

Interactive Workshop: Hands-on with Copilot Studio

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Microsoft Copilot

Copilot experiences across the ecosystem



Copilot Studio vs M365 Copilot vs SharePoint Agent

Feature / Solution	Copilot Studio(Agent)	M365 Copilot	SharePoint Agent
Primary Scope	Fully custom LLM-driven agents	Contextual productivity assistant inside M365 apps	SharePoint-centric Q&A and simple workflows
Integration Range	Any data source via connectors or APIs	Document- and mailbox- centric (OneDrive, Teams, etc.)	SharePoint lists/libraries only
Customization	Extensive (dialog flows, branding, connectors)	Limited to Microsoft's built-in capabilities	Moderate (Power Automate orchestration)
Deployment Effort	High (requires planning, prompt engineering)	Low (prebuilt, managed by Microsoft)	Low to Moderate (Power Virtual Agents + Flows)







Build an AI assistant to help

Agents: Intelligent AI assistants that use generative AI and large language models to assist humans with complex cognitive tasks.



Generative AI is changing conversational AI



Democratization of building

Government Use Cases for Copilot Studio Agents



- Citizen Self-Service enhances public engagement with 24/7 access.
- Internal Knowledge Access centralizes employee guidance for efficiency.
- Permit Processing automates request triage to speed up responses.
- HR Support streamlines onboarding and reduces HR inquiries.
- IT Helpdesk Assistance improves resolution times for technical issues.
- Emergency Operations provide rapid updates during crises.

Quick look at the interface



Agent Creation

Option 1

Use Copilot to create your agent. Describe your agent to create it.



Publishing agent

- You need to publish your agent before agents can engage with it or access your agent through multiple connections.
- Publish your agent after you make any changes, so your agents engage with the latest content. New changes are sent across all the connected channels.
- Publish to demo website and share the URL with colleagues so they can try the agent.





Available Channels

- Expand your agent's reach
- Deploy your agent on widely used services.
- These include live websites, mobile apps, and messaging platforms like Microsoft Teams and Facebook.
- To update your agent, simply publish it again within Microsoft Copilot Studio. This action ensures the agent is updated across all connected channels.

Channels

Configure your agent channels to meet your customers where they are.



What are Topics in Copilot Studio?

A Topic defines how an agent conversation progresses.

Topics represent specific conversation paths within agent, allowing natural and seamless interactions between users and the AI.

These predefined paths guide the flow of conversation and enhance the overall experience

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Q) Start Over	Phrases		MOD Administrat		On	
Q) Thank you	Phrases	This topic tr	MOD Administrat		On	

Topic types

Custom topic:

- User-Defined: Custom topics are created and defined by the user.
- Customizable: Users can fully customize these topics, including the triggers and responses.
- There are 3 lesion topics added for leaning purpose and recommended to disable for production agents.

System topic:

- System topics in agent are made to trigger automatically based on relevant events.
- You can also choose to start system topics manually by redirecting the conversation to them.
- System topics cannot be deleted but can be disabled.

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Create a topic for your agent

- A topic in Copilot Studio is a portion of a conversation between a user and na agent.
- It consists of trigger phrases and conversation nodes that define the dialog flow.
- Topics can be created from scratch, templates, or online content.

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Create a blank Topic

Topics \rightarrow Add a topic \rightarrow From blank

Each topic has below two components:

- Trigger phrases 1.
- 2. Conversation nodes

🔆 Copilot 🍰 Overview Knowle	edge Topics	Actions	Analytics (
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2 Lesson 1 - A simple topic	& Phrases		Trigger Phrase	Phrases
Q Lesson 2 - A simple topic with a co	& Phrases		nggerrindse	Phrases
Q Lesson 3 - A topic with a condition,	Phrases			No phrases to show
Q Start Over	Se Phrases		Add Conv	
C) Thank you	Phrases	This topic		Send a messageAsk a question
				E Ask with adaptive card
			Q	Add a condition
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			Q	Call an action
			0	Advanced >
			Ă	

Create topic from description

- Microsoft Copilot Studio lets you create and iterate on topics with a description.
 By describing what you want and having AI build it for you, time is saved in creating and updating agent topics.
- Al understands what you want to do, then automatically creates a topic with different node types and conversational responses.
- Example: Create a support ticket, including a title, severity (high / medium / low), description and an email address to send update notifications to.

Copilot 2	Overview	Knowledge	Topics
+ Add a topic ~	්) Ref	fresh	
🕒 From blank			
♦ Create from des	cription with	Copilot	

Create from description with Copilot		\times
Write a description of what you'd like your copilot to cover, and Copilot will create your topic. Learn more		
Name your topic *		
Create a topic to *		
Collect a user's street address, state and zip code. The user should be able to retry each question up to 4 times.		
Al-generated content can have mistakes. Make sure it's accurate and appropriate before using it. <u>Read terms</u>		
Or try one of these examples to get started		
${}_{igoplus}$ Let someone order a pizza, choosing from common pizza types and how many they want to order.		
🛞 Accept a user's name, age and date of birth and then repeat their responses back to them.		
P Collect a user's street address, state and zip code. The user should be able to retry each question up to 4 times.		
	Viet	w more examples
What does Copilot support?	Create	Cancel

Use Copilot to edit a topic

You can make changes to any topic using the power of natural language understanding (NLU).

If you want to move or update the nodes, you can describe what you want in the Edit with Copilot pane.

Use simple, plain English to direct the AI, like in these examples:

- Add a question to ask the user for their date of birth
- Add a question to ask the user to choose their preferred contact method, choosing from email, telephone or SMS..
- Summarize the information gathered from the user in an Adaptive Card.



Trigger phrases

- Trigger phrases are phrases, keywords, and questions that a user is likely to type that are related to a specific issue.
- Trigger phrases are configured at the topic level and capture the way an end-user would ask about a problem or issue.
- For example, "What's on the menu at the office cafeteria?"



Conversational nodes

Option	Description
<u>Send a message</u>	Send the customer a message.
<u>Ask a question</u>	Ask the customer a question.
Ask with adaptive card	Create a JSON snippet to exchange with other apps.
Add a condition	Branch your conversation based on a condition.
Variable management	Set a value, parse a value, or clear all variables.
Topic management	Redirect, transfer, or end the topic or conversation.
Call an action	Call a flow like Power Automate or Excel Online or use a connector or a plugin.
Advanced	Generative answers, HTTP requests, events, and more.



Power Platform Connectors

- Power Platform, including Power Automate and Copilot Studio, offers great integration capabilities, with more 1,200 native connectors or ways to create your own custom connectors to your APIs
- For a good end-user experience, cloud flows, HTTP requests and connectors triggered from Copilot Studio must execute quickly so that the user doesn't have to wait too long for the agent to answer



1200+ prebuilt data connectors

Call a Power Automate flow

Extend the capabilities of your agent with cloud flows that you build in Power Automate using low-code, dragand-drop tools.

You can use flows that already exist in your Power Apps environment or create a flow from the Copilot Studio authoring canvas.

To use cloud flows in custom agents in Copilot Studio, the flows must:

- Have the Run a flow from Copilot trigger.
- Flow must be in a solution within the same environment as the agent.
- Ensure response action is set to return in real time
- Actions that need to run longer can be placed after the Respond to Copilot action to continue executing for up to the flow run duration limit, which is typically 30 days.



Generative AI in Copilot Studio

Powered by Azure OpenAl Service

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TO BUILD

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	Create from description with Copilot	×
	Write a description of what you'd like your copilot to cover, and Copilot will create your topic. Learn more	
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	Create a topic to *	
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	On try one of these examples to get started	
	Q Let someone order a pizza, choosing from common pizza types and how many they want to order.	
	Q Accept a user's name, age and date of birth and then repeat their responses back to them.	
	Q: Collect a user's street address, state and zip code. The user should be able to retry each question up to 4 times.	
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		Ask a question or density them

Generative Answers

Dynamically generate multi-turn answers based off an organization's content in real-time.

Generative Actions

Generate dialog and act through dynamically chaining existing building blocks and actions.

Generative Building

The Copilot assistant helps build, design and modify agent topics through natural language.

Generative authoring experiences

Use Copilot to Create and update your agent

Al assistance in building topics, designing and modifying an agentall through natural language

Assisted authoring for:

- Topic creation and iteration
- Response generation
- Adaptive Card generation
- Topic improvement suggestions
- Suggested trigger phrases, names, descriptions
- Transcript generation
- Agent creation
- Topic suggestions



Describe your agent to create it:

•	Describe your copilot to create it Helpdesk Expense tracking HR and benefits	
	Use everyday words to describe what your copilot should do \triangleright	
	This AI-powered feature above is currently in preview. See terms and supplemental terms	

Add a topic using Copilot:

create from description with Copilot	
Vrite a description of what you'd like your copilot to cover, and Copilot will create your topic. Learn more	
Name your topic *	
reate a topic to*	
Let a user check the status of a flight, accepting the flight number and date. For each question add 2 messa	ge variations and a speech alternative.
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Building AI-powered agents

Agent building approach for AI-powered agents is different from classic bot building:



Instructions





Add Knowledge sources

Add a Knowledge Source

You can add a knowledge source to an agent from the following areas in Copilot Studio:

- The Configuration page ٠
- The Knowledge page ٠
- A generative answers topic •

When you add knowledge sources, they are automatically included in the "Conversation booster" system topic node.

Within the "Conversation booster" node, you can optionally select/deselect the desired knowledge sources.

Add available knowledge sources (Powered by Copilot Connectors) Users with edit permissions for this copilot can also reuse your connections for other topics within the copilot. Q Keywords for the data you're looking for Featured SharePoint and OneDrive Public websites Files Upload documents from your local Add public websites for real-time S Securely integrate and manage internal (i)computer data answers Dataverse (preview) Microsoft Fabric Customize and deploy structured data Accelerate data analysis Coming soon with AI capabilities tables Connect to your enterprise data (preview) [[•]] Azure SQL ADLS Gen2 MediaWiki SOL Enterprise websites Salesforce **NOW** ServiceNow Knowledge File share SharePoint Server Ado Git -SAP SAD lira Cancel

Х

Supported Knowledge Sources

Name	Source	Description	Number of inputs supported in general answers	Authentication
Public Website	External	Searches the query input on Bing, only returns results from provided websites	4 public URLs (example, microsoft.com)	None
Documents		Searches documents uploaded to Dataverse, returns results from the document contents	Limited by Dataverse file storage allocation	None
SharePoint / OneDrive		Connects to a SharePoint URL, uses Graph Search to return results	4 URLs	Agent user's Microsoft Entra ID authentication *
Dataverse (Preview)	Internal	Connects to the connected Dataverse environment and uses retrieval- augmented generative technique in Dataverse to return results	Two Dataverse knowledge sources (and up to 15 tables per knowledge source)	Agent user's Microsoft Entra ID authentication *
Enterprise data via graph connections		Connects to the connected Dataverse environment and uses retrieval- augmented generative technique in Dataverse to return results	Two per custom agent	Agent user's Microsoft Entra ID authentication *

* Agent user authentication for information sources means that when a specific user asks a question of the agent, the agent only surfaces content for that specific user to access.

Public website as Knowledge Source

Searches the query input on Bing, only returns results from provided websites.

Max 4 public URLs are supported.

URL Considerations:

- The URL can have up to two levels of depth, also called "subpaths," indicated by forward slashes /.
- A trailing forward slash isn't included in the limit of two slashes.

Va	lid	U	R	L:

- <u>www.contoso.com</u>
- <u>www.fabrikam.com/engines/rotary</u>
- www.fabrikam.com/engines/rotary/

Not a valid URL:

• www.fabrikam.com/engines/rotary/dual-shaft

Add public websit	es	×
 How to choose websites: If your site is external, make su Don't use sites with forums or Don't include query strings, maginal 	re it's indexed or found by Bing. comments from end users; this can reduce the releva ore than two levels of depth, or the character " in you	ncy of answers. r URL.
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Back		Add

Uploading file as Knowledge Source

The following file types are supported:

- Word documents (doc, docx)
- Excel spreadsheets (xls, xlsx)
- PowerPoint documents (ppt, pptx)
- PDF documents (pdf)
- Text documents (txt, md, log)
- HTML files (html, htm)
- CSV files (csv)
- XML files (xml)
- OpenDocument files (odt, ods, odp)
- EPUB documents (epub)
- Rich Text Format documents (rtf)
- Apple iWork documents (pages, key, numbers)
- JSON files (json)
- YAML files (yml, yaml)
- LaTeX files (tex)

	↑ Drag and drop a file here or <u>click t</u> Up to 512MB per file	to browse
File name	Name	Description
BI Tool recomendations.pdf	BI Tool recomendations	This knowledge source searches information

SharePoint and OneDrive as Knowledge Source

- Copilot Studio can leverage content from your internal SharePoint sites and libraries to respond to user queries.
- By pairing your agent with a SharePoint or OneDrive URL (e.g., contoso.sharepoint.com/sites/policies), agent searches the specified URL and its subpaths for relevant information.

Best Practices/recommendations:

- 1. Max 4 public URLs are supported.
- 2. A best practice is to omit https:// from the URL.
- 3. Recognized SharePoint URLs will be from the sharepoint.com domain.
- 4. SharePoint site URLs cannot be more than two levels deep.
- 5. Only modern pages are supported.
- 6. Content from classic aspx pages on SharePoint won't be used to generate answers.
- 7. Users need to authenticate to get Al generated content from SharePoint in both chats:
 - A test chat.
 - An agent's chat with a published copilot.

er a link			Add
nk	Name	Description	
https://m365x05932794.sharepoint.com/	BI ToolResource Center	This knowledge source provides in	nformation



Authentication

Easily add end-user authentication to your agent

- Authentication allows users to sign in, giving your agent access to a restricted resource or information.
- Users can sign in with Microsoft Entra ID, or with any OAuth2 identity provider such as Google or Facebook.

Settings	
钧 Agent details	Security
☆ Generative AI	Authentication Verify a user's identity during a chat.
Security	Web channel security
Authoring Canvas	Review other enhanced security options.
<u>ab</u> Entities	Allowlist Let other agents call your agent as a skill.

Authentication options in Copilot Studio

Three options to configure Authentication

- 1. No authentication
- 2. Authenticate with Microsoft (default)
- 3. Authenticate manually

Authenticate with Microsoft is enabled by default for agents that you create in Copilot Studio

Require users to sign in determines whether a user needs to sign in before talking with the agent. We highly recommend that you turn on this setting when your agent needs to access sensitive or restricted information

Your agent's authentication and Require user to sign in setting in combination determines whether you can <u>share the</u> <u>agent</u> to control who in your organization can chat with it. The authentication setting doesn't affect sharing an agent for collaboration.

< Authentication

Verify a user's identity during a conversation. The agent receives secure access to the user's data and is able to take actions on their behalf, resulting in a more personalized experience. Learn more

Choose an option

 \bigcirc No authentication \triangle

Publicly available in any channel

- Authenticate with Microsoft
 Entra ID authentication in Microsoft Teams, Power Apps, or Microsoft 365 Copilot
- Authenticate manually Set up authentication for any channel

ure access to th more personaliz



Control who can chat with the agent in the organization

No authentication:

• Any user who has a link to the agent (or can find it; for example, on your website) can chat with it. You can't control which users in your organization can chat with the agent.

Authenticate with Microsoft:

• The agent works only on the Teams channel. Since the user is always signed in, the Require users to sign in setting is implicitly always turned on. You can use agent sharing to control who in your organization can chat with the agent.

Authenticate manually:

- If the service provider is Microsoft Entra ID (forner Azure AD), you can turn on Require users to sign in to control who in your organization can chat with the agent using agent sharing.
- If the service provider is Generic OAuth2, you can turn Require users to sign in on or off. When turned on, a user who signs in can chat with the agent. You can't control which specific users in your organization can chat with the agent using agent sharing.





Copilot Studio Implementation Guide

The Copilot Studio implementation guide provides a framework to do a 360-degree review of a agent or Copilot project.

Through probing questions, it highlights potential risks and gaps, aims at aligning the project with the product roadmap, and shares guidance, best practices and reference architecture examples.

aka.ms/CopilotStudioImplementationGuide

Generative answers considerations

🔿 Generative answers processes and data sources

1	Relevant text content retrieval from configured sources V Summarization using		b	Public data		Website content must be indexed by Bing. Bing is a global service, no geo boundary.	Public Website Bing Custom Search	Up to 4 URLs, but the list can be dynamic. Max 2 subpages depth (<i>ien/hsign</i>), no direct pages. One configuration ID, but can bo set using a formula. Arue oosts covered by Microsoft Up to 400 URLs, custom ranking options. Max 2 subpages depth (<i>ien/hsign</i>), supports a direct pages.
	Custom instructions					Requires the user to be	authenticate	ed with Entra ID to make delegated calls to the Graph API.
2	Past 10 turns for contextualization		¢	SharePoint internal only		Up to 4 SharePoint or O Security trimming: retur Users eligible to Micros	neDrive for E ned results oft 365 Sem	Business sites (but the list can be dynamic), only include content the user has read access to, antic Index benefit from better results.
	References							
	Content summary		Λ	Azure OpenAl	 Returns results from the linked Azure Al Search index (keyword, semantic, and vector search). Not a passthrough to Azure OpenAl – generative answers summarization and validation apply. 			
	¥		~	on your data		Connection isn't delega	ted: no sec	urity trimming, no authentication requirement for the user.
	Response Validation					Files (max 3 MB) are sto	red in Dates	erse file storage and indexed with Datavarse Search
_	Azure OpenAl moderation layer		\odot	Uploaded documents		Not possible to offer a L Configured at the bot le	JRL to the so vel: possible	burce documents in the citations. • to disable file search at the node level but can't filter them.
3	Copilot Studio selected moderation layer					Allows to first query any	data source	e – through Power Automate or HTTP requests – and then
	Grounding validation / hallucination removal		L	{ } Custom data	 pass the data to generat Generative answers ex relevant content) and C 		rative answers to formulate an answer for the user query. xpects a table variable with 2 properties: Content (typically snippets o I ContentLocation (typically a URL).	

Copilot Studio architecture





Get started today





Copilot Studio website	aka.ms/CopilotStudio
Copilot Studio Demo	aka.ms/CopilotStudioDemo
Product documentation	aka.ms/CopilotStudioDocs
Product guidance	aka.ms/CopilotStudioGuidance
Implementation guide	aka.ms/CopilotStudioImplementationGuide
Community	aka.ms/CopilotStudioCommunity
Workshop Guides & labs	aka.ms/CopilotStudioWorkshop
Roadmap	https://releaseplans.microsoft.com/

Demo



https://aka.ms/ncid



Q & A



NC DIT Innovation Summit Follow-Up

