



# Microsoft Copilot Studio

## Lab 02: Influence answers with custom instructions

Hands-on lab step-by-step

March 2024

Microsoft Copilot Studio Workshop

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# Microsoft Copilot Studio

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## Goals for this lab

<p>After this lab you will be able to:</p> <ul style="list-style-type: none"><li>• Navigate to the Generative AI settings</li><li>• Navigate to the Conversational Boosting system topic</li><li>• Set custom prompt instructions</li></ul>	<p>The time to complete this lab is <b>[5]</b> minutes.</p>
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## Prerequisites

Please note that some labs, especially later labs, do reference previous labs in reference to capabilities and previous tasks. The labs have been designed so as long you have access to a Microsoft Copilot Studio trial. You can get started from most lab without having to complete the previous module to be able to move forward. However, for the best experience that shows the features and functionality that is possible within the product, it is recommended you have completed specific modules before starting some of the labs.

For Lab 02: Influence answers with custom instructions, you'll need to:

- Have completed Lab 01: Create a smart custom copilot using your website data.

## Exercise 1: Review the Generative AI settings

The goal of this exercise is to locate the Generative AI settings and review the individual options.

### Task 1: Navigate to Generative AI settings

1. In the Copilot Studio navigation, under **Settings**, select **Generative AI**

The screenshot displays the Microsoft Copilot Studio interface. On the left, a navigation pane shows the 'Settings' menu expanded, with 'Generative AI' highlighted. The main area is split into two panels. The left panel, titled 'Test copilot', shows a chat window with a message from 'Microsoft Store' and a 'Type your message' input field. The right panel, titled 'Generative AI', contains settings for enabling and managing the feature. It includes a section for 'Public websites & Sharepoint sources' with a table listing a website and its data source. Below this is an 'Upload a document' section with a file upload area and a 'Copilot content moderation' section at the bottom.

**Generative AI**

Generative AI is premium feature and can be enabled or managed by your administrators. [See pricing tiers](#)

Public websites & Sharepoint sources

Enter your website

Websites	Data source
<a href="https://www.microsoft.com/en-us/">https://www.microsoft.com/en-us/</a>	Public website

Upload a document

Upload a document to power real-time responses to users. The document will be stored securely and used as the data source for automatic responses. Recommend using text-based files. Please note that image, audio, video, and executable files are not supported. [Learn more](#)

File contents available to all users. Uploaded file content is available to anyone chatting with the copilot, regardless of file permissions or access controls.

Drag and drop files here or [click to browse](#)

Up to 3 MB per file

Copilot content moderation

## Task 2: Review common generative AI settings

1. From that menu, you can add multiple **website** URLs or **SharePoint or OneDrive for Business** URLs.

## Exercise 2: Navigate to the conversational boosting system topic and add custom instructions

### Task 1: Navigate to the conversational boosting system topic

1. From the navigation, select **Topics**.
2. Navigate to the list of **System** topics.
3. Select the **Conversational boosting** topic.

## Task 2: Update custom instructions

1. In the **Conversational boosting** topic, select the **Create generative answers** node and select ... to navigate to the node **properties**.
2. Define **custom instructions** to influence the way the answer is going to be generated or add rules to filter out specific questions. For example, **"Talk like a pirate. Use emojis in your responses. Answer in less than 50 words. Refuse to answer questions that are not about Microsoft products."**

The screenshot displays the Microsoft Copilot Studio interface. On the left, a chat window titled 'Test copilot' shows a conversation. The user asks, 'How does the Surface 9 compare to a MacBook?'. The assistant responds with a detailed comparison of the Surface 9 and MacBook, mentioning features like processors, battery life, and screen size. A reference link is provided: 'Compare Surface Pro, Surface L...'. Below the chat, there is a 'Type your message' input field.

The main workspace shows the 'Topics > Conversational boosting' view. The 'Create generative answers' node is selected, and its properties are displayed on the right. The properties include:

- Trigger:** On Unknown Intent (with an Edit link).
- Input:** {x} Activity.Text string (with a dropdown arrow).
- Data sources:** Public websites (1) (with an Edit link).
- Content moderation:** High (with a dropdown arrow).
- Custom instructions (preview):** {x} f\_x. The instructions are: 'Talk like a pirate. Use emojis in your responses. Answer in less than 50 words. Refuse to answer questions that are not about Microsoft products.' The character count is 146/2000 maximum characters.
- Latency Message:** In text conversations this message will be sent once.

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