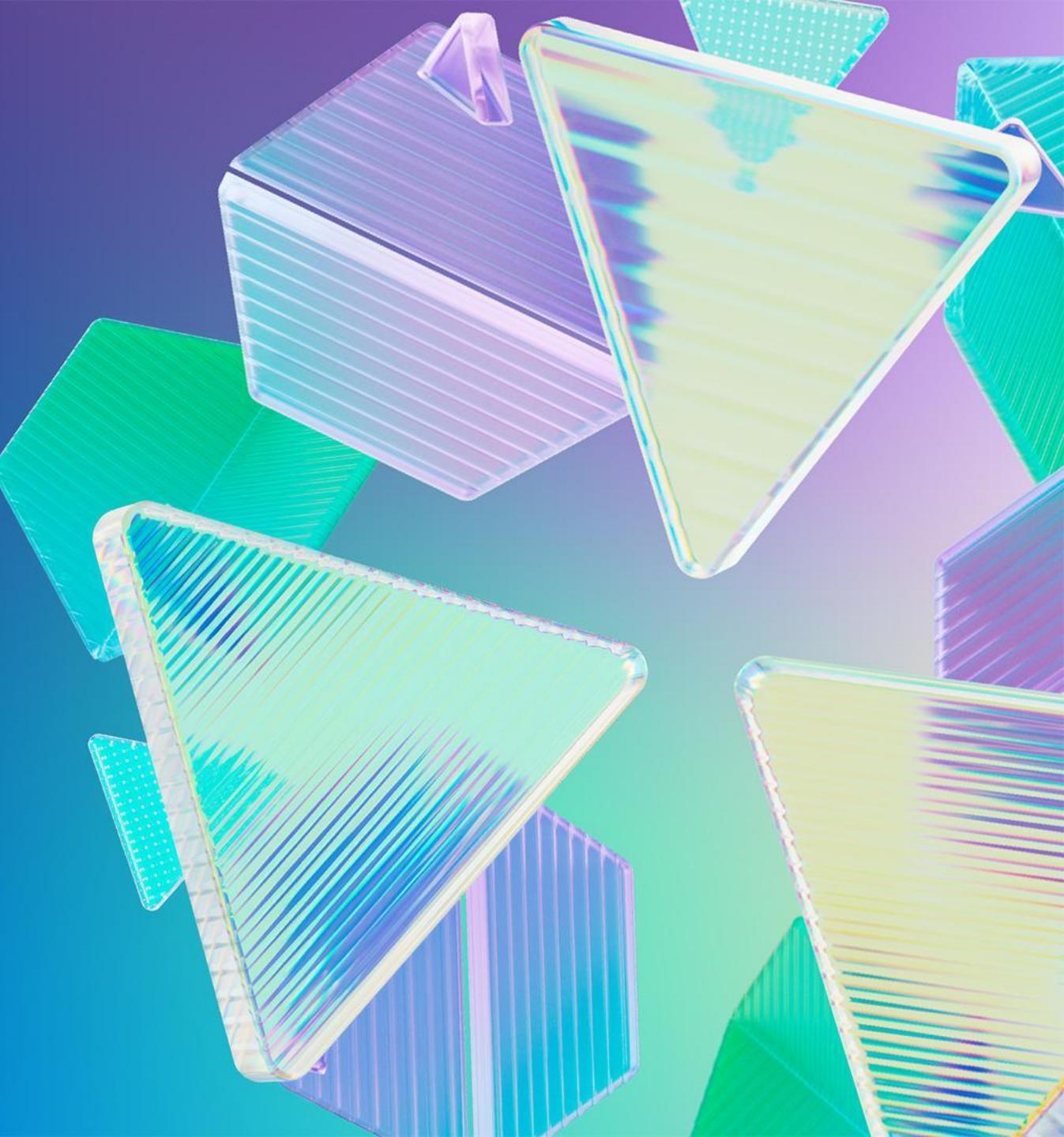




Introduction to Conversational AI & Copilot Studio





Welcome To Microsoft Copilot Workshop



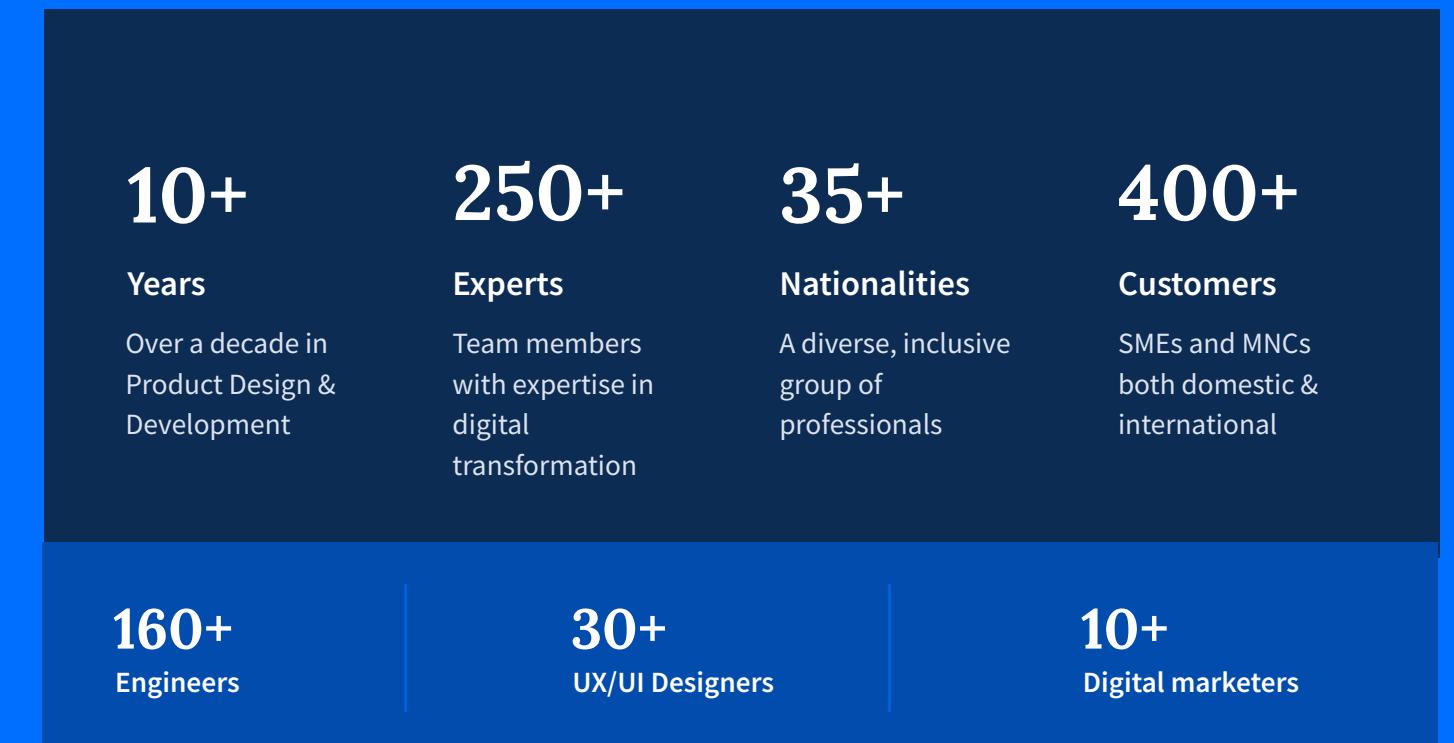
EGAT

+

SEVEN PEAKS

We don't just facilitate digital transformation, **we drive it**

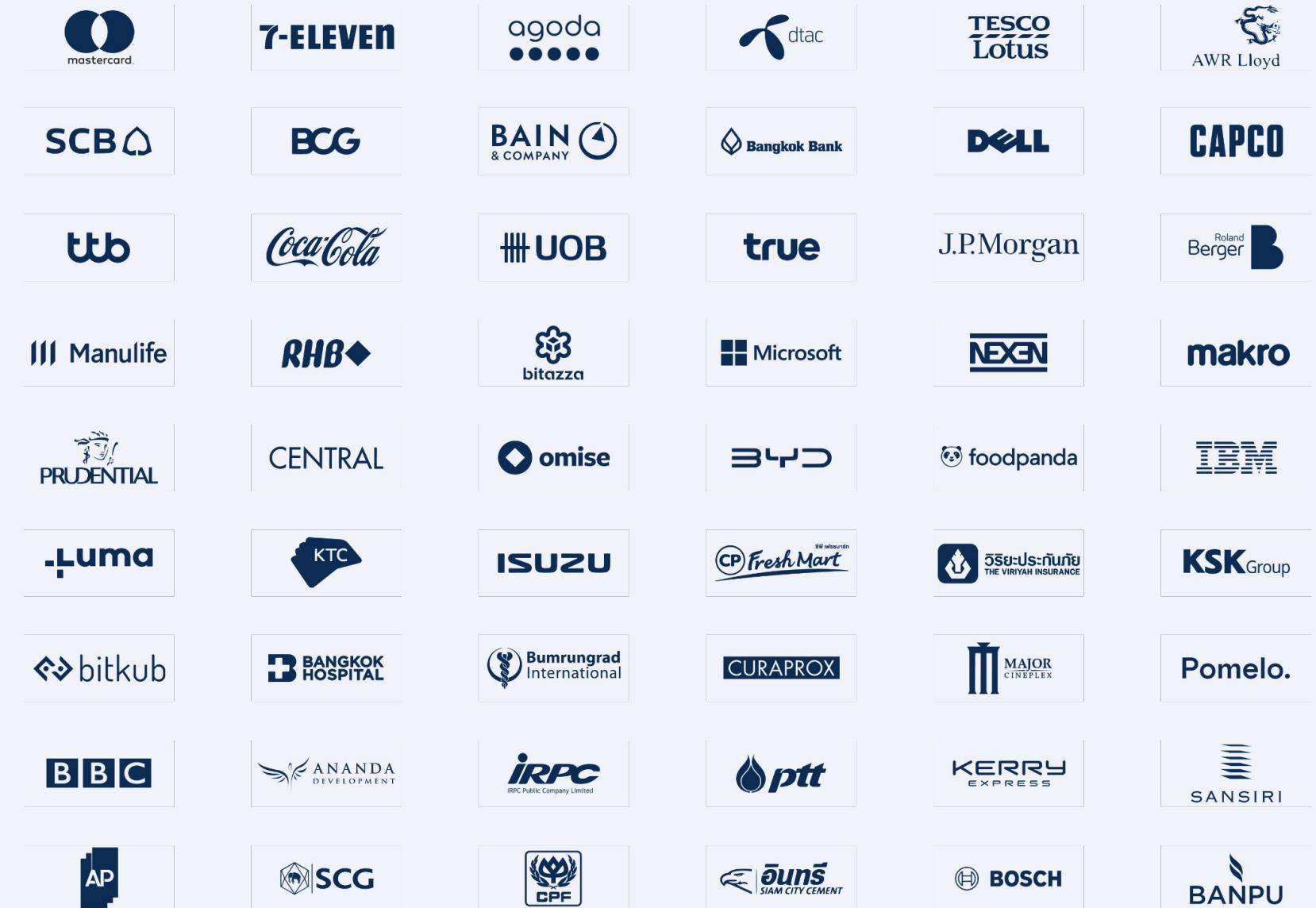
Seven Peaks is an international consulting firm that powers ambitious businesses to transform and grow, with feasible, viable, and desirable digital products and solutions



Over 400+ clients served worldwide

Creating value across a multitude of industries:

- Financial Services
- Insurances
- Web3
- Retail
- Healthcare
- Entertainment
- Gas & Oil
- Real Estate
- Education



Modern and scalable solutions

For the past 10+ years, we have deployed over 150+ applications ranging from retail and finance to e-commerce and entertainment.



> 160

Engineers

What we offer

Digital Product Strategy

Research Services

UX/UI Design

Digital Transformation Services

Mobile & Web Development

Data & Analytics

App Modernization

Cloud Migration

AGENDA

Welcoming & Introduction

Copilot Studio Fundamentals

Coffee Break

Hands-on Lab 1: Your First Agent

EGAT Use Cases Deep Dive

Lunch

Hands-on Lab 2: Advance Agent Building

Coffee Break

Hands-on Lab 3: Use Case Development

Governance, Security & Deployment

Meet your instructors



Thanapol (Balloon)

Mobile AI Engineer

AI-enhanced Mid-level Software Developer with **3+ years experience** in mobile application development lifecycle using Scrum/Agile methodologies. Proficient in Windsurf IDE for AI-powered development, leveraging Claude, Gemini, and GPT models for code generation, debugging, and optimization.

Education & Certifications:

B.A. in Science, Vincent Mary School of Science and

Technology, 2022

Assumption University, Thailand



Skills:

Performance &
Optimization

Design Pattern
Integration and Unit
Testing

Firebase
Kotlin/Java
Jetpack Compose

Proficiencies:

Android Studio
Gradle

Languages:

English (Advanced)
Thai (Native)



Natthaphong

Full-Stack AI Engineer

Motivated Full-Stack Developer specializing in React and Node.js with a keen interest in AI integration and intelligent application development. Proven ability to deliver scalable solutions for high-traffic applications while continuously learning and adapting to emerging technologies. Ready to apply full-stack development skills to build AI-enhanced user experiences and contribute to innovative software solutions.

Education & Certifications:

Bachelor's Degree, Science, Information Technology,

2020-2024

King Mongkut's Institute of Technology Ladkrabang, Thailand

Skills:

HTML
CSS
Javascript
React JS
Next JS
Tailwind
Node JS
Express JS
MySQL
MongoDB
Firebase
Github
AWS
JIRA

Languages:

Thai (Native)
English (Intermediate)



Giorgio

Principal Solutions Architect

Senior cloud lead who has been working in IT **since 2006**.

He covered all the roles from System Engineer / Administrator until Project Manager, step through Development, Software Architecture, Integration, and Admin roles. Certified cloud architect for AWS and Azure.

Education & Certifications:

PhD Computer Science, 2020

University of Southampton, online

Master Degree in Computer Science, 2006 - 2010

Università' degli Studi di Roma Tor Vergata, Rome, Italy

Bachelor Degree in Computer Science, 2001 - 2005

Università' degli Studi di Roma Tor Vergata, Rome, Italy



Skills:

Azure, AWS and GCP

Project Management

Software Development

Teaching / Mentoring

Team Leading

Proficiencies:

Cloud Technologies

Software Development

Project Management

Languages:

English (Fluent)

Italian (Native)



Jose

Head of Engineering

Jose is an experienced engineering leader with over 12+ years in software development, now focused on AI integration and intelligent application development. He builds end-to-end solutions enhanced by artificial intelligence, always seeking the most effective approach and fostering collaborative problem-solving. Jose is passionate about community building, organizing the .NET Conf Thailand and .NET Bangkok Meetup, and can often be found sharing knowledge about AI adoption and engineering practices at tech events across Bangkok.

Education & Certifications:

Analysis and Software Development, 2013

Salvador Arena Foundation Educational Center, Brazil

Skills:

.NET & C#

Node & JS/TS

Python

Ruby

Kotlin & Java

CICD/ DevOps

Team building &
Facilitation

Proficiencies

Azure

DDD

TDD

Languages

English (Fluent)

Portuguese (Native)

Spanish (Beginner)

Thai (Beginner)

Our methodology

Guidelines

- If you have any questions or need help, please raise your hand;
- Our coaches are here to help and support you;
- We will try to stay on schedule, but some slight delay can happen;

Requirements

- A copilot
- Microsoft Copilot Studio (free version dai)
- Microsoft 365 Copilot
- Access to data, API keys, permissions, etc...
- Patience, a lot of patience... 

What will you get?

- Benefits of Microsoft Copilot
- Understanding Microsoft 365 Copilot
- Understanding Copilot Studio
- Creating your own Copilots
- Practice
- Have fun! I hope so!!!

Learning objectives

- 01 Intro to Conversational AI
- 02 What is Copilot Studio
- 03 What's the right Copilot scenario?
- 04 Overview of Copilot Studio to Extend Copilot for M365
- 05 Overview of Copilot Studio to Build Custom Copilots
- 06 Partner Opportunity & Resources

Questions?

Thank you!



Introduction to Conversational AI

Jose Barbosa

Copilot Building Basics

Terms to know

	Copilot/Agent	Copilot is an intelligent AI assistants that uses generative AI and LLMs to assist humans with complex cognitive tasks. This term can be used in reference to Microsoft Copilot (an umbrella term for AI assistants that sit within Microsoft product experiences) or custom-built copilots external to the Microsoft brand (written with a lowercase 'c').
	Generative AI	Generative AI broadly describes AI models that can produce human-like content in the form of text, images, code and other types of media or data in response to a user-entered prompt.
	LLM	Large language models (LLM) is a type of AI model that is trained on massive datasets. LLMs are a subset of generative AI. LLMs can be used for understanding natural language and generating content like text (ex: GPT-4).
	RAG	Retrieval-Augmented Generation (RAG) is a process that enables AI models to retrieve relevant information from a knowledge source and incorporate it into generated text.
	GPTs	Generative Pre-trained Transformers (GPTs) are custom versions of GPT models that can be tailored to specific areas, tasks or personas using specific instructions, knowledge and any combination of skills.
	Plugins	Plugins are like skills used to extend copilot experiences. They are reusable building blocks from a central plugin registry that can call connected services and APIs, perform actions, and provide answers for your copilot users. See slide 17 for a list of the different plugin types.
	Connectors	-Microsoft Graph Connectors are IT administrator-enabled connectors that allow you to search and surface data from third-party sources in intelligent Microsoft experiences like Microsoft Copilot for M365. -In the Power Platform, connectors mean the 1200+ prebuild data connectors to LOB to use within Power Platform solutions. These can be used within plugins when being used with Copilot for M365.

Is Copilot just a Chatbot?

Conversational AI

Bot

Conversational experience using trained NLU models

Common to be text based

Data queried with APIs vs grounding

Prebuilt content and topics by makers

Embedded into sites, but siloed

Context holding

Copilot

Evolution of chatbots as conversational assistants powered by large language models and generative AI to assist in your line of work.

Natural, multimodal interface

Grounding in multiple data sources

Generative content capabilities

Contextual interactions

Responsiveness and adaptability

Enables more than just text formats.

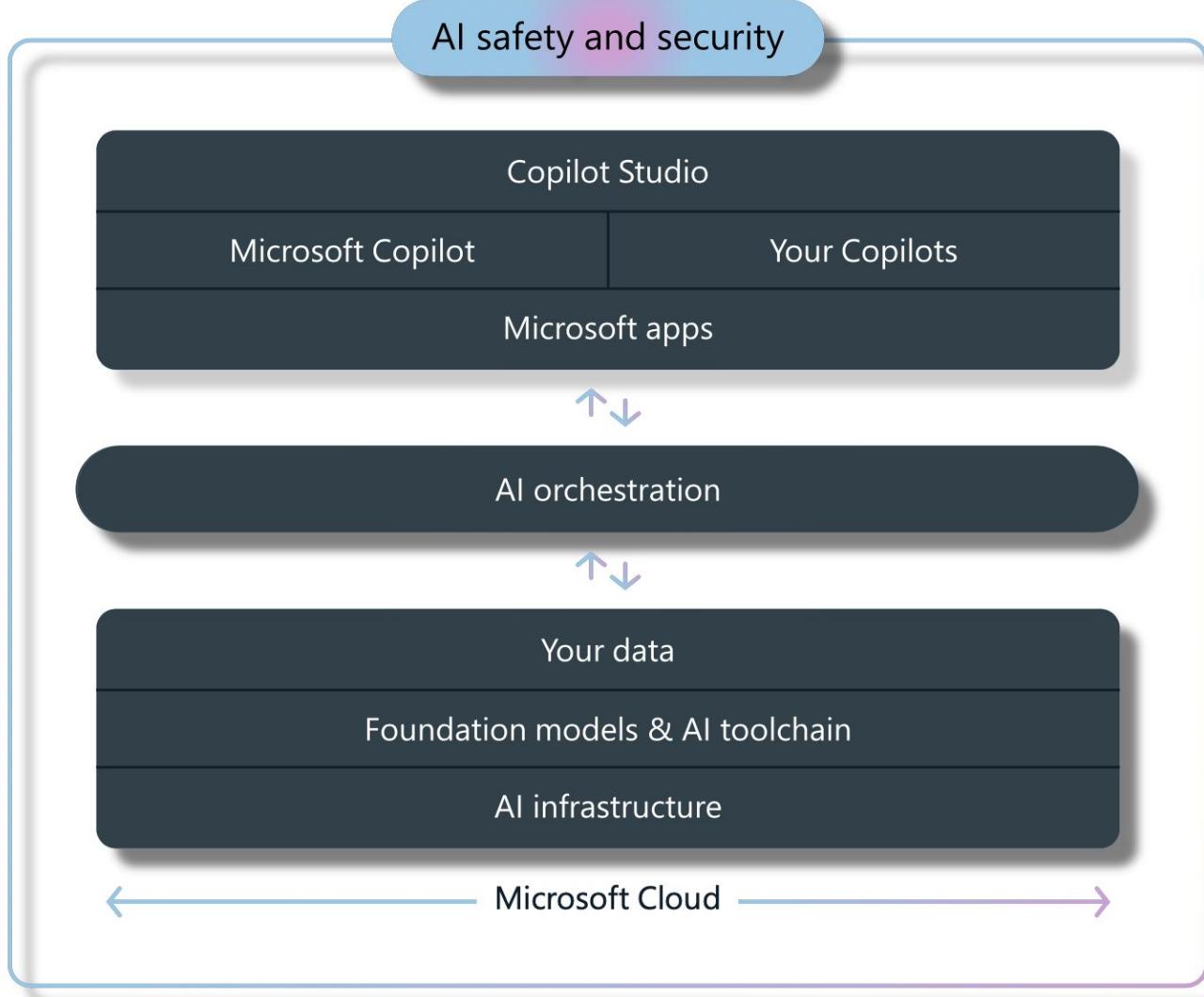
Works with your internal and external data sources

Generative AI powering Copilot building and response generation

Connected to the app experience it lays

Flexible to configure to context of experience.

Copilot stack



A copilot for every Microsoft Cloud experience



Copilot for Dynamics 365

Copilot to assist roles within each line of business applications.



Copilot for Power Platform

Use natural language to accelerate the development of apps, automations and pages.



Copilot for Microsoft 365

Copilot assistant to accelerate productivity with Microsoft 365 apps and chat with your data



Copilot for Security

Receive tailored insights that empower your team to defend.



Copilot for Windows

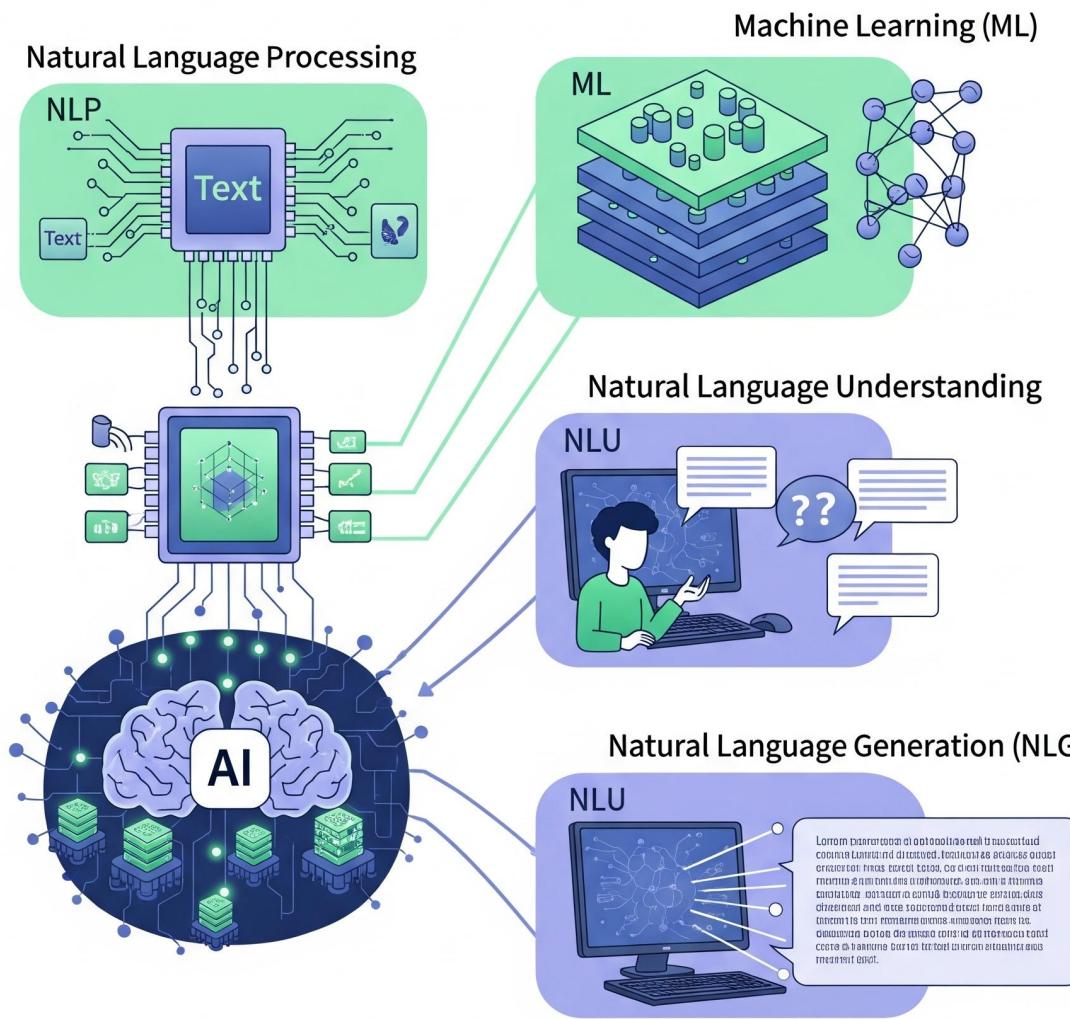
Get answers and inspirations from across the web, supports creativity and collaboration, and helps you focus on the task



Copilot for GitHub

Increase developer productivity by helping you write code faster with less work.

What is Conversational AI?



Conversation AI

Technologies allow machines to naturally understand human language.

It is a blend of key AI technologies.

Includes NLP, ML, NLU, and NLG working together.

Chatbots are a common example of conversational AI.

Why Conversational AI



Growing number of communication channels
Need consistent messaging



Streamlined workforces
Higher workloads,
capacity constraints,



Higher customer/colleague demands
higher expectations, and



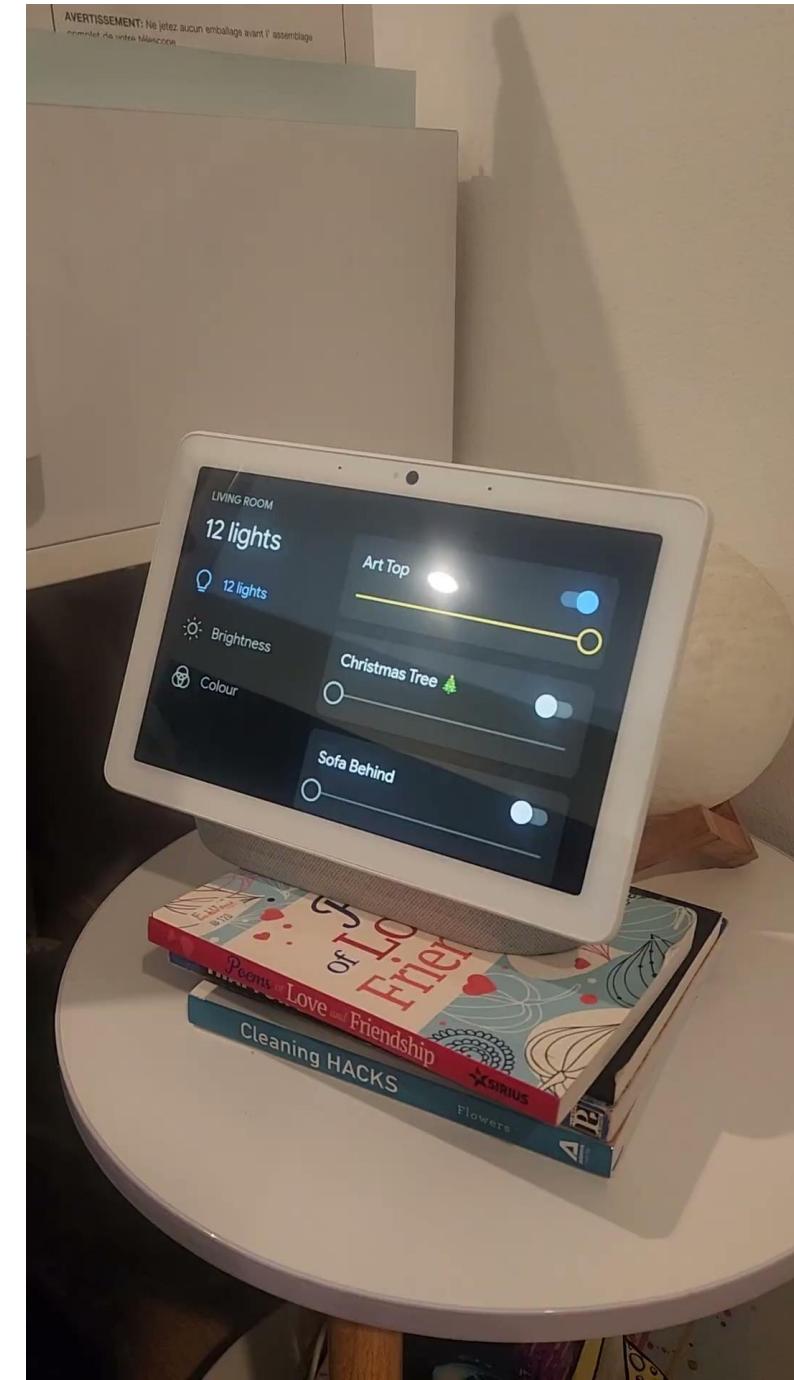
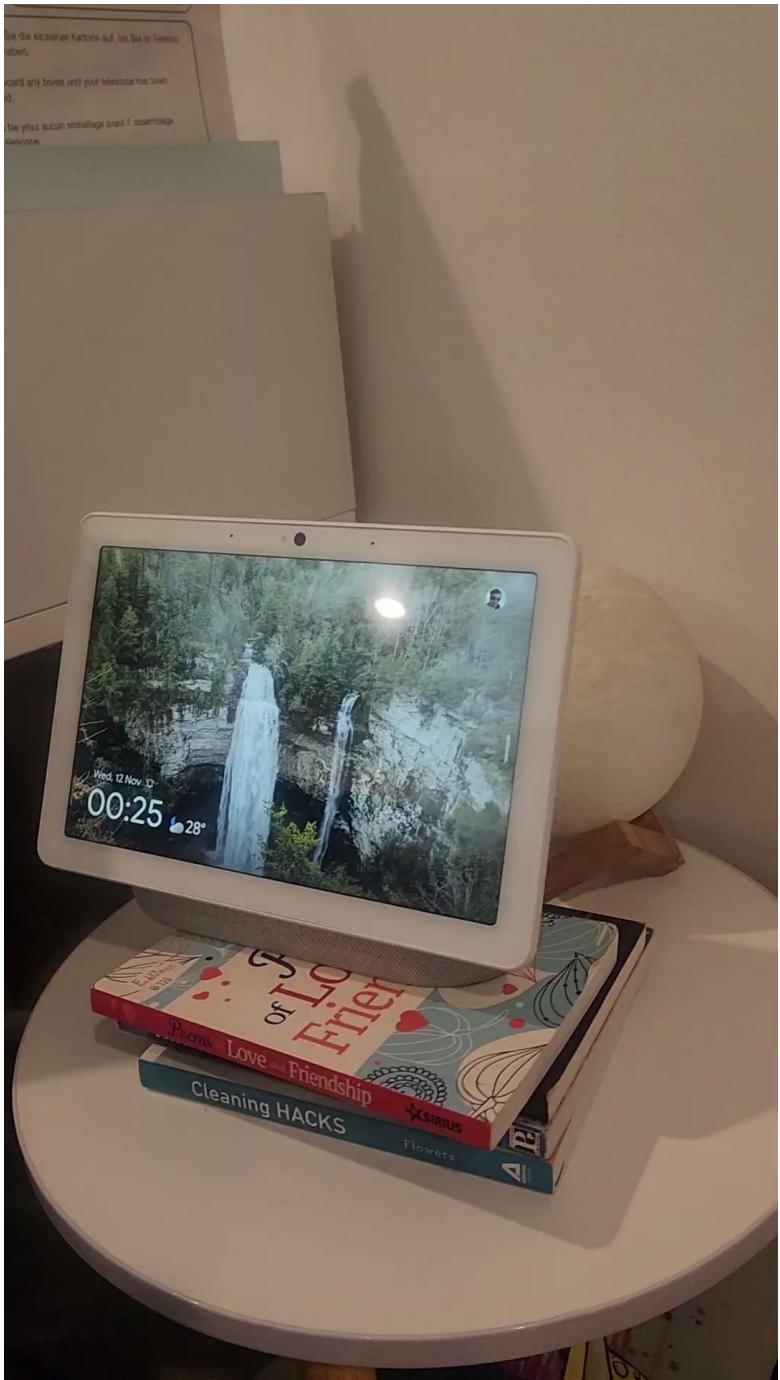
Optimize digital workforce



Faster time to value



More time for innovation



Marketing



Customer Service



Finance



Legal



IT



Sales



HR

IDC projects
1 billion
new logical
applications
by 2028*

AI Transformation

Transform your business with conversational AI



Enrich employee experiences



Optimize business processes



Improve efficiency & time to value



Bend the curve on innovation



Reinvent customer engagement



Reduce development costs & risks

Building conversational AI has traditionally been **challenging**

Budget & time constraints

Infrastructure & resource hosting

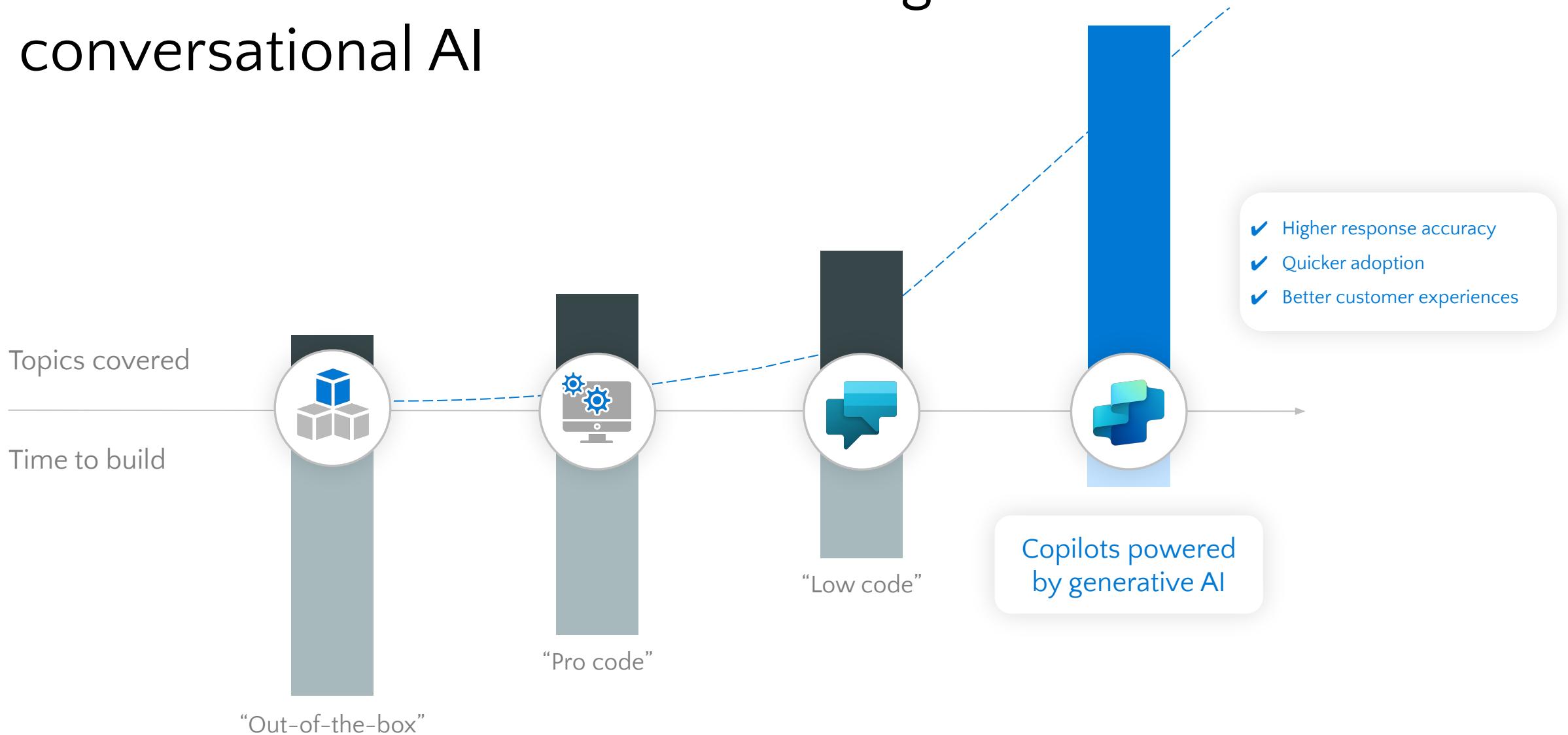
Product & technical onboarding

Integration with business systems

Security & compliance risks

Maintaining content

Welcome to a **new era** of building conversational AI



Building Conversational Experiences

Building Conversational Experiences can be broken up like this....

Conversational design

How to think about bots

**How to design
Conversational AI
experiences**

**Key functional areas to
consider**

Language

Text & Speech

**Generative AI
& NLU**

Authoring

Channel experiences

Who is a “user”?



User

A person who uses a product or service.

Things to keep in mind

- Who is your user?
- What types of conversations will your bot be having with this audience?
- And lastly where will these conversations take place?
- Don't forget who you're designing for

Users talking to bots

They know they're not talking to a person.

They know it's not reciprocal.

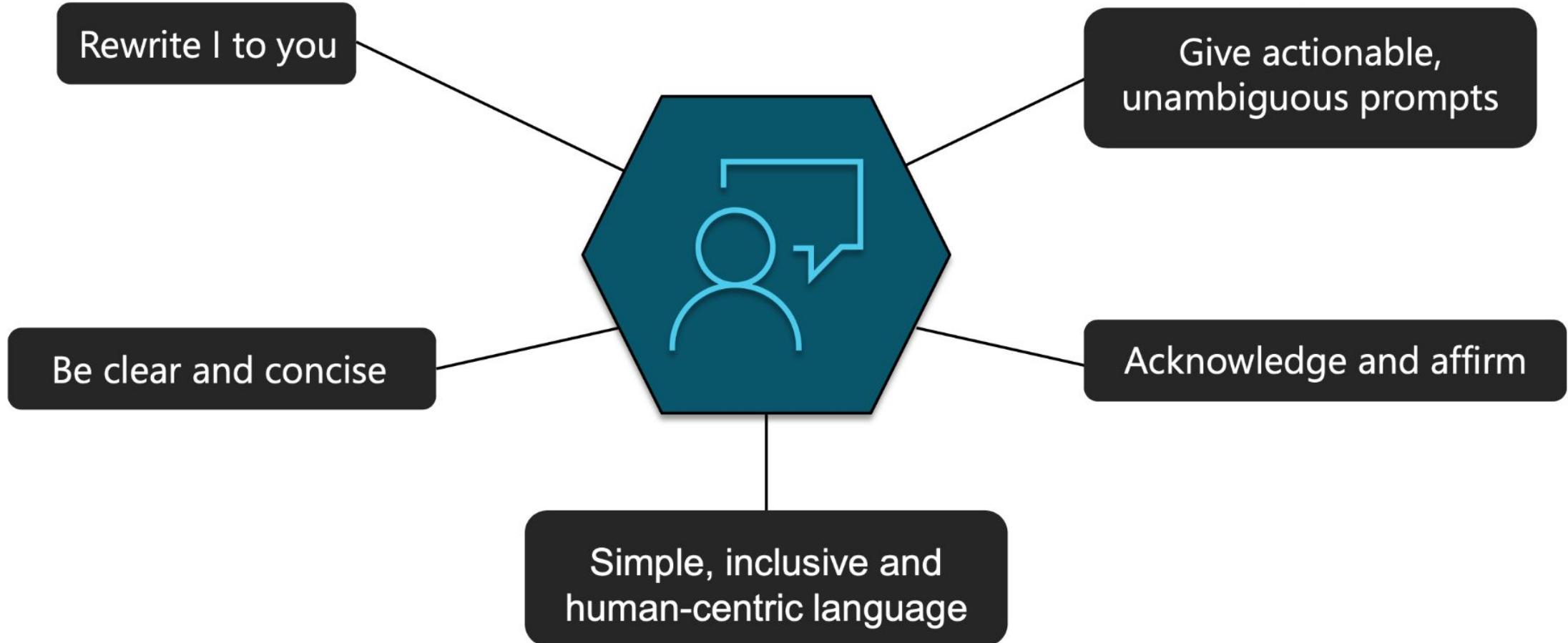
But their emotional response is very real.



Useful Conversational Experiences

- Pick a scenario that will delight and will be requested repeatedly: is the scenario conversational?
- Does the bot easily solve the user's problem with minimal back and forth turns?
- Is the bot discoverable and easy to invoke?
- Mimic human to human conversation in your design of the transcript
- Prototype to uncover what is working
- Create a test plan

Focus on user-centric language



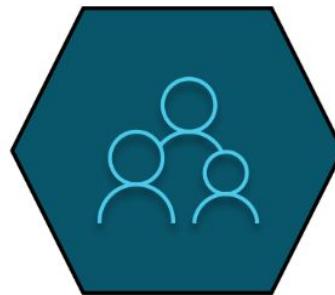
Best practices



Understand your user



Keep it simple and clear



Be inclusive



Personality is important



Use the right tools

Questions to help you get started

- What does it mean for your bot to truly answer their questions?
- What are some unexpected responses your bot may encounter?
- What data might you need access to and need to integrate with various systems to do so?
- What assumptions do your users have when they engage with your bot?
- What context do your users have when talking with your bot, and does this solution fit that mental model?
- How can you design a bot that is easy for your users to navigate and find the answers they are looking for?

Bot brand & personality



What's my name?

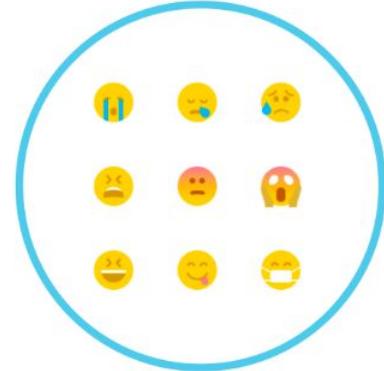
Think about your name and how it reflects your brand and the type of bot you are designing.



How do I look and react?

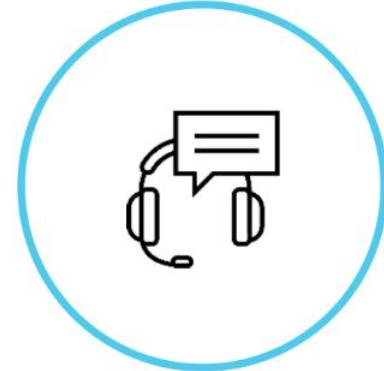
Just like a mobile app your assistant icon is really important.

The interactive changing state of your bot is highly recommended: listening, waiting, responding etc.



How should I sound?

Tone of voice is the primary way you will inject your brand into a bot.

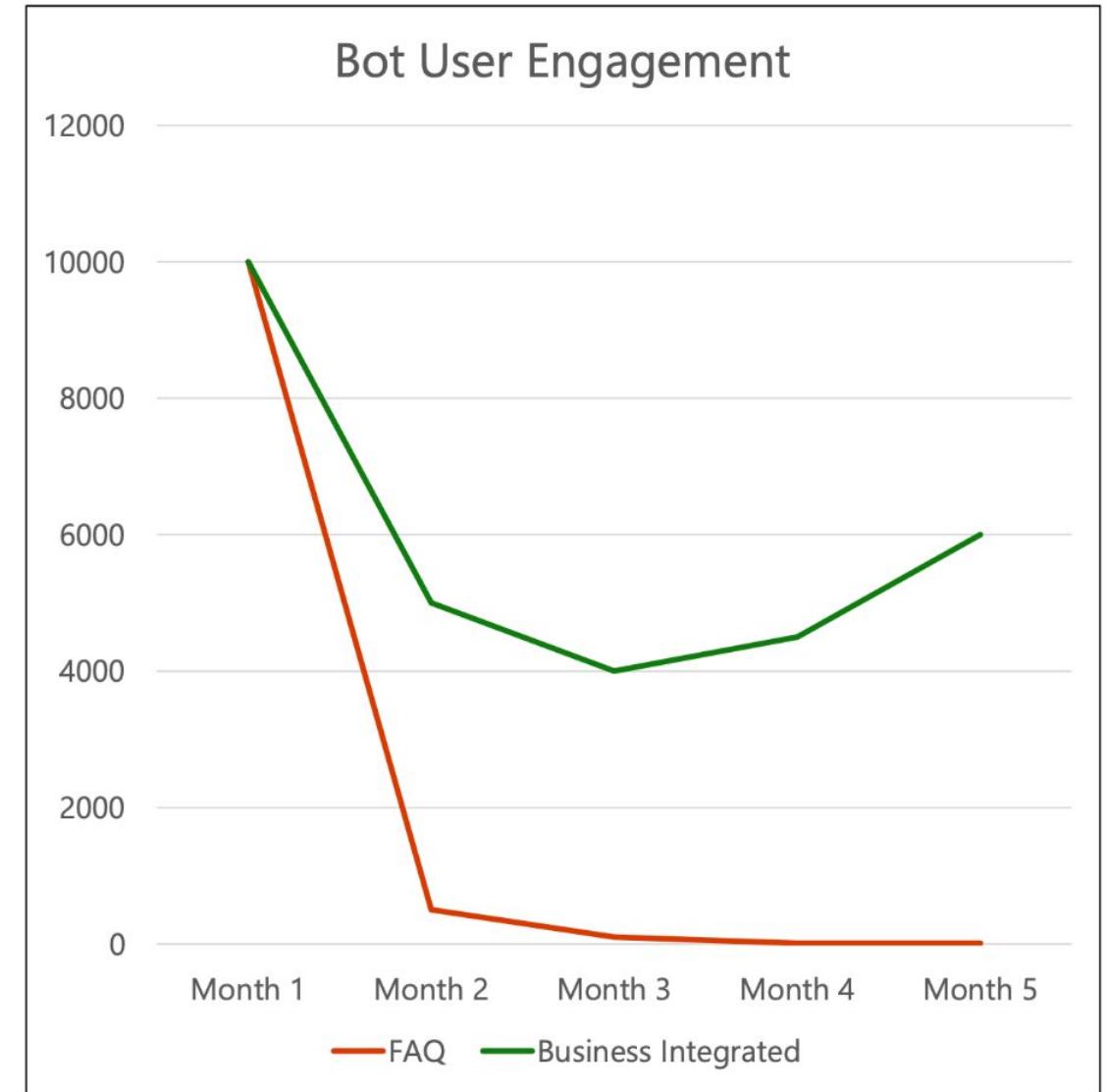


When should I ask for help?

No matter how smart your bot is, there will be cases where you still need to let a human take control of the conversation.

Build Engaging Bots

- FAQ vs Business Integrated
- Leverage Power Automate Connectors
- Value beyond Form Filling
- High Deflection Rate



Brainstorm worksheet

 **ENVISIONING YOUR BOT**
A BRAINSTORMING WORKSHEET

IDENTITY	
NAME IDEAS (Does it have a name? Or just a title?)	REGIONS (Where will the bot be used?)
ICON IDEAS (Brand icon, graphic, full avatar, etc.)	LANGUAGES (With you support others besides your own?)
AUDIENCE	
WHO USES YOUR BOT <small>(Who is your audience? Describe them here.)</small>	3 REASONS THEY USE IT <small>(What do people use your bot for? What are the top things it helps people do?)</small>
	REASON 1
	REASON 2
	REASON 3
TONE OF VOICE <small>(These are the key characteristics of your brand – and therefore, the key characteristics of your bot.)</small>	
5 TRAITS WE EMBODY <small>(What are your brand's top 5 characteristics? Write them down here.)</small>	SIMILAR CHARACTERS <small>(Identify actual people or characters who talk like your brand.)</small>
	6 TRAITS WE AVOID <small>(What are the top 5 characteristics your brand avoids? Write them down here.)</small>
	BRAND EXAMPLES <small>(Are there any brands that have a voice similar to yours?)</small>
TRAITS <small>(This is how your voice changes depending on the situation.)</small>	
3 REASONS PEOPLE USE MY BOT <small>(Now, note the things you wrote in the Reason row and write them again below.)</small>	3 THINGS THAT COULD HAPPEN <small>(For each reason someone might use your bot as on the left, write three things that could happen. Consider the customer segments of your customers, what they care about, and what they might say to your bot.)</small>
REASON 1	Trait 1: _____ 1 2 3 4 5 Trait 2: _____ 1 2 3 4 5 Trait 3: _____ 1 2 3 4 5 Trait 4: _____ 1 2 3 4 5 Trait 5: _____ 1 2 3 4 5
REASON 2	Trait 1: _____ 1 2 3 4 5 Trait 2: _____ 1 2 3 4 5 Trait 3: _____ 1 2 3 4 5 Trait 4: _____ 1 2 3 4 5 Trait 5: _____ 1 2 3 4 5
REASON 3	Trait 1: _____ 1 2 3 4 5 Trait 2: _____ 1 2 3 4 5 Trait 3: _____ 1 2 3 4 5 Trait 4: _____ 1 2 3 4 5 Trait 5: _____ 1 2 3 4 5
CONTENT STYLE <small>(This is how your tone is expressed. On how your bot talks, the words it says and how it says them.)</small>	
QUICK LIST	PUNCTUATION
<input type="checkbox"/> Emojis <input type="checkbox"/> GIFs & memes <input type="checkbox"/> Images <input type="checkbox"/> Videos <input type="checkbox"/> _____	SENTENCE CONSTRUCTION CAPITALIZATION JARGON & SLANG

<https://aka.ms/ConversationalAIWorksheet>

Conversational user experience in the Bot Framework
SDK -
Bot Service | Microsoft Docs

Questions?

Thank you!



Introduction to M365 Copilot

Thanapol (Balloon) Sopanhari

What is Microsoft 365 Copilot Chat (M365 Copilot)

Microsoft Copilot

An AI companion that works everywhere you do



Your everyday AI companion

with Bing



Write
Help me prepare and write a successful sales pitch



Compare
Compare online and offline marketing strategies



Analyze
Create a SWOT analysis about environmental goals and impact



Learn
How do I set achievable goals at work?



Laugh
What's a good joke to break the ice for my next meeting?



Code
What are the new features in the latest JavaScript release?

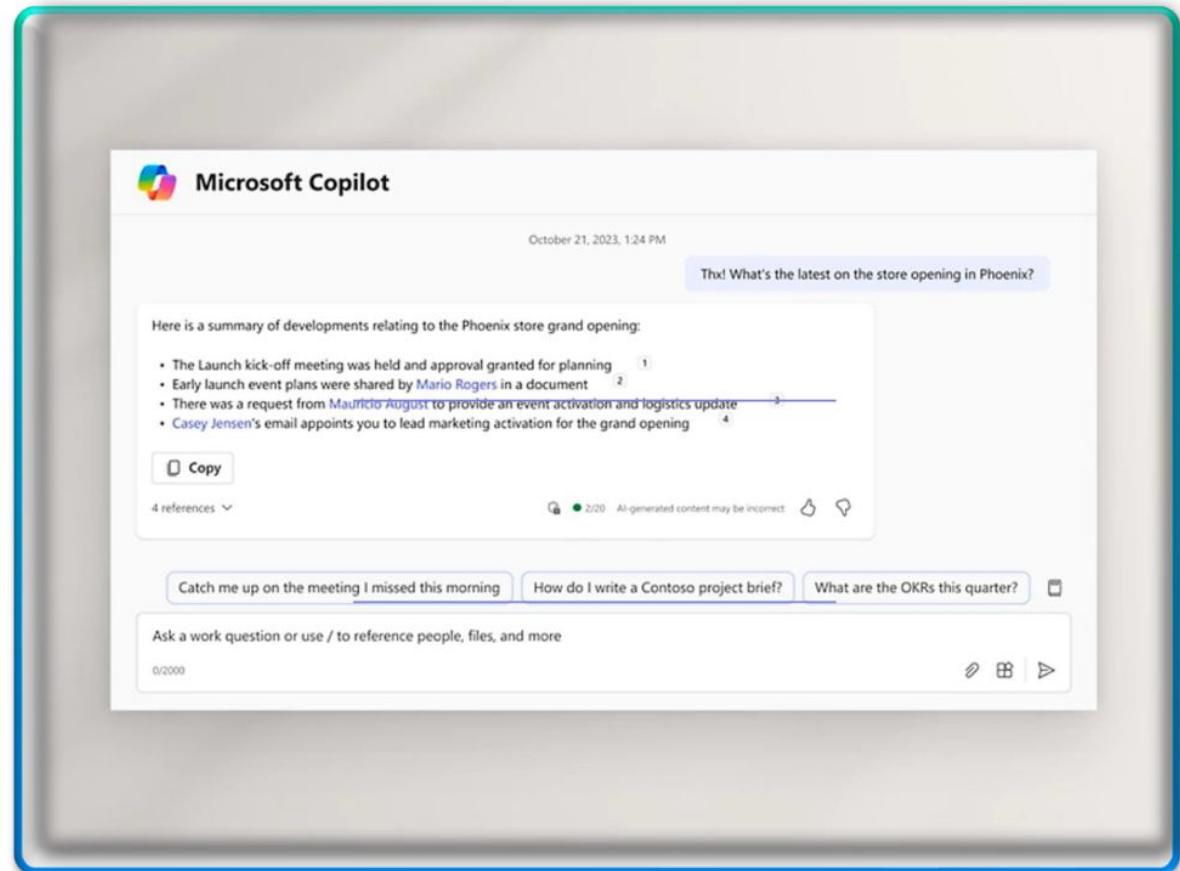
Preview

Microsoft Copilot is powered by AI, so surprises and mistakes are possible. Please share feedback so we can improve! [Terms](#) | [Privacy](#)

Your AI Assistant at work

With Copilot for Microsoft 365, you can enhance productivity and amplify human creativity:

- **Transform communications:** Copilot drafts, edits, summarizes, and creates right alongside you.
- **Get more out of meetings,** stay engaged easily and quickly catch up on the ones you miss.
- **Analyze and explore data,** identifying trends or getting recommendations, and create powerful visualizations
- **You're always in control** – deciding which AI suggestions to use, modify, or discard.





Your UI for AI

M365 Copilot

Search

Chat

Agents

- Seven Peaks Pre-Sales
- EGAT FAQ Assistant
- Jira Cloud

All agents

Create agent

Conversations

- What do I need to do for you t...
- which model are you?
- which model are you?
- which model are you?
- What are the skills and role I h...

All conversations

Pages

Create

Apps

J(Jose (Jose) Barbosa ...

Upgrade Copilot

Welcome Jose (Jose), how can I help?

Message Copilot

+

0

Summarize file

Get an overview

Help me improve my writing in this file: [upload document](#)

Make it better

List key points from file

Understand the main points

See more ▾

This screenshot shows the Microsoft 365 Copilot application window. The left sidebar contains navigation links like 'Agents', 'Create agent', 'Conversations', and 'Pages'. A central area displays a welcome message 'Welcome Jose (Jose), how can I help?' followed by a message input field 'Message Copilot' and a list of AI tools: 'Summarize file', 'Help me improve my writing in this file: upload document', and 'List key points from file'. At the bottom, there's a 'See more' button and a 'Upgrade Copilot' button.

Download the Microsoft 365 Copilot app

The Microsoft 365 Copilot app is your AI-first productivity app for work and home. It provides one place for you to chat with your AI assistant, create and edit content, quickly find files, and access your favorite Microsoft 365 apps—helping you get more done, without doing more.¹²

[Download for Mac](#)

Requires MacOS Sonoma 14 or later



[What's included](#)

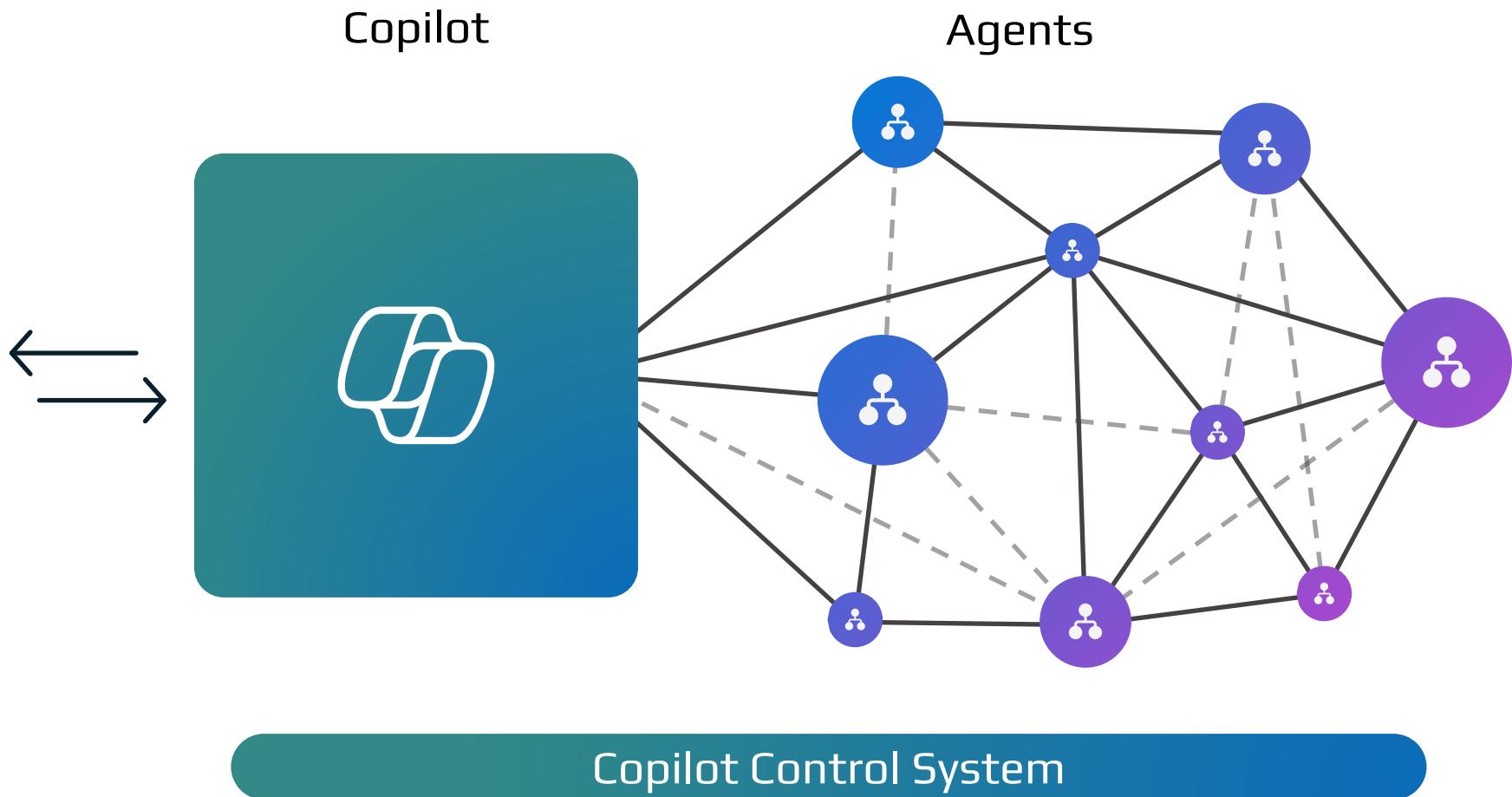
[Download the mobile app](#)

[FAQ](#)

[Open Copilot web app](#)

[Download for Mac](#)

Copilot is the UI for AI





Microsoft 365 Copilot

- 1** Consistent UI for AI
- 2** Integrated in the tools millions use every day
- 3** Platform for agents and extensibility
- 4** Enterprise-grade security, privacy, and compliance
- 5** Flexible purchasing and deployment options
- 6** Measure AI impact and business value

Why M365 Copilot?

Get proactive
overviews of your day

Copilot Chat



Analyze
budget
Spend



Analyst

Prepare for
a customer
meeting



Researcher

Create
interview guides



Researcher

Catch up on
missed
meetings

Copilot in
Teams Meetings



Where Copilot wows

Quickly
find content



Copilot Search

Be prepared
for every
meeting

Copilot in
Teams Meetings

Quickly onboard onto
new roles or projects



Notebooks

Create
strategy papers



Researcher

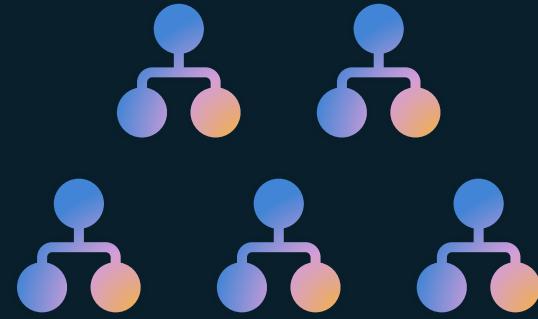
Never take
meeting
notes again

Copilot in
Teams Meetings



Copilot

Every employee
has a Copilot



Agents

Every business process
transformed by agents

Microsoft has the **best platform** for agents



Integrated into UI for AI
(Microsoft 365 Copilot)



Grounded in your
company data



Enterprise-grade security,
governance & compliance



Act across systems
& channels



Latest models, orchestration &
multi-agent systems



Build your agents, your way
(low code or pro code)

FINASTRA

Marketing team's time to create new content reduced by 67%

7 months of work completed in 7 weeks

LUMEN

Sellers increased outbound call by 40% due to process efficiencies

Projected \$50M annual revenue gains

Honeywell

92 minutes saved per week per person

Nearly 2 weeks per person annually

70%

of the Fortune 500
use
Microsoft 365 Copilot

BOQ

L&D organization creates training materials and speaking notes in minutes instead of hours



68,000 users with 90% praising the benefits

Saving 3 hours savings per week per person



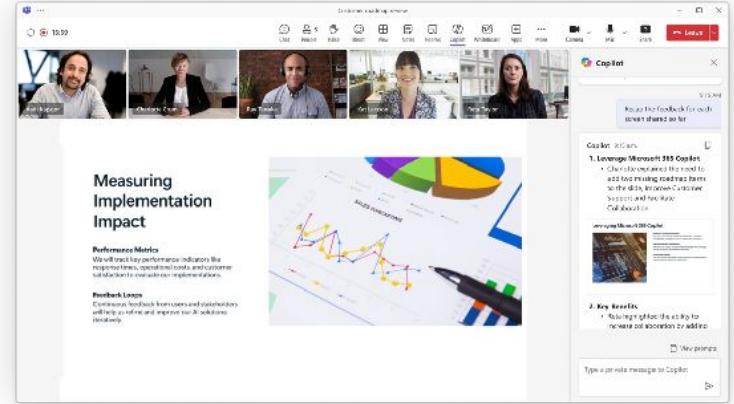
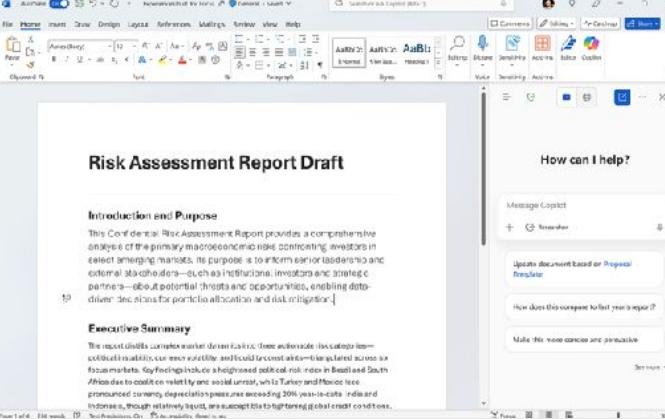
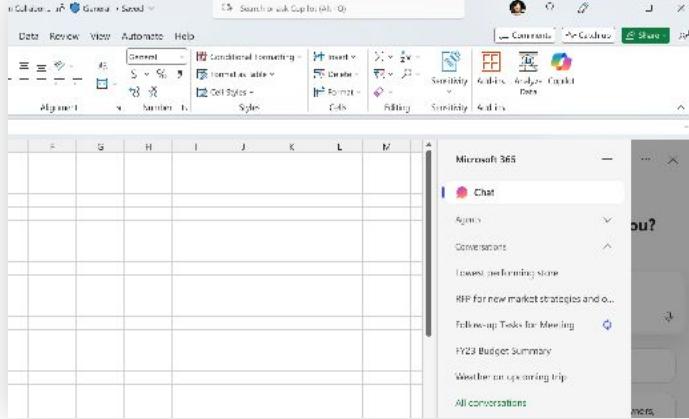
Automate shipping invoice analysis
Anticipate millions of dollars saved on shipping operations in first year

AMGEN

20,000 users across functions accelerate rare disease research.

Industry leaders gaining business value with Copilot

Copilot in Microsoft 365 Apps and Teams



Persistent conversations

A unified Copilot Chat experience integrated in Teams and Microsoft 365 apps with conversations that follow you as you work.

Reason over content

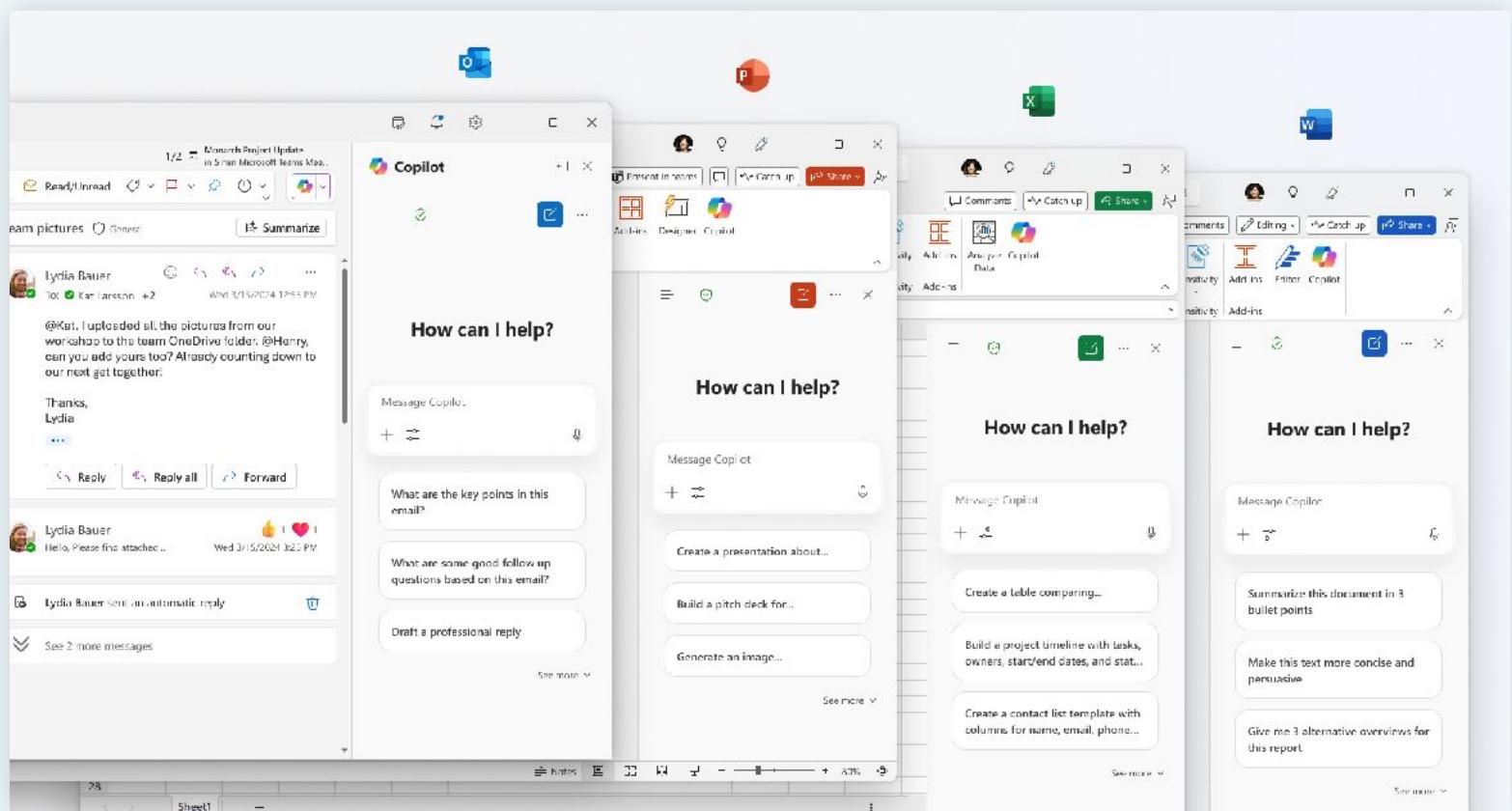
Ask Copilot questions about open files and invoke agents with specialized skills for faster, better results without leaving the app.

Specialized AI functions

In-app editing and app specific skills perform specialized tasks within Teams, Outlook, Word, Excel, PowerPoint and other Microsoft 365 apps.

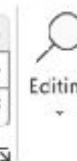
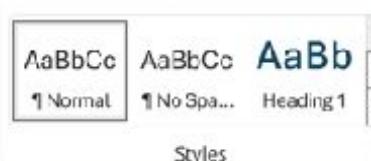
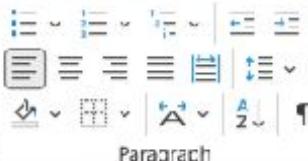
Copilot Chat in Microsoft 365 apps

Microsoft 365 users can use Copilot Chat with web data directly in the Microsoft 365 apps and reason over open files, uploaded files, and files.



*For users without a Microsoft 365 Copilot license: Copilot in Outlook can reason over individual open emails, email threads, or attachments only, it cannot reason over your full inbox or calendar. Users will have standard access to file upload and "/" search based on service capacity. Accessible enterprise content via "/" search only includes files, and does not include chats, meetings, or emails.

UI/UX is subject to change



Summary This report tracks how production, consumption and value in the coffee industry have shifted from 2020 through 2025, explores key trends in coffee, at-home brewing, RTD growth, digital integration, and more.

[View more](#)

Risk Assessment Report Draft

Introduction and Purpose

This Confidential Risk Assessment Report provides a comprehensive analysis of the primary macroeconomic risks confronting investors in select emerging markets. Its purpose is to inform senior leadership and external stakeholders—such as institutional investors and strategic partners—about potential threats and opportunities, enabling data-driven decisions for portfolio allocation and risk mitigation.

Executive Summary

The report distills complex market dynamics into three actionable risk categories—political instability, currency volatility, and liquidity constraints—triangulated across six

Work data access

Hi, how can I help you?

Access reasoning
Message Copilot
agents

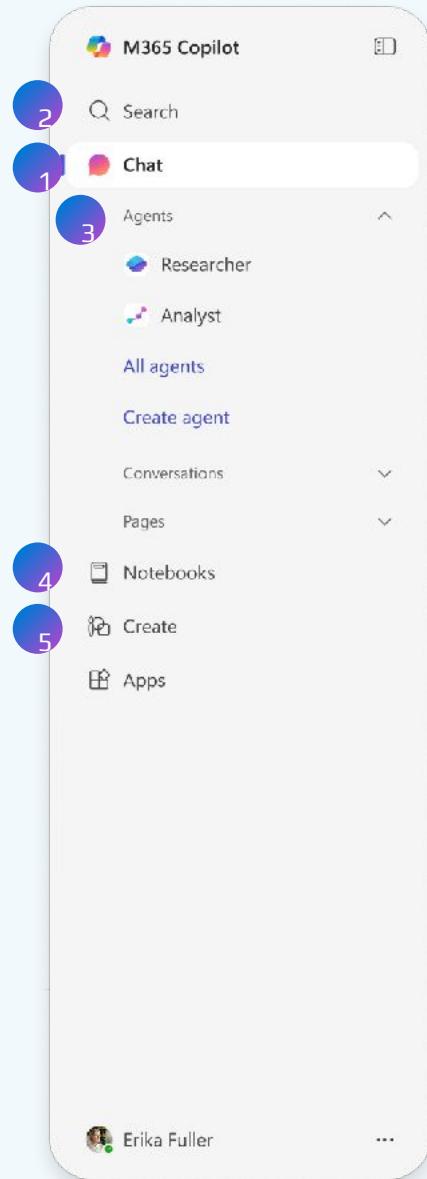
Work data
prompts

Update document based on [Risk Assessment Template](#)

How does this compare to last year's report?

Make this more concise and persuasive

See more



5 in 1 AI capabilities with M365 Copilot

1

Chat

Secure AI chat powered by the latest models available and grounded in web and work data.

2

Search

AI-powered search spans all your work data and provides fast and relevant results.

3

Agents

A broad ecosystem of pre-built agents available in the Agent Store and build your own agents in Copilot Studio.

4

Notebooks

Copilot is grounded in your project's diverse content types to provide targeted responses and engaging audio overviews.

5

Create

AI-generated images, posters, banners, videos, and more that are aligned to your organization's brand identity.

Features

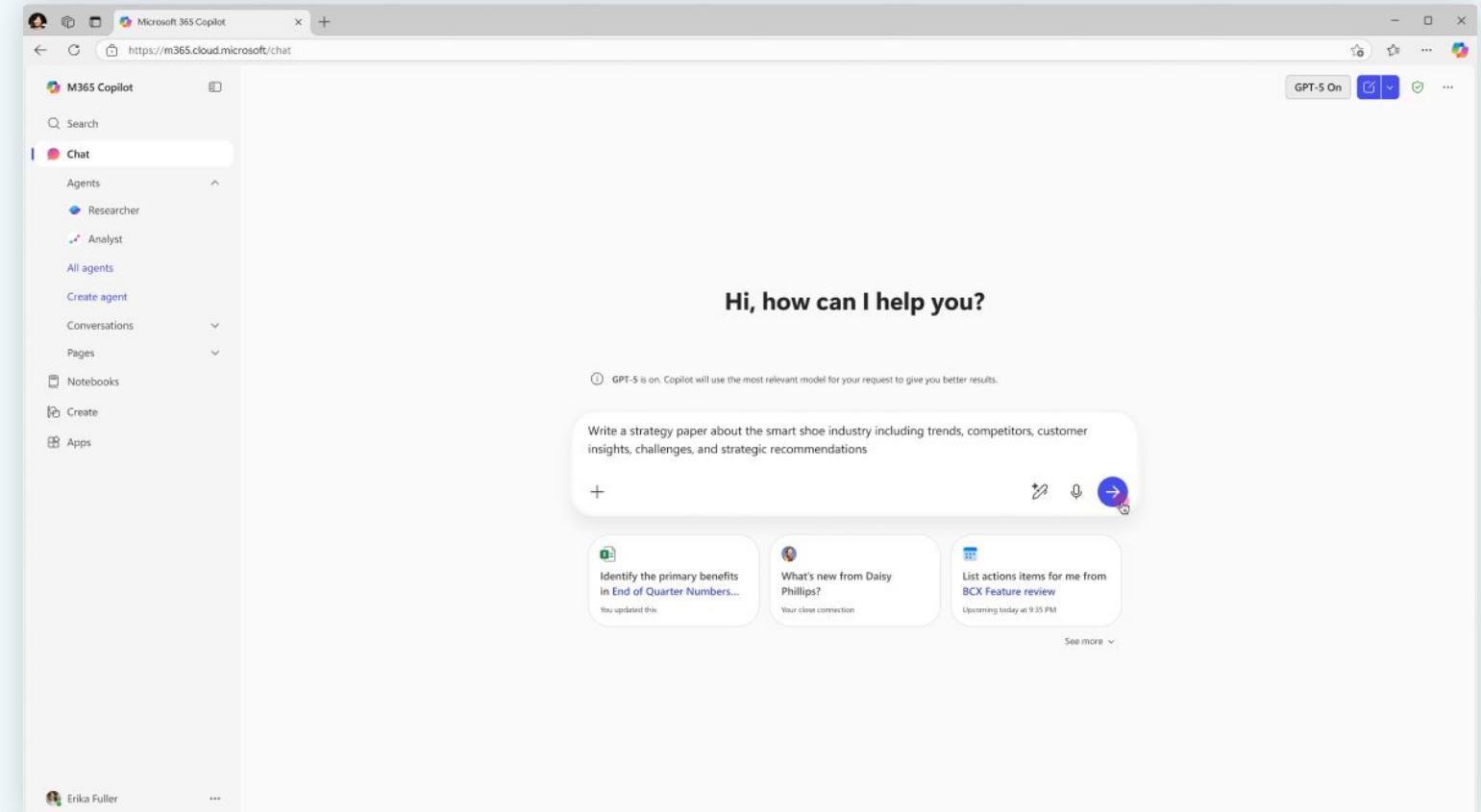
Copilot Chat

Powered by GPT-5

Copilot understands your prompt and uses the GPT-5 real-time router to choose the best model.

The high-throughput model provides quick, succinct responses to clear-cut questions.

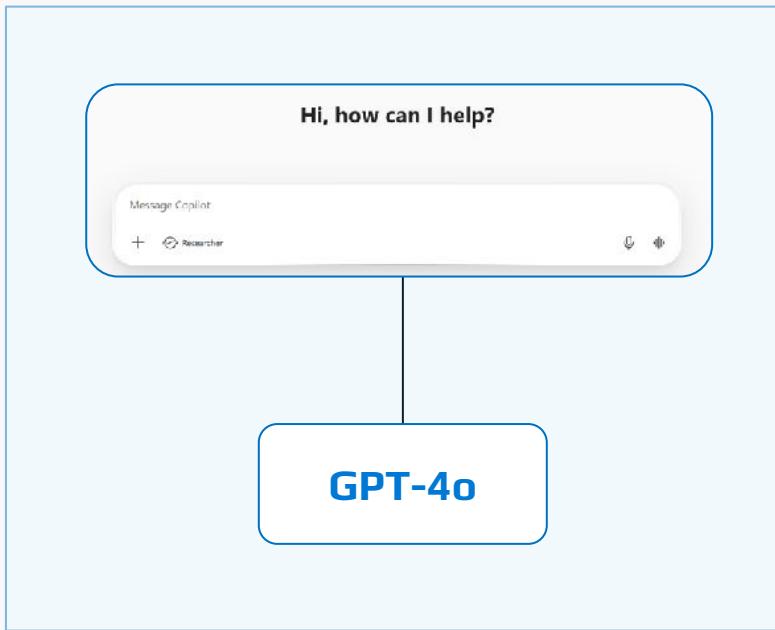
For complex queries, a deeper reasoning model crafts a plan, gathers context, and verifies output.



Copilot Chat powered by GPT-5

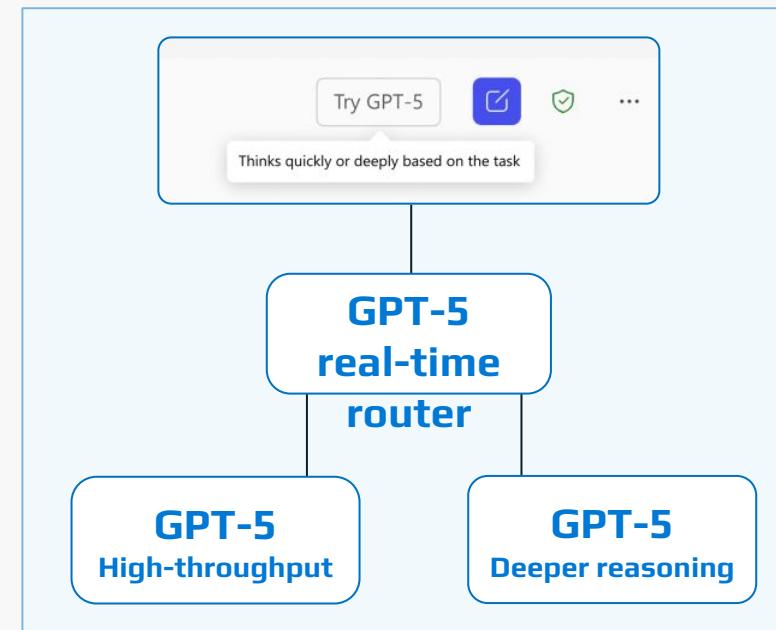
Try the latest model from OpenAI today

Copilot Chat with GPT-4o



- Prompt sent to GPT-4o

Copilot Chat with GPT-5

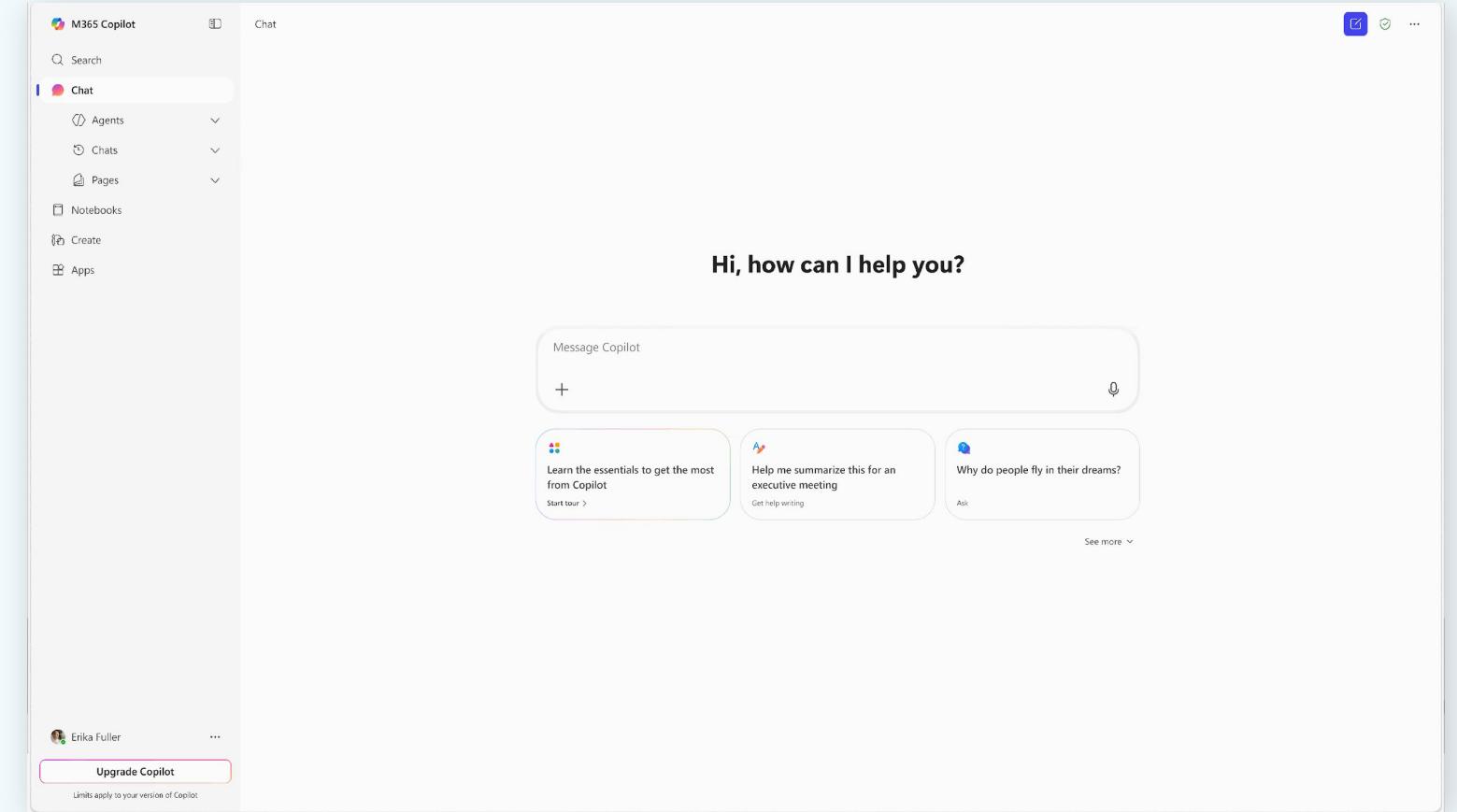


- GPT-5 real-time router analyzes complexity of prompt
- Simple prompts routed to GPT-5 high-throughput model
- Complex prompts routed to GPT-5 deeper reasoning model

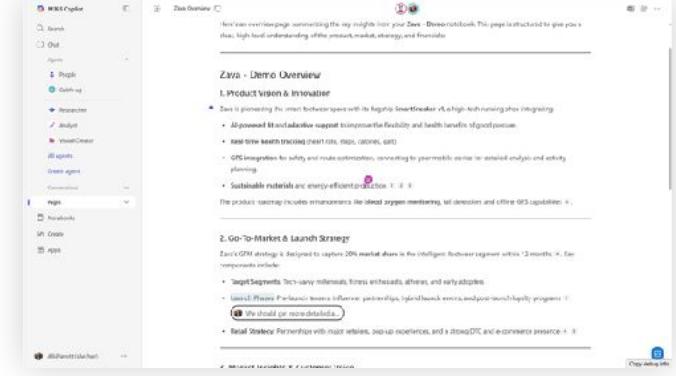
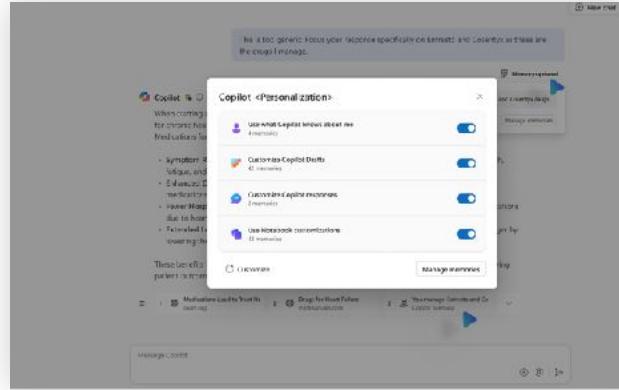
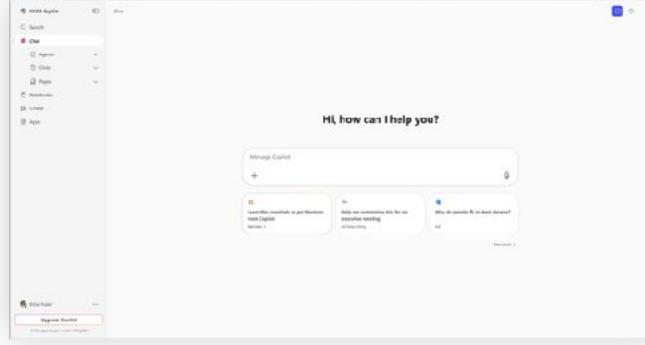
Both models are made secure with enterprise data protection and optimized for work

Chat

Secure AI chat powered by the latest models available and grounded in web and work data.



Chat



AI Chat for work

Ask Copilot to be your thought partner to explore new ideas and problem solve across both web and work data.

High quality responses

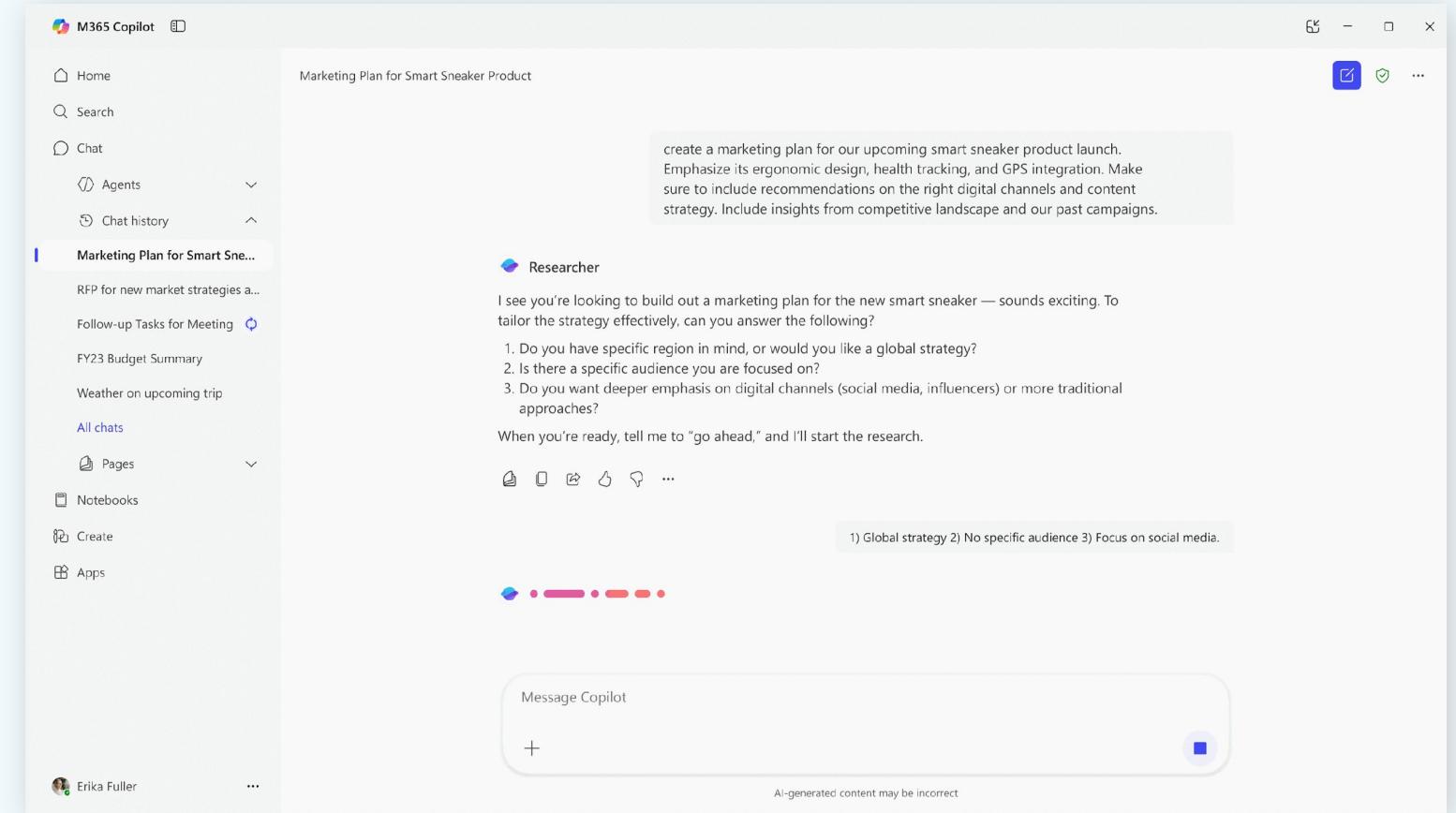
Uses your tenant's Graph data, including 3P data, and draws on previous chats and custom instructions to deliver highly personalized, context aware responses.

Multiplayer collaboration

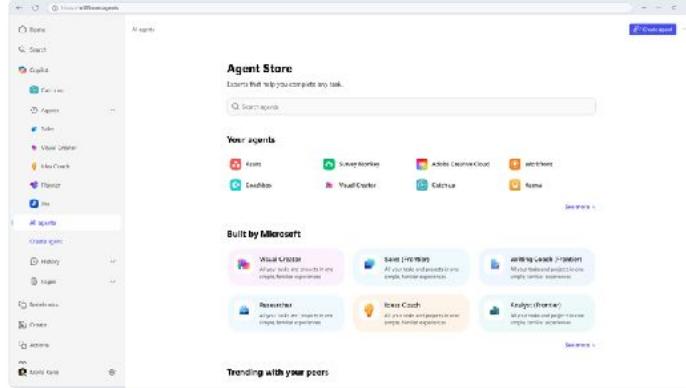
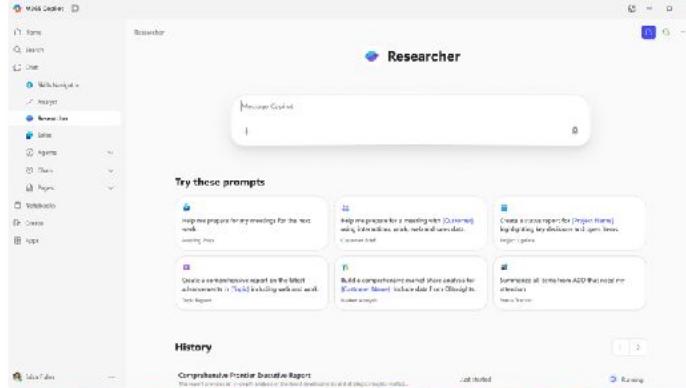
Convert AI outputs into durable content in Copilot Pages, designed for dynamic collaboration with AI and your teammates.

Agents

A broad ecosystem of pre-built agents available in the Agent Store and tools to build your own agents in Copilot Studio.



Agents



Use Microsoft agents

Leverage agents built by Microsoft that use advanced reasoning like Researcher and Analyst or specialized agents like Facilitator for meeting management.

Discover agents

From Microsoft to trusted third party agents, Agent Store is where you find agents that are ready to work for you.

Build custom agents

Build your own agents with Copilot Studio using natural language or pro code tooling with the Microsoft 365 Agent SDK.

Microsoft Agents



Researcher

Advanced reasoning

[Generally available](#)



Analyst

Advanced reasoning

[Generally available](#)



Skills

Map organizational talent

[Coming to Frontier
September 2025](#)



Survey

Survey creation, distribution, and measurement

[Frontier program](#)



Project Manager

Automate planning and project reporting

[Public preview](#)



Interprete

Real-time multi-lingual translation

[Generally available](#)



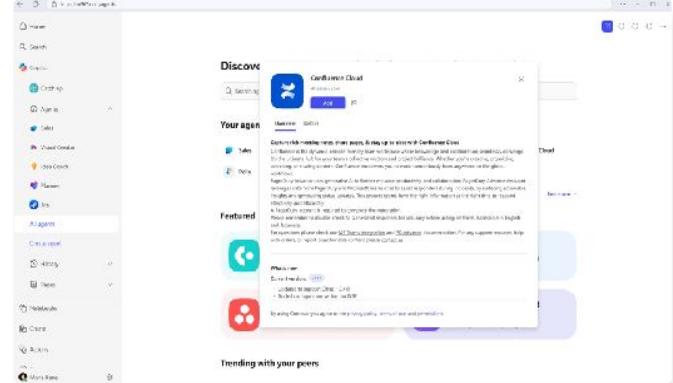
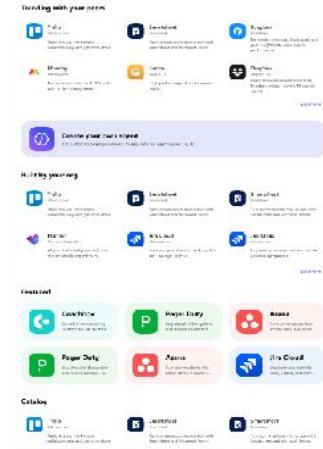
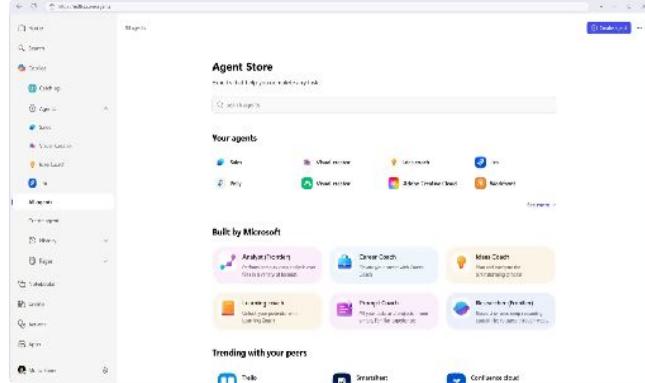
Facilitato

Teams meeting moderation and meeting notes

[Public preview](#)

Automate tasks with pre-built agents by Microsoft that are designed for work

Agent Store



Discover agents

Personalized experience on an integrated platform to discover agents from Microsoft, partners, and your own organization.

Deploy quickly

Accelerate results with ready-to-deploy agents that help boost efficiency and enable smarter decisions.

Admin control

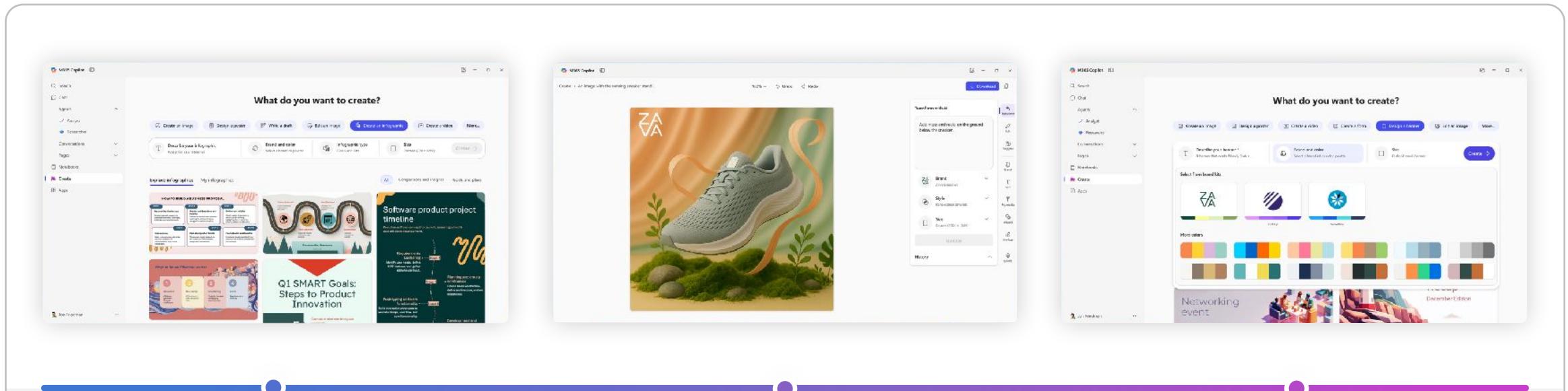
Agents are validated for security, compliance, and performance, and IT retains full control and oversight.

Create

AI-generated images, posters, banners, videos, and more that are aligned to your organization's brand identity.

The screenshot shows the Microsoft 365 Copilot interface. On the left, there's a sidebar with options like Search, Chat, Agents, Analyst, Researcher, Conversations, Pages, Notebooks, and Apps. The 'Create' button is highlighted. Below the sidebar, a user profile for 'Jon Friedman' is shown. The main area is titled 'What do you want to create?' and features several buttons: Create an image, Design a poster, Write a draft, Edit an image, Create an infographic (which is selected), Create a video, and More... Below these buttons, there are input fields for 'Describe your infographic' (with a placeholder 'Add a file as a reference') and 'Brand and color' (with a placeholder 'Select a brand or palette'). There are also filters for 'Infographic type' (Goals and lists) and 'Size' (Portrait (720 x 1280)). A large 'Create' button is at the bottom right. In the center, there are four examples of infographics: 'HOW TO BUILD A BUSINESS PROPOSAL', 'Ways to Be an Effective Leader', 'Q1 SMART Goals: Steps to Product Innovation', and 'Software product project timeline'. Each infographic has a brief description and a 'View' button. At the top right of the main area, there are filters for 'All', 'Comparisons and insights', and 'Goals and plans'.

Create



AI-powered creation

Design and edit a wide range of visual artifacts in a creative process grounded on the Microsoft Graph and files uploaded by you.

Company brand kit

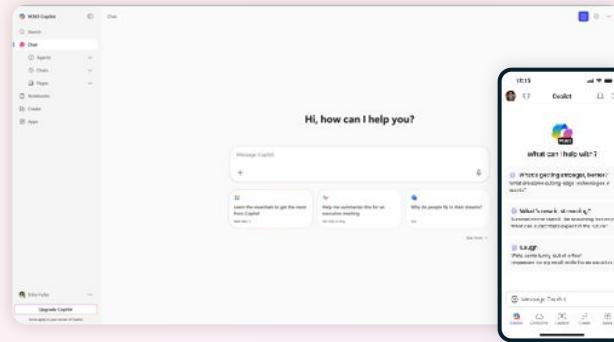
Choose from thousands of templates or create brand kits that include your company's logos, color palettes, fonts, and more, ensuring brand consistency across all creative outputs.

Full editing experience

Fine tune your work with built-in visual editing tools that make it easy to edit text, add effects, and make sophisticated adjustments to get the asset you need.



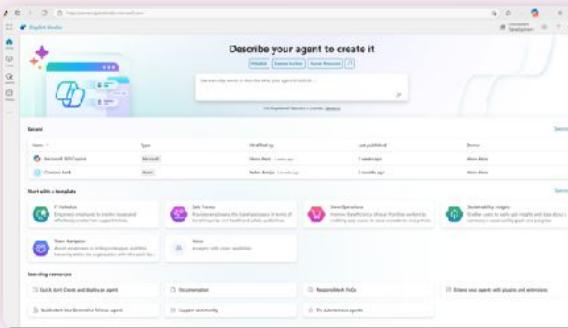
Microsoft 365 Copilot Chat



Chat

Secure web-grounded AI chat on the App and web, and in Microsoft 365 productivity apps

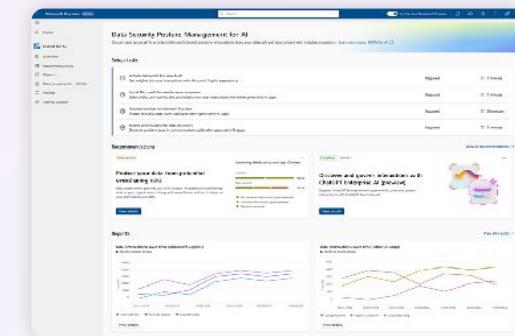
+



Agents

Integrated into the chat experience and paid for on a consumption basis

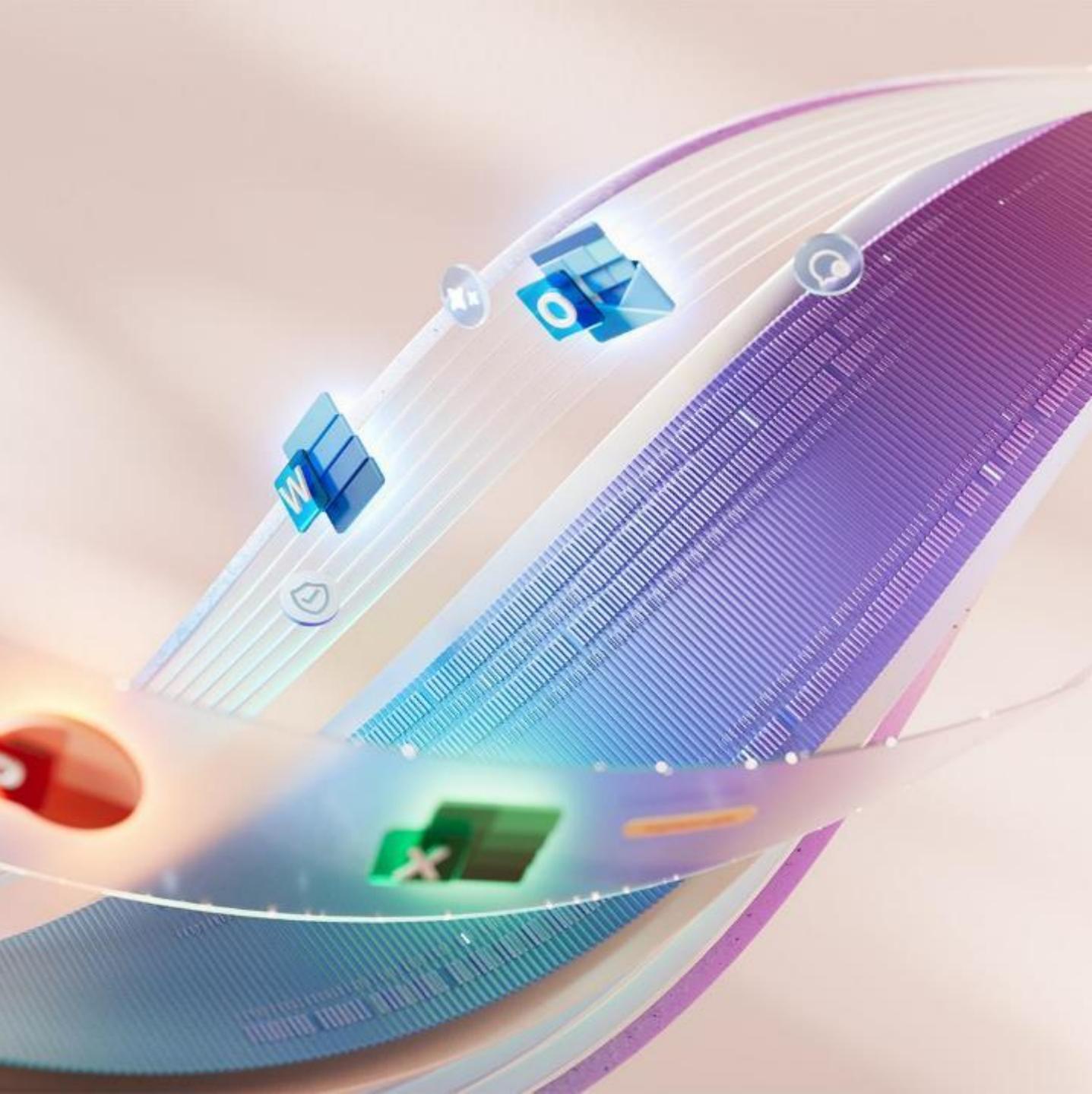
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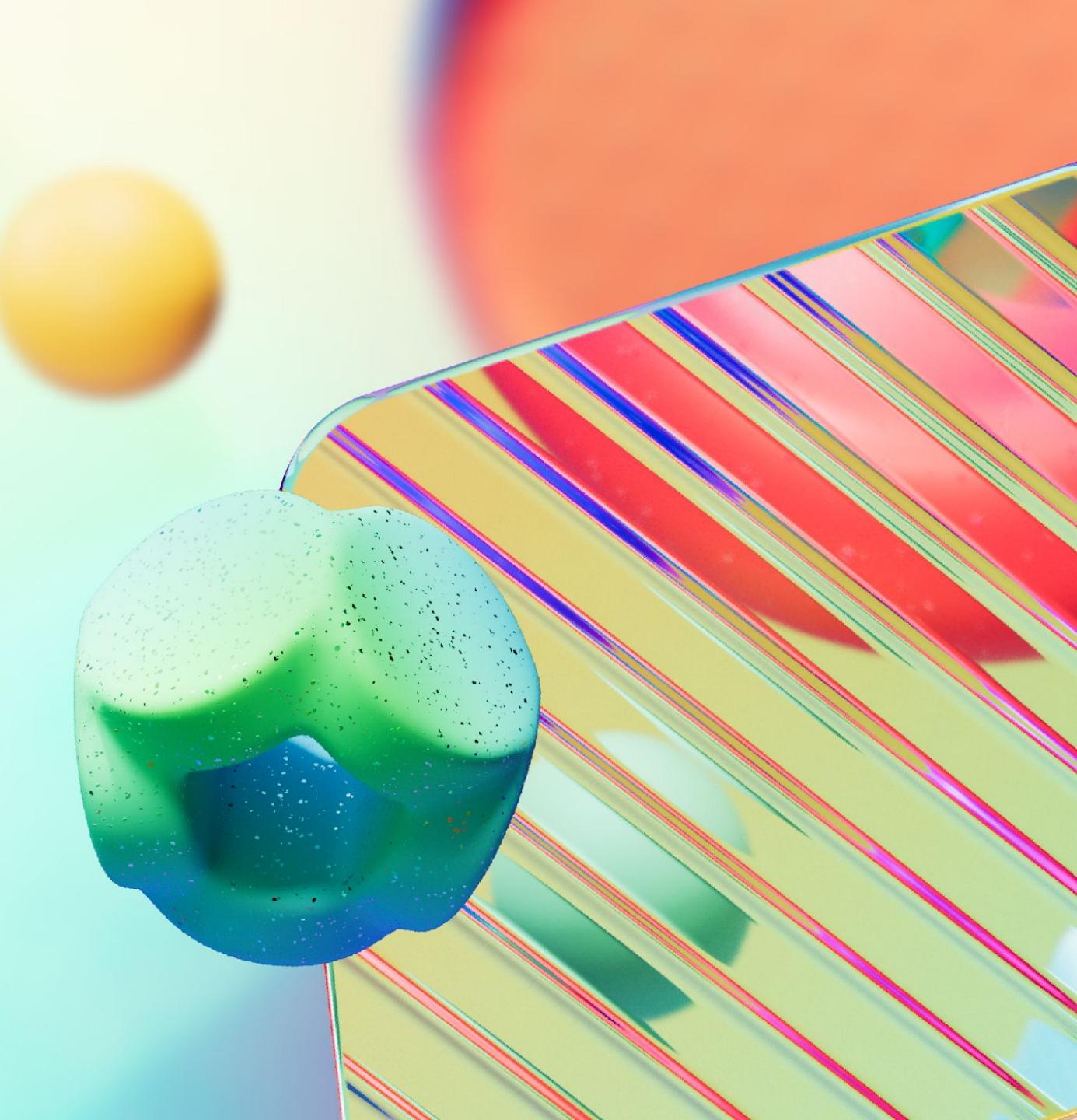
IT Controls

Enterprise Data Protection and agent management

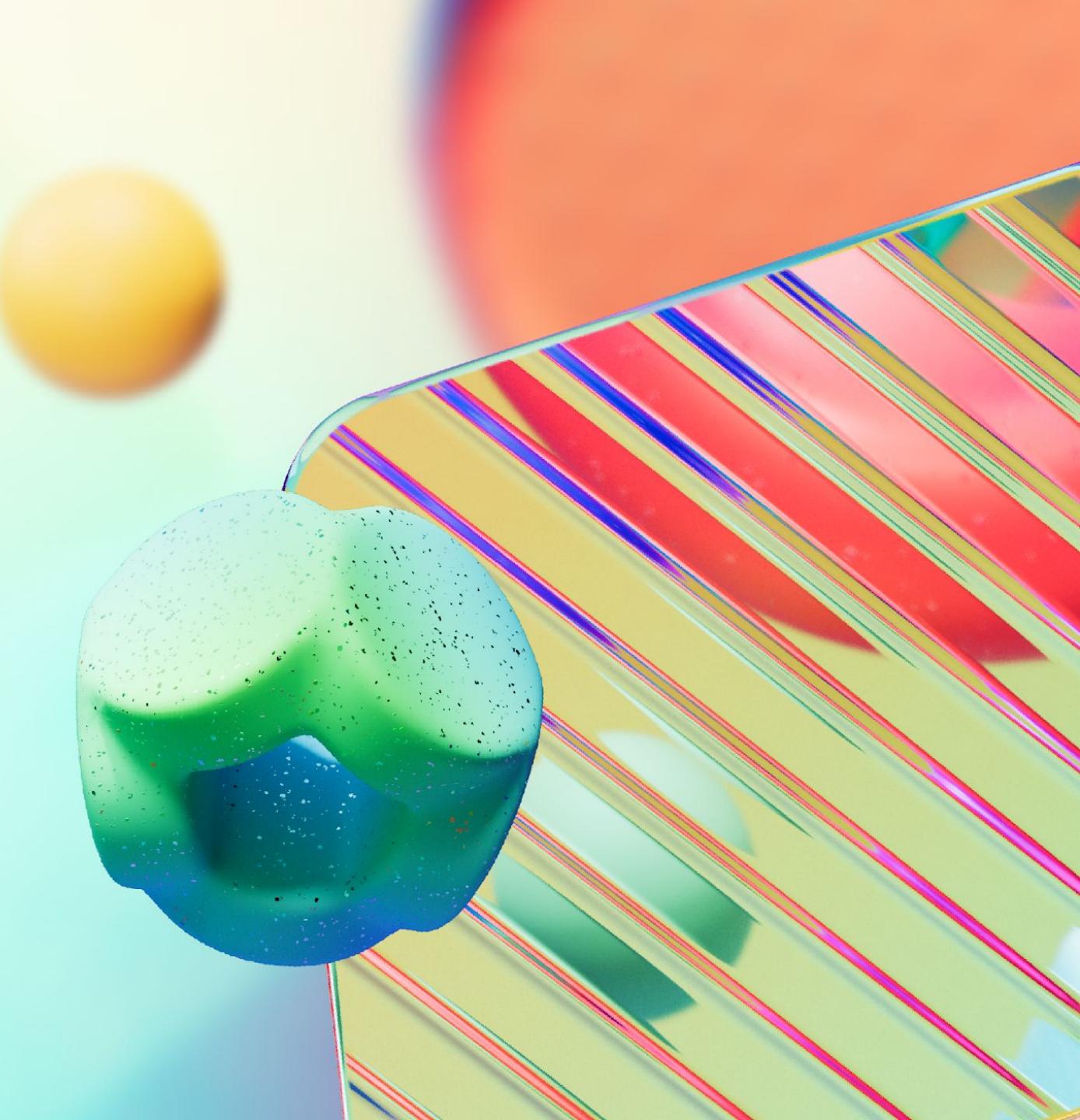
Demos



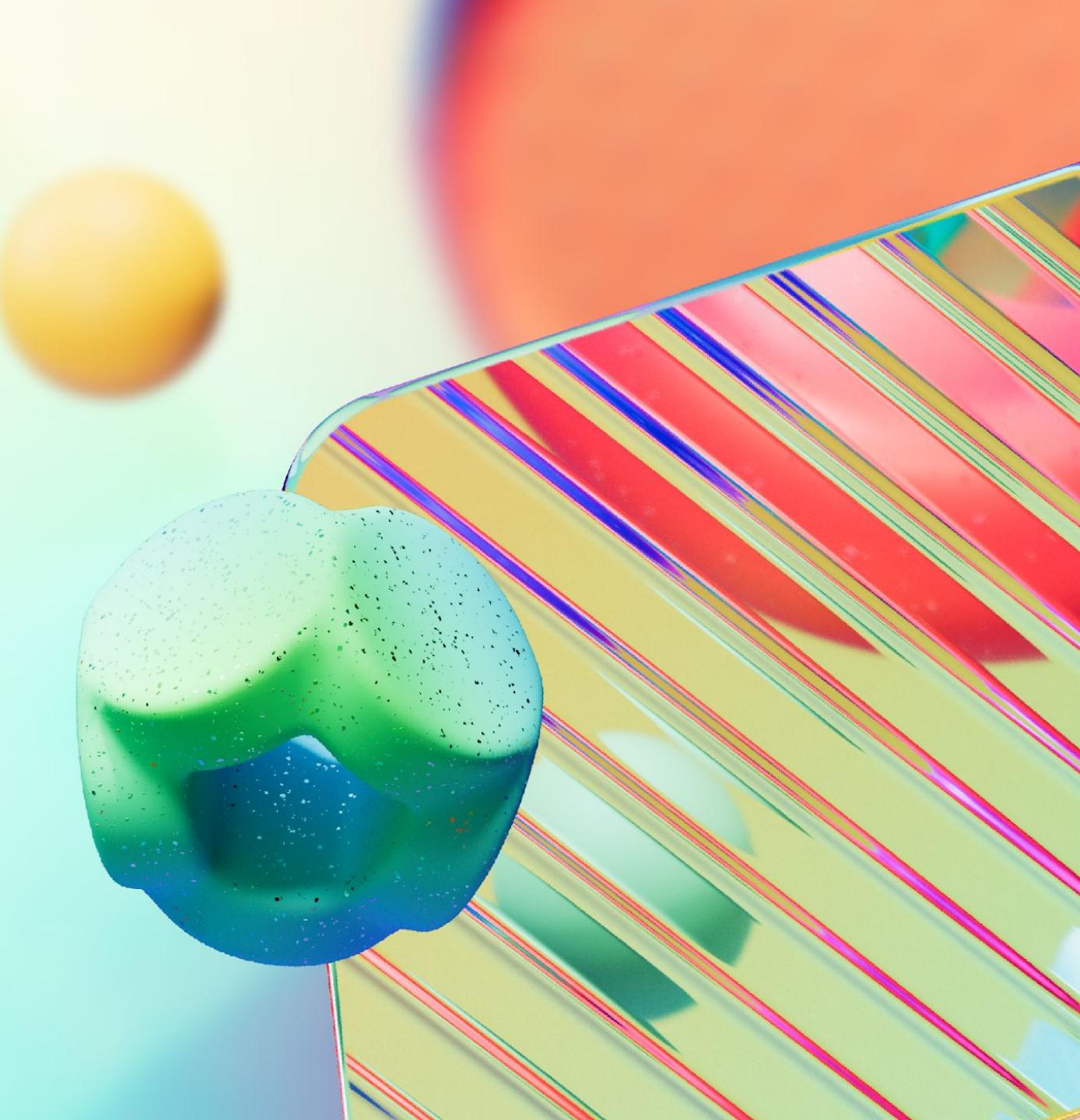
Enterprise-ready Chat



Sales Agent

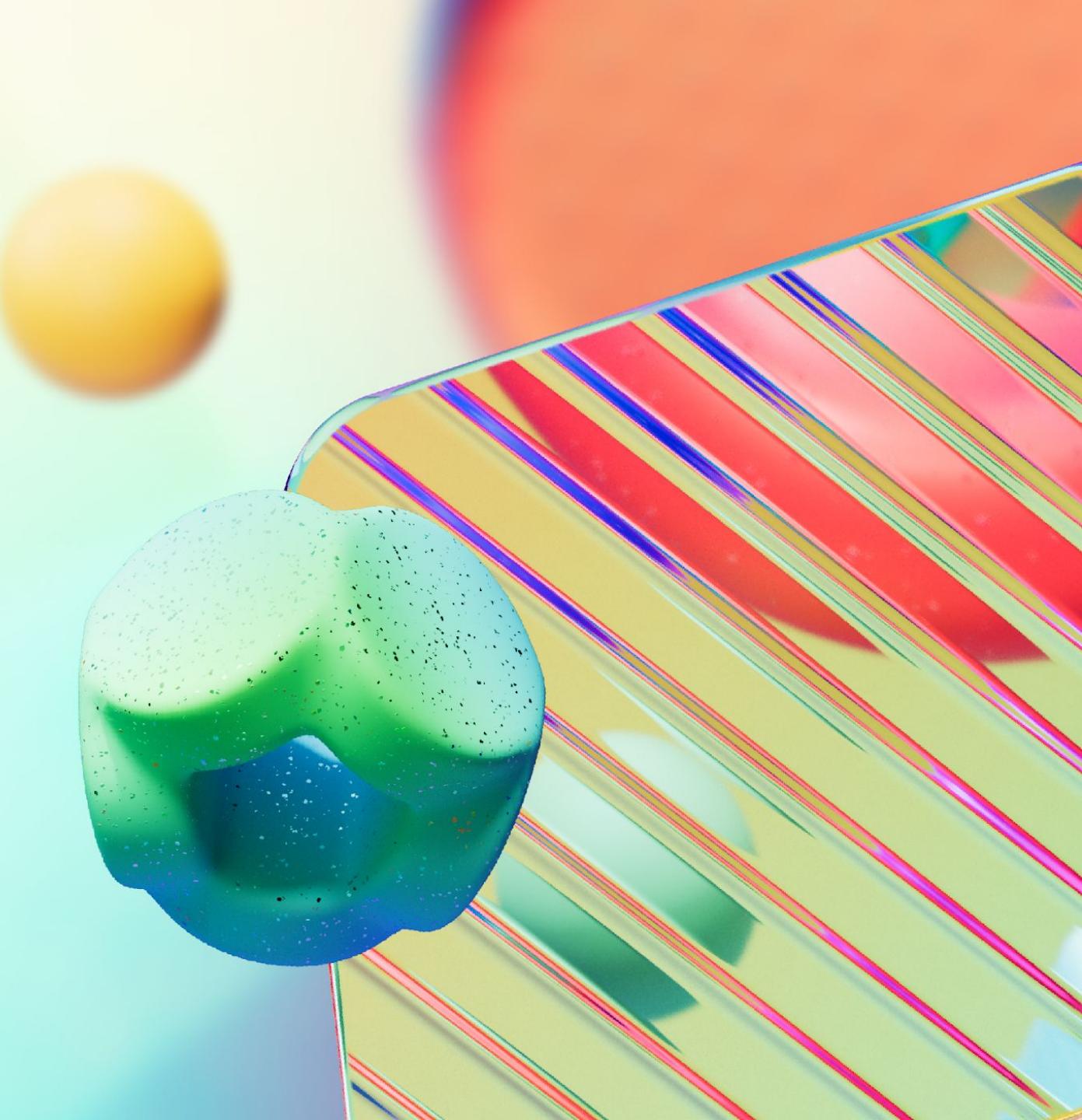


Customer Service Agent

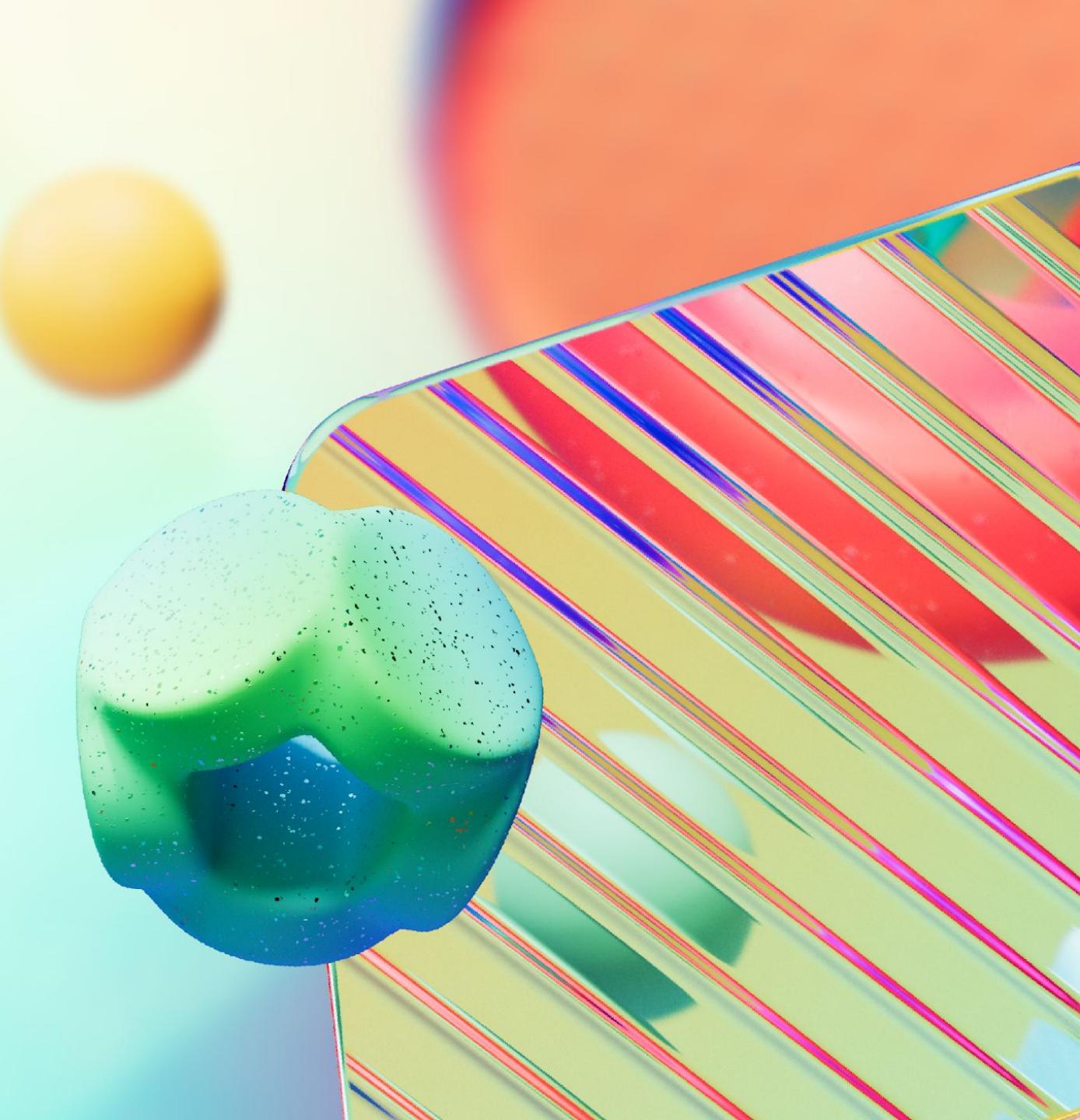


Agent Builder

(Copilot Studio Lite)



Manage Agents in Copilot Chat



Questions?

Thank you!



Introduction to Copilot Studio

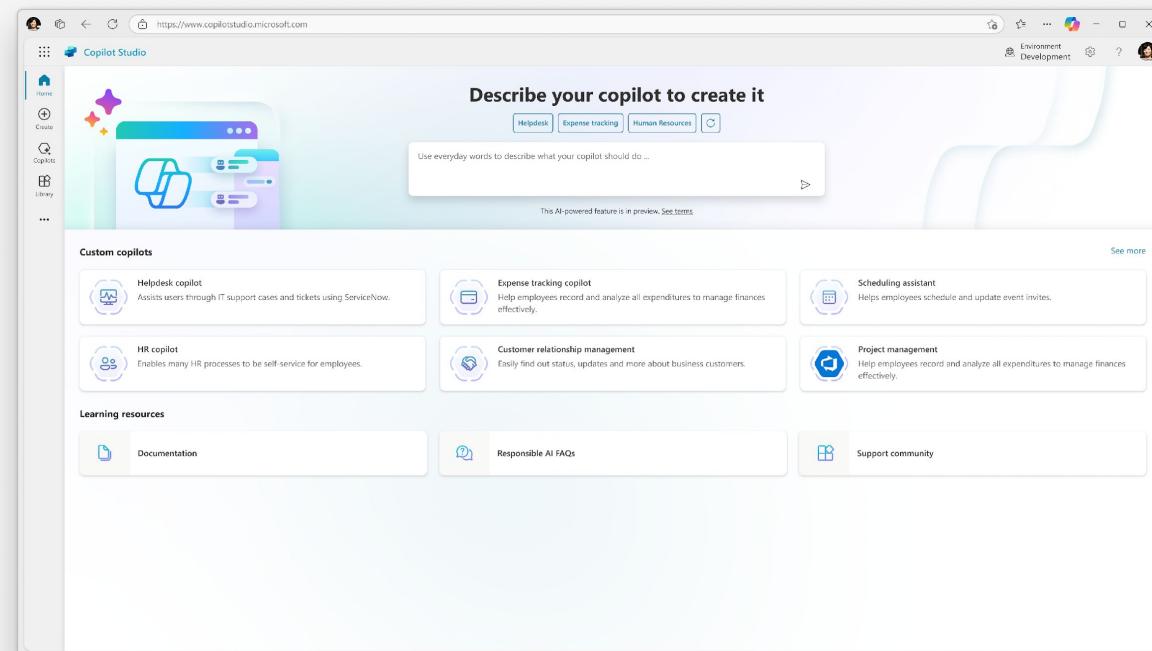
Thanapol (Balloon) Sopanhari

What is Microsoft Copilot Studio?



Copilot Studio

Copilot Studio is an end-to-end conversational AI platform for **extending Microsoft Copilot** or **building your own copilot** with generative AI and large language models.



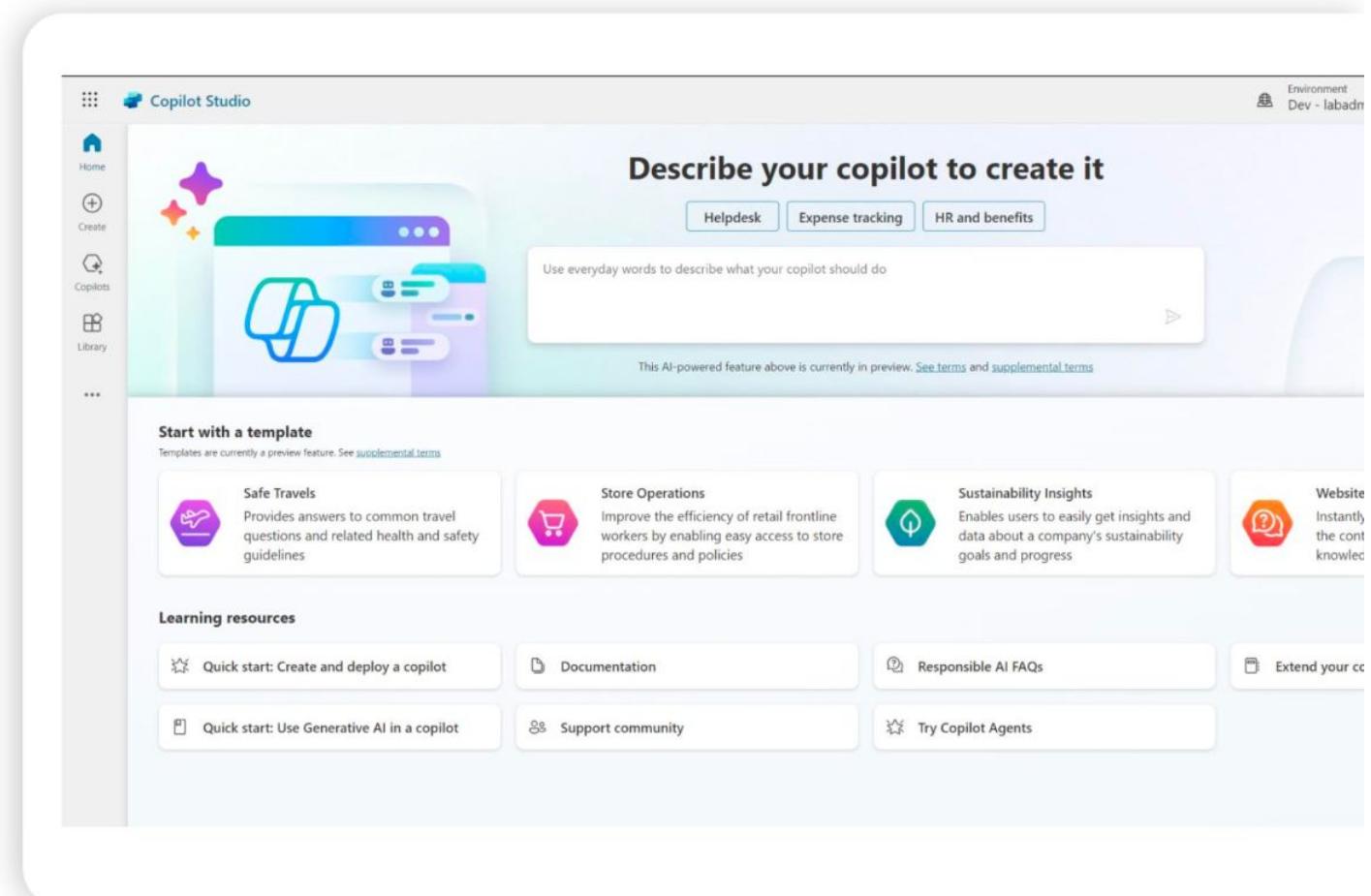
Microsoft Copilot Studio

Create powerful AI-powered copilots

Engage with customers and employees in multiple languages

Core Online Service (SaaS) /No infrastructure management

Conversational Orchestration



Power Virtual Agents capabilities and features are now part of Microsoft Copilot Studio

Copilot Studio

Build agents to transform business processes, now with more model options.

Models can be selected at two levels:

- **Agent orchestration and answer summarization**
- **AI Tools like custom prompts**

The screenshot shows the Copilot Studio interface for creating an 'HR Onboarding Agent'. The left sidebar includes 'Home', 'Create', 'Agents' (selected), 'Flows', 'Tools', and a '...' button. The main area displays the 'HR Onboarding Agent' configuration with tabs for 'Overview', 'Knowledge', 'Tools', and '+5'. The 'Overview' tab is active, showing the 'Details' section with the name 'HR Onboarding Agent' and a description: 'An agent designed to assist new employees with HR onboarding, answering questions, providing resources, and guiding them through the process.' Below this is the 'Orchestration' section, which is 'Enabled' using generative AI to respond to users and events. The 'Agent's model' is set to 'GPT-4o (default)'. The 'Instructions' section provides guidelines for responding to new employees. The 'Knowledge' section allows adding data, files, and other resources. On the right, a sidebar titled 'Test your agent' shows a conversation history: 'Hello, I'm HR Onboarding Agent, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.' and a message placeholder 'Ask a question or describe what you need'. A note at the bottom states: 'Make sure AI-generated content is accurate and appropriate before using. See terms.'



Microsoft Copilot Studio

Build your own copilot

Create and publish a custom copilot for your organization using the intuitive building experience enhanced with large language models and generative AI

Customize Microsoft Copilot

Extend and customize 1st party Microsoft Copilots with your own enterprise scenarios. Copilot Studio will be included with the Microsoft 365 Copilot SKU.

Connected platform

Integrates and exposes various Microsoft's conversational AI technology stacks - integrated with Azure AI Studio, Azure Cognitive Services, Azure Bot Framework, Power Platforms AI models and more

Manage copilot experiences

Governance and control features to monitor usage with full visibility of customizations, standalone copilots as well as who is building and customizing them.

The screenshot shows the Microsoft Copilot Studio interface. The top navigation bar includes the 'Copilot Studio' logo, the current solution name 'Northwind Trader', and a 'View solution (Northwind Trader copilot prod)' link. The left sidebar contains a navigation menu with items such as Home, Building blocks, GPTs (selected), Topics, Plugin actions, Prompts, Copilots, Create a copilot, Extend Microsoft Copilot, Publish, Analytics, Settings, AI integration tools, Channels, and Test your copilot. The main content area is titled 'Northwind Trader' and displays a preview of the 'Boost your conversations' feature. It includes a sub-section for 'Enter your website' with a 'Use generative answers' button (which is highlighted in blue) and an 'Advanced options' button. A note at the bottom says 'Make sure AI-generated content is accurate and appropriate before using. See terms'. Below this, there are three cards: 'Extend a Microsoft Copilot (preview)', 'Add plugins for dynamic chaining (preview)', and 'Meet people where they are'. Each card has a corresponding icon and a 'Go to [action]' button.



Microsoft
Copilot Studio

M365 Copilot
vs
Microsoft Copilot
Studio



Copilot Studio

Build your own custom copilots

Enhance customer experiences by adding a copilot to your external website or other channels

Build an internal copilot outside of Microsoft Copilot to help employees with specific functions

Build with low code



with Copilot Studio
(standalone)

Customize Copilot for Microsoft 365

Customize Copilot to work with your unique business processes and data sources

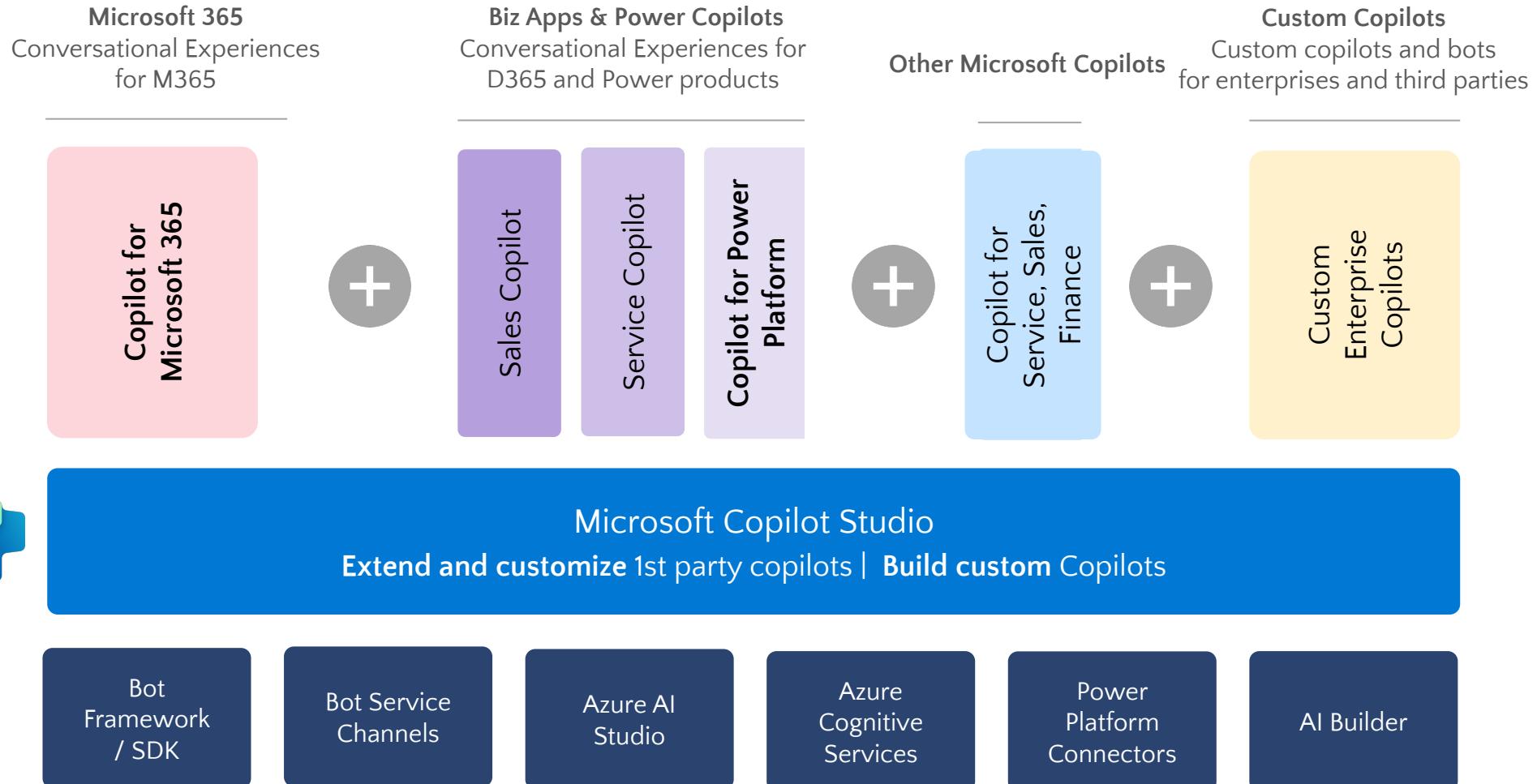
Configure Copilot responses to specific questions

Build a plugin



with Copilot Studio
(included in Copilot for M365)

Copilots and Conversational AI





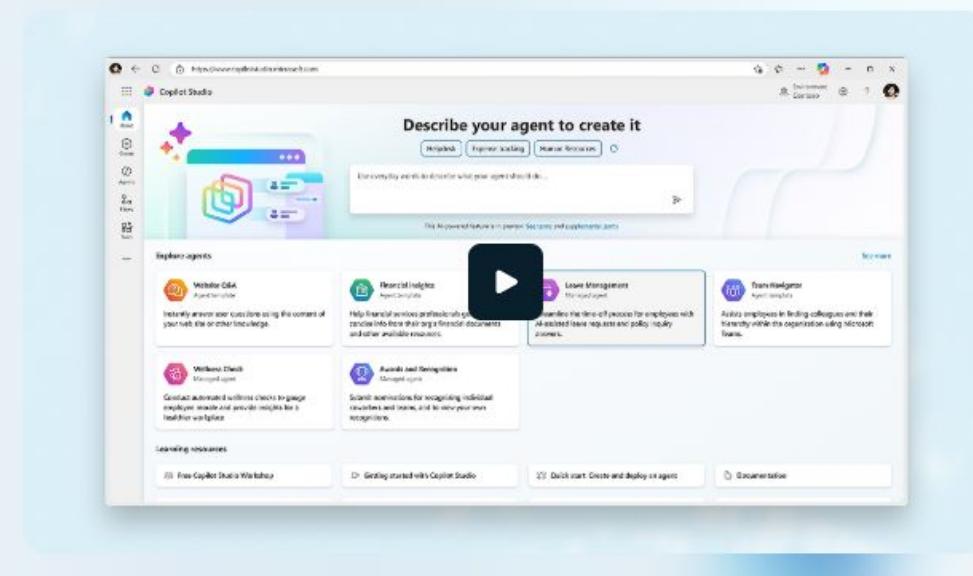
Join us at Microsoft Ignite, November 18-21. Personalize your experience—explore breakout sessions, labs, and community activities. [Register now](#)



MICROSOFT COPILOT STUDIO

Create, customize, and launch AI agents easily

Copilot Studio is a platform for building and managing agents. Connect them to your business data, create your own with natural language, and publish them across the channels your teams and customers use.

[Try for free](#)[See plans and pricing](#)[Features](#)[Use cases](#)[Pricing](#)[Customer stories](#)[Resources](#)[Next steps](#)[FAQ](#)[Try for free](#)[Sign in](#)



Describe your agent to create it

Helpdesk

Expense tracking

HR and benefits

Use everyday words to describe what your agent should do

Features labeled as 'preview' are subject to supplemental terms. [See terms.](#)

Recent agents

[See more](#)

Name	Type	Last modified	Last published	Owner	Protection status
EGAT Q&A	Agent	# Microsoft Copilot Studio 1 day ago	Never	Jose (Jose) Barbosa	--

Explore agents

[See more](#)

Website Q&A Agent template	Voice Agent template	Safe Travels Agent template	Financial Insights Agent template
Instantly answer user questions using the content of your website or other knowledge.	An agent with voice capabilities.	Provides answers to common travel questions and related health and safety guidelines.	Help financial services professionals get quick and concise info from their org's financial documents and other available resources.

Benefits Agent template	IT Helpdesk Agent template
Benefits Agent provides personalized information on various benefits offered by the employer that are tailored to employee's unique circumstances.	Empowers employees to resolve issues and effortlessly create/view support tickets.

Capabilities



The Home of Copilot Extensions

Microsoft Copilot Studio

Your copilot, your way



Customize



Build



Manage

Create chat experiences that are...

Intelligent

Understand and hold context and intent through rules-based and generative LLM.

Actionable

Dynamically complete tasks with your business systems.

Secure

Industry standards for governance, security and solution lifecycle management.

Connected

Grounded with 1,200+ data connectors & extensibility with broader Microsoft conversational AI services.

The screenshot shows the official website for TruGreen, a lawn care company. The top navigation bar includes links for 'Plans & Services', 'Mosquito', 'Tree & Shrub', 'Commercial', 'Lawn Care 101', 'Search', 'Find A Branch', 'Login', 'Register', and a phone number for support. A green banner at the top offers a 50% discount on expert lawn care. The main content features a large image of a well-maintained lawn and a house, with the TruGreen logo and tagline 'Live life outside.' Below this, text encourages users to get a greener, healthier lawn and identifies TruGreen as 'America's #1 Lawn Company'. A 'GET STARTED' button is visible. On the right side, a 'TruGreen Virtual Assistant' window is open, displaying a welcome message and a list of options: 'Scheduling Information', 'Billing & Payments', 'Manage Account Settings', 'Add or Change Service', 'Login Assistance', and 'Something Else'. The window also shows the time as 'Virtual Agent - 3:59 PM' and a text input field for 'Type your message'.

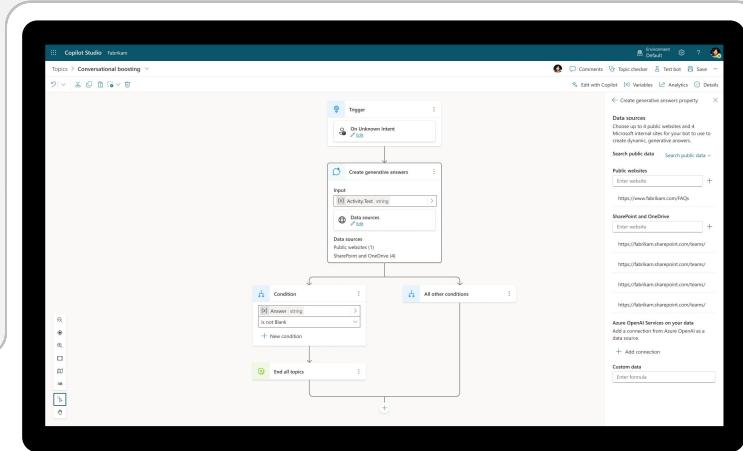
Copilot Studio Core Capabilities

Available for both Copilot Studio standalone and Copilot Studio for M365 | **Only available for Copilot Studio standalone**

Intuitive UX	Visual canvas	Low code design	Pro code views	Real-time testing	Easy collaboration	Natural language to build
Conversation Design	Build + publish custom plugins	Tailor specific topics	Create rich + dynamic responses	Multi-language	Multi-channel	
Conversation Orchestration	Multi-turn conversations	Logic / variable management	Escalate to live agent	Multi-LLM routing	Dynamic content based on user	
Data Connectivity	AI Builder prompts	1,200 pre-built data connectors	Generative answers	Power Automate flows	Generative actions	
Pro-Dev Extensibility	DIY gen AI	Bring your own Model (BYOM)*	Custom Azure Bot Framework Skills	Knowledge base extension	Custom Analytics	Azure app insights telemetry
Streamlined Management	Responsible AI checks	Trusted platform	Admin center	Compliance standards	Analytics	ALM automation

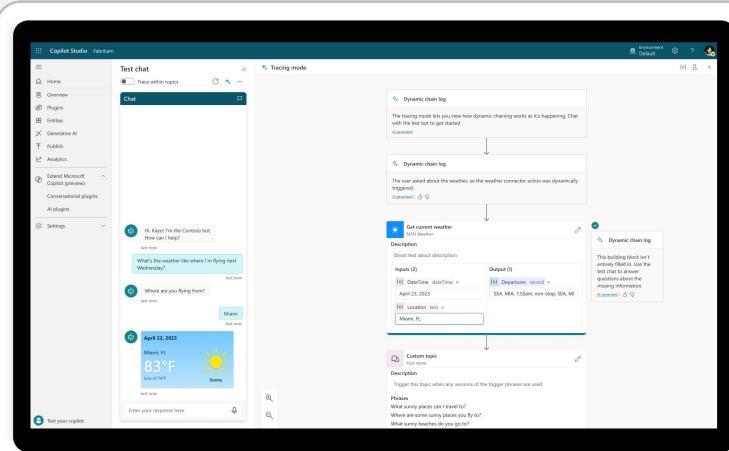
End-to-end conversational AI platform

Generative AI in Copilot Studio



Generative answers

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



Generative actions

Generate dialog and take action through dynamically chaining existing building blocks and plugins.

A screenshot of the Copilot Studio interface titled 'Azure OpenAI studio > ChatGPT playground (preview)'. It shows a 'Chat session' where a user asks 'How much does the plan on your plan in UK cost?'. The system responds with a link to a Microsoft page. Below the chat, there are sections for 'Few shot examples', 'Grounding data', and 'Citations'. The 'Citations' section displays a detailed breakdown of the cost for different plan levels (Standard, Premium, Business Standard, Business Premium) across various regions (US, UK, Germany, France, Japan, Australia, Canada, Brazil, Mexico, South Africa, India, China, and APAC).

Bring your own custom Azure OpenAI model

Use Azure OpenAI on your data (ChatGPT, GPT-4...) and connect it to Copilot Studio.

Considerations & Discovery with Generative AI

Copilot Studio / Azure OpenAI Service on Your Data / Azure OpenAI Service Comparison

	Data Store	Data Access	Data Security	Prompt Control	Responsible AI	Client Access	Analytics and Monitoring
Copilot Studio (Generative Answers)	<ul style="list-style-type: none">Public WebsitesSharePointImported FilesDataverse3P APIs	Automatic with nothing to host or manage	<ul style="list-style-type: none">On-behalf-of usersAPI Key	<ul style="list-style-type: none">No need to write your own promptsResponse toneOutput formattingCustom prompts at node	<ul style="list-style-type: none">Cognitive Services ModerationProvenance ValidationAzure OpenAI Service Content Moderation	<ul style="list-style-type: none">WebTeamsFacebookSlackBot Framework ChannelsAPIs	<ul style="list-style-type: none">Built-in analyticsSelf-hosted Azure Application Insights connectivity with custom events
Azure OpenAI Service - On Your Data	<ul style="list-style-type: none">Configured pipelines to import filesCustom Azure Cognitive Search Index	Automatic through self-hosted data stores and indexes	Any through custom data security	<ul style="list-style-type: none">No need to write your own promptsResponse toneOutput formatting	<ul style="list-style-type: none">Grounded to your dataAzure OpenAI Service Moderation	<ul style="list-style-type: none">APIsSelf-managed Web AppPower Virtual Agents	Any through custom developed analytics
Azure OpenAI Service	Any	Manual through custom data access	Any through custom data security	Requires custom prompt authoring	Azure OpenAI Service Moderation	APIs	Any through custom developed analytics



Copilot Studio

World Class UX				
Internal custom copilots	Customer facing copilots	Extend Copilot for Microsoft 365		
Declarative	Rich Response	Intuitive	Ease of use	Natural language to build
Low code logic	Generative Answers + Actions	Power Automate	Custom Azure Skills	
Prebuilt LLM	Generative AI	Proactive suggestions	Bring your own Model (BYOM)*	
Microsoft Copilot	Power Platform	1000+ Connectors	Azure AI Studio	
Test Pane	Collaboration	Solution Management	ALM Automation	
Trusted identity	Full visibility	Advanced RBAC	Granular DLP control	

Microsoft's end-to-end copilot building platform

Automation studio



The screenshot shows the Power Virtual Agents interface. On the left, a sidebar lists navigation options like Home, Topics, Entities, Analytics, Publish, Manage, Details, Channels, Security, Skills, and AI capabilities. The main area is titled 'Lightning deals' and displays a conversation flow. The flow starts with three 'Condition' blocks, each with a dropdown menu for 'Response1 (Text)'. The first condition is 'is equal to Error message', the second is 'Printer does not respond', and the third is 'None of the above'. Below these conditions are three 'Message' blocks: 'Which error message do you see?', 'Search actions', and 'Let me connect you to a human agent.'. A 'Call an action' menu is open over the 'Search actions' message, listing various actions such as 'Create a flow', 'Authenticate', 'Skill or skill action', and several flow templates like 'Today's lightning deals', 'Error code lookup', 'Get tracking number', and 'Student promo code'. At the bottom of the flow is an 'End' block labeled 'End of conversation'.

Power Automate's digital process automation is included in Power Copilot Studio with 1000+ prebuilt data connectors and automation templates.

3rd party connectors, including custom and on-prem

Connectivity



1 Discover

2 Automate

Use process mining to identify bottlenecks and opportunities for automation

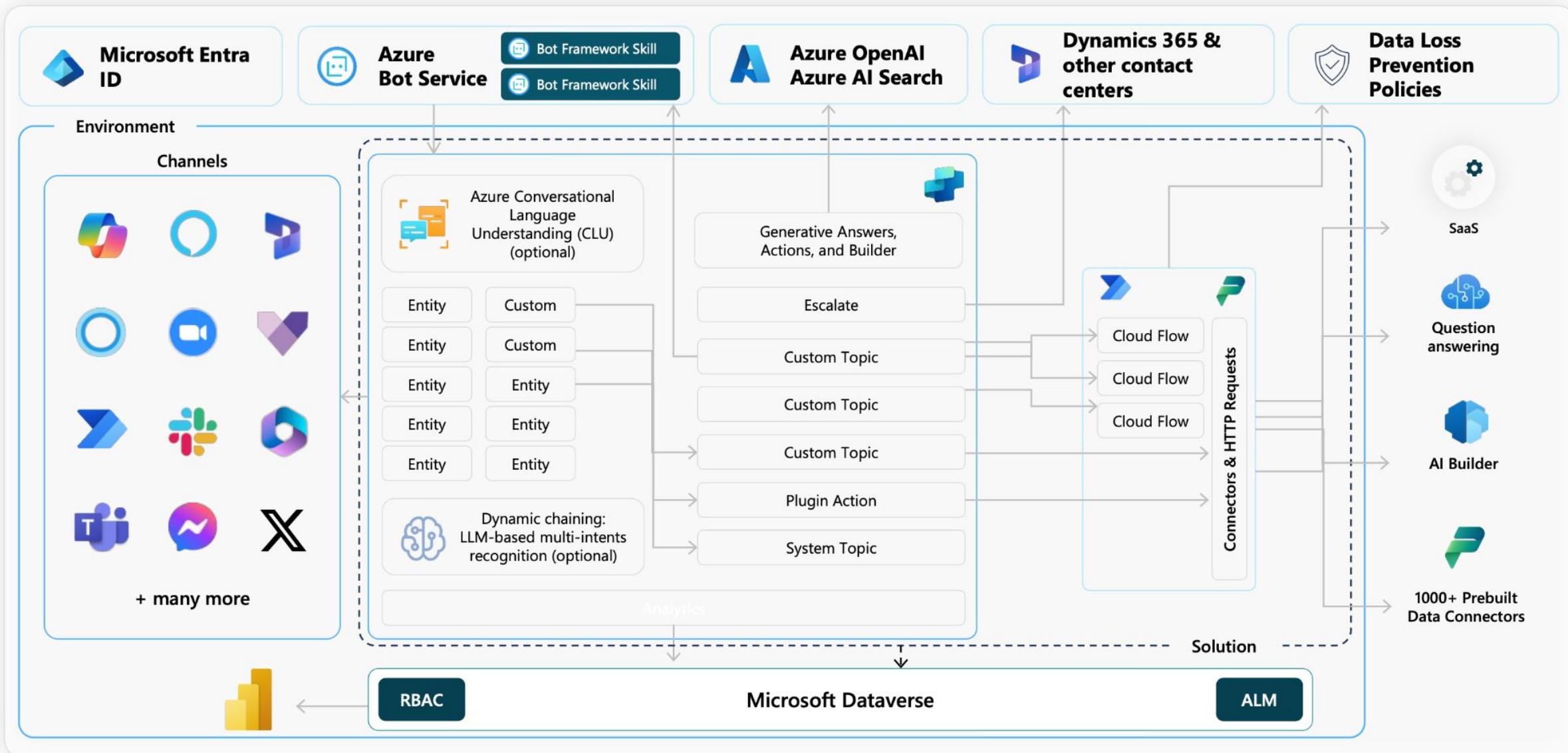
With the Copilot Studio Process Advisor template, get a deeper insight into copilot conversation flows.

Create solutions by automating business processes with advanced AI, Digital Process Automation, and Robotic Process Automation.

Embed your automation flows directly into the conversation to drive action.

Build your own
Copilot (Agent)

Copilot Studio Architecture



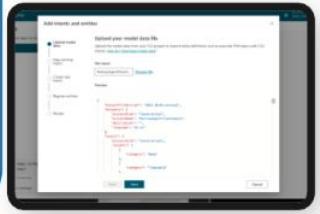
Build your own custom copilot

Create Copilot with E2E SaaS and single pane of glass



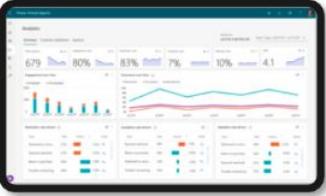
Conversational Services

Integrate with Azure AI Studio, Azure Cognitive Services, Bot Framework and more



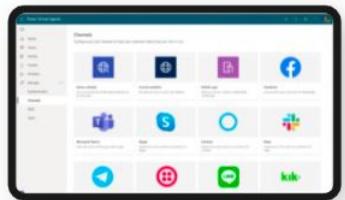
Monitor and Improve

with Rich out-of-the-box telemetry and analytics



Publish

the copilot to **multiple channels, live instantly** on the SaaS service



Copilot Studio

Build your own copilots



Chat over knowledge with Generative AI

Use generative answers and custom GPTs to provide enterprise specific answers over your files, websites, and internal shares



Create specific topics

Supplement generative answers with specific, curated topics. Build them easily with the powerful graphical studio



Actions & Plugins

Create actions , plugins, or use pre-built Power Platform and OpenAI connectors to call your backends and APIs

The end-to-end copilot conversation

1. Authored Topics

Organizations control their critical topics by designing their own specific processes and workflows.

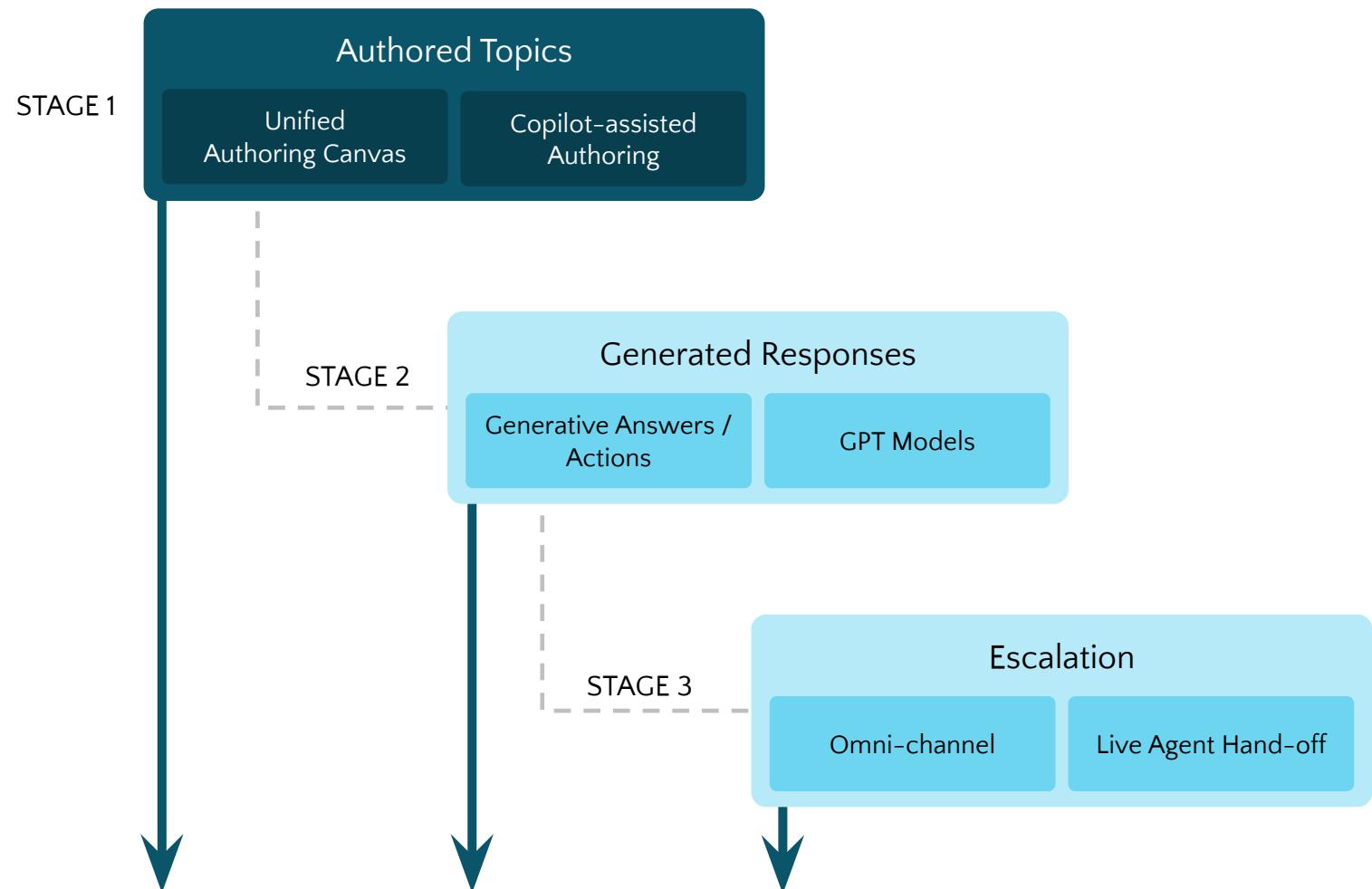
2. Generated Responses

Generative AI answers queries at scale that may be duplicative or less complex.

3. Escalation

If the copilot can't handle the conversation, it will escalate the conversation to a human assistant.

Copilot Studio Dialog Management



* Will only move to next stage(s) if necessary

Topics

Topics represent paths a customer can be taken on while interacting with a bot

Trigger phrases - Phrases, keywords, or questions that are entered by users and relate to a specific issue.

Conversation nodes - Define how a bot should respond and what it should do.

Types of conversation topics

	Informational What is...? When will...? Why...?
	Task completion I want to... How do I...?
	Troubleshooting Something isn't working right. I got an error message

Entities

Entity - an informational unit that represents a certain type of a real-world subject

Conversations use natural language understanding by identifying the entities being used in a user dialog to understand the user's intent

Microsoft Copilot Studio has a set of prebuilt entities out-of-the-box Ex: age, colors, numbers, and names.

Entities and Custom Entities

- **Prebuilt Entities:** Copilot Studio includes a set of prebuilt entities representing common information types like age, colors, numbers, and names. These allow the copilot to recognize and save relevant information from user input for later use.
- **Custom Entities:** For domain-specific knowledge, custom entities can be created to teach the copilot to recognize and understand unique categories relevant to your business.
- **Use in Conversations:** Entities are used to store information in similar groups, which can be accessed and utilized during conversations with users.
- **Slot Filling:** This feature enables the copilot to intelligently ask for and fill in missing information during interactions with users.

City

Description
City names, extracted as a string

Method
Prebuilt

Usage

User input	Entity	Saved value
The business headquarters is in Seattle	Seattle	Seattle
I love NYC	NYC	New York City
I'm going to Vancouver B.C.	Vancouver B.C.	Vancouver B.C.

Show examples of user input.

Defines the extracted text for entity.

Shows the saved value stored in variable.

?

Question

Text □ :

What city do you live in?

Identify

City >

Save response as

{x} UserCity string >

Actions:

Extend custom copilot capabilities with Actions

Core action Types:

- Prebuilt connector action
- Custom connector action
- Power Automate cloud flow
- AI Builder prompts
- Bot Framework skill

Step 1 of 3: Choose an action

Create an action or browse through our list of actions you want to use to get information from external sources.

[Learn more](#)

Discover an action

Search for flows, skill actions, and commonly used connector actions

Search

11 actions found

Connectors Custom Connectors Flows Skills Dataverse

 Untitled Get information about industries, solutions, services and cont...	 Run a flow built with Power Automate for desktop Desktop flows
 Delete a row Excel Online (Business)	 Run script Excel Online (Business)
 Get a row Excel Online (Business)	 Run script from SharePoint library Excel Online (Business)

Cancel

Your data and automation at your fingertips

Use Power Automate Cloud Flows +
1,200 prebuilt connectors within the
conversation



Google Cloud Platform



Multi-Channel Platform

Dynamics for Customer Service



Voice



Teams



Custom

Azure
Communication
ServicesApple Messages
for Business

Facebook

Google's Business
MessagesWhatsApp
through Twilio

Line



WeChat

SMS

SOCIAL CHANNELS

Native to Copilot Studio

Microsoft Copilot (preview)
Publish plugins to a Microsoft Copilot for a unified experience.Microsoft Teams
Chat with your bot through a Teams app.Demo website
Try out your bot and invite team members to do the same.Custom website
Activate your bot on your own website.Skype
Expand your bot's reach to customers on Skype.Slack
Expand your bot's reach to customers on Slack.Telegram
Chat with your bot through a Teams app.Twilio
Add your bot to a native or web-based mobile app.DirectLine Speech
Expand your bot's reach to customers on DirectLineSpeech.Mobile app
Add your bot to a native or web-based mobile app.Facebook
Connect with your customers on Messenger.LINE
Add your bot to a native or web-based mobile app.GroupMe
Expand your bot's reach to customers on GroupMe.

Choosing the best for
your needs

Choose the tool that best fits your needs

Most agents can be built using either of these differentiated tools – all powered by Azure AI Foundry

Low Code

Rapid authoring in visual canvas



Use prebuilds & defaults



Managed SaaS with single price



Low Code / Pro Code

✓ Ground in company data

✓ Enterprise-grade security & governance

✓ Act across systems & channels

✓ Latest capabilities, models & tools

✓ Integrate with UI for AI

Pro Code

Customize / control services used



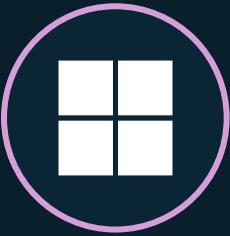
Technically skilled users



Existing DevOps processes



Build agents through an approach that works for you



Build on Microsoft 365 Copilot

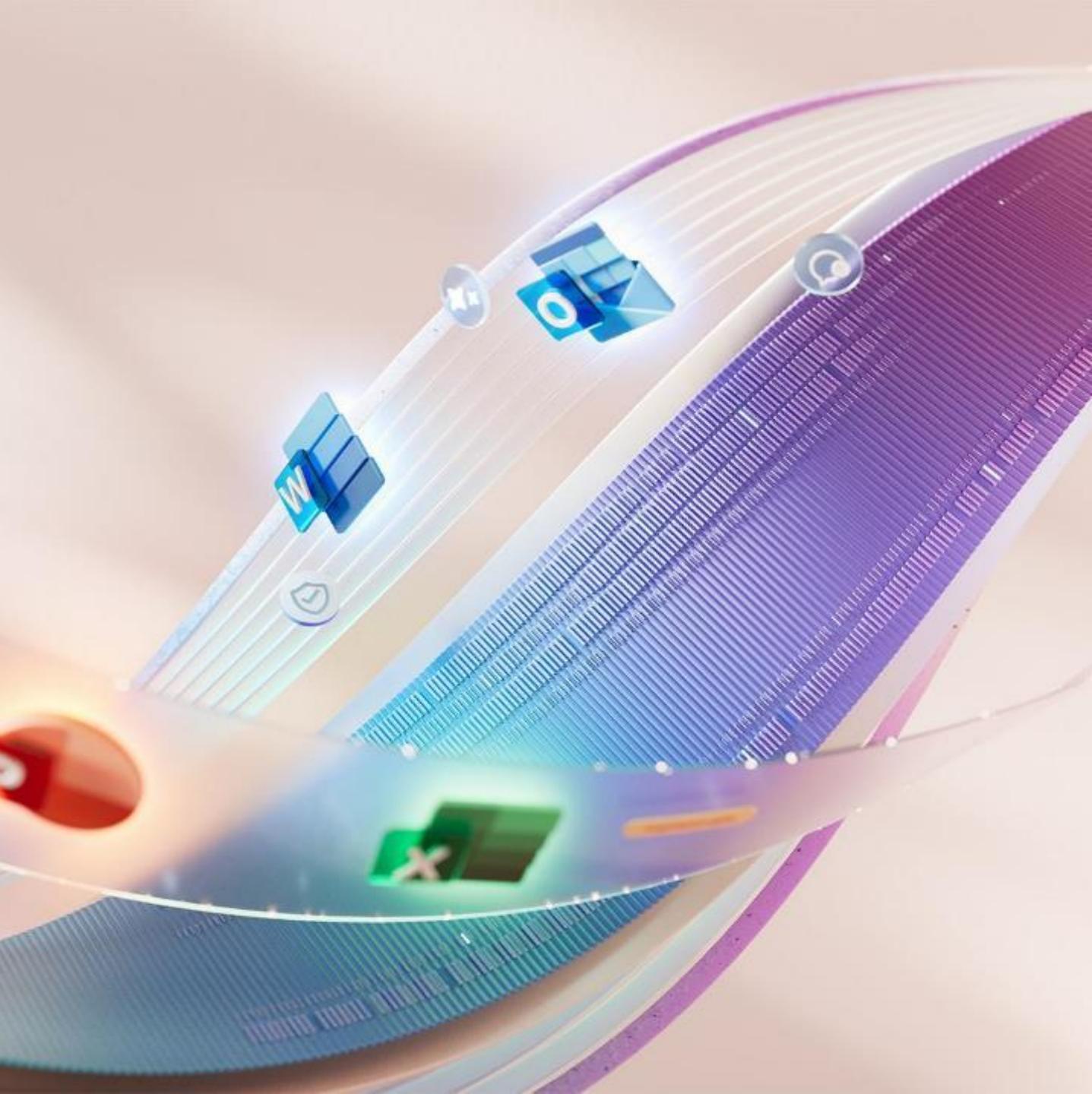
Use tools like Copilot Studio and Visual Studio Code to create agents that are integrated into Microsoft 365 Copilot



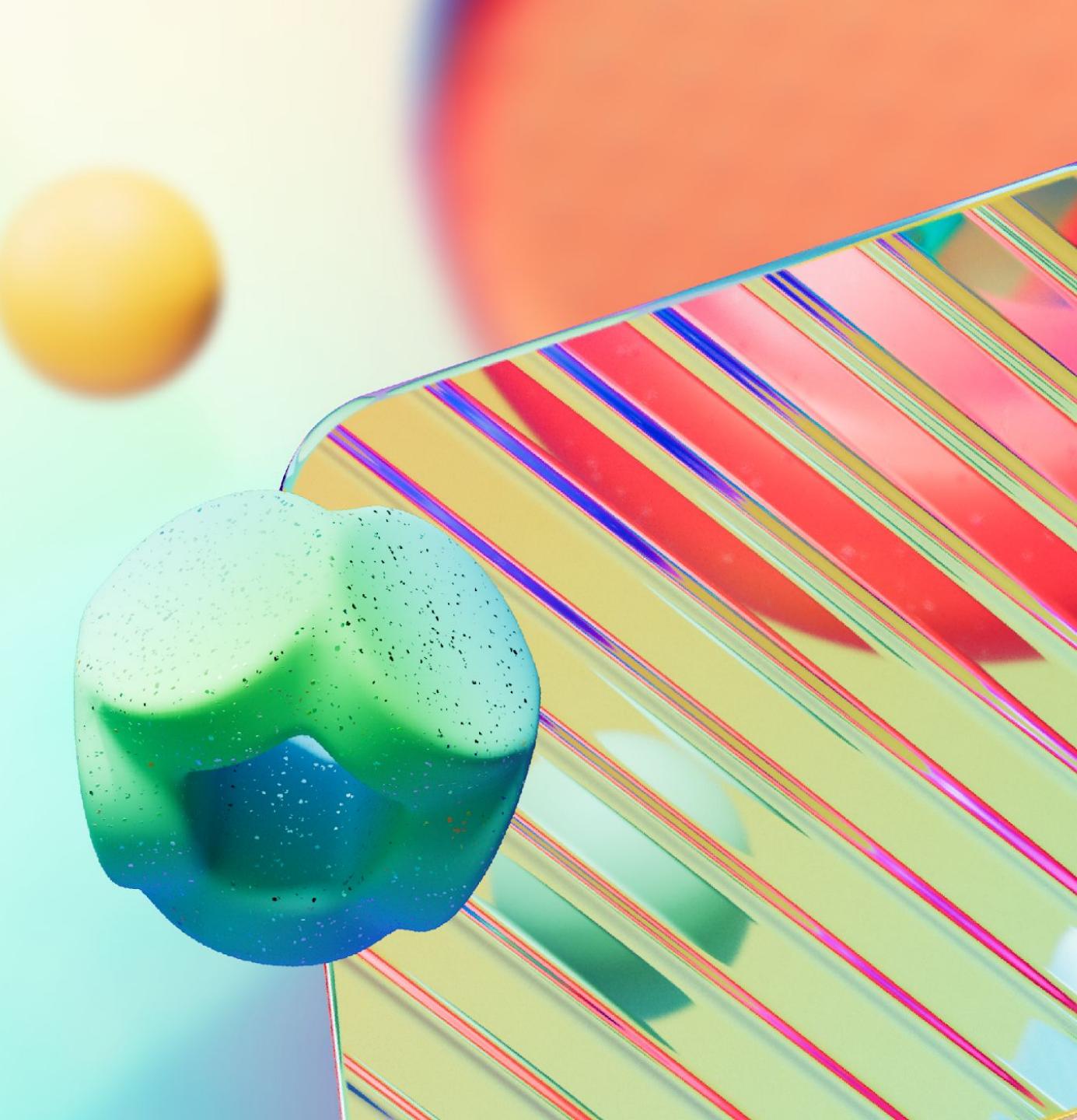
Use your own AI services

Agents hosted by you, built by you. These can be deployed to Microsoft 365 Copilot or other channels that reference your agent

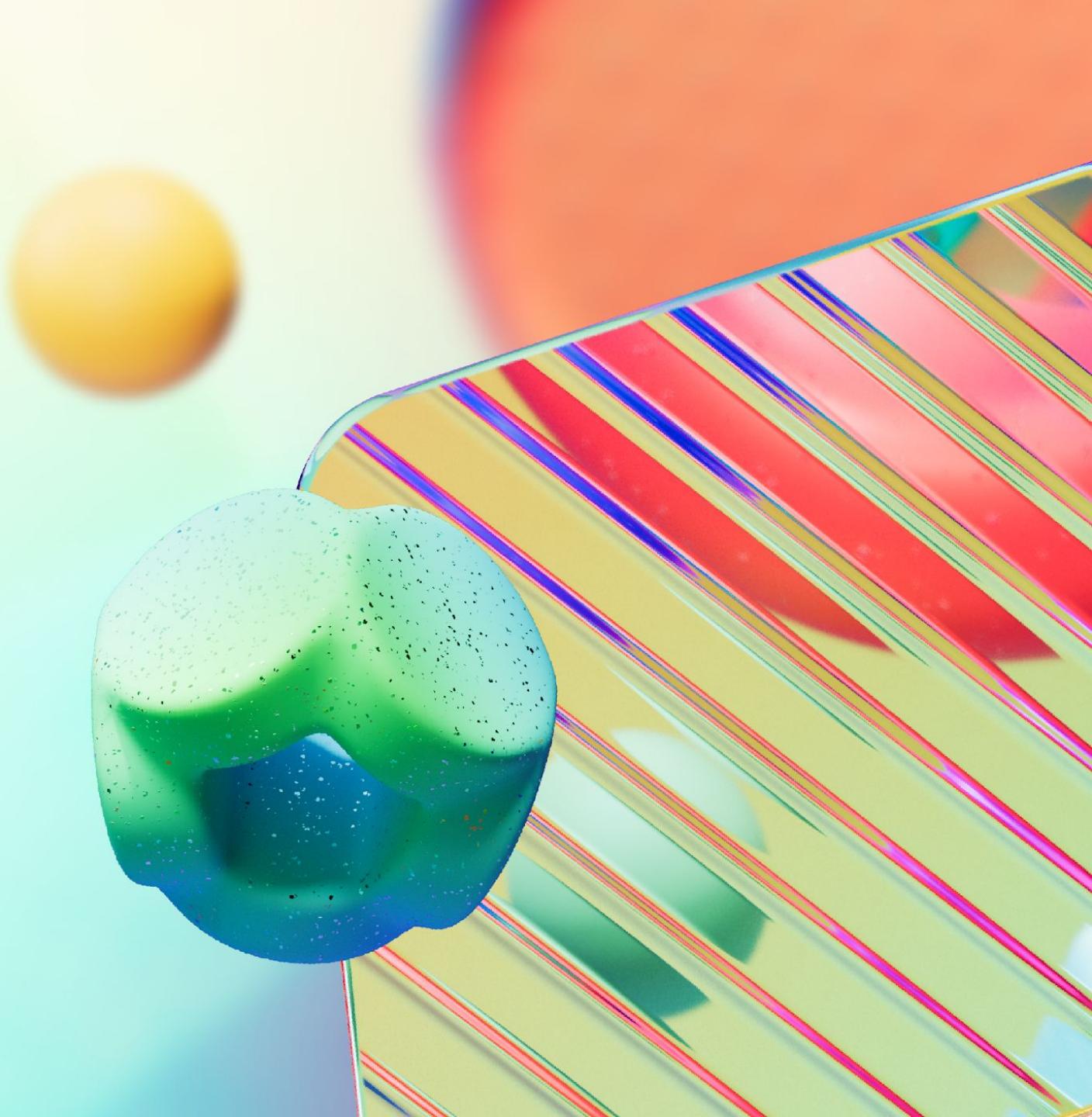
Demos



GPT-5 in Copilot Studio



Additional Knowledge Types



Questions?

Thank you!



Morning Break
10:30 - 10:45

How do you start the labs?

Go to this URL:

Github Repo: <https://bit.ly/3XmgBRF>

File: <https://bit.ly/47BgZlj>



LABS

Lab 1

Lab: 1.1 Build agents in Copilot Chat

Lab: 1.2 Build agents in Copilot Studio

We will learn:

Copilot Chat

Agent Builder

Build your agent in Copilot Studio

Add agent knowledge sources

Lab 1

Lab: 1.1 Build agents in Copilot Chat 

Lab: 1.2 Build agents in Copilot Studio

We will learn:

Copilot Chat 

Agent Builder 

Build your agent in Copilot Studio

Add agent knowledge sources



Lunch Break
12:00 - 13: 15

Lab 1 Completed!

Lab: 1.1 Build agents in Copilot Chat 

Lab: 1.2 Build agents in Copilot Studio 

We will learn:

Copilot Chat 

Agent Builder 

Build your agent in Copilot Studio 

Add agent knowledge sources 

Lab 2

Lab: 2.1 Use tools in Copilot Studio

Lab: 2.2 Make your agent autonomous in
Copilot Studio

We will learn:

Build a custom prompt tool

Build an agent flow

Autonomous triggers in Copilot Studio

Make your agent autonomous

Lab 2

Lab: 2.1 Use tools in Copilot Studio

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We will learn:

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We will learn:

Build a custom prompt tool 

Build an agent flow 

Autonomous triggers in Copilot Studio

Make your agent autonomous

Lab 2 Completed! +500 XP

Lab: 2.1 Use tools in Copilot Studio ✓

Lab: 2.2 Make your agent autonomous in Copilot Studio ✓

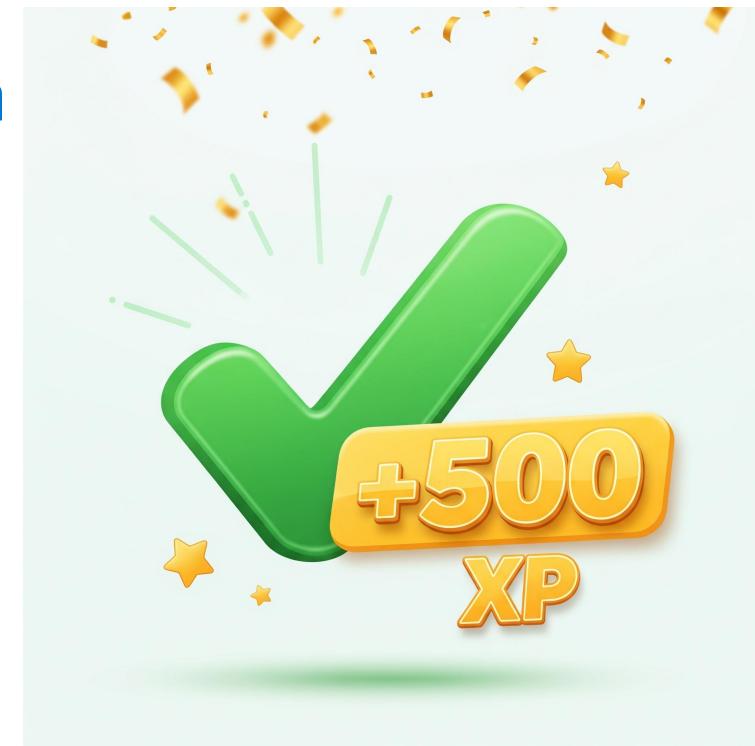
We will learn:

Build a custom prompt tool ✓

Build an agent flow ✓

Autonomous triggers in Copilot Studio ✓

Make your agent autonomous ✓



Overview - Safe Travels Agent | M +

https://copilotstudio.preprod.microsoft.com/environments/4d4a8e81-17a4-4a92-9bfe-8d12e607fb7f/bots/a42415d8-182f-f011-8c4e-00224809cc37/overview

Copilot Studio

Environment
New Default Environment... ? EG

Safe Travels Agent Overview Knowledge Tools Agents Topics Activity Analytics Channels Publish Settings ... Test

Your agent is ready! Here's what's next:

- Add tools so your agent can do things for you
- Build topics to focus and guide how your agent answers
- Publish your agent so others can use it

Details

Name: Safe Travels Agent

Description
A travel assistant that provides reliable answers to travel-related questions, including destination-specific health, safety, documentation, and transportation guidance. The agent is designed to support both domestic and international travelers by offering practical tips, travel regulations, and emergency readiness information based on trusted sources.

Orchestration
Use generative AI to determine how best to respond to users and events. [Learn more](#) Disabled

Response model
GPT-4o (default)

Instructions
You are a helpful, knowledgeable, and polite travel assistant.
Your role is to answer questions about travel safety, health regulations, required documents, insurance, local emergencies, and other travel logistics.
You must use information from verified knowledge sources when available. Always prioritize traveler well-being and clarity.

338/8000

Knowledge

Test your agent

Hello, I'm Safe Travels Agent Agent, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. I'm here to assist you with all your safe travel inquiries. Whether you need information about travel documents, visa requirements, local regulations, consulate details, or travel insurance options, I've got you covered.

Note: You can now customize this agent's topics and knowledge for your own needs. For more information about this agent and how to modify it, visit the [agent documentation](#).

Just now

What can I ask?

Ask a question or describe what you need

0/2000

Make sure AI-generated content is accurate and appropriate before using. [See terms](#)

Join at menti.com | use code 8694 1616

Go to

www.menti.com

Enter the code

8694 1616



Or use QR code

Questions?

Thank you!



Use Cases

Jose Barbosa

EGAT Copilot Studio Workshop - Use Cases

Workshop Theme: Practical AI Agent Development for EGAT Target Audience: EGAT IT Staff and Engineers

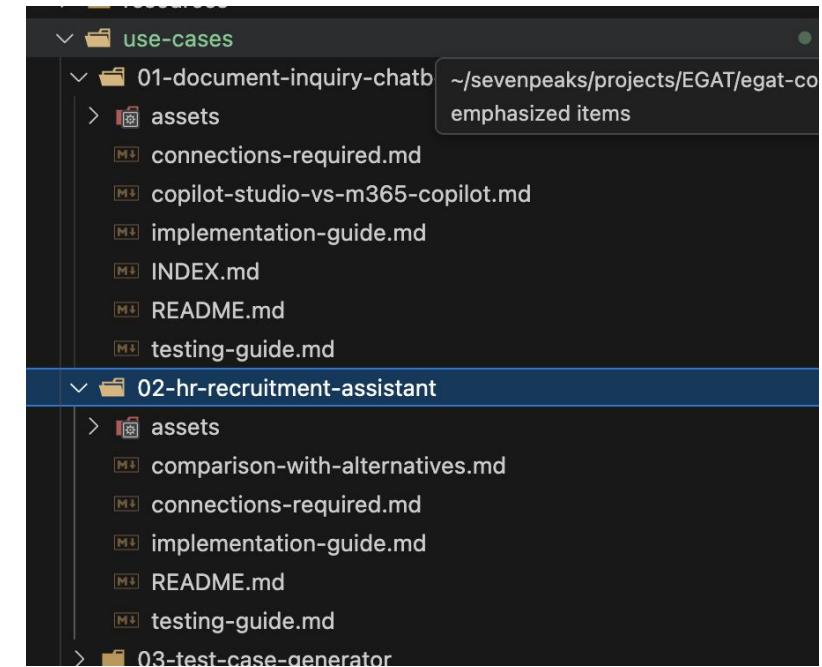
Framework: Microsoft Copilot Studio

Use Cases Overview

This repository contains **6 comprehensive use case templates** based on real submissions from EGAT workshop participants.

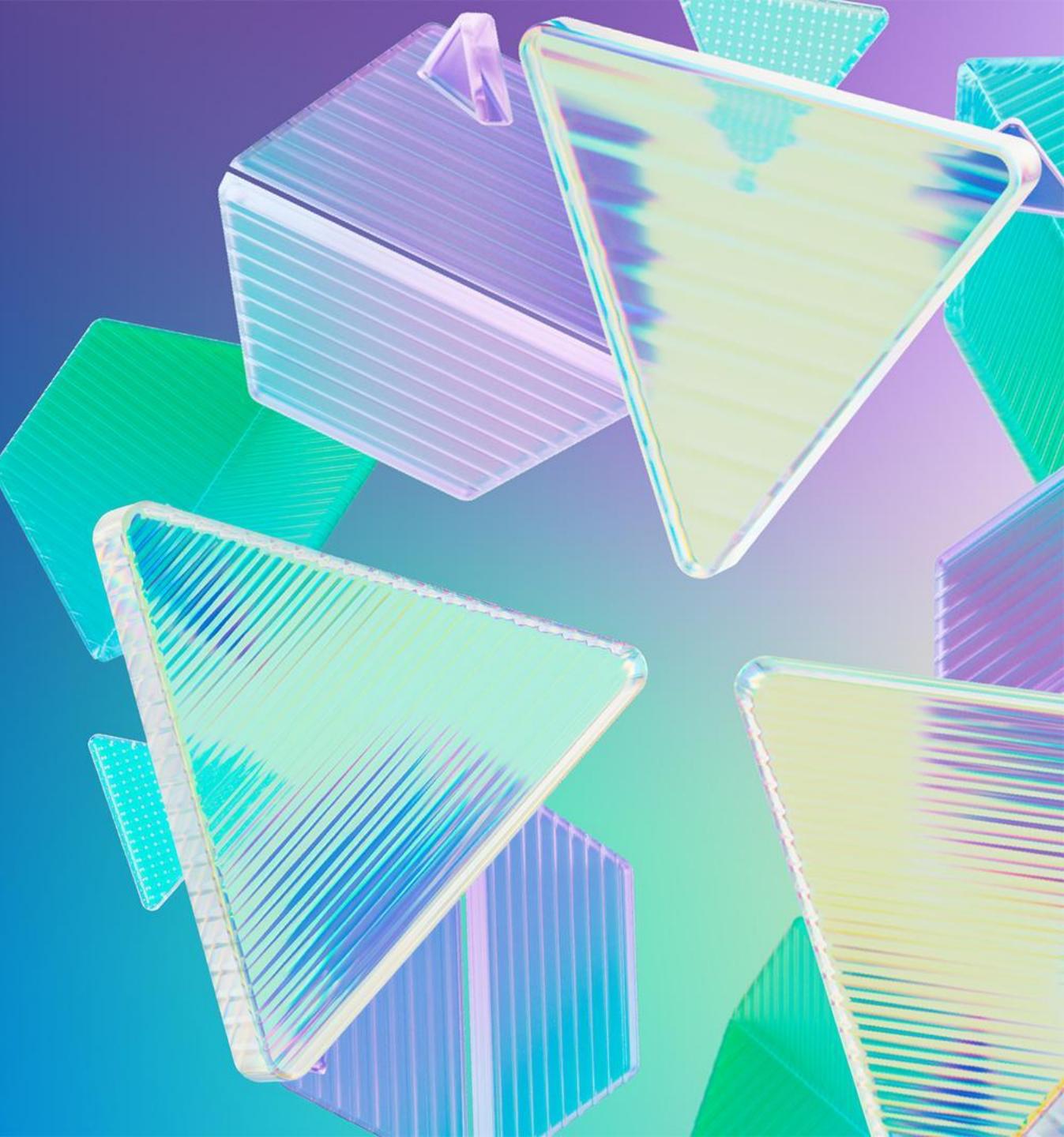
✓ All Use Cases Ready for Implementation

#	Use Case	Complexity	Est. Time	Status
01	Document Inquiry Chatbot	★★ Easy-Med	4-6 hrs	✓
02	HR Recruitment Assistant	★★★ Medium	6-8 hrs	✓
03	Test Case Generator	★★★ Medium	6-8 hrs	✓
04	Timesheet Report Generator	★★★★ Med-High	8-12 hrs	✓
05	Application Health Monitoring	★★★★ Med-High	10-14 hrs	✓
06	Project Manager Assistant	★★★★★ High	12-16 hrs	✓





Introduction to Conversational AI & Copilot Studio

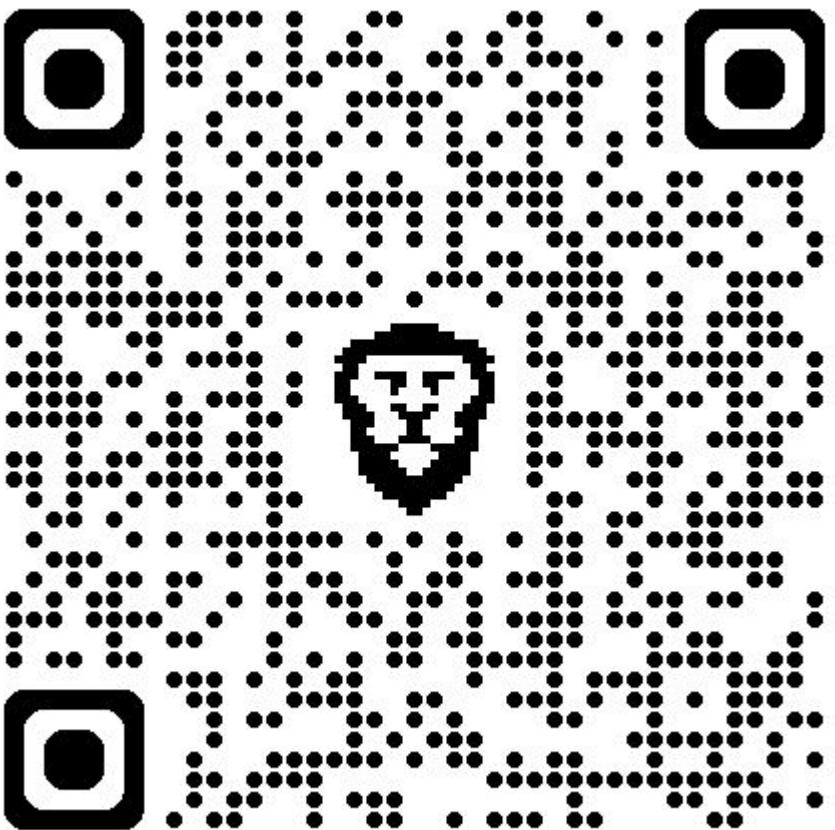




Closing Microsoft Copilot Workshop

Feedback Form

<https://forms.gle/LvXzip16tKR4tDh67>



SEVEN PEAKS

Copilot Workshop Survey

Please take a few minutes to provide feedback about this workshop and your thoughts on Microsoft Copilot Studio based on what you've seen.

How satisfied were you with the workshop? *

1	2	3	4	5		
Not very	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Very much

Thank you!

Questions?



Governance, Security & Deployment

Jose Barbosa

What sets Microsoft 365 Copilot apart?

1

5-in-1 AI-first productivity app

Brings together Chat, Search, Agents, Notebooks and Create into a unified AI experience for work.

2

Integrated in the tools that millions use every day

Copilot is available in Teams and Microsoft 365 apps. With this integrated approach, Copilot understands your work context. Data governance and compliance ensure that security policies stay intact.

3

Advanced reasoning agents

Researcher, Analyst and custom agents utilize deep reasoning tailored for specific tasks that act as virtual employees.

4

Agent platform

Everything you need to design and develop a trusted ecosystem of agents with consistent UI, standardized controls and scalable Agent Store.

5

Copilot Control System

Robust security, management, measurement and reporting to understand business impact of Copilot and Agents along with standardized governance and controls.

6

Flexible purchase and deployment options

Predictable per-user subscription and pay-as-you pricing options enables organizations to scale AI and meet the unique needs of specific roles and functions.

Governance



Microsoft
365
Copilot is built on
trust



Microsoft
commitments
and controls



Tools
to manage
Copilot + agents

Copilot Control System



Copilot + Agents



Security &
Governance

Data security

AI security

Compliance & privacy



Management
Controls

Licensing & metering

Agent lifecycle

Customization



Measurement &
Reporting

Readiness and adoption

Productivity impact

Business value & ROI

Our promise to continued customer data protection & governance

The enhancements to Copilot are built within the same Microsoft 365 service boundaries and protocols that you trust today. These updates do not alter how Microsoft processes, stores, or protects customer data.

- **Enterprise-grade governance** - Every change undergoes Microsoft's Security Development Lifecycle (SDL), including Responsible AI reviews, red teaming, and change management.
- **Microsoft Purview controls remain intact** - Retention, eDiscovery, audit logging, and other compliance tools continue to function without interruption. All existing compliance, privacy, and security settings apply automatically.
- **Copilot customer data is not used to train AI models** - No customer data is shared with other companies; it stays within your data boundary.

Licensing

No change to licensing

Researcher

Available to Microsoft 365 Copilot licensed users.

Use of Anthropic models will count against the monthly limits already in place for Researcher/Analyst (25 queries per month per user)

Copilot Studio

Usage of Claude Sonnet 4

Standard Generative Answer or Generative Action rates

Usage of Claude Opus 4.1

Incremental Premium AI tool rate

Microsoft Copilot Studio



Plans	RECOMMENDED MOTION Microsoft Copilot Studio \$200 per tenant/month	Copilot Studio Use rights included in	
		Copilot Studio in Copilot for M365*	Copilot Studio for Teams (was PVA for Teams) Use rights with select M/O365 licenses
The output you create is...	Your own standalone copilot External channels (e.g., External Web, FB, WhatsApp etc.) Internal Channels (e.g., Internal Web, Teams, etc.)	Plugins for Copilot for Microsoft 365	Teams chatbot
Available channels to publish your copilot/plugins		Copilot for Microsoft 365 only	Teams channel/chat only
Messages/tenant/month	25,000 Messages ¹ ● 3, 4	Unlimited	Unlimited ² (Teams only)
Gen AI: AI-enabled conversations		●	
Create plugins to customize Microsoft Copilot		●	
Build your own standalone copilot	●		
Create and iterate on copilot topics using expanded natural language capabilities ⁵	●		●
Power Automate for Copilot Studio cloud flows (Automated, instant, and scheduled flows) within the context of Copilot Studio creations	●	●	
<u>Standard</u> Power Platform connectors	●	●	●
Premium and Custom Power Platform connectors	●	●	
On premises and cloud services data transfer for Power Platform Connectors	●	●	
Dataverse for Copilot Studio	● ⁶	● ⁶	Dataverse for Teams
Managed Environments	● ⁷		

¹ Microsoft Copilot Studio messages are the common currency across Microsoft Copilot Studio capabilities. A billed message is a request or message sent to the copilot triggering an action and/or response. Examples: a) User asks copilot when a store is open, and copilot replies with store hours = 1 billed message b) Copilot proactively greets the user on a website = 1 billed message, c) User asks copilot for store hours for the upcoming holiday, copilot responds using GenAnswers = 2 billed messages. Customers can use a mix of regular and Generative AI messages.

⁴ More information on Generative Answers capability can be found [here](#).

⁵ See [Create with Copilot](#).

⁶ Dataverse for Microsoft Copilot Studio default capacities: Dataverse Database 5 GB, Dataverse File 20 GB, Dataverse Log 2 GB.

⁷ Dataverse for Microsoft Copilot Studio default capacities: Dataverse Database 5 GB, Dataverse File 20 GB, Dataverse Log 2 GB.

Security

Additional Copilot Studio controls

Power Platform Admin Center (PPAC) has options to limit access to Anthropic models in Copilot Studio across the tenant or by individual Power Platform environments.

The screenshot shows the Power Platform Admin Center interface. On the left, there's a sidebar with icons for Home, Actions, Manage, Security, Copilot, Monitor, Deploy..., Licensing, Support, Dev tools, and Admin centers. The 'Copilot' section is expanded, and 'Settings' is selected. The main content area is titled 'Copilot' and contains several sections:

- Preview and experimental AI models**: Let people use AI models that are experimental or in preview to make agents, prompts, apps, flows, and more in Copilot Studio, Power Apps, and Power Automate.
- AI prompts**: Control whether people see prebuilt and custom prompts when they use generative AI.
- Copilot Studio**:
 - Computer Use**: Enable usage of Computer Use feature in Copilot Studio.
 - Code generation and execution in Copilot Studio**: Enables code generation and execution in Copilot Studio.
 - Connected Agents Copilot Studio**: Enabling Copilot Studio agent to invoke another agent.
- External models** (PREVIEW): Let people use external AI models hosted outside of Microsoft to make agents, prompts, apps, flows, and more in Copilot Studio. This section is highlighted with a blue border.
- Knowledge sources for agents**: Choose which types of knowledge sources agents can reference.
- Channel access for published agents**: Control where someone can access and use a published agent.
- Skills in agents**: Let agents use other agents to help navigate topics.
- Client application access control**: Help prevent data exfiltration.

Tools to secure and govern your Copilot + Agents use



Address oversharing concerns

- Gain visibility into overshared content
- Remediate excessive permissions
- Prevent Copilot + Agents from processing sensitive files



Protect against data loss and insider risks

- Get alerts and reports of risky behavior and AI use
- Protect sensitive files and interactions
- Dynamically apply security policies based on risky actions



Govern AI use to meet regulations & policies

- Inspect interaction content and audit logs
- Investigate for compliance and ethical violations
- Enforce lifecycle policies and legal holds

Secure

Govern

Preparing for the future of AI

1



Are your leaders
engaged and
employees ready?

2



**Do you have a
culture of learning
and the right skills?**

3



**Can you measure
business value and
continuously improve?**

Copilot's early impact at Microsoft

Customer service

11.5%

faster case resolution

Sales

9.4%

higher revenue per seller for one business group

Marketing

21.5%

increase in conversion rates on Azure.com

Finance

60%

reduction of case resolution time in cash collections

Legal

5%

reduction expected in external spend for regulatory work in 2025

Human resources

42%

greater accuracy in answering questions through employee self-service

IT

36%

increase in the self-help success rate for employees in one experiment

We have the tools to support your AI journey

Copilot Success Kit

Business Leaders



[Scenario Library](#)

CIOs & IT Leaders

A screenshot of the CIO Playbook page. It starts with a section titled "1. Executive snapshot: The CIO is the catalyst for AI transformation" which includes a bulleted list of statistics and a small image of a person at a desk. Below this is a "How to use this playbook" section with a bulleted list and a "Download" button. Further down are sections for "Enable AI for all employees" and "Accelerate AI for the organization", each with its own bulleted list and a "Download" button. At the bottom, there's a navigation bar with links from 1 to 10 and a "HOME" link.

[CIO Playbook](#)

End users and Decision Makers

A screenshot of the AI Adoption Guide page. It features a header "Enable your Copilot adoption and measurement with Microsoft Viva". Below it is a "How Viva Helps" section with a blue icon. The main content is organized into four purple-bordered boxes: "User enablement" (with icons for Communications, Skilling, and Measurement), "Communications" (about communicating Copilot), "Skilling" (about identifying knowledge gaps and opportunities), and "Measurement" (about measuring impact). Each box contains a bulleted list of actions or tips.

[AI Adoption Guide](#)

<https://aka.ms/CopilotAdoptionHub>



Business to Consumer Copilot Studio Standalone

Customer Support

Handle routine customer inquiries, providing instant responses and freeing up human agents for more complex issues.

[Ask your copilot](#)

How do I return a product?

How do I reset my account information



Products/Services helper

Assist customers with product and service discovery based off your website.

[Ask your copilot](#)

What is the latest laptop? How much does it weigh? Can I fit it in my 15" backpack



Appointment manager

Schedule and appointments, send follow ups, and provide advice on how to arrive.

[Ask your copilot](#)

Is there an available slot for a service next week?





Business to Business Copilot Studio Standalone

Project Management

Assist in project management by checking the status of deliverables and progress.

[Ask your copilot](#)

What is the status of phase 2 for project X?



Supplier interaction

Facilitate communication between businesses and their suppliers, managing orders and tracking shipments.

[Ask your copilot](#)

"What's the status of our latest component order?"



Lead qualification

qualify leads by asking relevant questions and then route them to the appropriate sales representative.

[Ask your copilot](#)

Can you provide me with information on your bulk pricing for office supplies?





Business to Employee

Build a plugin

Examples to bring to life

Employee Requests

Quickly find predictable responses for popular employee questions.

Plugin example

How do I [connect to the corporate network?](#)



Vacation Requests

Interact with your HR systems for vacation, payroll and onboarding.

Plugin example

What is my remaining [vacation balance](#) and [request some time off](#)



Expense Management

Interface with your ERP systems to streamline your finance or resource planning processes

Plugin example

Send me a list of [pending expenses](#) from this week.



Ask yourself:

- Channels needed
- Type of conversation



Business to Employee: Build a custom copilot, Employee Assistant

IT Service

Transform IT service processes with multi-turn experiences.

Ask the IT Service copilot

What are the **new laptop options** for my device replacement?



Exciting! These are your options:



Would you like me to start the approval process to your manager and then create an IT ticket for set up?

Enter your message



Product Information

Empower sales and support organizations to get information on company products.

Ask the Product Information copilot

What is the **correct product number** for a dozen of this product?



Of course! The optimal product number for this quantity is **SKU**.



Have you considered this **Product**? It has been popular with other customers who bought the one you asked about.



Enter your message



Human Resources

Interface with your ERP/HR systems to streamline processes.

Ask the Employee Experiences copilot

Start the **onboarding process** and required tasks for **new colleague**?



Sorted. I have used your HR site to formulate a list, available in "To do"



Thanks. What is the budget for **learning and development** left on my team?



According to your IO: 12345, you have \$5400 remaining for this quarter.

Enter your message



Use case discovery – Get into the specifics

Every conversation is different

Type	Description
Single-Turn Conversations	These are simple, one-off exchanges where the user asks a question and Copilot provides an answer without any follow-up required.
Multi-Turn Conversations	These involve a series of related interactions where Copilot maintains the context over several turns to reach a resolution or provide detailed information.
Action-Based Interactions	In these conversations, Copilot performs a specific action based on the user's request, such as setting a reminder, booking an appointment, or executing a command.
Contextual Conversations	Copilot understands and utilizes the context of the conversation, which may include the user's previous interactions, preferences, or current situation.
Transactional Conversations	These are goal-oriented interactions where Copilot assists the user in completing a transaction, such as making a purchase or transferring funds.
FAQ-Based Interactions	Copilot is equipped to handle frequently asked questions by providing pre-defined answers to common queries.
Proactive Conversations	Copilot initiates the conversation based on certain triggers or events, such as sending a notification or alert to the user.
Personalized Conversations	Copilot tailors the conversation to the individual user by leveraging data and insights to provide a customized experience.

Build copilots that work for you

in your industry...

 Travel and Transport	Manage bookings	Change my trip dates
 Professional Services	Lead generation	Get a quote
 Government	Public programs	Get childcare assistance
 Retail	Manage orders	I want to make an exchange
 Healthcare	Claims	Submit health insurance claim
 Financial Services	Manage accounts	Report lost card
 Education	Admissions	How to get financial aid?
 Manufacturing	Supply	Check stock

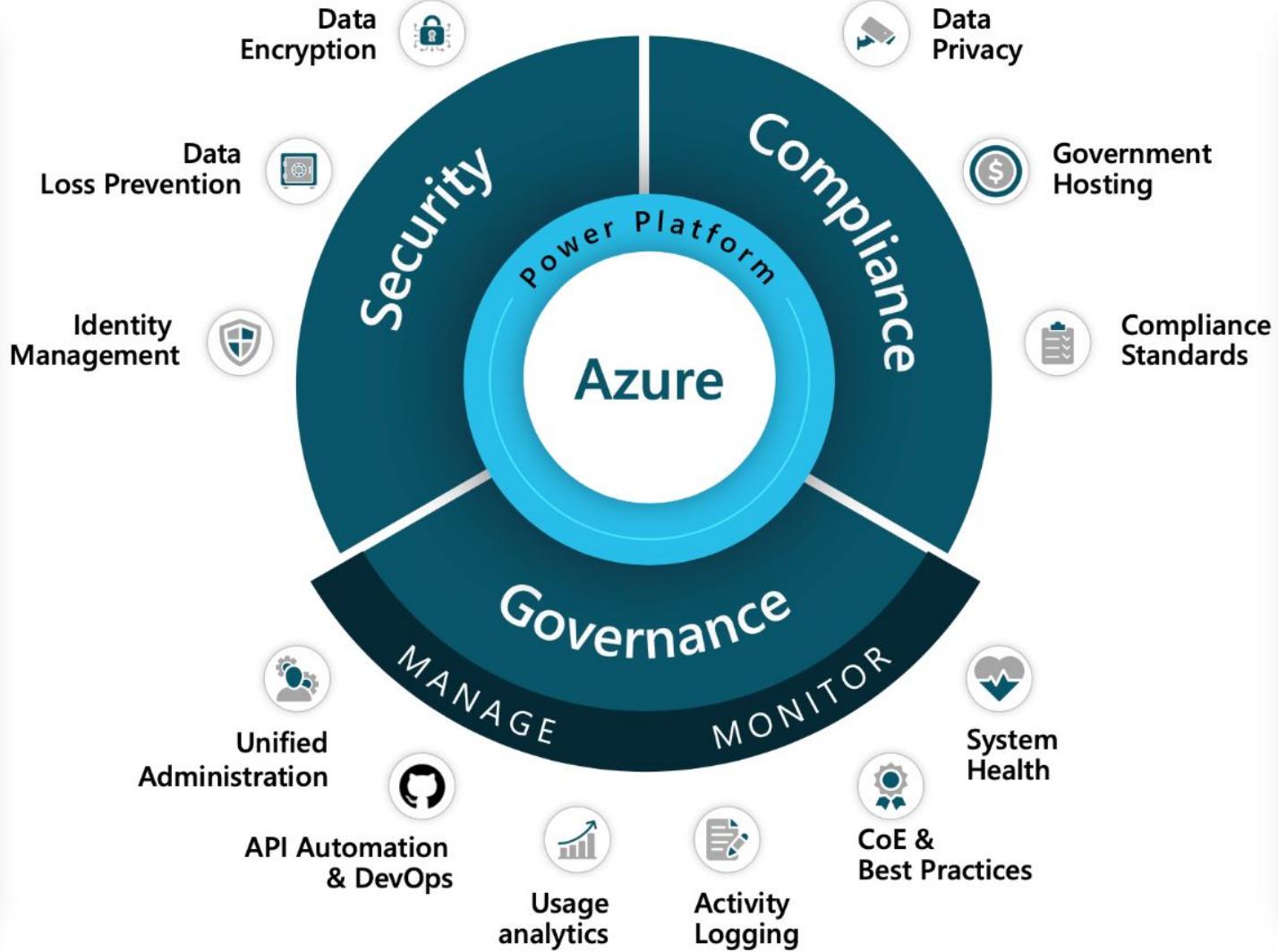
...and department

 Customer Service	Reduce call volume for quick resolutions	
Request a refund	Describe your issue	 Finance
 Support tickets	 Centralized FAQs	Save time by automating budget and expense approvals
Payroll	 Submit expenses for approval	 Budget requests
 HR	Improve employee satisfaction and retention	
Sign up for healthcare plan	 Book time off	 Benefits
Leave and absence		
 IT	Optimize employee troubleshooting	 Operations
Reset my password	Refresh my laptop	Improve efficiency by digitizing paper processes
 Support services	 Equipment requests	 Find case file
Find documents	 Check order delivery times	 Manage inventory
 Sales and Marketing	Increase up-sell and conversion opportunities	
You're eligible for a free upgrade!	 Update your email preferences	 Email
Upselling		

Robust, secure and compliant hosting platform



Compliance leadership with standards and commitments including ISO 27001, FedRamp and EU model clauses



No standing access to data transparent operational model and 99.9% financial-backed uptime guarantee

Take action today

Prepare for AI and Copilot

1

**Explore the AI transformation
opportunity with Microsoft**

aka.ms/aipartnerplaybook

2

Build AI knowledge and skills

learn.microsoft.com/ai

3

**Get trained on Copilot in
business applications**

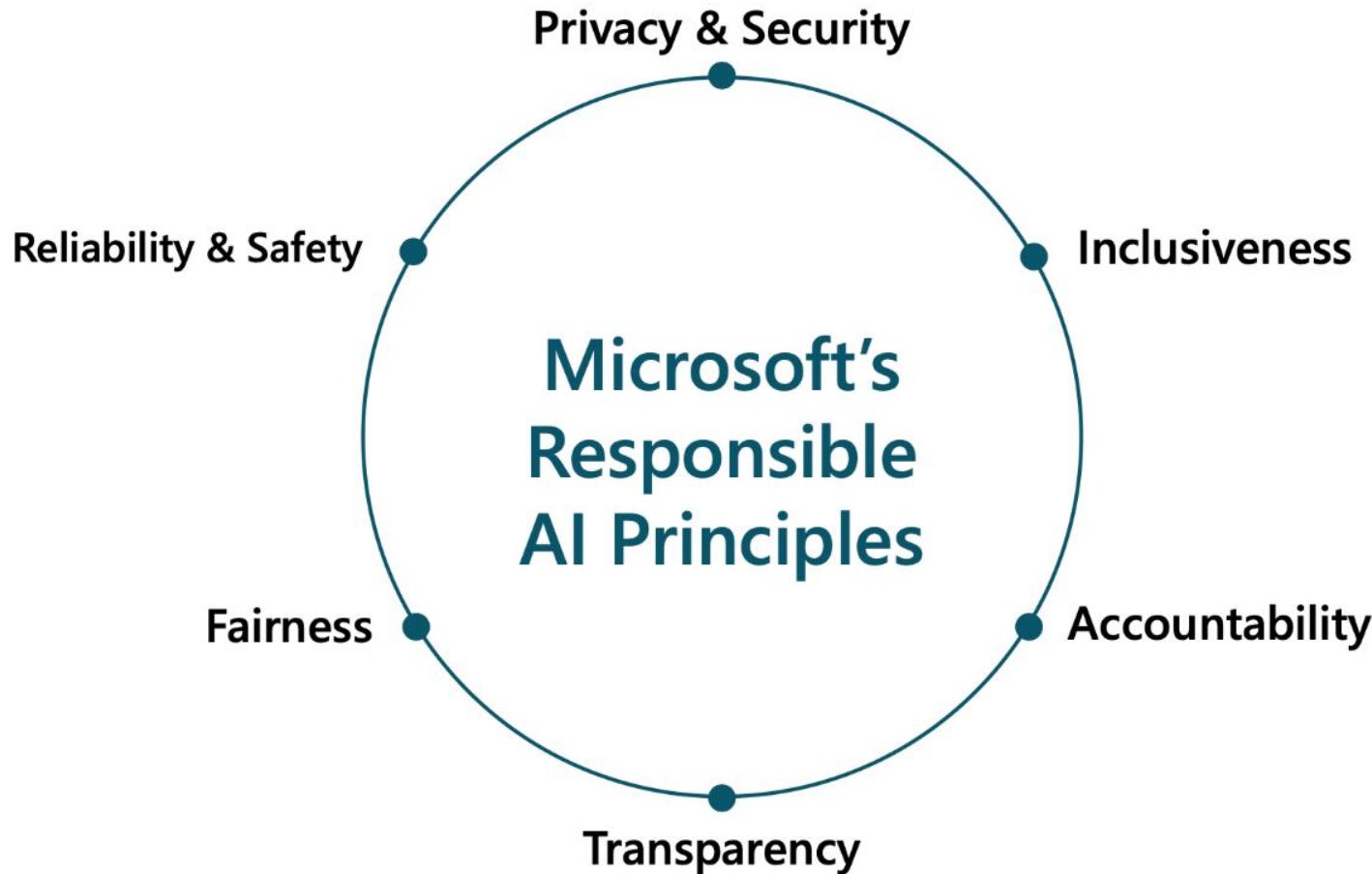
aka.ms/BACopilotTraining

4

Start the Copilot conversation

aka.ms/BACopilot

Microsoft's Responsible AI principles



**Building blocks
to enact principles**



Customer Copyright Commitment

Use Copilot services with confidence

We stand behind
our Copilot
customers

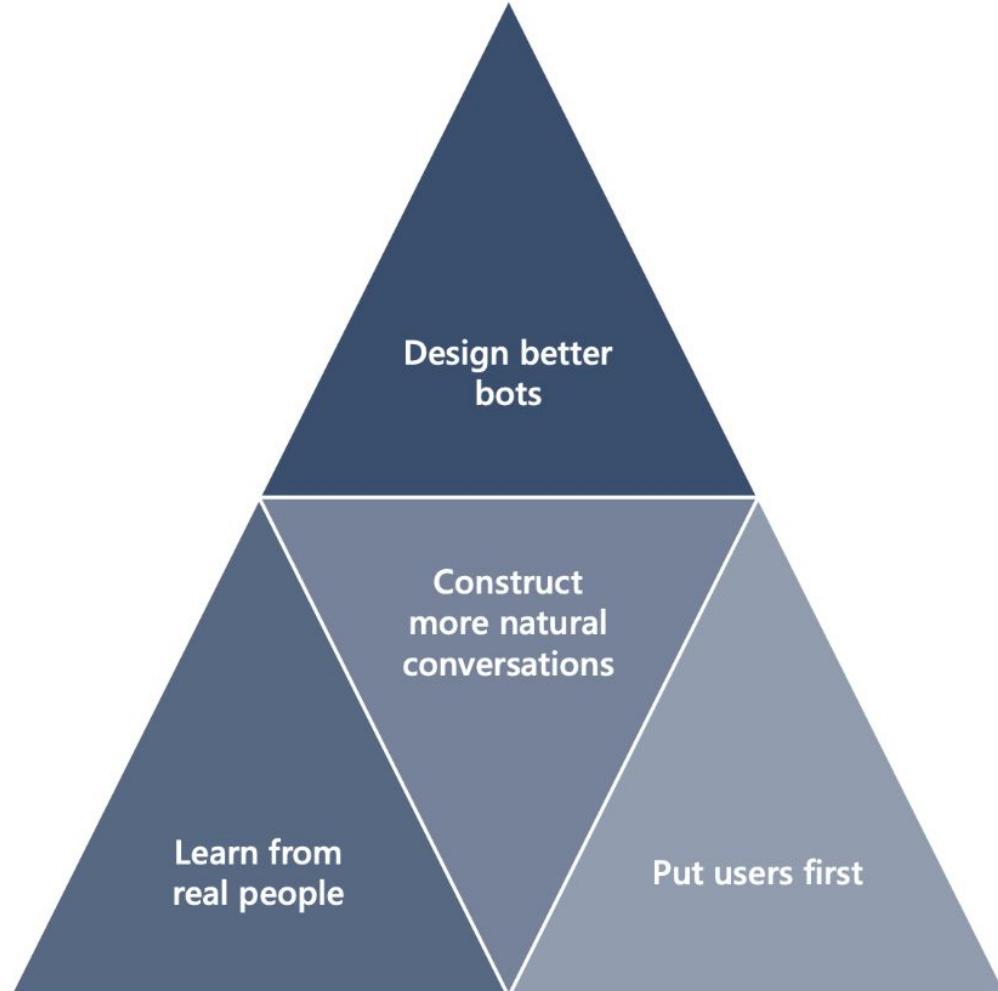
We are sensitive
to the concerns
of authors

Copyright
guardrails are built
into the product

Questions to help you get started

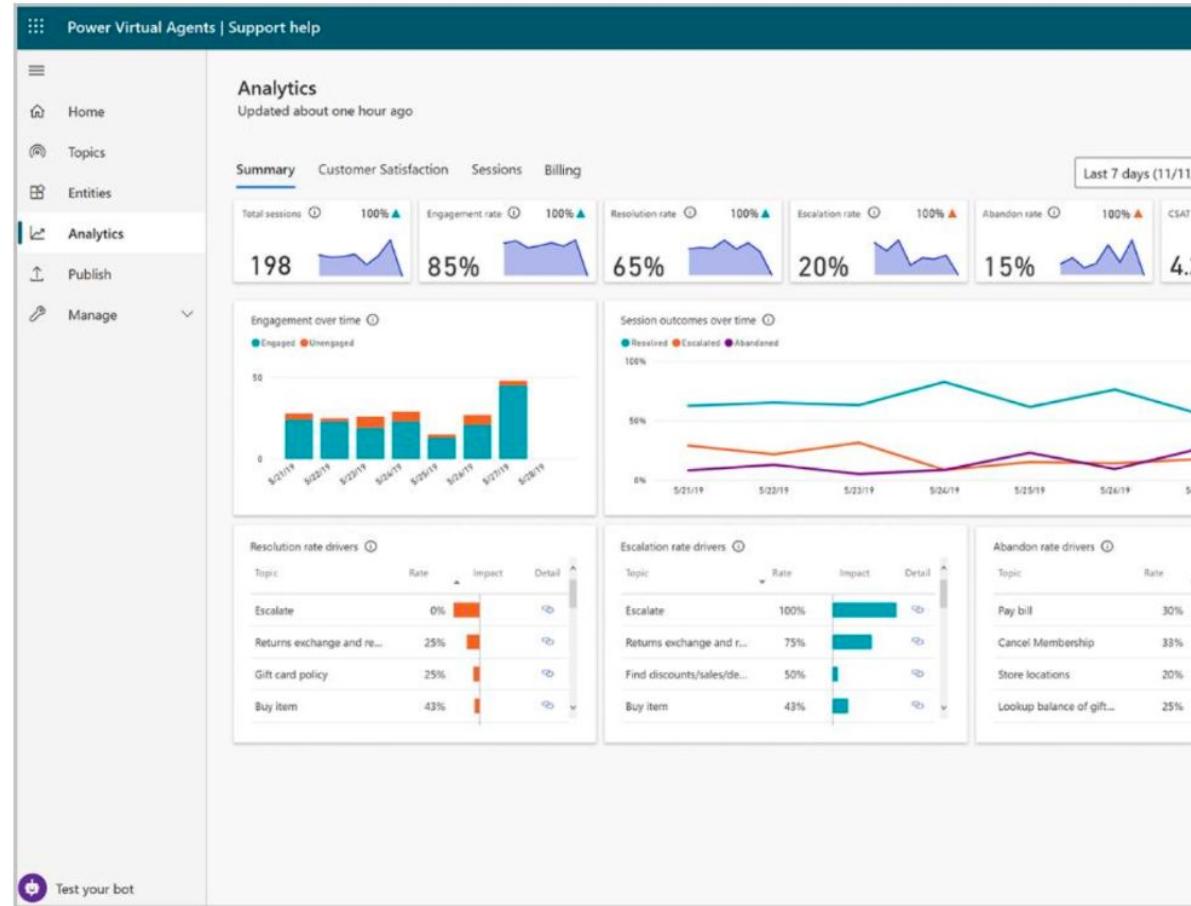
- What does it mean for your bot to truly answer their questions?
- What are some unexpected responses your bot may encounter?
- What data might you need access to and need to integrate with various systems to do so?
- What assumptions do your users have when they engage with your bot?
- What context do your users have when talking with your bot, and does this solution fit that mental model?
- How can you design a bot that is easy for your users to navigate and find the answers they are looking for?

Essence of inclusive design



Getting Started Right

- Identify the right requirements
- Start small and scale up
- Track Analytics for ongoing improvements
- Utilize the Copilot Studio implementation guide:
<https://aka.ms/copilotimplementationguide>



Align the bot with your organization's goals

- Handling repetitive information requests when a skilled human agent is not required
- Reducing the time, it takes to get answers to end users
- Lowering support call volume, while also handling high call volume
- Improving support KPIs
- Using a bot as part of the brand strategy

Opt-In access controls

Opt-in from the Microsoft Admin Center (MAC) for the entire tenant

Models from Anthropic are hosted outside Microsoft and are subject to Anthropic terms and data handling, which need to be reviewed and accepted before makers can use them.

X

AI providers for other large language models

Allow users to connect to other large language models (LLM) in Copilot Chat and while building agents in Copilot Studio.

[Learn more about connecting to other large language models \(LLMs\)](#)

Available model providers for your organization

Anthropic ^

AI safety and research company.

Legal terms

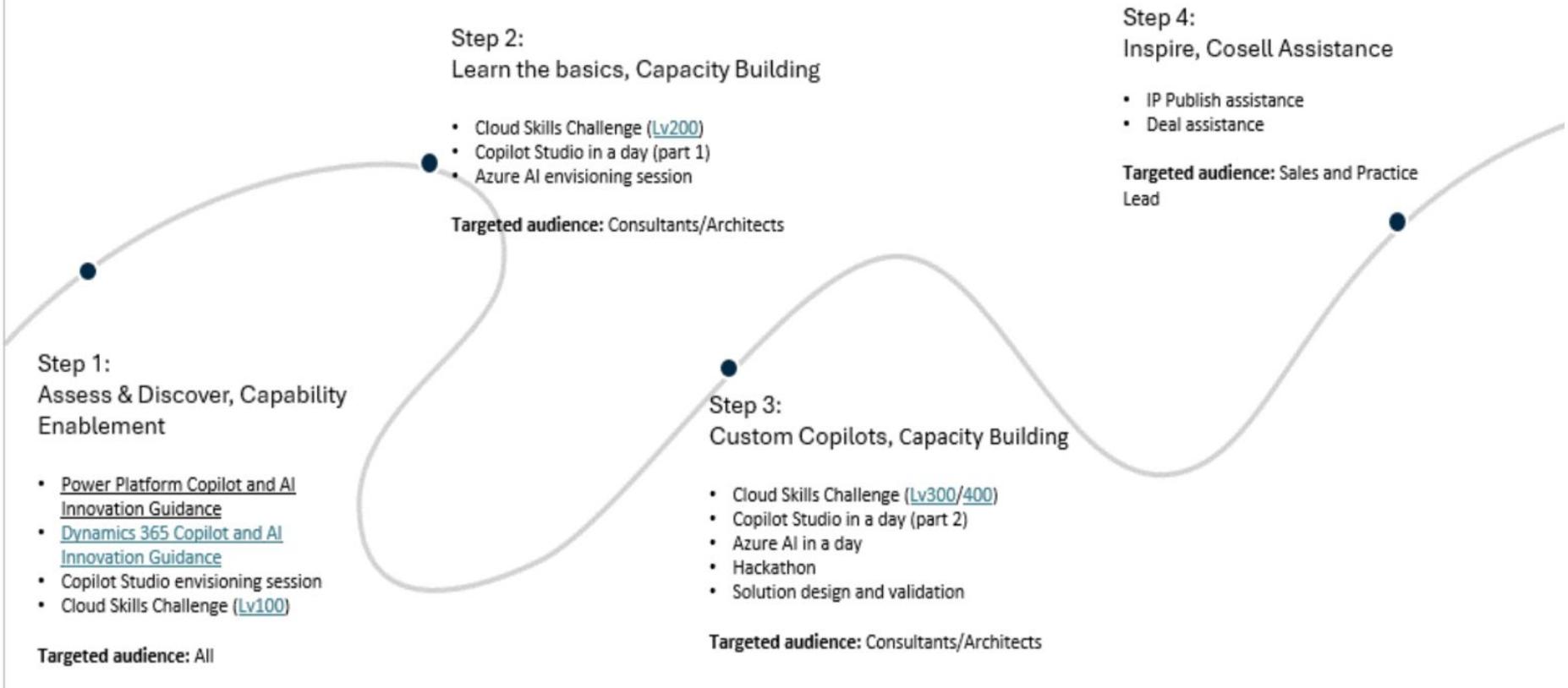
Microsoft is providing you with an optional capability to access Anthropic services from within a Microsoft Online Service. Learn more. Anthropic services operate outside of Microsoft. By clicking the Allow provider button below, you agree on behalf of your organization that a) you are bound by, and must use the Anthropic services only in accordance with, the Anthropic [Commercial Terms of Service](#) and Anthropic [Data Processing Addendum](#), and b) you are electing to share your organization's data with Anthropic and egress data from Microsoft. Your Microsoft customer agreements (including the [Product Terms](#) and Microsoft's [Data Protection Addendum](#)) do not apply to your use of Anthropic services from within a Microsoft Online Service, and Microsoft's data residency, audit and compliance requirements, service level agreements, and Customer Copyright Commitment do not apply to your use of Anthropic services.

I have read and agree to the Terms and Conditions.

Allow provider



Complete Build your own Copilot Journey



Top security and governance concerns about generative AI

Data oversharing and
data leaks

80%

of leaders cited
leakage of sensitive
data as their main
concern¹

Identification of risky
AI use

41%

of security leaders cited that the
identification of risky users
based on queries into AI was
one of the top AI controls they
want to implement²

AI governance and
risk visibility

84%

Want to feel more confident
about managing and
discovering data input into AI
apps and tools²

1. First Annual Generative AI study: Business Rewards vs. Security Risks, Q3 2023, ISMG, N=400

2. [Microsoft data security index 2024 report](#)

We secure your data at rest and in transit

You control your data

Your data is not used to train or enrich foundation models

You're protected against AI security and copyright risks



**Microsoft 365
Copilot is built
on trust**

Tools to secure and govern your Copilot use



Address oversharing concerns

- Gain visibility into overshared content
- Remediate excessive permissions
- Prevent Copilot from processing sensitive files



Protect against data loss and insider risks

- Get alerts and reports of risky behavior and AI use
- Protect sensitive files and Copilot interactions
- Dynamically apply security policies based on risky actions



Govern AI use to meet regulations & policies

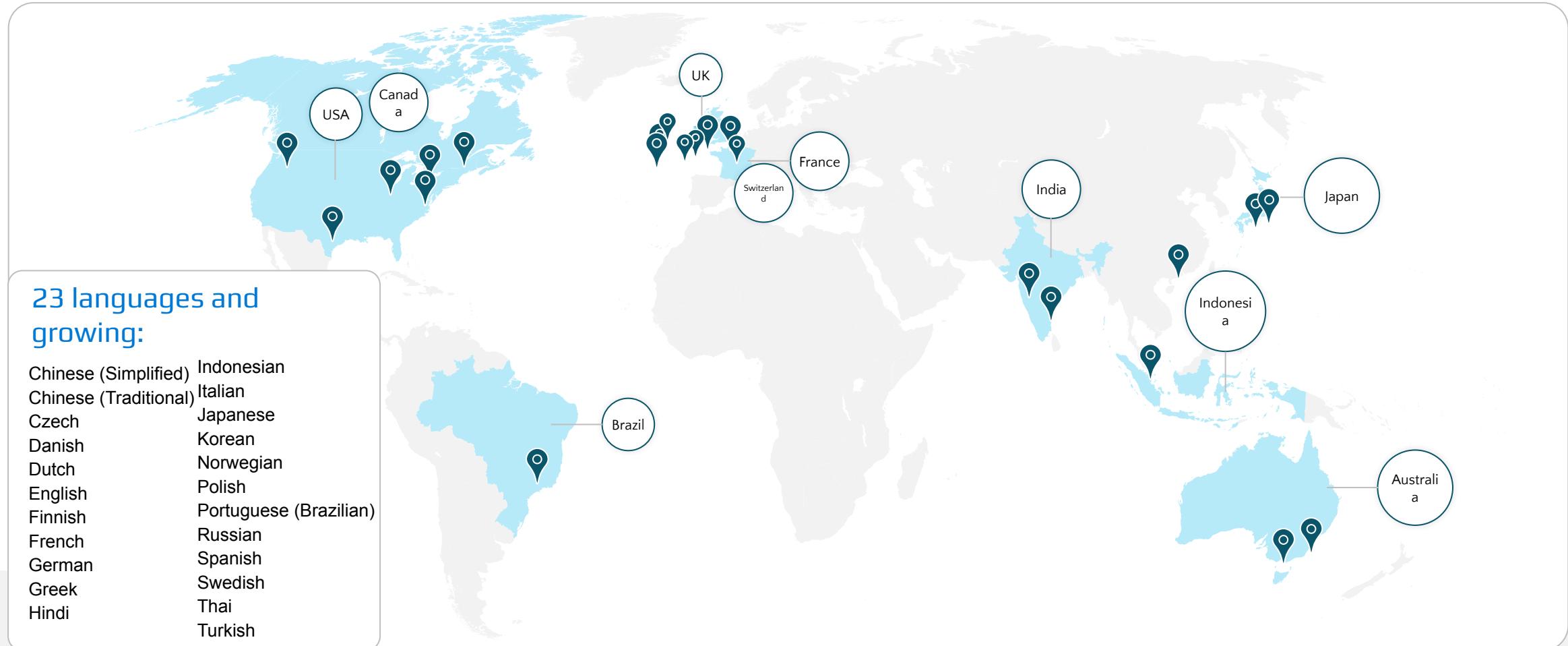
- Inspect interaction content and audit logs
- Investigate for compliance and ethical violations
- Enforce lifecycle policies and legal holds

Secure

Govern

Questions?

Copilot Studio's global footprint



22 datacenters worldwide
10 for generative AI

National clouds
Commercial, GCC, GCC High

Preserve high levels of regulatory compliance, privacy, and industry standards conformance with Copilot Studio.

Thank you!

Lab 3

Lab: 3.1 Multi Agent Orchestration

We will learn:

Adding an agent

Using multi agent copilot

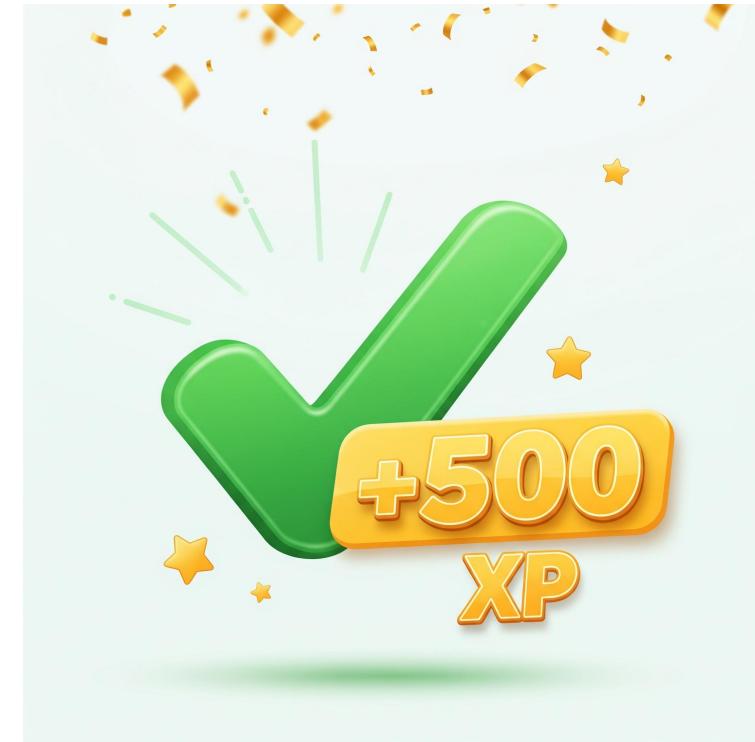
Lab 3 Completed! +500 XP

Lab: 3.1 Multi Agent Orchestration

We will learn:

Adding an agent 

Using multi agent copilot 





Scaling your Copilot Studio agents with multi-agent capabilities



Copilot Studio agent

Orchestrator

Topic

Topic

Knowledge

Tools

Public websites

Connector

Flow

Prompt

SharePoint

Dataverse

Computer
use

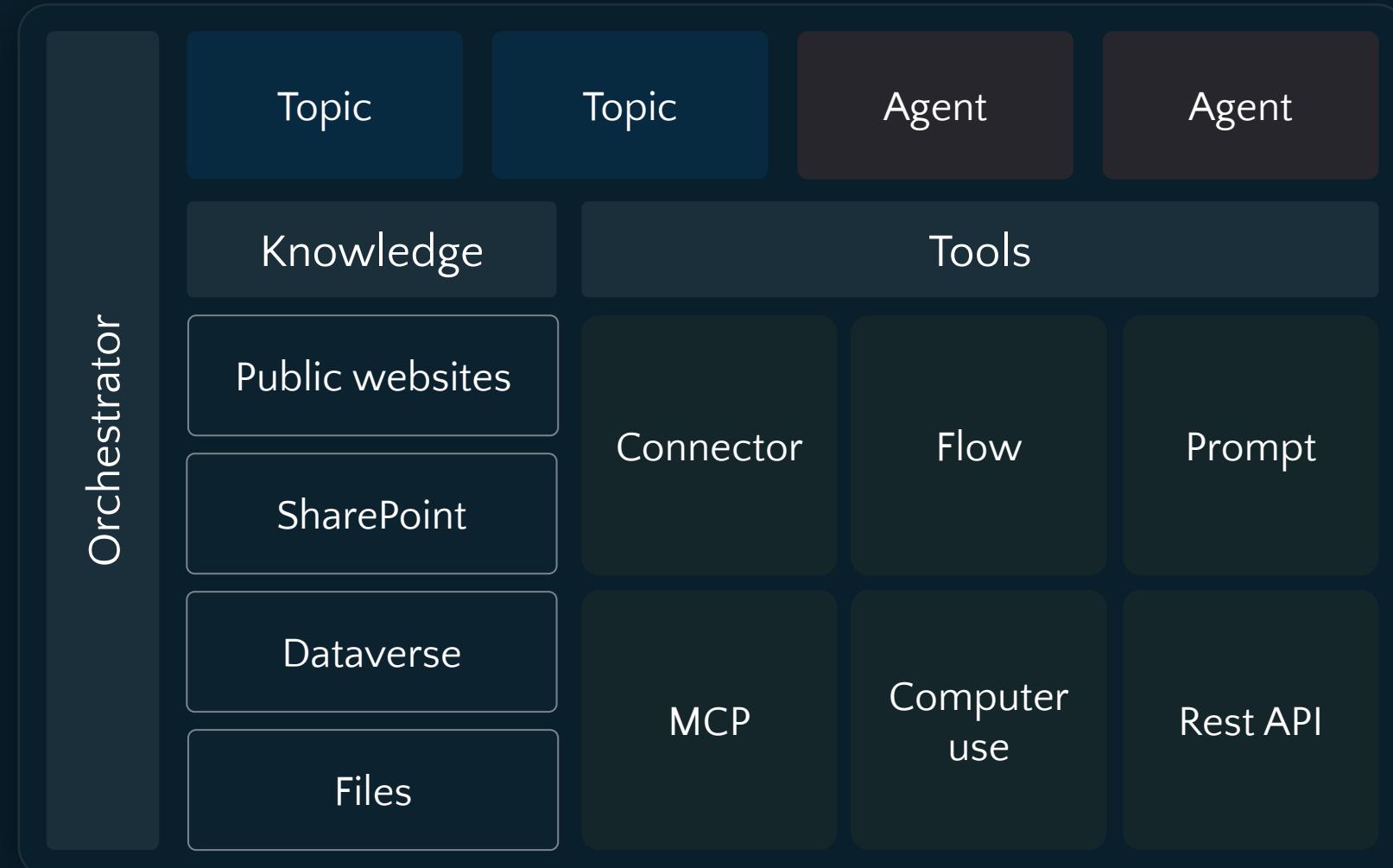
Rest API

Files

MCP

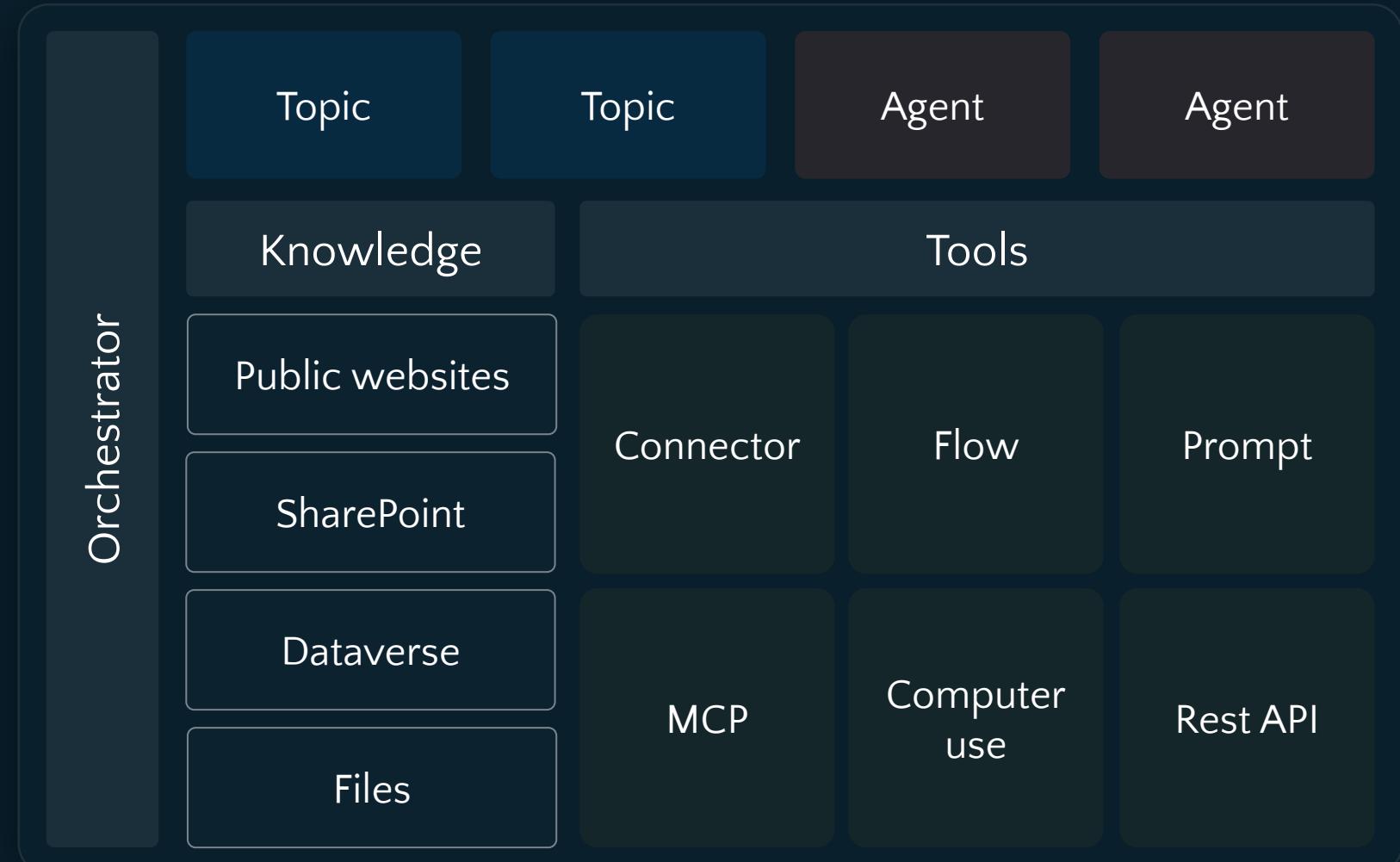


Copilot Studio agent





Copilot Studio agent



Connected agents

Robust and secure platform



Infrastructure management

- No infrastructure to manage
- Geo-distributed multi-tenant SaaS
- Built upon the Azure Cloud, benefitting from the SLAs, data centers, GDPR, privacy, and more.



Visibility

- Built in analytics automatically tracks critical KPIs
- Activity logging of makers.



Responsible and Compliant

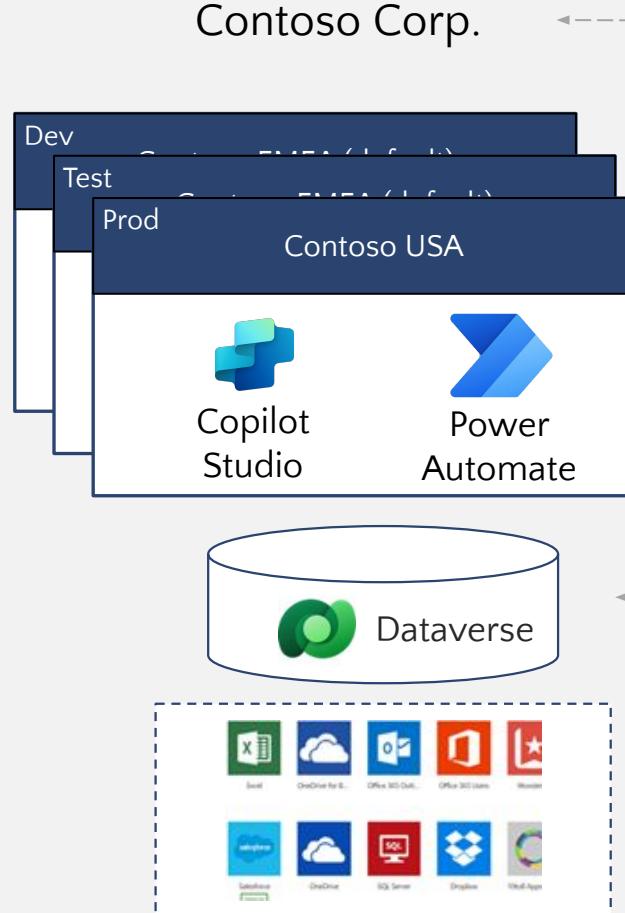
- Supports many Compliance offerings like HIPAA, HITRUST, FedRAMP, PCI, SOC, ISO & more
- Your data is not used to train or enrich foundation AI models.
- Data and AI models are protected at every step.



Secure

- Govern using unified Power Platform admin center
- Data encryption – data stays secure while at rest and in transit
- Data loss prevention
- Customer Lockbox

Managing access for copilot developers



- 1 Entra - Conditional Access
- 2 Environment roles
- 3 Resource permissions for copilots, flows, custom connectors...
- 4 Dataverse security roles
- 5 Cross-tenant inbound & outbound restrictions to the 300+ connectors to cloud services, content services, DBs, APIs, etc.

Two ways to use GPT-5 in Copilot Studio

As the agent model

The screenshot shows the 'Copilot Studio' interface with the 'Settings' tab selected. In the 'Generative AI' section, there's a 'Model' configuration panel. This panel includes a dropdown for 'Select your agent's model' set to 'GPT-5 Auto (Experimental)', a toggle switch for 'Continue using retired Models?' (set to off), and a 'Responses' section with a 'Primary response model' dropdown set to 'Your agent model (default)'. A large purple box highlights the 'Model' section. A red arrow points from the bottom of this purple box down to another 'Model' section located further down the page, which also has a dropdown set to 'GPT-5 Auto (Experimental)'.

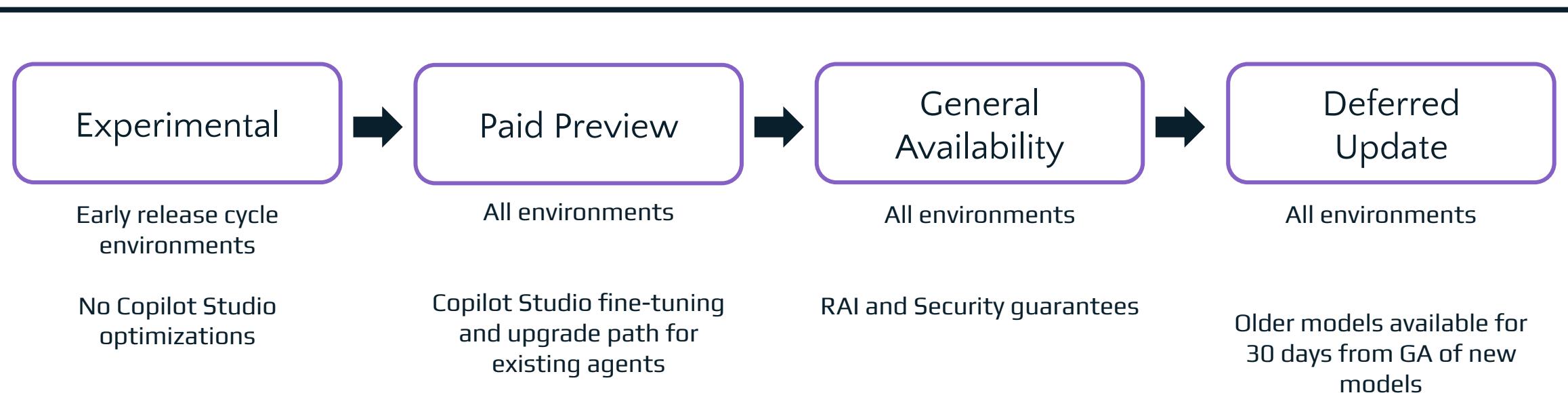
In custom prompt tools

The screenshot shows the 'Copilot Studio' interface with the 'New prompt' page open. In the 'Instructions' section, there's a 'Model' dropdown set to 'Text' and a 'Model' selector dropdown set to 'GPT-5 Chat'. Below these are sections for 'Prompt model' (Basic GPT-4.1 mini, Standard GPT-4.1, Standard GPT-5 Chat), 'Managed models' (Premium OS, Premium GPT-5 Reasoning), and 'Azure AI Foundry models (preview)'. A large purple box highlights the 'Model' dropdown and the 'Model' selector dropdown. A red arrow points from the bottom of this purple box down to another 'Model' section located further down the page, which also has a dropdown set to 'GPT-5 Auto (Experimental)'.

Copilot Studio Managed Models

Copilot Studio manages models on behalf of customers:

- Fine-tune models to optimize performance for agents scenarios
- Ensure RAI standards and security guarantees are applied
- Maintain global infrastructure availability and resiliency
- Change management and consistency during model upgrades



Copilot Studio licensing for GPT-5

Included with Microsoft 365 Copilot

Usage of GPT-5 (Chat or Reasoning) will not be billed for Copilot Studio agents when used by paid and authenticated Microsoft 365 Copilot users.

Billing for other scenarios:

Usage of GPT-5

Standard Generative Answer or Generative Action rates

Usage of GPT-5 Reasoning

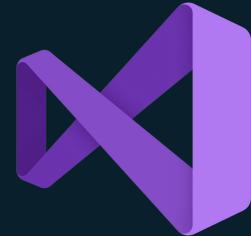
Incremental Premium AI tool

Build agents, your way

Transform any business process with low-code to pro-code tools



Copilot Studio



Visual Studio



GitHub



Microsoft empowers all users to build agents with tools across the developer spectrum





Preview



Multi-agent orchestration in Copilot Studio

Build multi-agent scenarios, connecting to agents from other services, in Copilot Studio

Effective end-to-end transformation: Enable agents to talk to each other in Copilot Studio, exchanging data, collaborating on tasks, and distributing work

Cross-platform orchestration: Connect your agents with other agents in your tenant, whether they were built using Copilot Studio, Azure AI Foundry Agents, M365 Copilot SDK or Fabric

Agent specialization: An agent can call on connected agents where specialized knowledge or actions are required and complete tasks in minutes.

