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Cassidy AI Essentials

Knowledge-grounded agents and a bounded business workflow

FA-0596 · 1 day

Agentic & Generative AI · Automation, RPA & Power Platform

Create a scoped Cassidy agent and inspect a small knowledge-grounded workflow, with evidence checks and explicit human decision ownership.

Introduction

This one-day workshop introduces Cassidy's Knowledge Base, Agents and Workflows through a selected business-document example. Participants practise clear instructions, approved knowledge selection, a small multi-step workflow and review of generated outputs.

An illustrative insurance-submission scenario shows extraction, completeness checking, guideline retrieval and summary drafting without transferring underwriting authority to AI. Exercises use synthetic or non-confidential documents and a learning workspace. Connected actions, approvals, sharing and usage limits depend on the workspace configuration; review steps can remain manual where native approval mechanisms are not available.

Learning outcomes

The course teaches participants to:

- Explain the roles of Cassidy Knowledge Base, Agents, Workflows and chat.
- Prepare approved documents and check source-grounded responses against the originals.
- Write narrow agent instructions with inputs, output structure, boundaries and missing-information handling.
- Create or refine a selected agent and small workflow using supported workspace features.
- Apply human review to a synthetic document-intake or underwriting-support example.
- Test outputs, access boundaries, failure handling and usage considerations before a pilot.

Prerequisites

- Basic computer and web-browser skills
- Familiarity with routine business documents and processes
- Access to an approved Cassidy AI workspace
- Sample or non-confidential training documents
- No programming experience required

Training outline

1. Module 1 — Platform and Responsible Use

- Knowledge Base, Agents, Workflows, chat and connected-app concepts.
- Meeting-intelligence and integration features as availability-dependent overviews.
- Plans, credits and usage; distinguish a feature demonstration from entitlement.
- Hallucinations, privacy, approved sources, data minimisation and human accountability.
- Check permissions and organisational restrictions before connecting data or tools.

2. Module 2 — Knowledge and Chat

- Organise selected documents in collections/folders and review import or sync options.
- Compare available OneDrive or other connectors without assuming access inherits correctly in every configuration.
- Choose appropriate knowledge, check conflicts/outdated material and verify cited responses.
- Practise a business request with supporting context, output formatting, follow-up questions and source checking.

3. Module 3 — Agent Instructions and Scope

- Define the task, role, terminology, required inputs and output structure.
- Specify rules, missing-information handling, escalation and quality-review criteria.
- Create a narrow agent with supported natural-language setup and approved knowledge.
- Review instructions, connector/read-write permissions, sharing and maintenance.
- Test normal and boundary cases rather than assume grounding prevents errors.

4. Module 4 — Workflow Prototype

- Compare a conversational agent with a defined multi-step workflow.
- Use a template, blank workflow or Workflow Copilot to draft a selected flow.
- Review triggers, inputs, variables, AI/connected actions, conditional paths and structured outputs.
- Insert explicit review/approval points: use supported native mechanisms where verified, otherwise a manual checkpoint.
- Test one bounded learning run; keep record updates and external communications mocked or disabled.

5. Module 5 — Illustrative Underwriting Support

- Use synthetic submission documents for classification, extraction, completeness checks and guideline lookup.
- Draft an evidence-linked risk-information summary, referral note or missing-information request.
- Compare renewal or claims-history summaries using prepared sample data.
- Review normalisation, exceptions, referral routing and reviewer decisions.
- Underwriting, acceptance, pricing and coverage decisions remain with authorised professionals; the example is document support, not validated automated risk assessment.

6. Module 6 — Testing and Pilot Handover

- Define expected results and check sources, accuracy, consistency and edge cases.
- Test access boundaries and failure handling; refine instructions and retain approved versions.
- Review feedback, ongoing monitoring, credits and process ownership.
- Prepare a small pilot outline with user responsibilities, documentation, change review and escalation.
- Identify remaining organisational/legal review rather than claim compliance or production readiness.

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