OVERNET.

2025 WPC

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

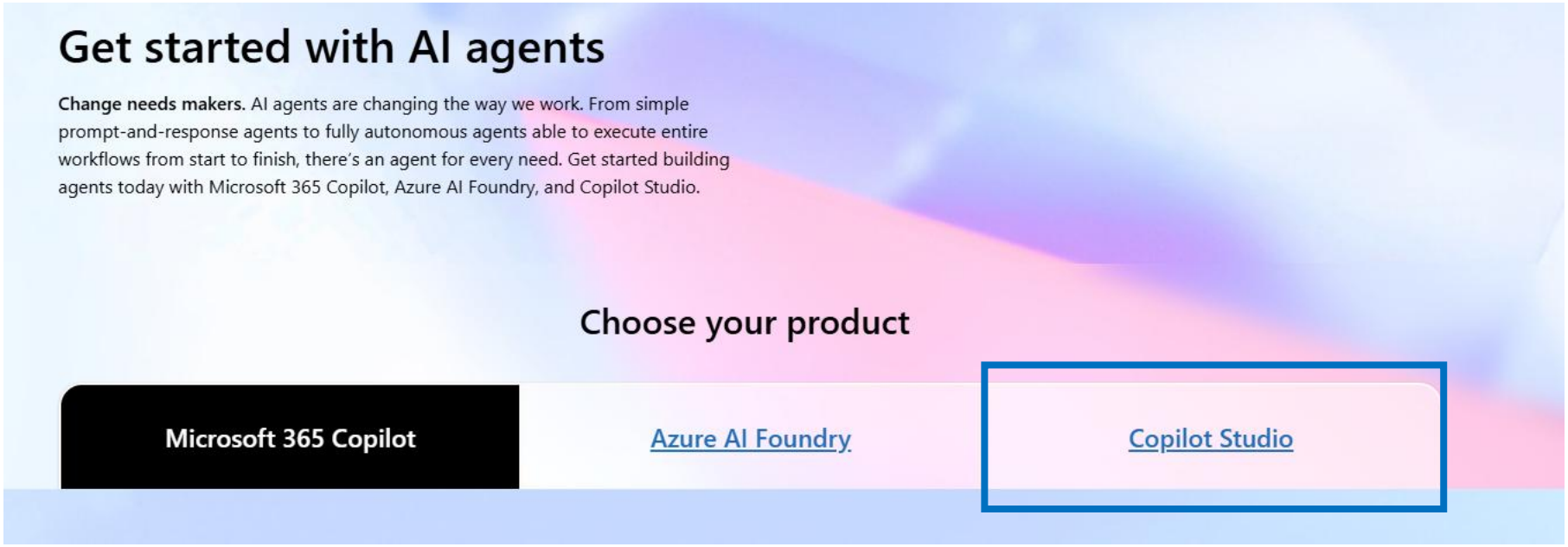
Agenda

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?

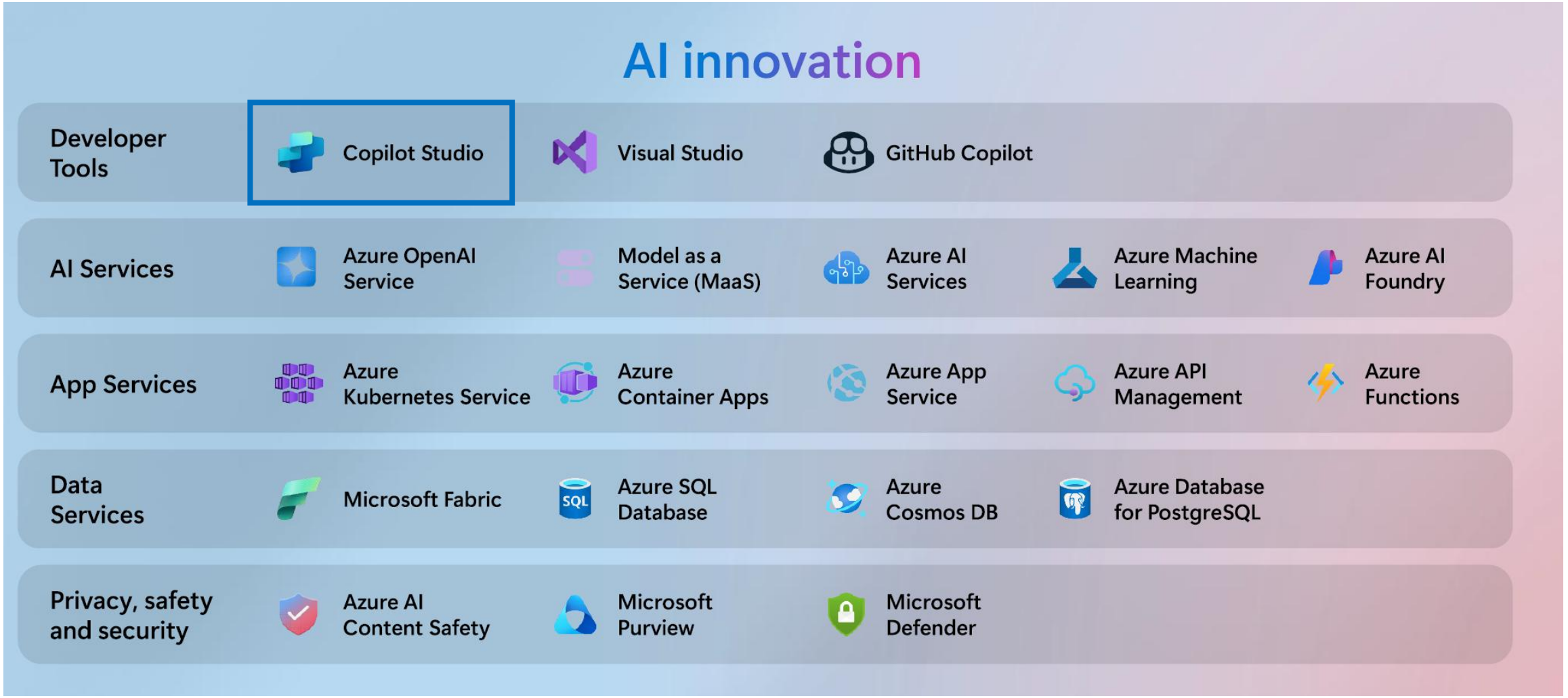
In Pandora we are running a few use cases, testing Copilot Studio Agent for future large-scale adoption



https://adoption.microsoft.com/en-gb/ai-agents/

Agents vs Copilot

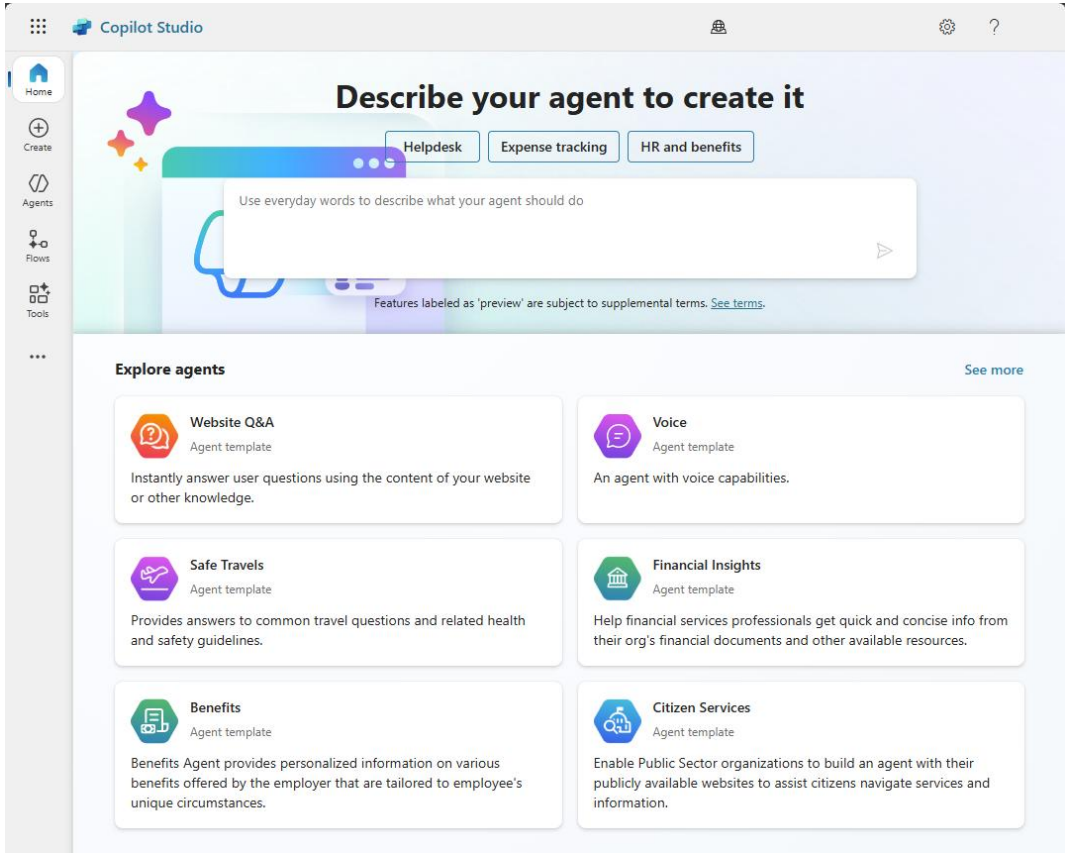
Microsoft Copilot Studio



https://learn.microsoft.com/en-us/microsoft-copilot-studio/fundamentals-what-is-copilot-studio

Microsoft Copilot Studio

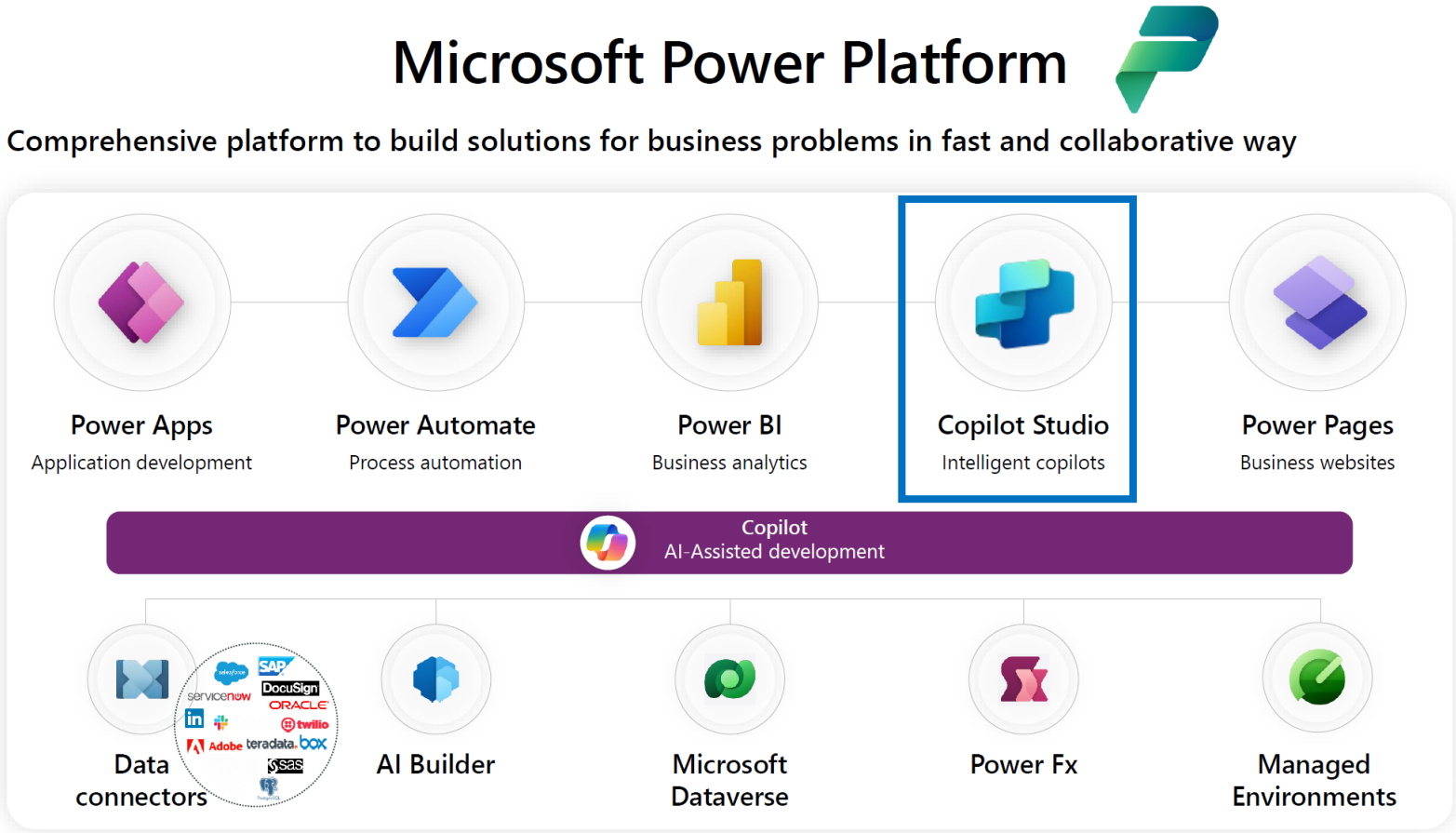
"Copilot Studio is a graphical, low-code tool for building agents and agent flows"



https://learn.microsoft.com/en-us/microsoft-copilot-studio/fundamentals-what-is-copilot-studio

Microsoft Copilot Studio

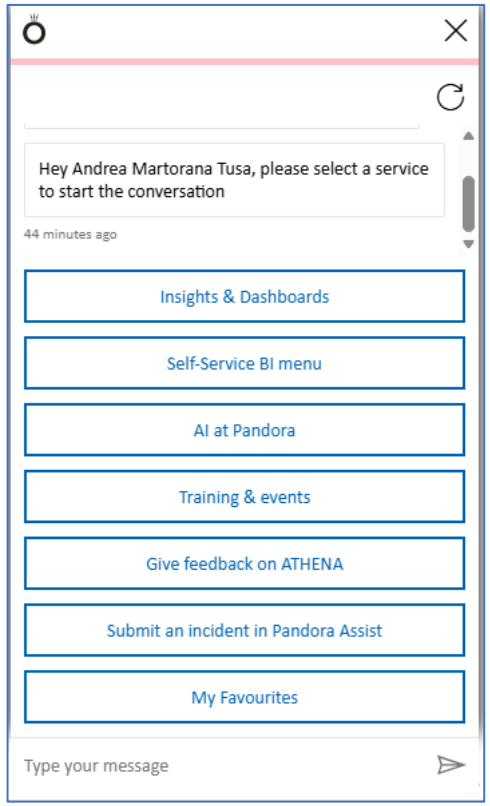
Very important to mention that Copilot Studio is a component of the Power Platform



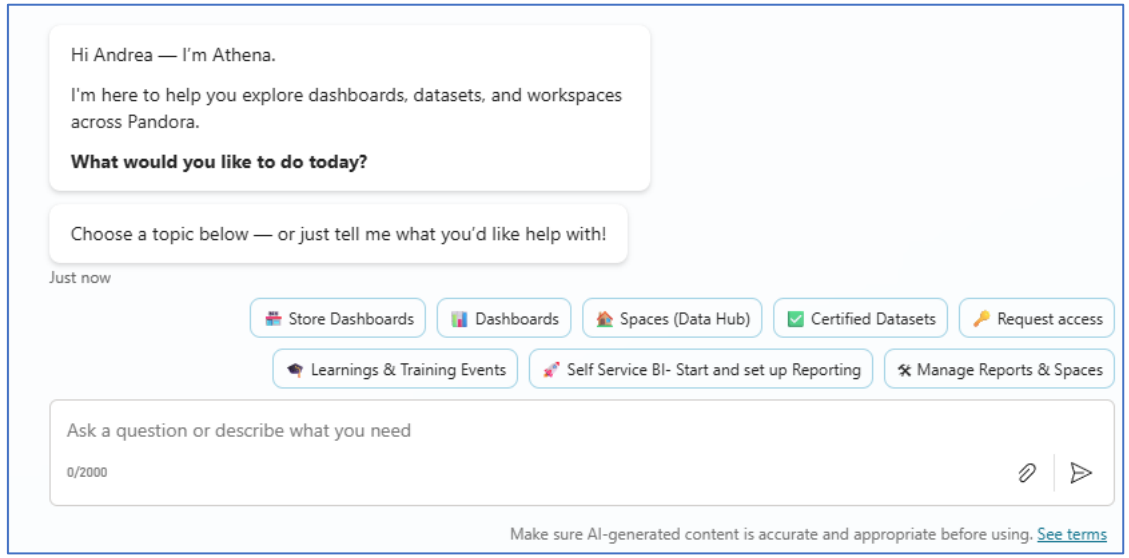
https://learn.microsoft.com/en-us/power-platform/

Our use case

From a “stupid” Azure Chatbot



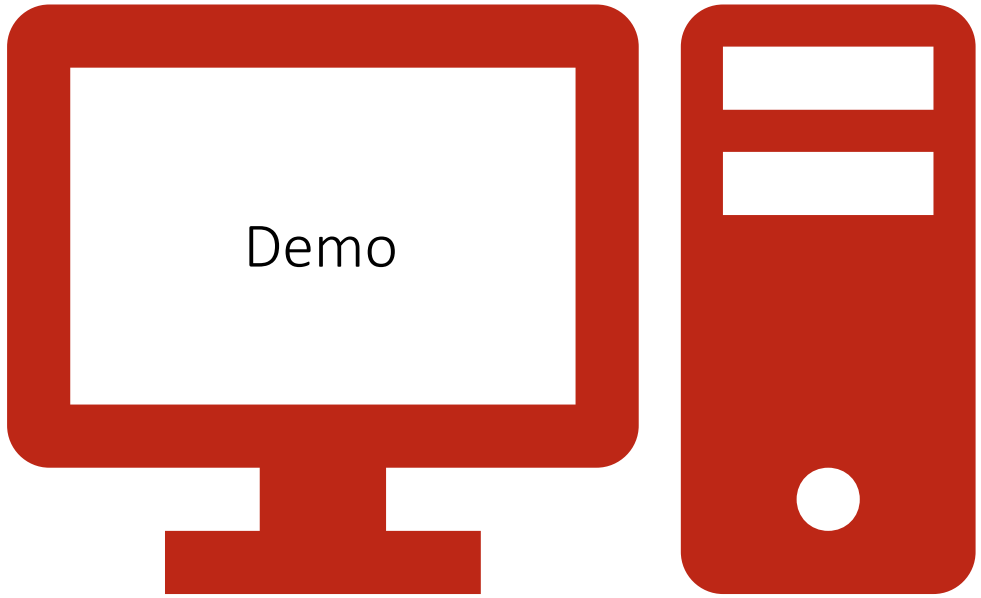
… to a “smart” conversational agent in Copilot Studio



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'*."

ATHENA LLM Agents – Prompting & Generative AI Findings - Athena - Confluence

Knowledge source definition

CENTRALISED KB ON SHAREPOINT

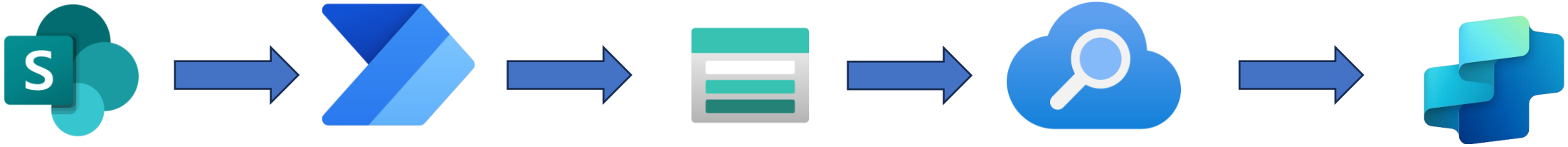
COGNITIVE SERVICES- AI SEARCH USING VECTOR EMBEDDING

AI SEARCH WITH PROMPT ENGINEERING

TOPIC DEFINITION

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

Data source workflow



Athena knowledge source library in SharePoint

Power Automate flow

Azure Blob Storage

AI search with vector embedding

Copilot Studio for generative answers

Athena knowledge base

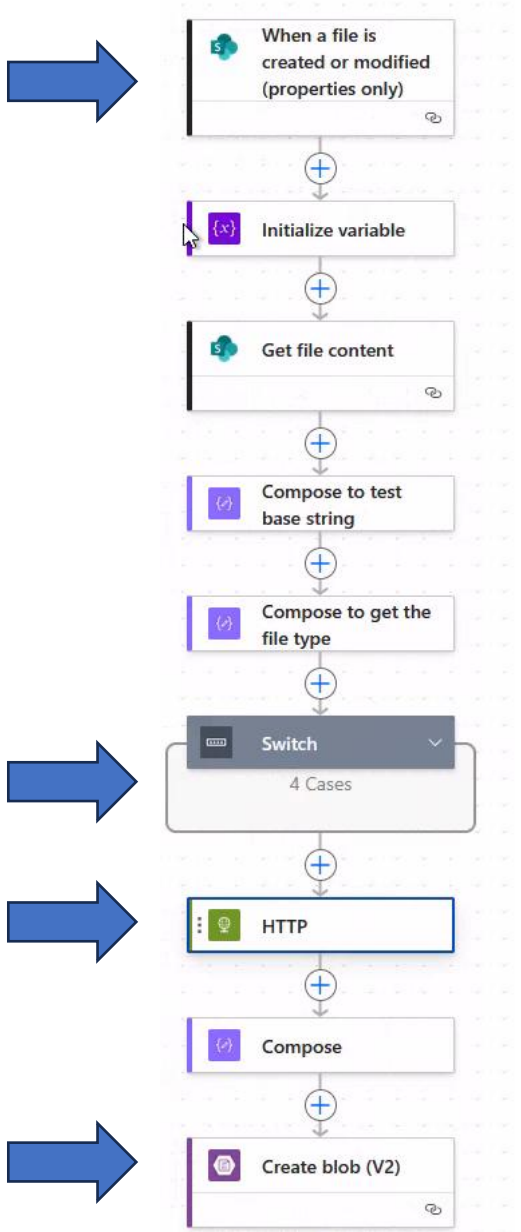
The Athena knowledge base is stored in a SharePoint list classified by topic. We are using a lot of tags to contextualize each topic and build the expected user journey

AthenaKnowledgeBase

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

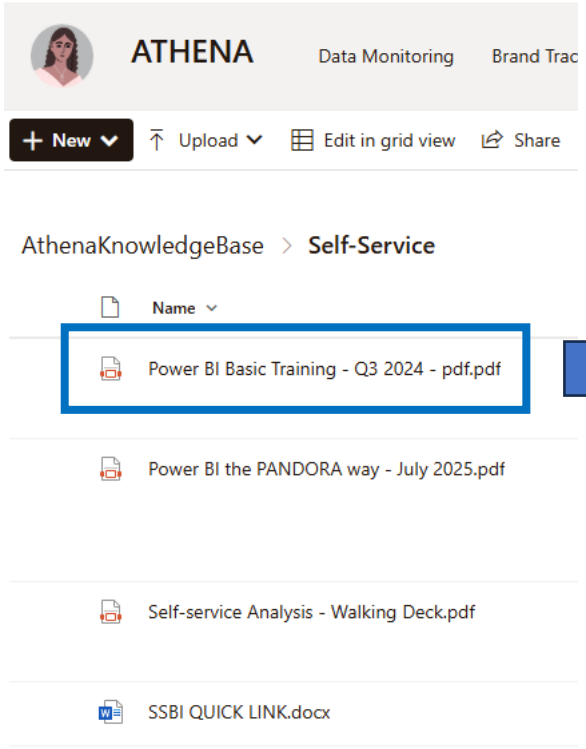
Power Automate

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

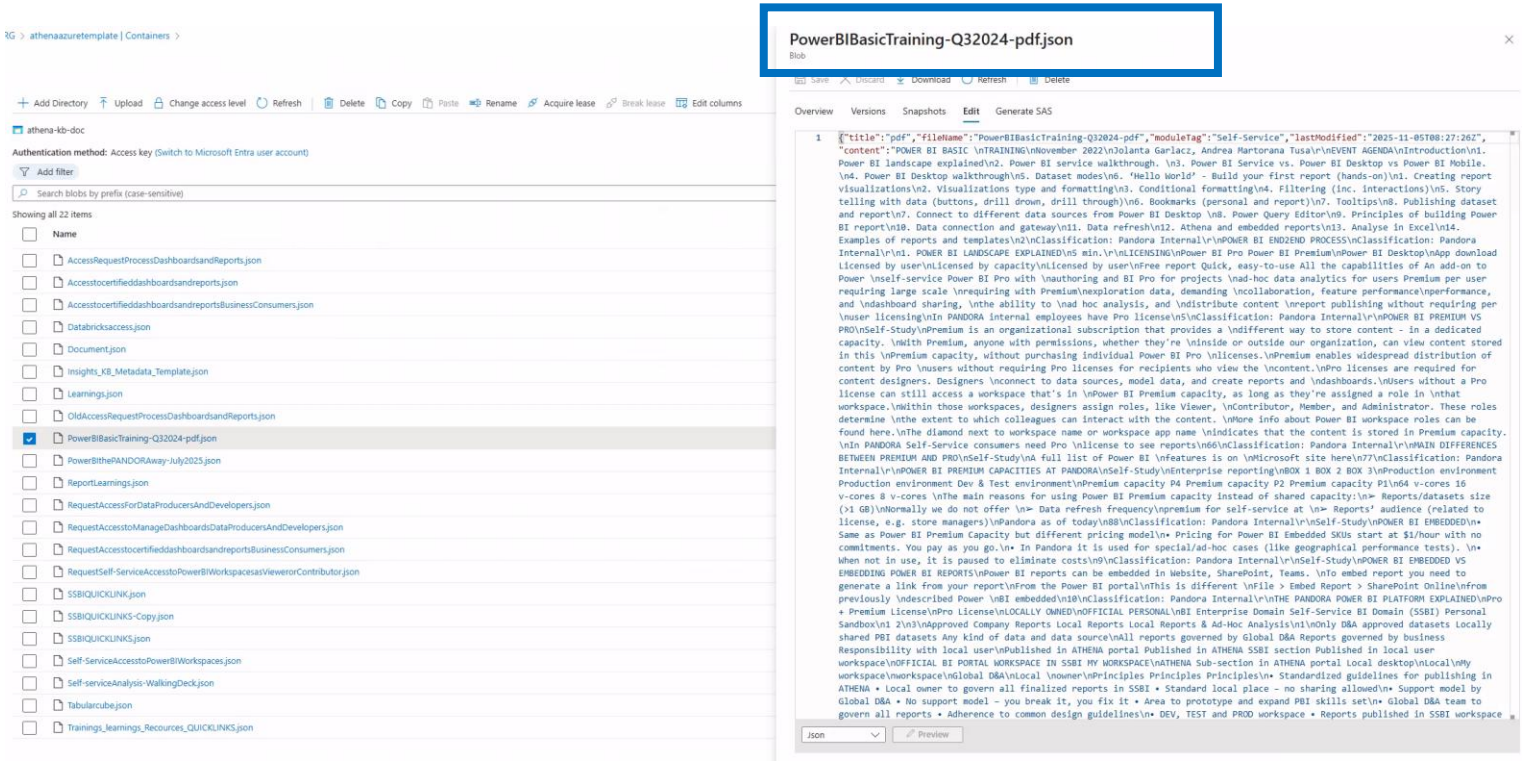


Azure blob storage

- Before

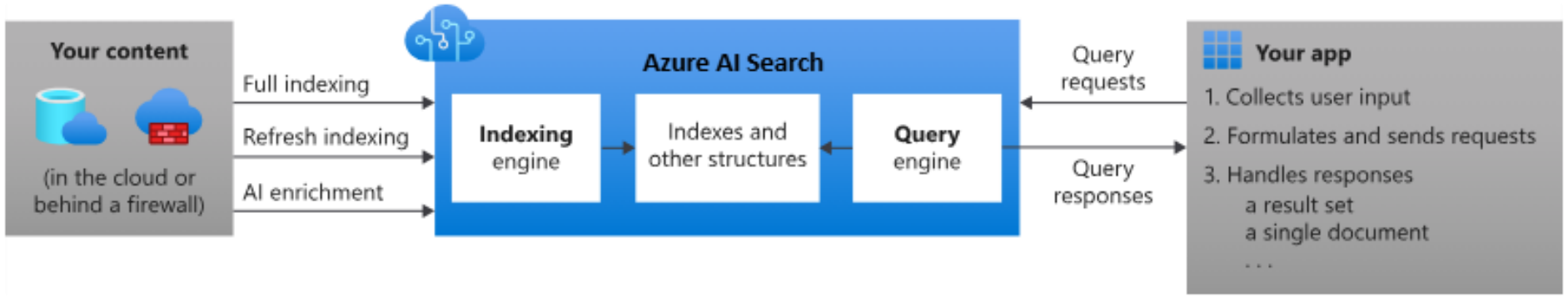


- After



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"

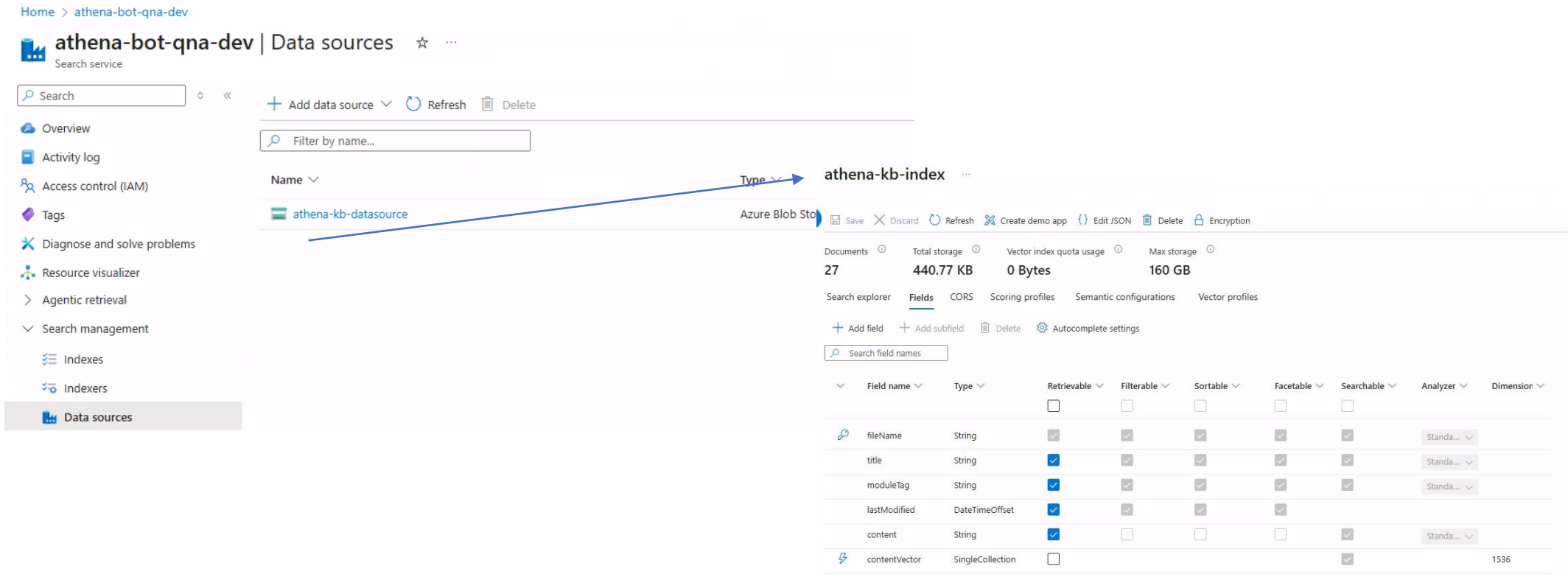


On the indexing side, if your content is on Azure, you can use indexers and skillsets for automated and AI-enriched indexing. Or, create a logic app workflow for equivalent automation over an even broader set of supported data sources.

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

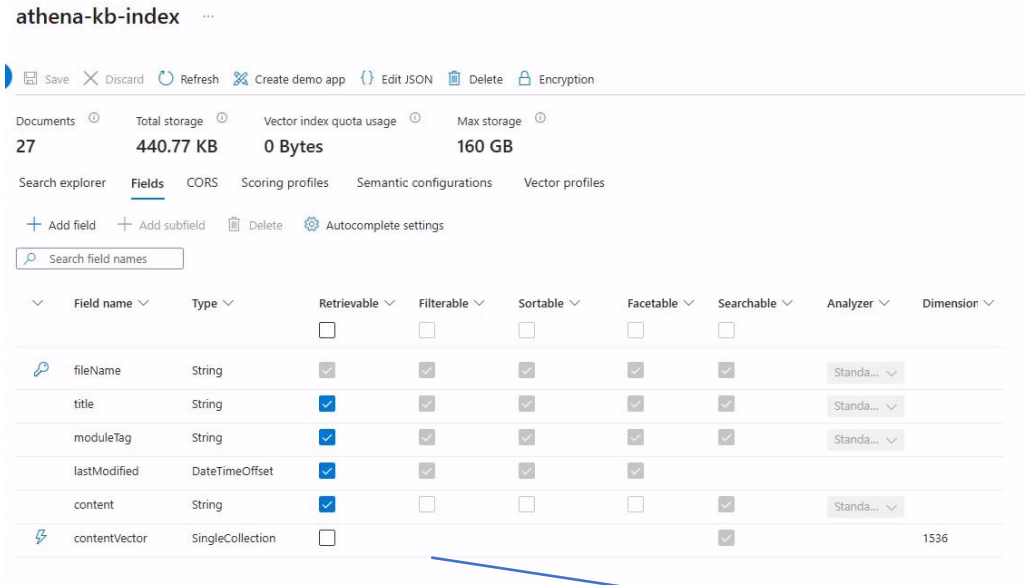
Azure AI search service

Data sources and indexing

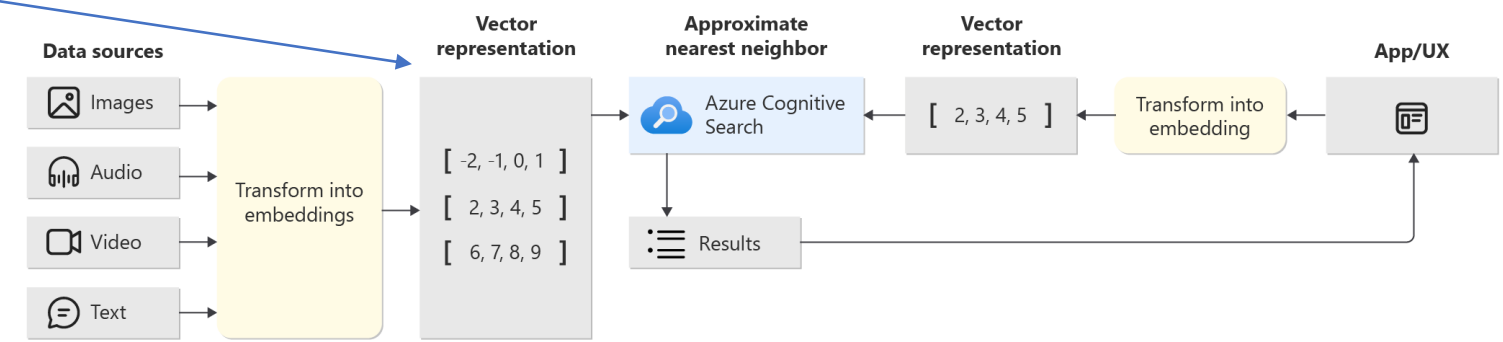


https://learn.microsoft.com/en-us/azure/search/vector-search-overview

Azure AI search service

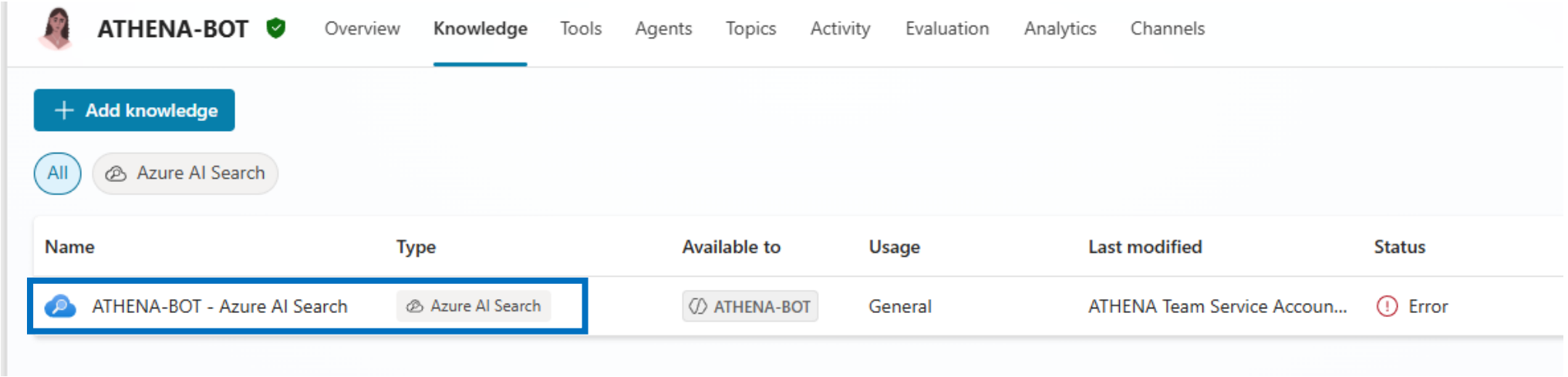


Search services using indexes and vectors

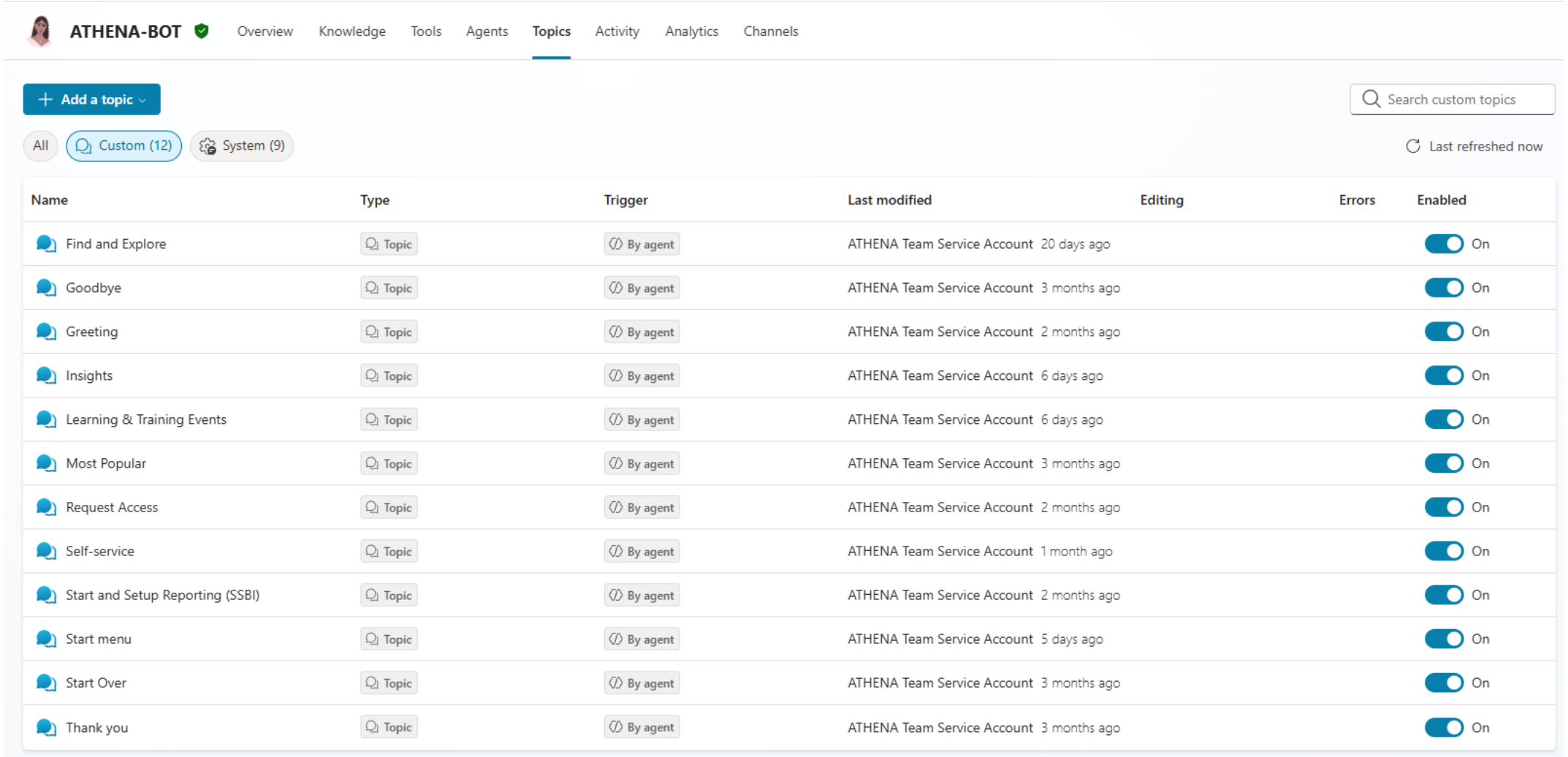


https://learn.microsoft.com/en-us/azure/search/vector-search-overview

Agent’s knowledge source



Topics definition



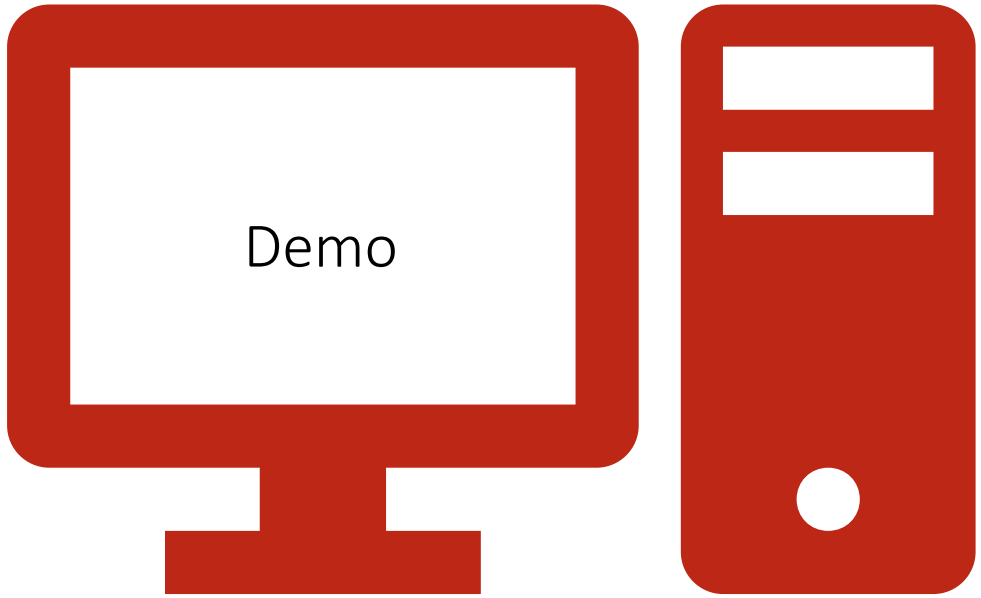
Knowledge, prompting, topics and tagging

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

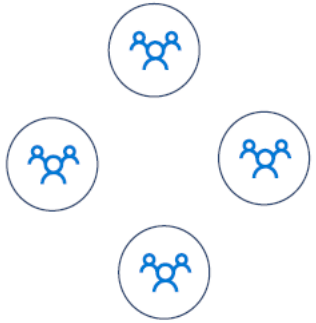
Delivery models

Centralized

Governance
DevOps
Change Management
Support

Decentralized

Governance
DevOps?

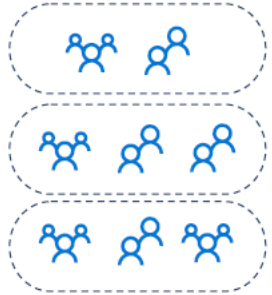


Matrix

Governance
DevOps

BizDevOps

Governance



https://learn.microsoft.com/en-us/power-platform/guidance/adoption/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

https://learn.microsoft.com/en-us/power-platform/guidance/adoption/delivery-models

Pandora's minimum setup

Use case = Developer environment

License management

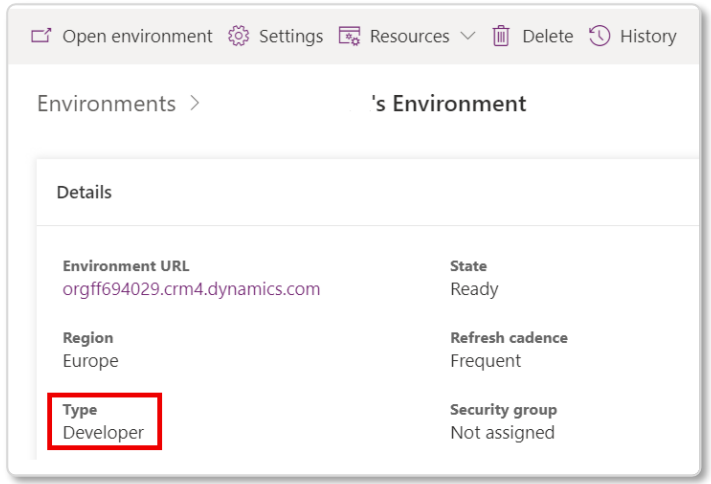
- Copilot Studio User license
- Tenant license

Author permissions

Data Loss Prevention policy

Billing plan

Copilot Studio prepaid message subscription



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

Entra ID security group

Environment Maker role

Copilot Studio authors group

Test users

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.

Checklist

What	Where	Who
Developer environment creation	Power Platform Admin Center	PP Admin / Office 365 admin
License management • 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
Limit sharing	Environment	PP Admin / Office 365 admin
Capacity enforcement Manage Copilot Studio messages and capacity	Environment	PP Admin / Office 365 admin
Data Loss Prevention policy	Power Platform Admin Center	PP Admin / Office 365 admin
Billing plan		
Copilot Studio prepaid message subscription	Power Platform Admin Center	PP Admin / Office 365 admin

https://learn.microsoft.com/en-us/microsoft-copilot-studio/billing-licensing

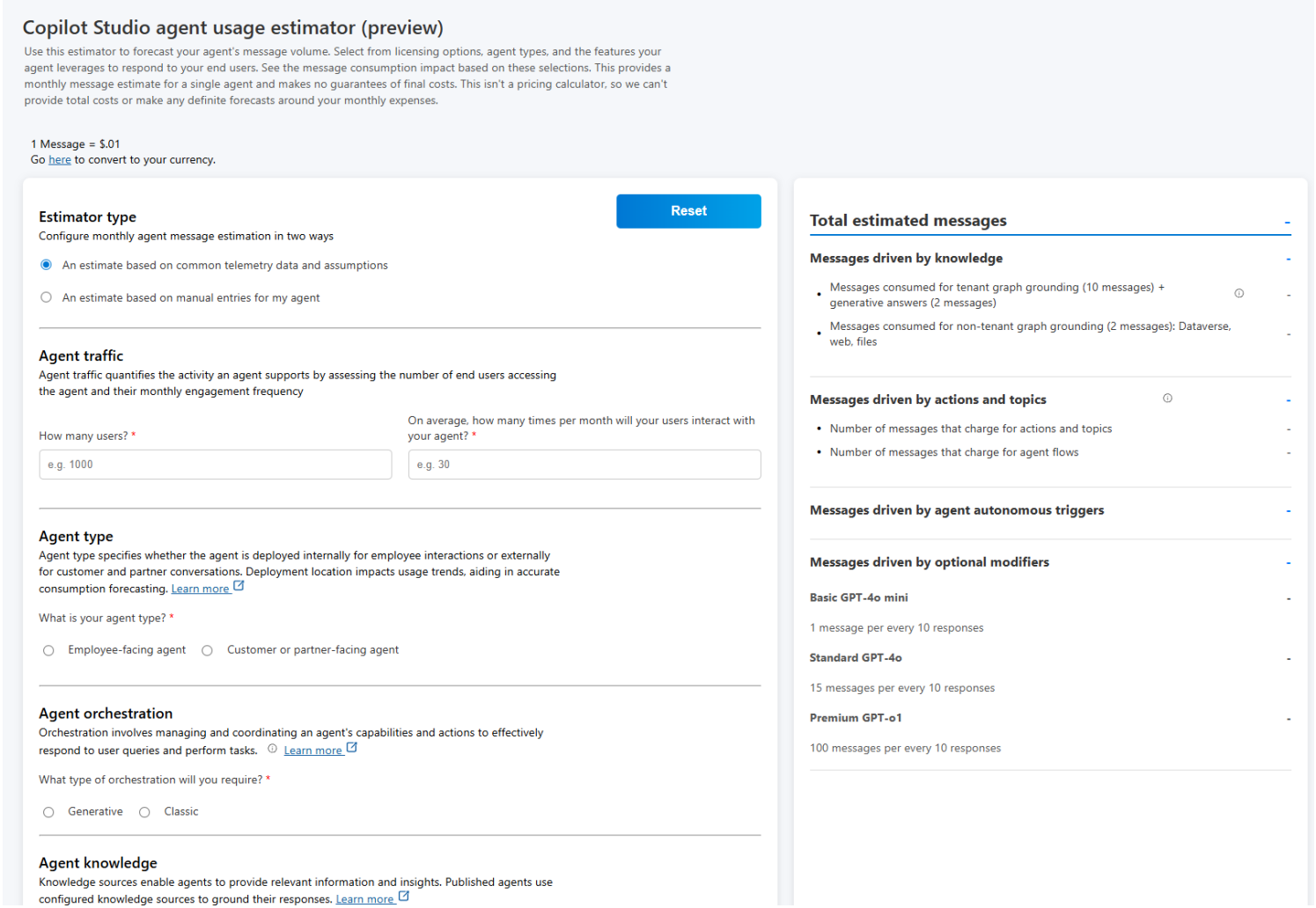
Costs

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[1]	Pay-as-you-go[2]	25,000 Messages[3]	Unlimited[4]
Generative AI	●	●	Limited[5]
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[6]
Power Automate for Copilot Studio cloud flows (Automated, instant, and scheduled flows) within the context of Copilot Studio creations	●	●	●
Standard Power Platform connectors	●	●	●
Premium and custom Power Platform connectors	●	●	●
On premises and cloud services data transfer for Power Platform Connectors	●	●	●
Dataverse for Copilot Studio	●[7]	●[7]	
Managed Environments	●[8]	●[8]	●[8]
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

https://learn.microsoft.com/en-us/power-platform/admin/pricing-billing-skus

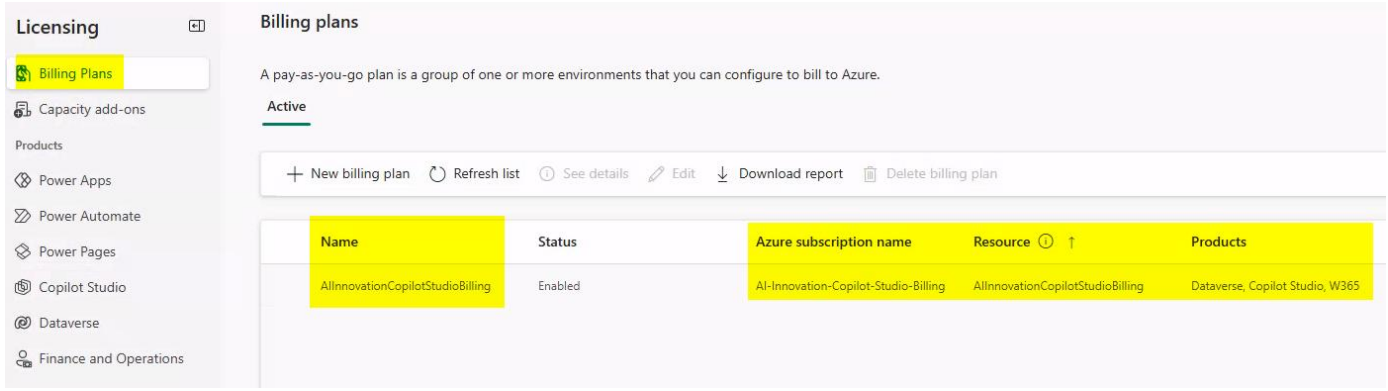
Cost estimator



https://microsoft.github.io/copilot-studio-estimator/

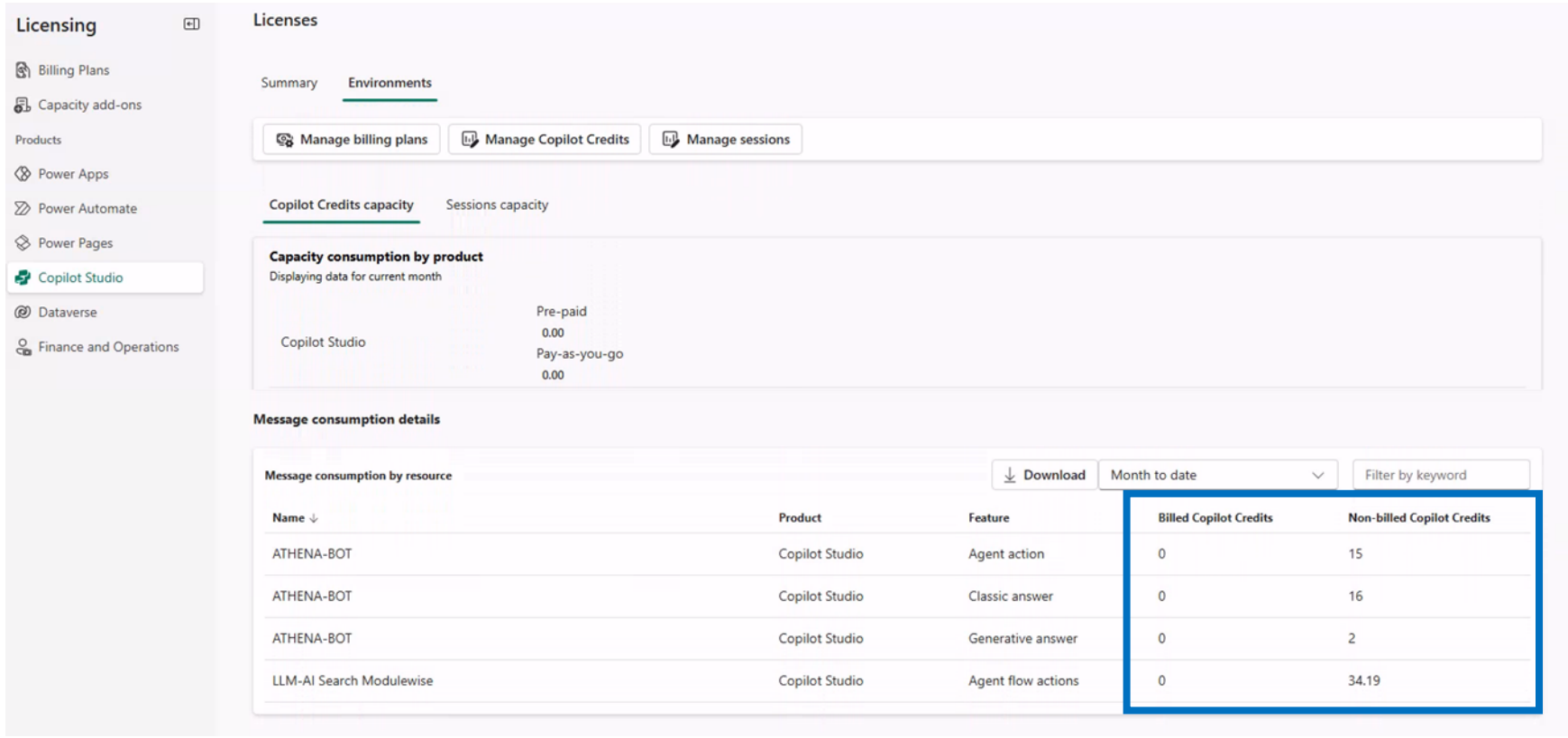
Cost setup – Power Platform Admin Center

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



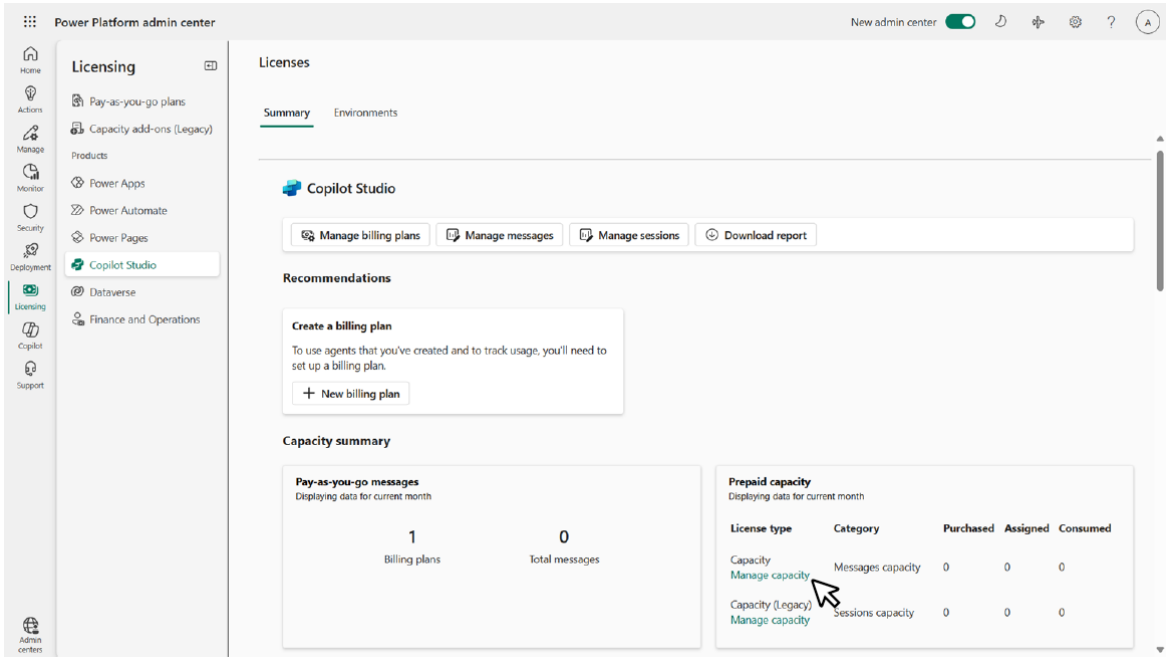
Cost tracking

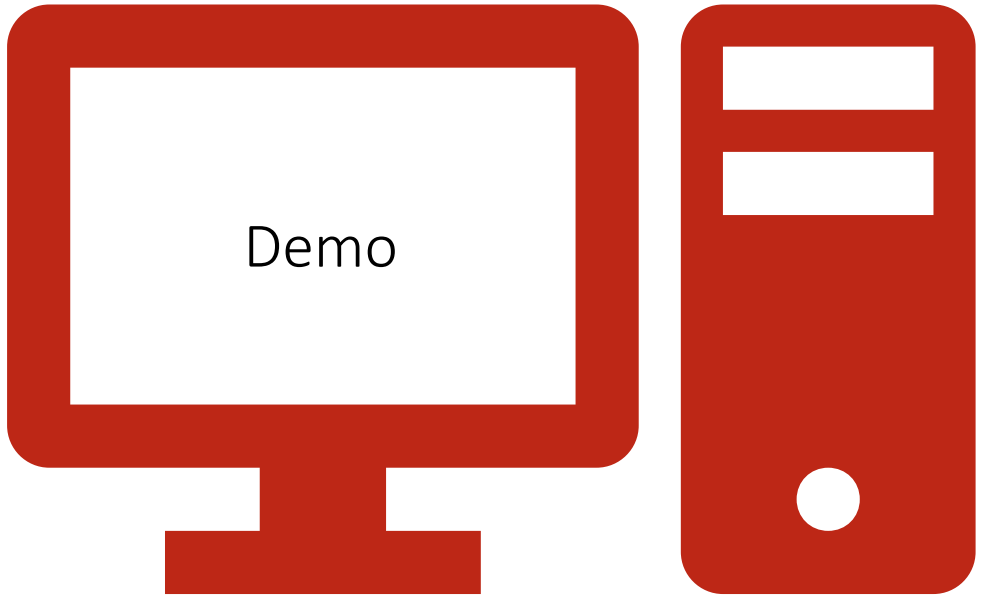
Power Platform Admin Center



Licensing > Copilot Studio

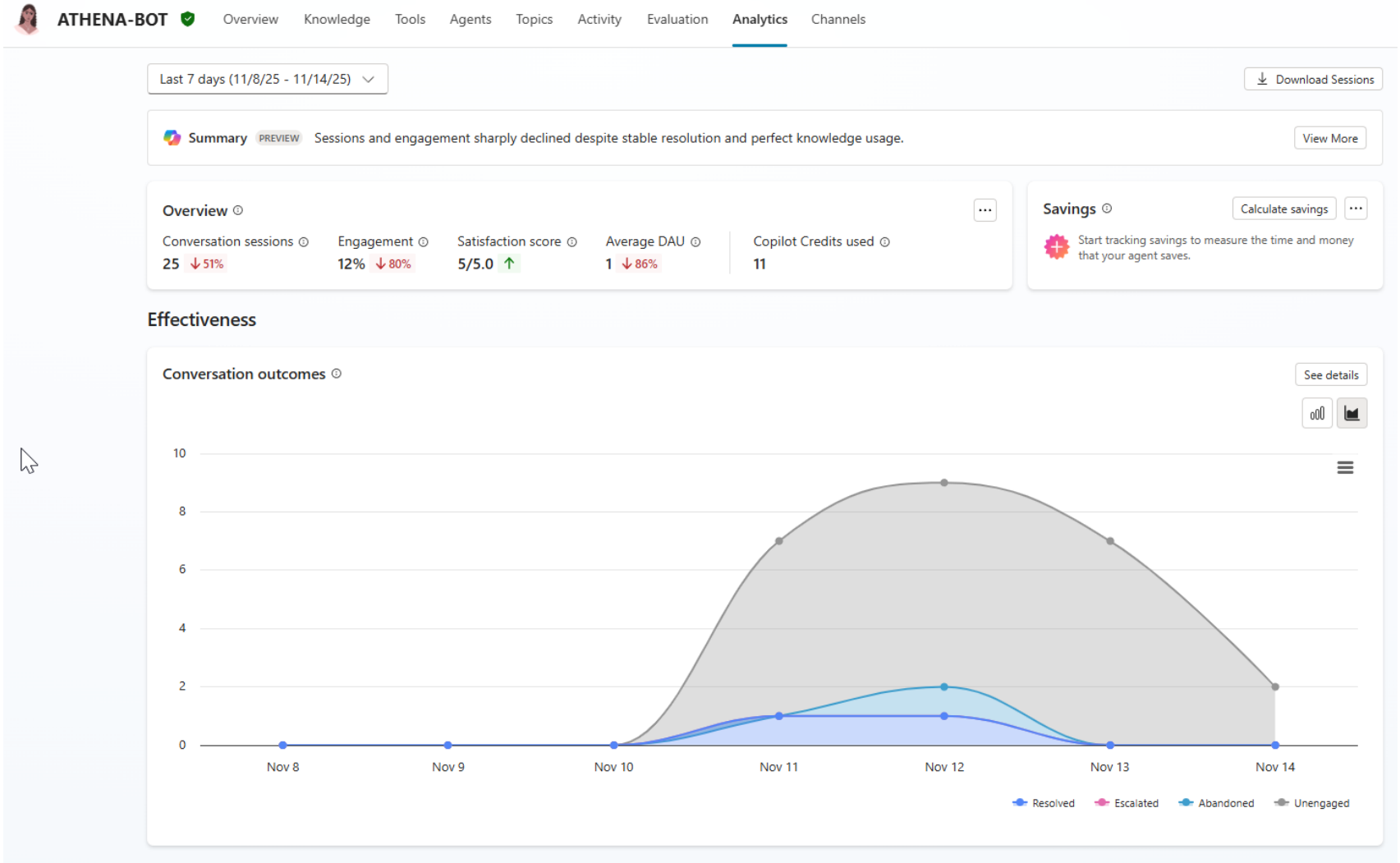
Power Platform Admin Center





Monitoring

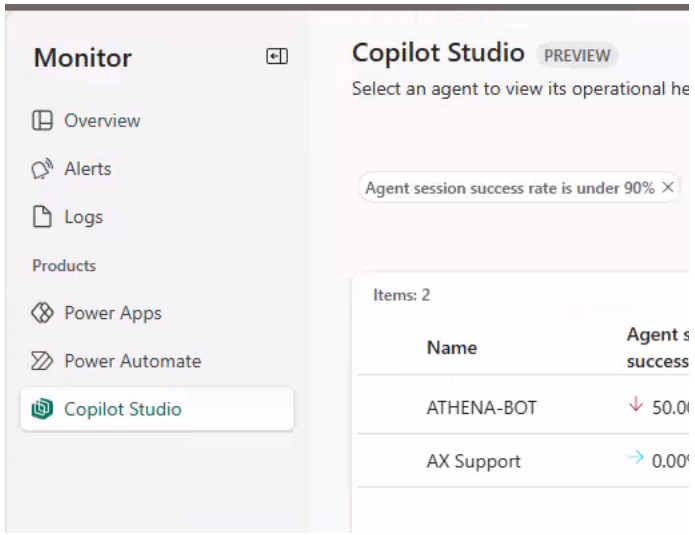
Copilot Studio agent's analytics



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

Power Platform Admin Center

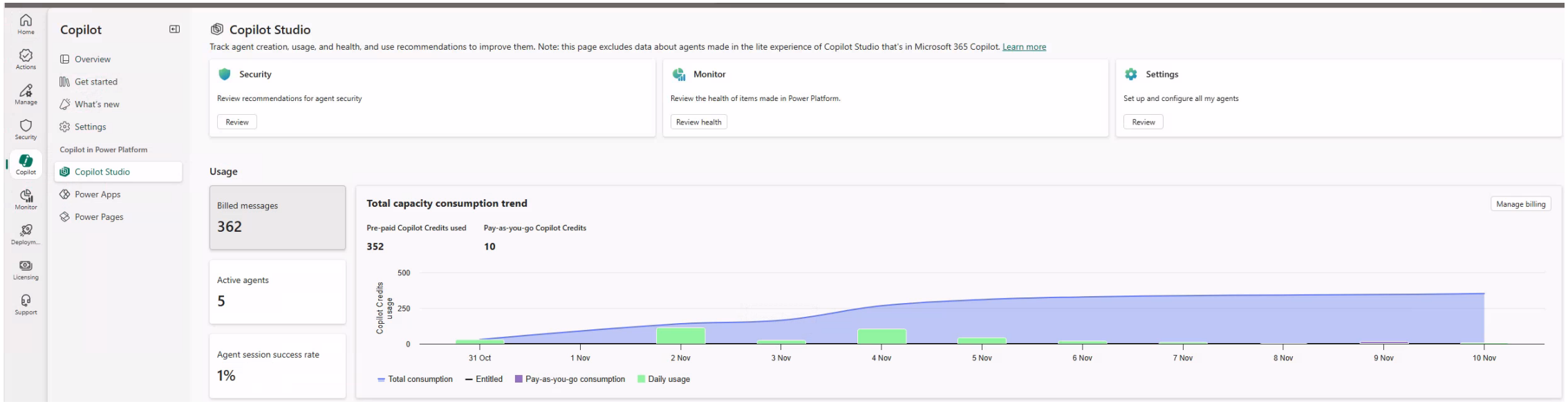
Monitoring interface keeps changing ….



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 Automation center for a similar experience.
Power Automate	Desktop flows	Generally available	Not available. Use the Automation center for a similar experience.
Power Automate	Work queue	Public preview	Not available. Use the Automation center 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

https://learn.microsoft.com/en-us/power-platform/admin/monitoring/monitoring-overview

Copilot Studio tab



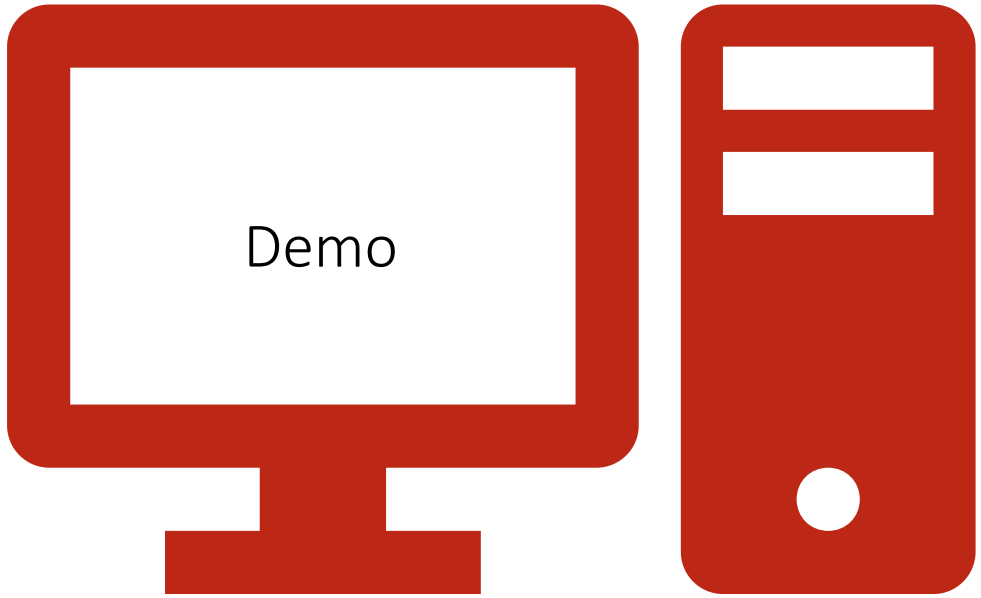
https://learn.microsoft.com/en-us/power-platform/admin/copilot/copilot-hub?tabs=new

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

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

https://github.com/Andrea-Martorana-Tusa/CopilotPandora

Q&A

Grazie!