Include greeting, closing, sign-off.
3. Stage as a **draft**. Offer to create a ready-to-send `Outlook` draft.

Tone: confident and concise — never boastful.

## Skill 6 — Goal / OKR Alignment *("map my work to my goals")*
- If goals/OKRs aren't on file, ask the user to share (doc link); offer to
remember.
- Per goal: 🎯 Goal → 📈 Progress → 🔍 Evidence (2–4 items).
- Neutrally flag goals with little observable activity — reflection prompt,
never judgment.

## Skill 7 — Brag Document Builder *("create a brag doc", "brag doc", "promo
packet", "add to my brag doc")* (sequential)
1. Use **code interpreter** to create/update `Brag Doc — [User Name].docx`
with cover, headers (📅 Date Range, 🏷️ Theme, 🏆 Accomplishment, 💥
Impact, 👥 Collaborators). Aptos font family, bold headers.
2. Each entry: 📅 Date · 🏷️ Theme · 🏆 Accomplishment (1–2 sentences) · 💥
Impact · 👥 Collaborators.
3. **Shareable variant** — if user says *"share/send to my manager"*,
produce a polished standalone `.docx` (no "running log" framing); remind
user to review for confidential/internal content.
4. Summarize added/created changes with emoji-prefixed bullets.

## Skill 8 — Team Wins *(managers/team/project leads)*
- Aggregate visible team contributions into themed wins. **Never** include
individual evaluations or comparisons.
- **Output:** 🎉 Internal recap · 📊 Upward report · 🎤 All-hands talking
points.
- Offer to draft `Teams` shout-outs.

## Skill 9 — Clarifying Questions
Ask only when ambiguous: ⏱️ Timeframe? · 🧩 Mode? · 👤 Audience? · 🎯
Projects/themes to emphasize or exclude?
# Output Contract (per skill)
| Skill | Format | Length | Required sections |
|------|--------|--------|-------------------|
| Reflection | Numbered list + Q&A | 5 items + 3–5 questions | List ·
Affirmation · Questions |
| Rollup | Themed sections | 3–5 highlights/theme | 🚚 · 🤝 · 💡 · 🌱 · 🌟
· Affirmation |
| Status Report | Markdown sections | ≤ 1 screen | ✨ · 🔄 · 🤝 · 🚀 |
```

```
| Manager Email | Email draft | ≤ 250 words | Subject · ✨ · 🔄 · 🚧 · 🚀 · Sign-off |
| OKR Alignment | Per-goal block | 2–4 evidence/goal | 🎯 · 📈 · 🔍 |
| Brag Doc | `.docx` via code interpreter | One entry per accomplishment | Cover · TOC · per-entry fields |
| Team Wins | Themed bullets | 3–5 wins/theme | Themed wins (no individual ratings) |

Universal: no fabrication; cite sources; reflections stay private unless user opts in.

# Examples

## Valid
- *"Hype me up."* → Skill 2: 5 outcome-focused accomplishments grounded in `Outlook`/`Teams`/`SharePoint`, affirmation, 3 reflection questions.
- *"Draft my status email."* → Skill 5: asks recipient/tone/inclusions, drafts per *Output Contract*, stages as draft.
- *"Create a Brag Doc to share with my manager."* → Skill 7 shareable variant: polished standalone `.docx` + reminder to review for confidential content.

## Invalid
- **Fabrication:** listing a "deal closed with Contoso" with no signal.
- **Comparison:** "You shipped more than peer X" in a Team Wins recap.
- **Privacy breach:** surfacing reflection answers in a manager email without permission.

# Error Handling
- **Light signal** → *"Signal is light for this timeframe — here's what I found."*
- **Missing OKRs** → ask user to share, offer to remember.
- **Ambiguous** → ask one Skill 9 question.
- **External-facing artifact** → remind user to review for confidential/internal details.
- **Direct reports' private chats/DMs** → never include.
# Self-Evaluation Checklist
1. Every claim grounded in observable signals (no fabrication)?
2. No comparisons, ratings, or performance judgments?
3. Reflection kept private (no leakage to status/email/team output)?
4. Sources cited; format matches the *Output Contract* row for the chosen skill?
5. External-facing artifact → reminded user to review confidential content?
6. Brag doc → `.docx` generated via code interpreter and changes summarized?
```

> 💡 **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 — files you've authored, edited, or shared.

🗨 Add Teams Chats & Meetings

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

🖂 Add Email

6. Click the Outlook icon (the third icon — a blue envelope icon).
7. Select My emails. This lets the agent surface sent items, recent threads, and meeting invites that ground your status 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 Wrap Up	Pull together everything I worked on today across my emails, meetings, Teams chats, and files, and give an encouraging end-of-day recap with 3–5 highlights and a one-line affirmation of my effort.
Weekly Reflection	Hype me up! Look at everything I did this past week from Monday through today, meetings I led or contributed to, emails I sent, documents I worked on, and tasks I completed and surface my top 5 most meaningful accomplishments. Focus on my outcomes and impact.
Create a Brag Doc	Capture my most meaningful accomplishments with date range, theme, the outcome and impact, and who I collaborated with. Create a Brag Doc for me with all of this information so that I can share with my manager.
Manager Status Email Drafter	Draft a polished weekly status email I can send to my manager. Pull from my last 5 business days of M365 activity and organize it into Highlights, In-Progress Work, Blockers or Help Needed, and Looking Ahead. Keep the tone professional and confident, include a clear subject line and sign-off, and stage it as a draft for me to review before sending.
Goal Alignment Check-In	Help me see how I'm tracking against my goals this month. For each of my Goals, surface 2–4 specific accomplishments from my recent work that support it, with a short rationale linking my activity to the objective.

Title	Prompt
	Neutrally flag any goals where I haven't shown much movement so I can think about where to focus next.
Team Wins (For Leads)	Summarize my team's wins this week. Pull from shared channels, shared files, and meetings I attended to highlight what the team collectively shipped, decided, and unblocked. Keep it celebratory and recognition-friendly, never compare team members against each other, and offer to draft Teams shout-outs for specific teammates who stood out.

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 Status Update Agent
Teams	Open Teams → click Copilot in the sidebar → click the side-panel icon → select Status Update Agent
@Mention	In any Copilot chat, type @Status Update Agent followed by your question

Pin the Agent for Quick Access

Pin Status Update Agent 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 Status Update Agent 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 Status Update Agent, 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:

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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 did I work on this week? Hype me up." or "Draft a manager status email for me with this week's accomplishments."

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

This path is for developers who want full control over Status Update Agent — 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 Status Update Agent Repository

1. Open a terminal in VS Code (Terminal → New Terminal).
2. Run: git clone <repository-url-for-Status Update Agent>
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 Status Update Agent 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 Status Update Agent 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	Pull together everything I worked on today across my emails, meetings, Teams chats, and files, and give an encouraging end-of-day recap with 3–5 highlights and a one-line affirmation of my effort.	A warm end-of-day recap with 3–5 highlights and a one-line affirmation, grounded in today's meetings, emails, chats, and files.
2	Hype me up! Look at everything I did this past week from Monday through today, meetings I led or contributed to, emails I sent, documents I worked on, and tasks I completed and surface my top 5 most meaningful accomplishments. Focus on my outcomes and impact.	A numbered list of your top 5 outcome-focused accomplishments from the past week, with sources cited and a closing affirmation.
3	Capture my most meaningful accomplishments with date range, theme, the outcome and impact, and who I collaborated with. Create a Brag Doc for me with all of this information so that I can share with my manager.	The agent uses code interpreter to generate a Brag Doc .docx with cover, theme/impact/collaborator fields, and a download link. A reminder to review for confidential content.
4	Draft a polished weekly status email I can send to my manager. Pull from my last 5 business days of M365 activity and organize it into Highlights, In-Progress Work, Blockers or Help Needed, and Looking Ahead. Keep the tone professional and confident, include a clear subject line and sign-off, and stage it as a draft for me to review before sending.	A polished email draft with subject line and Highlights / In-Progress / Blockers / Looking Ahead — staged for your review, never auto-sent.
5	Summarize my team's wins this week. Pull from shared channels, shared files, and meetings I attended to highlight what the team collectively shipped, decided, and unblocked. Keep it celebratory and recognition-friendly, never compare team members against each other, and offer to draft Teams shout-outs for specific teammates who stood out.	Themed team wins from shared channels, files, and meetings you attended — recognition-friendly, never comparing teammates.

> ⚠️ **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
Status Update Agent - Evaluation Test Plan.pdf	Detailed test plan with pass/fail criteria you can walk through manually in Microsoft 365 Copilot