

# Microsoft Copilot Studio: a Pandora implementation use case

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# Chi sono io? Andrea Martorana Tusa

- Product Manager in Pandora. Manager di un team che si occupa di Power BI, Fabric, Power Platform, Copilot, in termini di Governance e Management
- 25+ anni di esperienza nel mondo dati
- Ex Microsoft MVP 2018-2024
- Speaker da molti anni in molti differenti eventi in giro per l'Europa



# Agenda

1. The use case and Copilot Studio
2. User-centric design
3. Prompting and knowledge sources
4. SharePoint integration
5. Governance
6. Costs
7. Monitoring
8. Findings and conclusions

The use case and Copilot Studio

# Which Copilot?

In Pandora we are running a few use cases, testing Copilot Studio Agent for future large-scale adoption

The screenshot shows a landing page for AI agents. At the top, a section titled "Get started with AI agents" contains a paragraph about AI agents changing work methods. Below this, a heading "Choose your product" is followed by three options: "Microsoft 365 Copilot" (highlighted in a black box), "Azure AI Foundry", and "Copilot Studio" (which is highlighted with a blue border).

**Get started with AI agents**

Change needs makers. AI agents are changing the way we work. From simple prompt-and-response agents to fully autonomous agents able to execute entire workflows from start to finish, there's an agent for every need. Get started building agents today with Microsoft 365 Copilot, Azure AI Foundry, and Copilot Studio.

**Choose your product**

**Microsoft 365 Copilot**

[Azure AI Foundry](#)

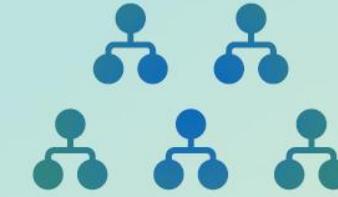
[Copilot Studio](#)

# Agents vs Copilot



Copilot

Every employee  
has a Copilot



Agents

Every business process  
transformed by agents

# Microsoft Copilot Studio

## AI innovation

Developer Tools



Copilot Studio



Visual Studio



Github Copilot

AI Services



Azure OpenAI Service



Model as a Service (MaaS)



Azure AI Services



Azure Machine Learning



Azure AI Foundry

App Services



Azure Kubernetes Service



Azure Container Apps



Azure App Service



Azure API Management



Azure Functions

Data Services



Microsoft Fabric



Azure SQL Database



Azure Cosmos DB



Azure Database for PostgreSQL

Privacy, safety and security



Azure AI Content Safety



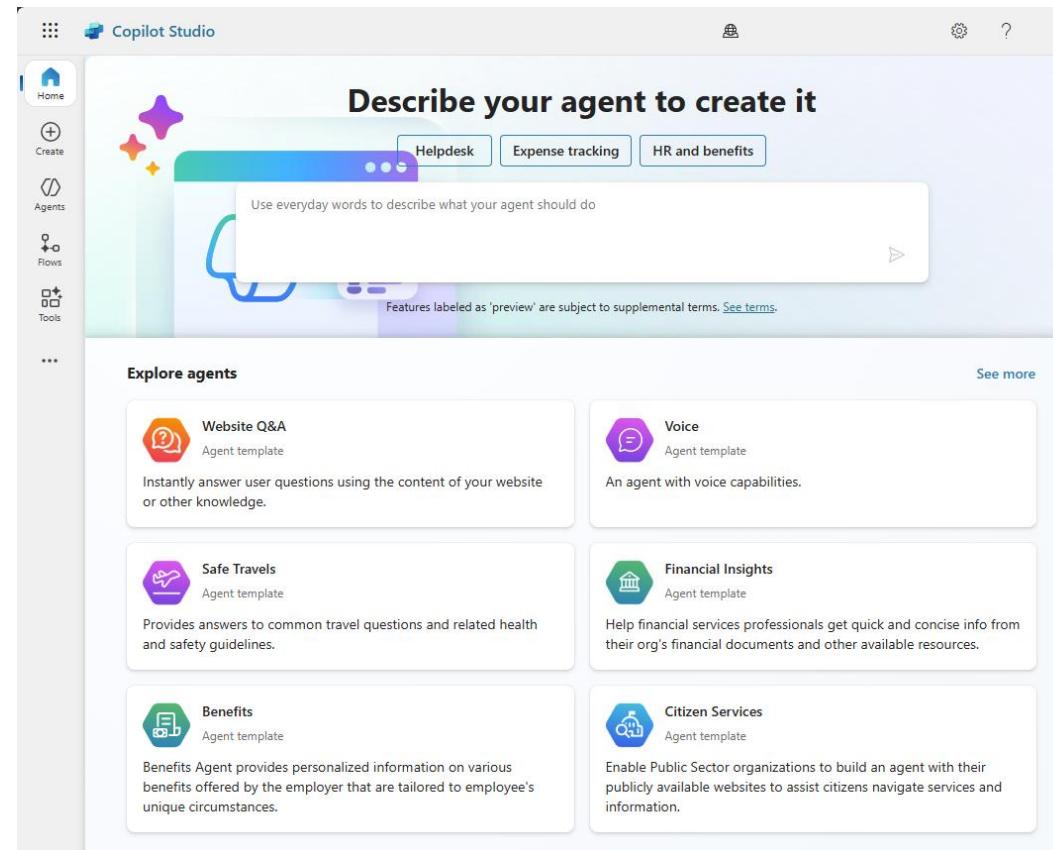
Microsoft Purview



Microsoft Defender

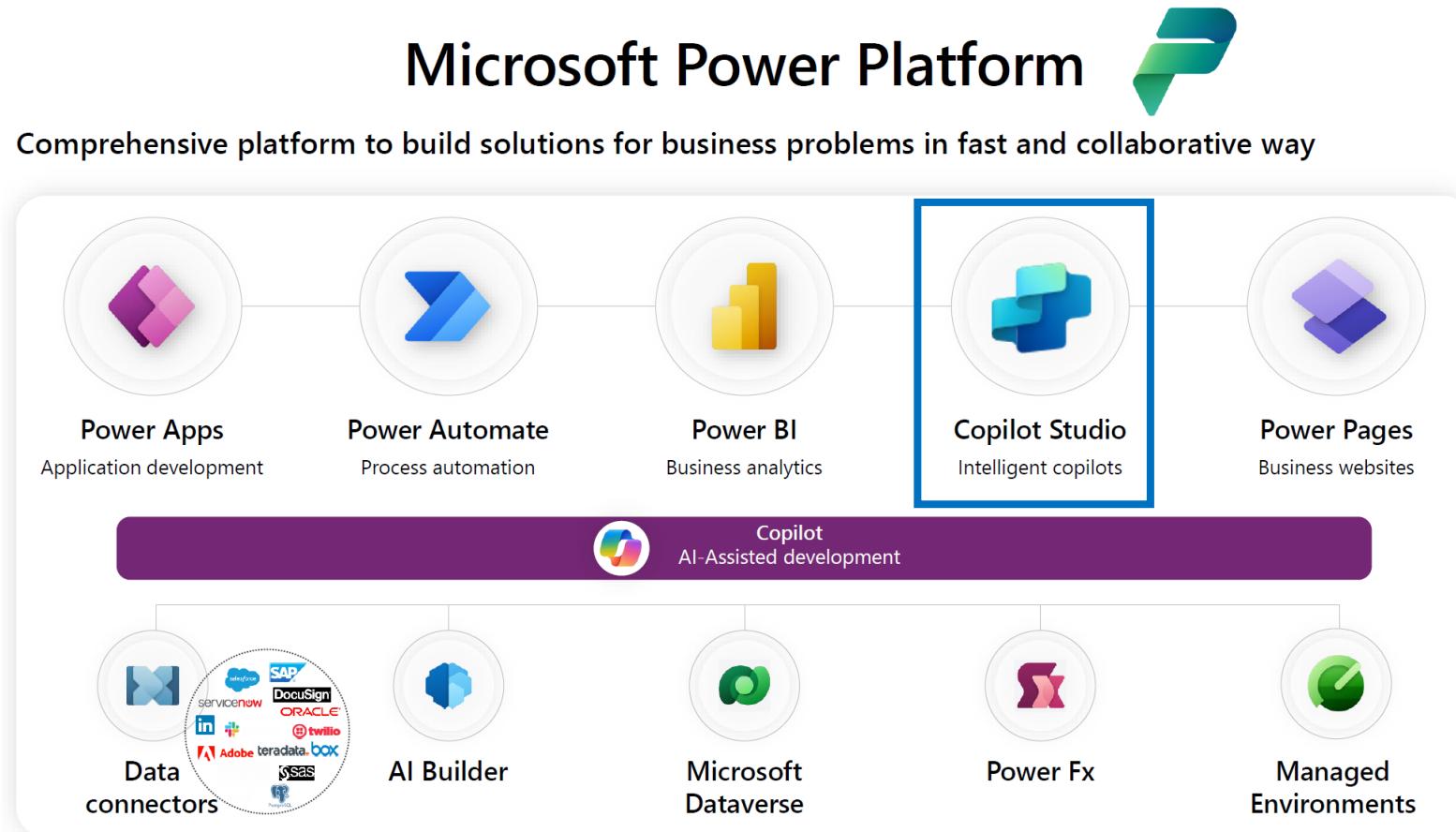
# Microsoft Copilot Studio

Copilot Studio is a graphical, low-code tool for building agents and agent flows



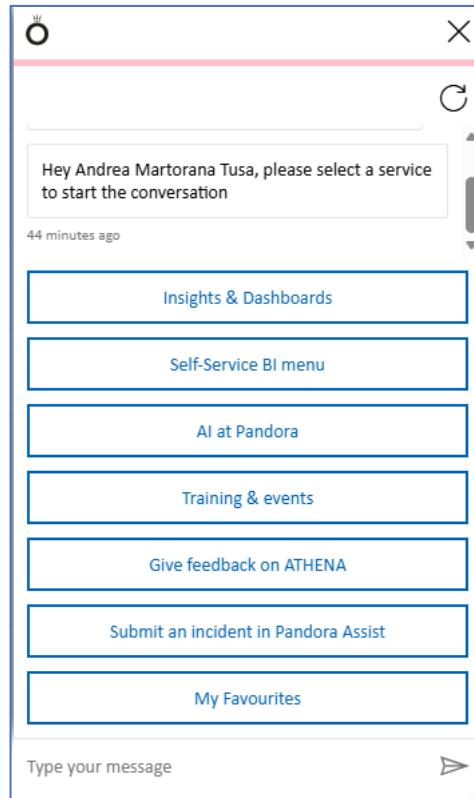
# Microsoft Copilot Studio

Very important to mention that Copilot Studio is a component of the Power Platform

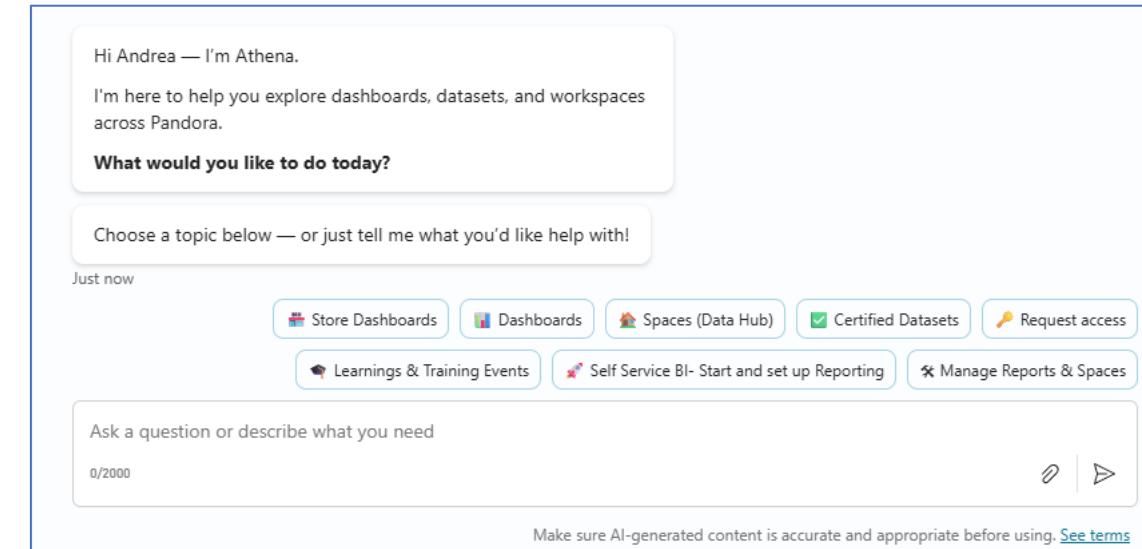


# Our use case

From a “stupid” Azure Chatbot



... to a “smart” conversational agent in Copilot Studio



# Goals

1

Replace the old  
Athena bot with  
Athena Copilot

2

Support users across  
domains to find  
reports, datasets, and  
insights faster.

3

Reduce friction in  
onboarding,  
navigation, and  
content discovery.

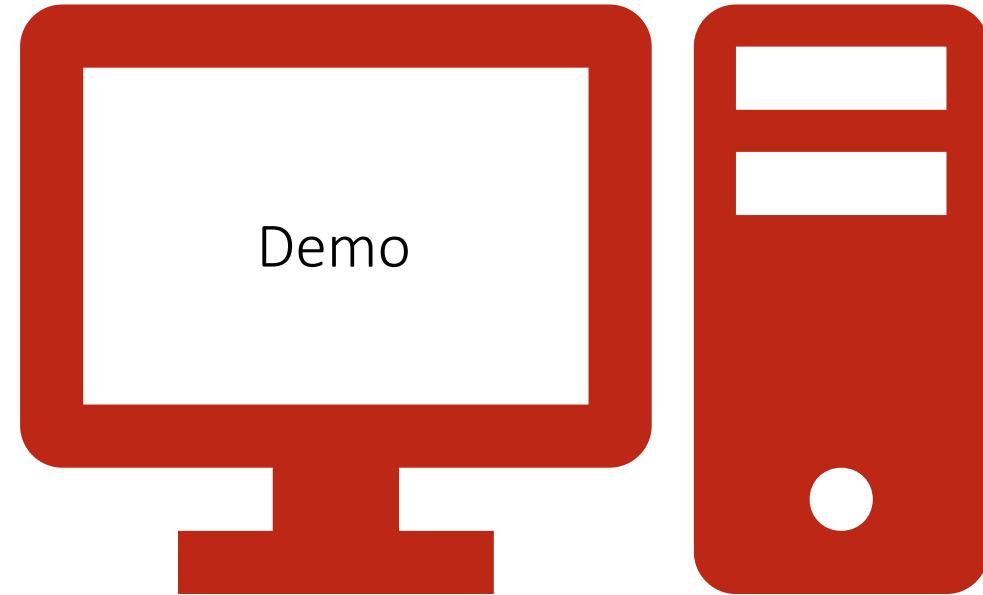
4

Strengthen self-  
service BI adoption

5

Showcase how AI  
improves usability  
and engagement  
across Athena.

# Athena Azure chatbot in Sharepoint



User-centric design

# User centric design



## Research-Based Approach

Chat flow analysis · User personas · Feedback from domain users



## Three User Groups

- 👤 **Data Consumers** – Find dashboards & KPIs (e.g., Store Managers)
- ⚙️ **Data Providers** – Use certified datasets & publishing flow
- ✳️ **Admins / Owners** – Track usage, adoption & certification



## Design Principles

- 🗣 Natural language simplicity
- 🧭 Context-aware routing (Domain · SSBI · Dataset)
- 📊 Progressive disclosure
- 🔗 Seamless SharePoint integration

Prompting and knowledge base

# Prompt engineering and patterns

We figured out the essential setting to get a meaningful outcome from the generative AI was to build a prompt contextualized to our patterns.

## Findings



### 1. Prompt Engineering Guidelines

- Prompts should be **contextualized to ATHENA's function**: insights, reports, knowledge base, and service interactions.
- Use **structured prompt templates** to guide the model:
  - "You are ATHENA, an intelligent assistant for Pandora's analytics. When asked, provide report insights, KPIs, or data guidance in simple language."
- Ensure prompts include:
  - Report or domain context
  - Action verbs (e.g., "summarize," "compare," "highlight anomalies")
  - Output format (e.g., chart, summary, insight, explanation)

[ATHENA LLM Agents – Prompting & Generative AI Findings - Athena - Confluence](#)

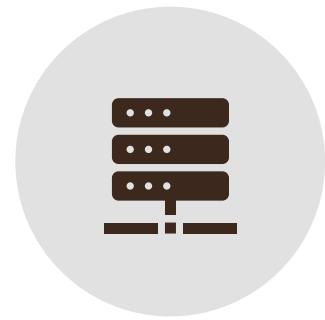
# Prompt engineering and patterns



## 3. End-to-End Conversation Flow (Loop Model)

- **Start Node:** Welcome + Prompt Example
  - "Hi! I'm ATHENA. I can help you with analytics insights, report summaries, or finding store performance. Ask me something like: '*How did NSW stores perform last month?*'"
- **Processing Node:** LLM interprets and retrieves insight
  - NLP maps question to insight (via Azure Language Service or QnA)
- **Response Node:** Rendered insight or visual
  - Output can be tabular, textual, or link to Power BI component
- **Loop / Follow-up Suggestions:**
  - "Would you like to explore another region or metric?"
- **End Node:** Optional exit
  - "Thanks! If you need more insights, just say 'ATHENA help'."

# Knowledge source definition



CENTRALISED KB ON  
SHAREPOINT



COGNITIVE SERVICES-  
AI SEARCH USING  
VECTOR EMBEDDING



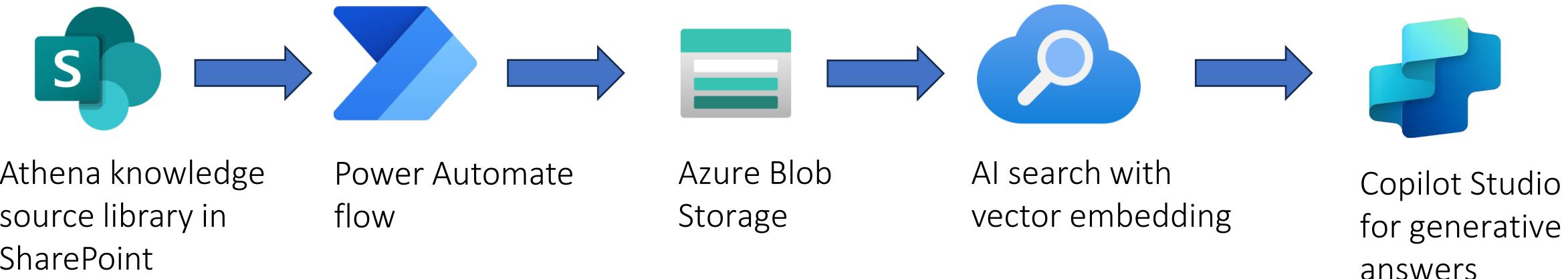
AI SEARCH WITH  
PROMPT ENGINEERING



TOPIC DEFINITION

[ATHENA LLM Agents – Prompting & Generative AI Findings - Athena - Confluence](#)

# Data source workflow



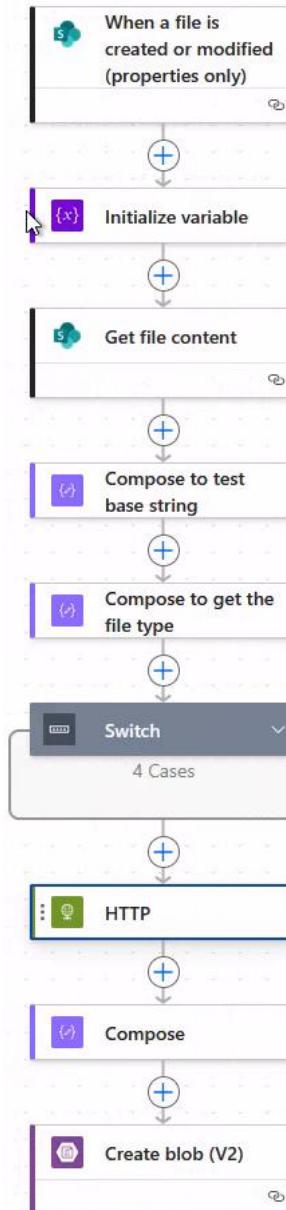
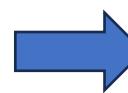
# Athena knowledge base



The Athena knowledge base is stored in a SharePoint list classified by topic. We are using a lot of tags to contextualize each topic and build the expected user journey

Name	Modified	Content Owner	Modified By	ModuleTag
AI	July 24		Monika Gupta	
Incident	November 5		Elnaz Moradi	Incident
Insights	November 5		Elnaz Moradi	Insights
Self-Service	November 5		Elnaz Moradi	Self-Service
Training	November 5		Elnaz Moradi	Training

# Power Automate

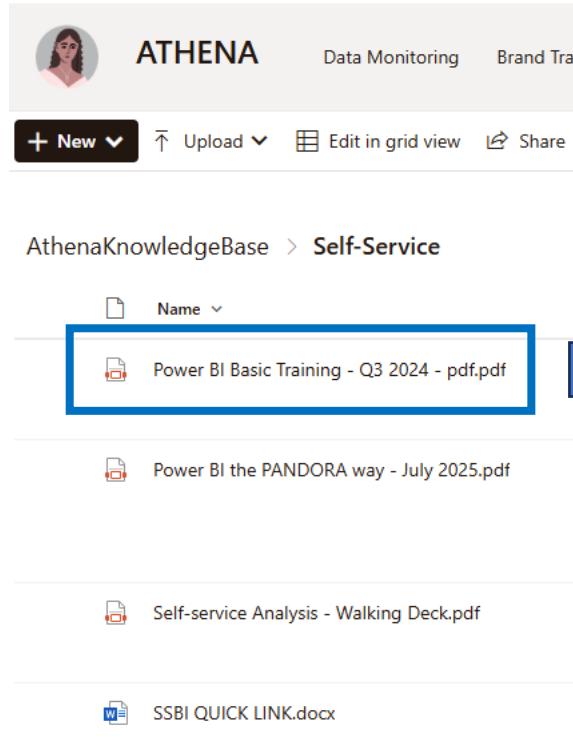


- From SharePoint list to blob storage
- Convert all documents in JSON

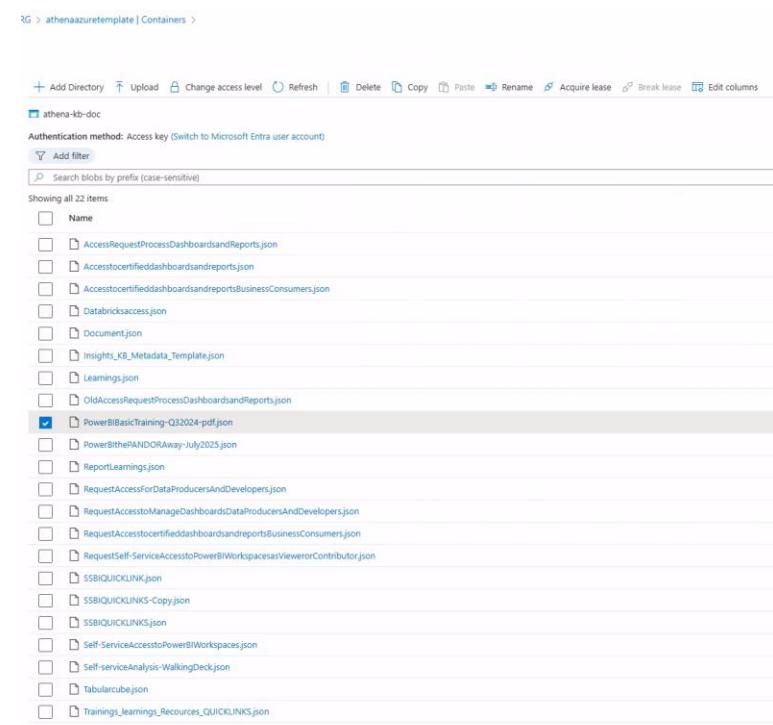


# Azure blob storage

- Before

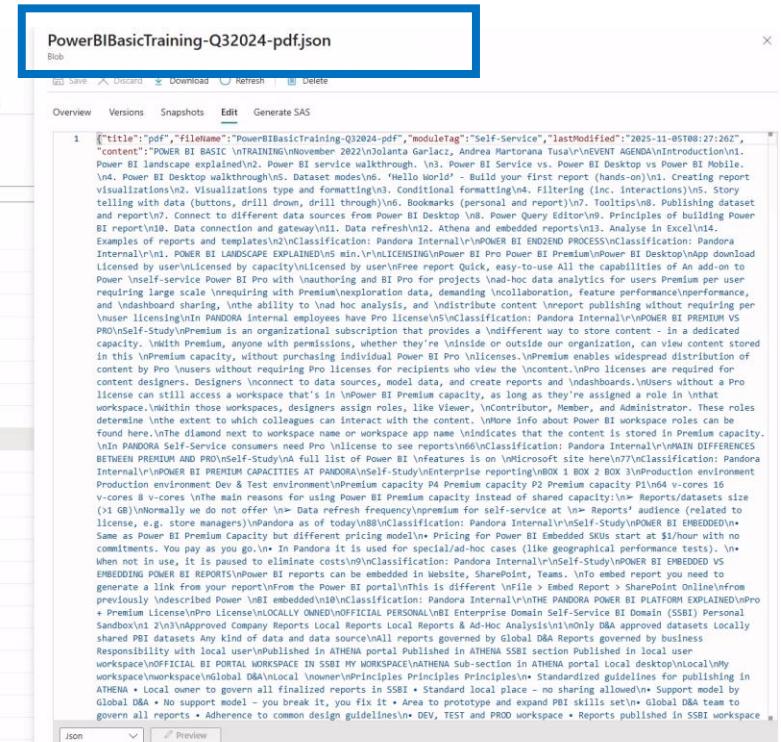


The screenshot shows the ATHENA interface with a navigation bar at the top. Below it, there are buttons for '+ New', 'Upload', 'Edit in grid view', and 'Share'. The main area displays a list of files under 'AthenaKnowledgeBase > Self-Service'. One file, 'Power BI Basic Training - Q3 2024 - pdf.pdf', is highlighted with a blue box.

The screenshot shows the 'athenaazuretemplate | Containers' page. It includes a toolbar with '+ Add Directory', 'Upload', 'Change access level', 'Delete', 'Copy', 'Paste', 'Rename', 'Acquire lease', 'Break lease', and 'Edit columns'. Below the toolbar is a search bar with 'Search blobs by prefix (case-sensitive)'. A list of files is shown, with one file, 'PowerBIBasicTraining-Q32024-pdf.json', highlighted with a blue box.

- After

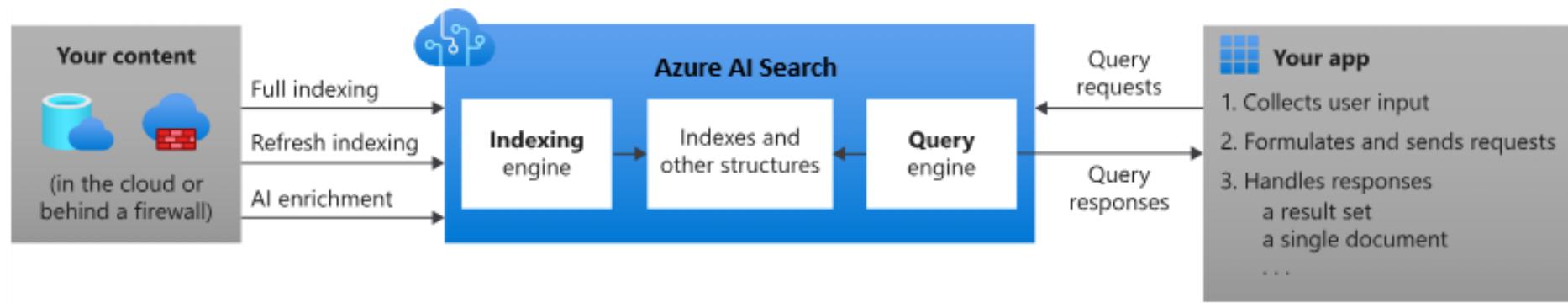


The screenshot shows a Power BI report titled 'PowerBIBasicTraining-Q32024-pdf.json'. The report content is a large block of JSON code. The title of the report is also highlighted with a blue box.

# Azure AI search service



Azure AI Search is a scalable search infrastructure that indexes heterogeneous content and enables retrieval through APIs, applications, and AI agents.



On the indexing side, if your content is on Azure, you can use indexers and skillsets for automated and AI-enriched indexing. Or, create a logic app workflow for equivalent automation over an even broader set of supported data sources.

<https://learn.microsoft.com/en-us/azure/search/search-what-is-azure-search>

# Azure AI search service



## Data sources and indexing

Home > athena-bot-qna-dev

### athena-bot-qna-dev | Data sources

Search service

Search Filter by name...

Add data source Refresh Delete

Name athena-kb-index

Type Azure Blob Sto

Save Discard Refresh Create demo app Edit JSON Delete Encryption

Documents 27 Total storage 440.77 KB Vector index quota usage 0 Bytes Max storage 160 GB

Search explorer Fields CORS Scoring profiles Semantic configurations Vector profiles

+ Add field + Add subfield Delete Autocomplete settings

Search field names

Field name	Type	Retrievable	Filterable	Sortable	Facetable	Searchable	Analyzer	Dimension
fileName	String	<input checked="" type="checkbox"/>	Standa...					
title	String	<input checked="" type="checkbox"/>	Standa...					
moduleTag	String	<input checked="" type="checkbox"/>	Standa...					
lastModified	DateTimeOffset	<input checked="" type="checkbox"/>						
content	String	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Standa...	
contentVector	SingleCollection	<input type="checkbox"/>				<input checked="" type="checkbox"/>		1536

<https://learn.microsoft.com/en-us/azure/search/vector-search-overview>

# Azure AI search service



athena-kb-index ...

Save Discard Refresh Create demo app Edit JSON Delete Encryption

Documents Total storage Vector index quota usage Max storage

27 440.77 KB 0 Bytes 160 GB

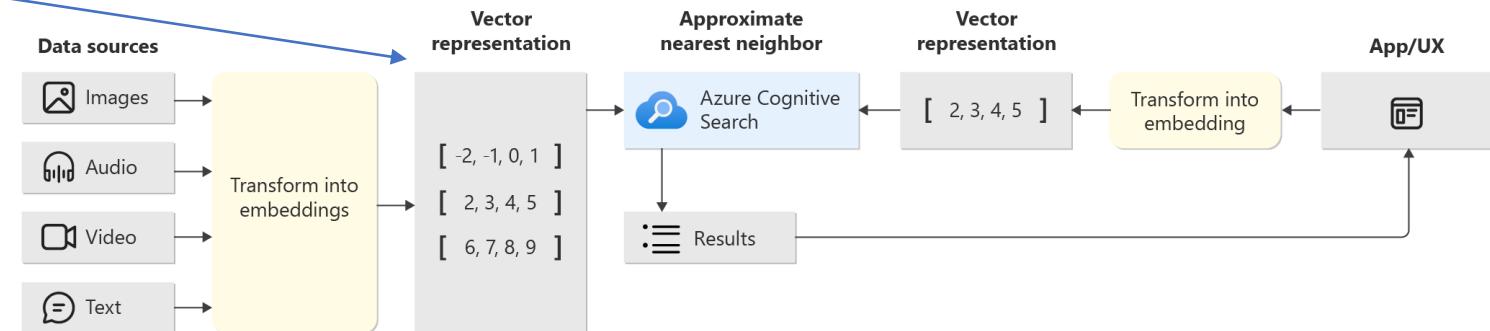
Search explorer Fields CORS Scoring profiles Semantic configurations Vector profiles

+ Add field + Add subfield Delete Autocomplete settings

Search field names

Field name	Type	Retrievable	Filterable	Sortable	Facetable	Searchable	Analyzer	Dimension
fileName	String	<input checked="" type="checkbox"/>	Standa...					
title	String	<input checked="" type="checkbox"/>	Standa...					
moduleTag	String	<input checked="" type="checkbox"/>	Standa...					
lastModified	DatetimeOffset	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
content	String	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Standa...	
contentVector	SingleCollection	<input type="checkbox"/>				<input checked="" type="checkbox"/>		1536

Search services using indexes and vectors



<https://learn.microsoft.com/en-us/azure/search/vector-search-overview>

# Agent's knowledge source

The screenshot shows the ATHENA-BOT knowledge management interface. The top navigation bar includes 'ATHENA-BOT' with a green shield icon, 'Overview', 'Knowledge' (which is active), 'Tools', 'Agents', 'Topics', 'Activity', 'Evaluation', 'Analytics', and 'Channels'. Below the navigation is a button '+ Add knowledge'. A filter bar shows 'All' selected over 'Azure AI Search'. The main table lists one knowledge source:

Name	Type	Available to	Usage	Last modified	Status
ATHENA-BOT - Azure AI Search	Azure AI Search	ATHENA-BOT	General	ATHENA Team Service Accoun...	Error

# Topics definition

ATHENA-BOT  Overview Knowledge Tools Agents **Topics** Activity Analytics Channels

+ Add a topic   Search custom topics

All  Custom (12)  System (9)  Last refreshed now

Name	Type	Trigger	Last modified	Editing	Errors	Enabled
Find and Explore			ATHENA Team Service Account 20 days ago		On	
Goodbye			ATHENA Team Service Account 3 months ago		On	
Greeting			ATHENA Team Service Account 2 months ago		On	
Insights			ATHENA Team Service Account 6 days ago		On	
Learning & Training Events			ATHENA Team Service Account 6 days ago		On	
Most Popular			ATHENA Team Service Account 3 months ago		On	
Request Access			ATHENA Team Service Account 2 months ago		On	
Self-service			ATHENA Team Service Account 1 month ago		On	
Start and Setup Reporting (SSBI)			ATHENA Team Service Account 2 months ago		On	
Start menu			ATHENA Team Service Account 5 days ago		On	
Start Over			ATHENA Team Service Account 3 months ago		On	
Thank you			ATHENA Team Service Account 3 months ago		On	

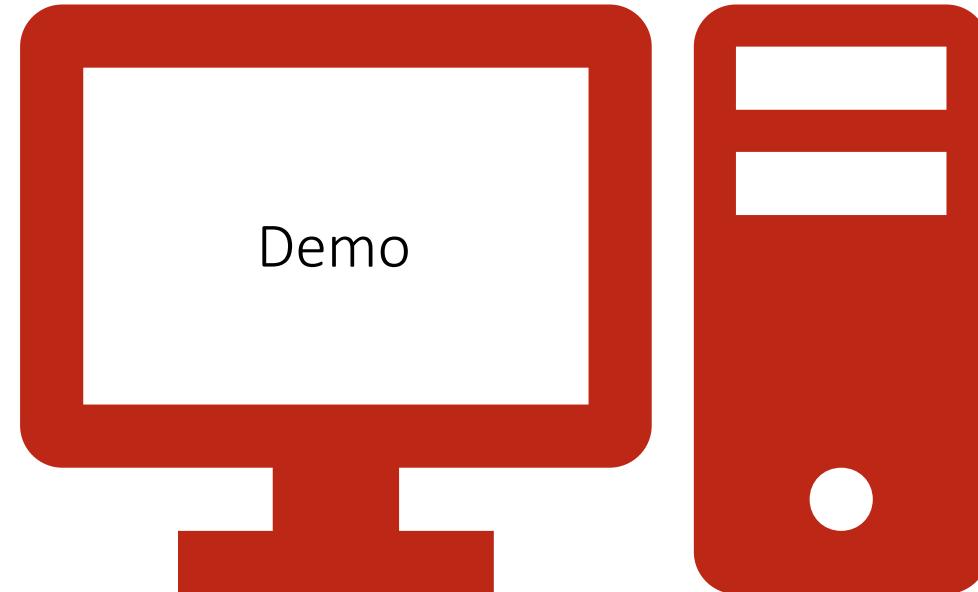
# Knowledge, prompting, topics and tagging

[ATHENA - AthenaKnowledgeBase - All Documents](#)

[OSWEU1-EDWD-ATHENA-001-RG - Microsoft Azure](#)

[Overview - ATHENA-BOT | Microsoft Copilot Studio](#)

[ATHENA LLM Agents – Prompting & Generative AI Findings - Athena - Confluence](#)



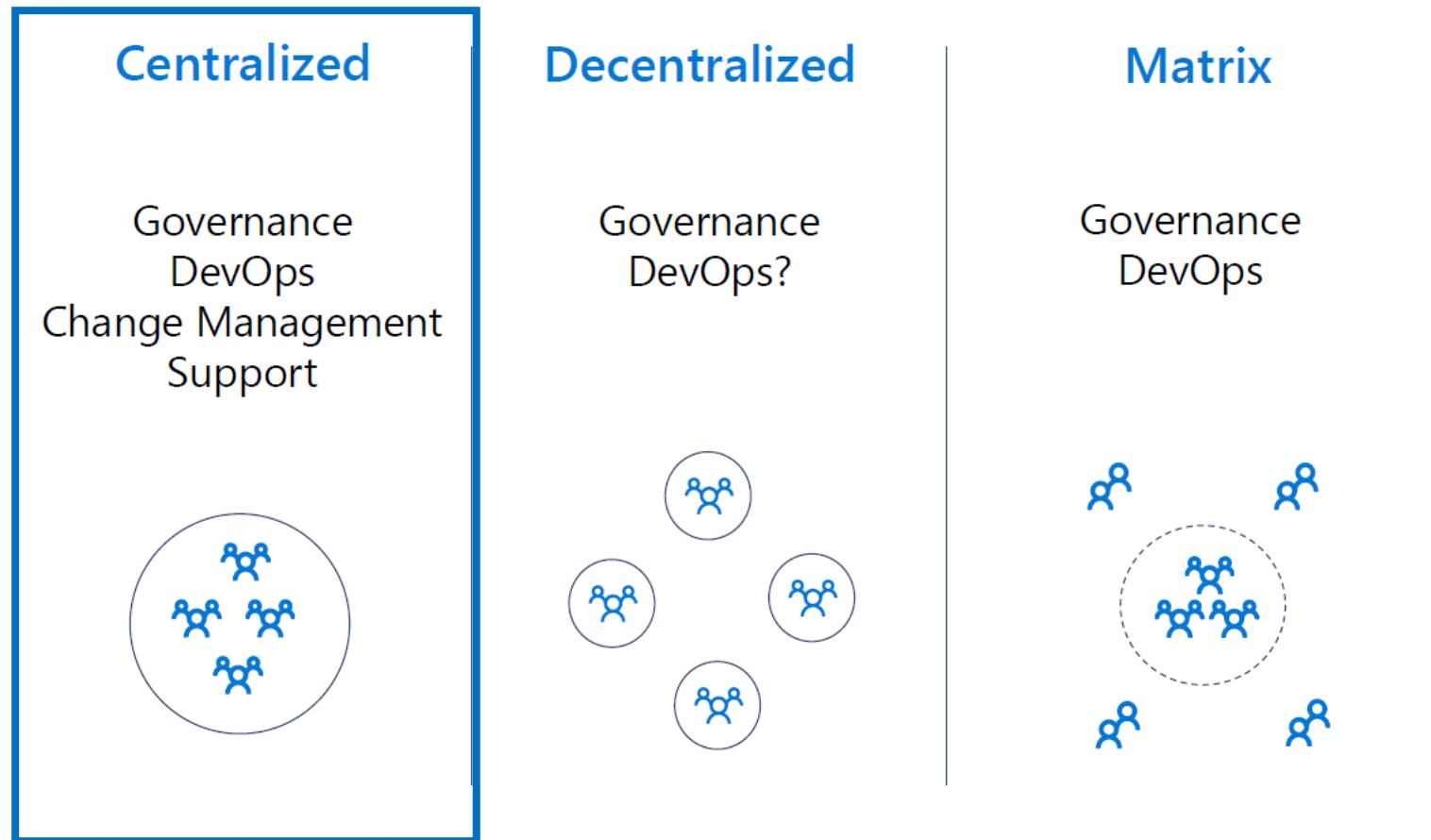
SharePoint integration

# SharePoint integration

- **SSO** (Single Sign-On) allows users to authenticate once for multiple Microsoft 365 services, using Azure Active Directory (AAD) for identity management.
- In **SharePoint**, users access the site with the embedded **Copilot Agent**, which receives a secure AAD token to access data, personalize responses, and maintain session context.
- Key setup steps are registering the Copilot Agent in Azure AD, enabling SSO in Copilot Studio, configuring SharePoint permissions, and using data-suggested-action-layout for UI customization.
- **Benefits** include no repeated logins, secure personalized interactions, and improved user experience in SharePoint

# Governance

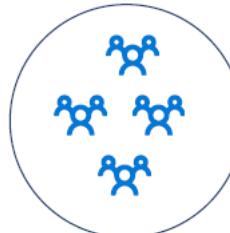
# Delivery models



# Delivery model and roles

## Centralized

Governance  
DevOps  
Change Management  
Support



## AI & Innovation team

- Use cases
- AI Do's and Don'ts
- Risks and Challenges
- Training
- ...

## Power Platform admin

### Tenant settings

- Set policies on resource usage, access and monitoring
- Control agents creation and sharing
- Monitor usage and adoption
- Set DLP
- Set limit sharing ...

### Environments strategy

### Manage security

# Pandora's minimum setup

WPC  
2025



## License management

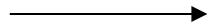
- Copilot Studio User license
- Tenant license

## Author permissions

## Data Loss Prevention policy

## Billing plan

## Copilot Studio prepaid message subscription



Use case = Developer environment

The screenshot shows the 'Environments' section of the Microsoft 365 admin center. It displays a table with the following data:

Details	
Environment URL	orgff694029.crm4.dynamics.com
Region	Europe
Type	Developer
State	Ready
Refresh cadence	Frequent
Security group	Not assigned

- Environment group
- Limit sharing
- Capacity enforcement
- Environment rerouting?

To create and manage agents with Copilot Studio, you need:

- A license for each user, also known as a *per user license* (or *Copilot Studio User License* as referred to on the [Microsoft 365 admin center](#)), should be assigned to individual users who need access to create and manage agents.
- A license for your organization, also known as a *tenant license* (or *Copilot Studio* as referred to on the [Microsoft 365 admin center](#)), should be acquired by the tenant administrator. This license can't be assigned to individual users.



Entra ID security group

Environment Maker role

Copilot Studio authors group



Test users

# Checklist

What	Where	Who
Developer environment creation	Power Platform Admin Center	PP Admin / Office 365 admin
<u>License management</u> • Microsoft 365 Copilot • Tenant license • User license	M365 admin portal	Office 365 admin
Create Entra ID group	Active Directory	
Environment rerouting and role assignment	Power Platform Admin Center	PP Admin / Office 365 admin
Copilot Studio authors group	Power Platform Admin Center	PP Admin / Office 365 admin
<u>Limit sharing</u>	Environment	PP Admin / Office 365 admin
<u>Capacity enforcement</u> <u>Manage Copilot Studio messages and capacity</u>	Environment	PP Admin / Office 365 admin
Data Loss Prevention policy	Power Platform Admin Center	PP Admin / Office 365 admin
<u>Billing plan</u>		
<u>Copilot Studio prepaid message subscription</u>	Power Platform Admin Center	PP Admin / Office 365 admin

Costs

# Licensing

Summary of Copilot Studio		Copilot Studio Pay-as-you-go meter	Copilot Studio Message packs	Copilot Studio use rights with Microsoft 365 Copilot
Plans		RECOMMENDED MOTION Copilot Studio \$0.01 per message	Copilot Studio \$200 per tenant/month	Copilot Studio in Microsoft 365 Copilot Use rights with Microsoft 365 Copilot licenses \$30 per user/month
Included Messages <sup>1</sup>		Pay-as-you-go <sup>2</sup>	25,000 Messages <sup>3</sup>	Unlimited <sup>4</sup>
Generative AI		●	●	Limited <sup>5</sup>
Create and publish your own agents anywhere		●	●	●
Create and publish your own agents and plugins to extend Microsoft 365 Copilot				●
The output you create is...		Your own agent	Your own agent	Your own agent <sup>6</sup>
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		●	●	●
<u>Premium</u> and <u>custom</u> Power Platform connectors		●	●	●
On premises and cloud services data transfer for Power Platform Connectors		●	●	●
Dataverse for Copilot Studio		● <sup>7</sup>	● <sup>7</sup>	
Managed Environments		● <sup>8</sup>	● <sup>8</sup>	● <sup>8</sup>
Available channels to publish your copilot/plugins		External channels (e.g., External Web, FB, WhatsApp etc.) Internal Channels (e.g., Internal Web, Teams, etc.)	External channels (e.g., External Web, FB, WhatsApp etc.) Internal Channels (e.g., Internal Web, Teams, etc.)	Microsoft 365 channels: Microsoft 365 Copilot, Teams, SharePoint

# Cost estimator

**Copilot Studio agent usage estimator (preview)**

Use this estimator to forecast your agent's message volume. Select from licensing options, agent types, and the features your agent leverages to respond to your end users. See the message consumption impact based on these selections. This provides a monthly message estimate for a single agent and makes no guarantees of final costs. This isn't a pricing calculator, so we can't provide total costs or make any definite forecasts around your monthly expenses.

1 Message = \$0.01  
Go [here](#) to convert to your currency.

**Estimator type**  
Configure monthly agent message estimation in two ways

An estimate based on common telemetry data and assumptions  
 An estimate based on manual entries for my agent

**Agent traffic**  
Agent traffic quantifies the activity an agent supports by assessing the number of end users accessing the agent and their monthly engagement frequency

How many users? \*

On average, how many times per month will your users interact with your agent? \*

**Agent type**  
Agent type specifies whether the agent is deployed internally for employee interactions or externally for customer and partner conversations. Deployment location impacts usage trends, aiding in accurate consumption forecasting. [Learn more](#)

What is your agent type? \*  
 Employee-facing agent    Customer or partner-facing agent

**Agent orchestration**  
Orchestration involves managing and coordinating an agent's capabilities and actions to effectively respond to user queries and perform tasks. [Learn more](#)

What type of orchestration will you require? \*  
 Generative    Classic

**Agent knowledge**  
Knowledge sources enable agents to provide relevant information and insights. Published agents use configured knowledge sources to ground their responses. [Learn more](#)

**Total estimated messages**

**Messages driven by knowledge**

- Messages consumed for tenant graph grounding (10 messages) + generative answers (2 messages)
- Messages consumed for non-tenant graph grounding (2 messages); Dataverse, web, files

**Messages driven by actions and topics**

- Number of messages that charge for actions and topics
- Number of messages that charge for agent flows

**Messages driven by agent autonomous triggers**

**Messages driven by optional modifiers**

**Basic GPT-4o mini**  
1 message per every 10 responses

**Standard GPT-4o**  
15 messages per every 10 responses

**Premium GPT-o1**  
100 messages per every 10 responses

# Cost setup – Power Platform Admin Center

- Azure subscription
- Billing policy
  - Subscription
  - List of environments linked to the azure subscription
- Billing plan
- Manage prepaid capacity

The screenshot shows the 'Billing plans' section of the Power Platform Admin Center. On the left, there's a sidebar with 'Licensing' at the top, followed by 'Billing Plans' (which is highlighted in yellow), 'Capacity add-ons', and a list of products: Power Apps, Power Automate, Power Pages, Copilot Studio, Dataverse, and Finance and Operations. The main area is titled 'Billing plans' and contains the following text: 'A pay-as-you-go plan is a group of one or more environments that you can configure to bill to Azure.' Below this is a table with the following data:

Name	Status	Azure subscription name	Resource	Products
AllInnovationCopilotStudioBilling	Enabled	AllInnovation-Copilot-Studio-Billing	AllInnovationCopilotStudioBilling	Dataverse, Copilot Studio, W365

# Cost tracking

## Power Platform Admin Center

The screenshot shows the 'Licensing' section of the Power Platform Admin Center. On the left, a sidebar lists various products: Billing Plans, Capacity add-ons, Power Apps, Power Automate, Power Pages, Copilot Studio (which is selected), Dataverse, and Finance and Operations. The main area is titled 'Licenses' and has tabs for 'Summary' and 'Environments'. Below these are buttons for 'Manage billing plans', 'Manage Copilot Credits', and 'Manage sessions'. A sub-section titled 'Copilot Credits capacity' shows consumption by product. The table data is as follows:

Product	Pre-paid	Pay-as-you-go
Copilot Studio	0.00	0.00

Below this is a section titled 'Message consumption details' with a table titled 'Message consumption by resource'. The table data is as follows:

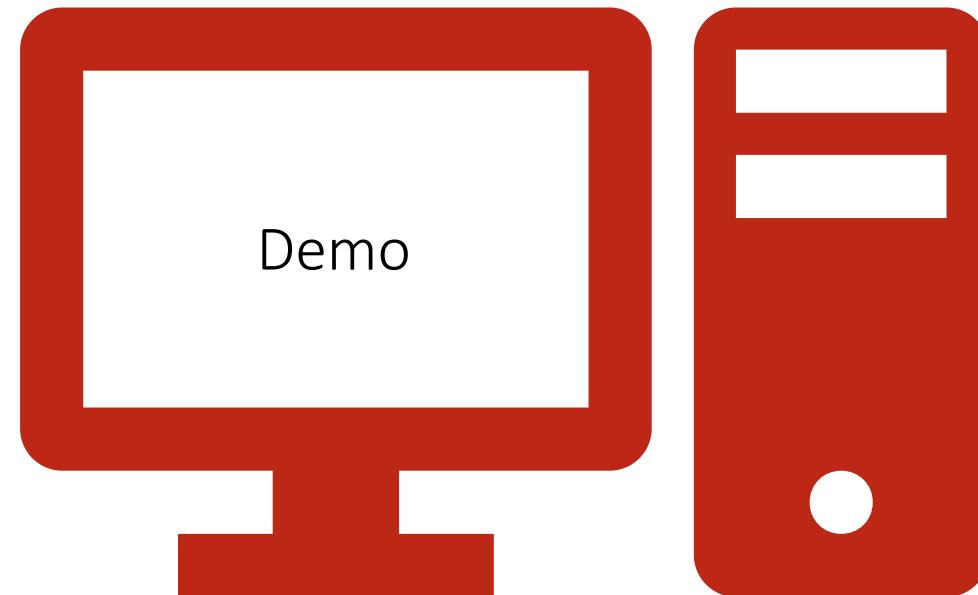
Name	Product	Feature	Billed Copilot Credits	Non-billed Copilot Credits
ATHENA-BOT	Copilot Studio	Agent action	0	15
ATHENA-BOT	Copilot Studio	Classic answer	0	16
ATHENA-BOT	Copilot Studio	Generative answer	0	2
LLM-AI Search Modulewise	Copilot Studio	Agent flow actions	0	34.19

# Licensing > Copilot Studio

## Power Platform Admin Center

The screenshot shows the 'Licensing' section of the Power Platform Admin Center. On the left, a sidebar lists various admin centers: Home, Actions, Manage, Monitor, Security, Deployment, Licensing (selected), Copilot, and Support. The main area is titled 'Copilot Studio' under the 'Licenses' tab. It includes sections for 'Manage billing plans', 'Manage messages', 'Manage sessions', and 'Download report'. A 'Create a billing plan' button is present. Below this is a 'Capacity summary' section showing 'Pay-as-you-go messages' with 1 Billing plan and 0 Total messages. To the right is a 'Prepaid capacity' table:

License type	Category	Purchased	Assigned	Consumed
Capacity	Messages capacity	0	0	0
Capacity (Legacy)	Sessions capacity	0	0	0



# Monitoring

# Copilot Studio agent's analytics

ATHENA-BOT ✅ Overview Knowledge Tools Agents Topics Activity Evaluation Analytics Channels

Last 7 days (11/8/25 - 11/14/25) Download Sessions

**Summary** PREVIEW Sessions and engagement sharply declined despite stable resolution and perfect knowledge usage. View More

**Overview** Conversation sessions 25 ↓51% Engagement 12% ↓80% Satisfaction score 5/5.0 ↑ Average DAU 1 ↓86% Copilot Credits used 11

**Savings** Calculate savings Start tracking savings to measure the time and money that your agent saves.

**Effectiveness**

**Conversation outcomes** See details

Date	Resolved	Escalated	Abandoned	Unengaged
Nov 8	0	0	0	0
Nov 9	0	0	0	0
Nov 10	0	0	0	0
Nov 11	1	0	0	0
Nov 12	2	0	0	9
Nov 13	0	0	0	7
Nov 14	0	0	0	2

Nov 8 Nov 9 Nov 10 Nov 11 Nov 12 Nov 13 Nov 14

Resolved Escalated Abandoned Unengaged

<https://learn.microsoft.com/en-us/microsoft-copilot-studio/analytics-overview>

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# Power Platform Admin Center

Monitoring interface keeps changing ....

The screenshot shows the Power Platform Admin Center interface. On the left, there's a sidebar with 'Monitor' selected. Under 'Copilot Studio', it says 'Select an agent to view its operational health'. Below that, it shows 'Agent session success rate is under 90%'. A table lists two agents: 'ATHENA-BOT' with a success rate of '50.00' and 'AX Support' with '0.00'. To the right, a large table compares product availability across the Power Platform admin center and the maker experience.

Product	Resource	Availability in the Power Platform admin center	Availability in the maker experience
Power Apps	Canvas app	Generally available	Generally available
Power Apps	Model-driven apps	Generally available	Generally available
Power Automate	Cloud flows	Generally available	Not available. Use the <a href="#">Automation center</a> for a similar experience.
Power Automate	Desktop flows	Generally available	Not available. Use the <a href="#">Automation center</a> for a similar experience.
Power Automate	Work queue	Public preview	Not available. Use the <a href="#">Automation center</a> for a similar experience.
Dataverse	Dataverse	Not yet available	Not yet available
Copilot Studio	Copilot Studio agents	Not yet available	Not yet available
Dynamics 365	Apps	Not yet available	Not yet available

# Copilot Studio tab

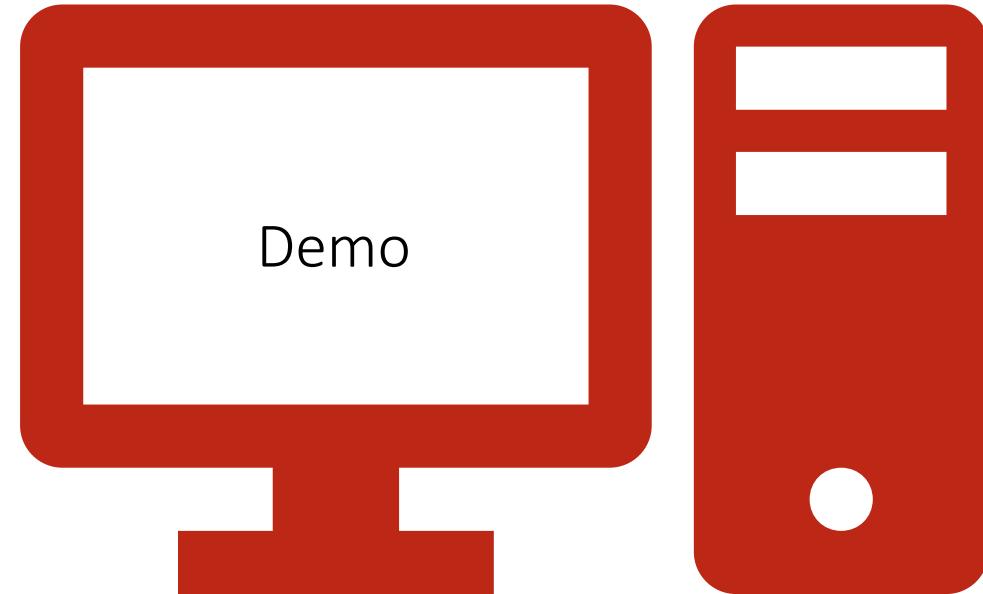
The screenshot shows the Copilot Studio tab within the Microsoft Power Platform Admin Center. The left sidebar includes links for Home, Actions, Manage, Security, Copilot (selected), Monitor, Deploy..., Licensing, and Support. The main content area has three cards: Security (Review recommendations for agent security), Monitor (Review the health of items made in Power Platform), and Settings (Set up and configure all my agents). Below these is a section titled 'Usage' with metrics: Billed messages (362), Active agents (5), and Agent session success rate (1%). A large chart titled 'Total capacity consumption trend' displays Copilot Credits usage from October 31 to November 10. The chart shows a total consumption of 352 credits, with 10 pay-as-you-go credits used on November 2nd. The legend indicates Total consumption (blue), Entitled (black line), Pay-as-you-go consumption (purple), and Daily usage (green).

# Monitoring

Copilot Studio Agent Analytics

Power Platform Admin Center

Copilot Studio tab in PPAC



## Findings and takeaways

# The team involved

- UX designer/user researcher
- Azure engineer
- Product Manager
- Power Platform admin
- Data scientist from the AI team
- Microsoft consultants
- ... + several calls and workshops with Microsoft

# Findings

- Real teamwork with several skills and roles required
- Consistent metadata (title, moduleTag, lastModified) is vital for accurate AI Search indexing
- Utilize Azure AI Search vector indexing for semantic understanding
- Merge prompt engineering with search grounding to refine bot responses
- Heavy Power Platform management: environments, access and roles, monitoring, tenant settings, billing plans
- Needs automation to manage users and permissions
- Cannot stop publishing on the Default environment. Lot a mess to deal with
- Sharing and publishing not clear. How-to? Best practices?
- Difficult to monitor at-a-glance

Q&A

Grazie!

# Take aways

- Need a team. Is not a one-man show
- Low code / No-code tool? Not true in our case
- Proper prompting is the key
- Immature from many angles (Governance, distribution, monitoring, security, ...)
- Need a Power Platform admin (and skills)
- Missing transparency on costs
- Monitoring is not available yet