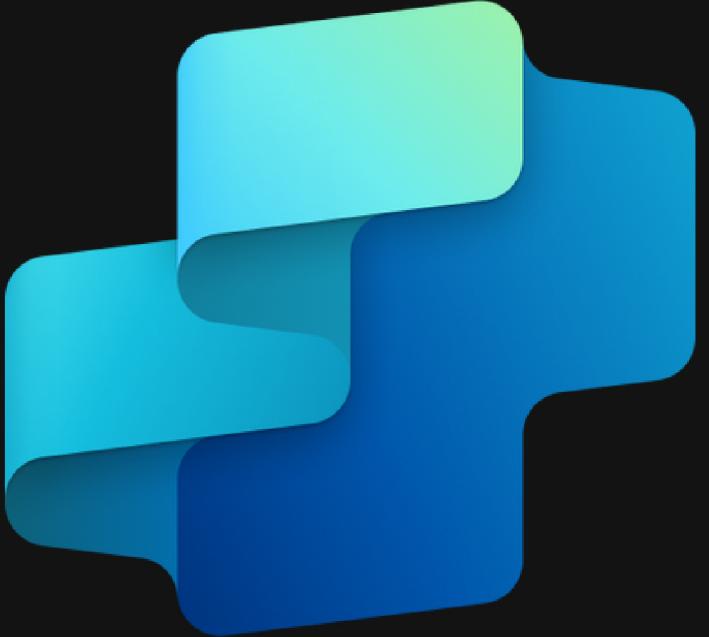


- 08 -

Boost Conversations  
with Generative AI



MONTHLY MASTERY

# FEATURE-A-DAY

with Copilot Studio



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# Generative Answers in Copilot Studio

Generative Answers in Copilot Studio is a powerful feature that allows your copilot to **gather information** from a variety of sources, transforming it into an all-knowing assistant.



It can tap into:

- Public Websites
- Internal Sources
- Uploaded Documents
- Custom Data



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# Generative Answers Enable AI Features

Activating  
Generative Answers  
is a breeze!

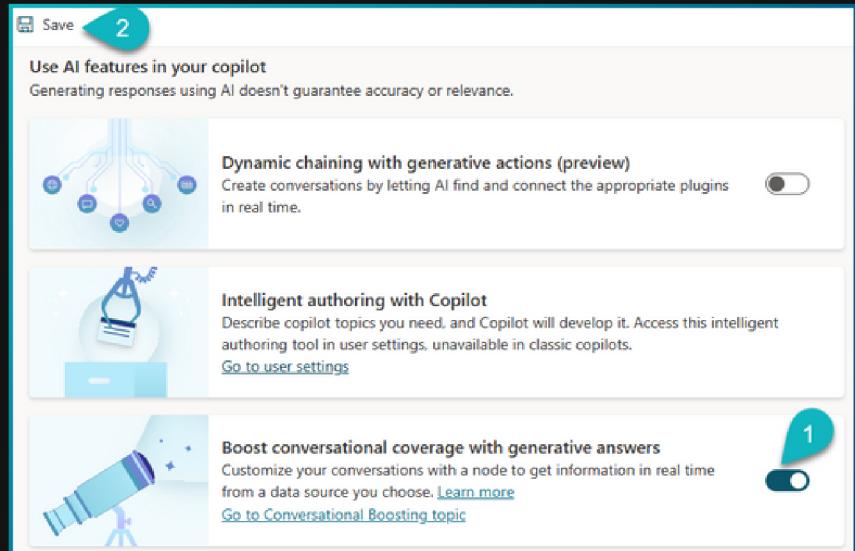
Here's how to enable  
real-time data sourcing:

1. Open your Copilot and navigate to the

[Generative AI](#) section

2. Simply turn on the [Boost conversational coverage with generative answers](#) feature

3. Don't forget to [Save](#)



Keep in mind, this step is essential for all types of generative answers.



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# Public & Internal sources

## Add a source

Adding public and internal sources to your Copilot is a snap on the [Generative AI](#) page:

1. Enter the [URL](#) of your chosen public website or SharePoint source in the text box
2. Select [Add](#) to include it
3. Remember to [Save](#) your changes
4. Give it a [few minutes](#), and then you can test your Copilot. Ask it anything that can be answered from your added sources and see how it performs!

The screenshot shows the 'Generative AI' settings page. At the top, there's a 'Save' button with a circled '3'. Below it, the title 'Generative AI' is followed by a note about it being a premium feature managed by administrators with a 'See pricing tiers' link. A large input field labeled 'Enter your website' with a circled '1' is centered. To its right is an 'Add' button with a circled '2'. Below this, a table lists sources under 'Public websites & Sharepoint sources':

Website	Data source
<a href="https://learn.microsoft.com/en-us/microsoft-copilot-studio">https://learn.microsoft.com/en-us/microsoft-copilot-studio</a>	Public website
<a href="https://microsoft365.sharepoint.com/sites/PowerPlatformApps-DEV">https://microsoft365.sharepoint.com/sites/PowerPlatformApps-DEV</a>	SharePoint and OneDrive



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# Public & Internal sources

## Content Moderation

Spice up your Copilot's moderation settings from the Generative AI page. Choose how cautious you want it to be:

- **High**: Keeping it safe and relevant (the default setting)
- **Medium**: More adventurous, but might get off-topic
- **Low**: The wildcard, expect a mixed bag of responses

After selecting your preferred level of daring, hit **Save**.

Then, put your Copilot to the test with a range of questions, even the tricky ones, to see if its level of daring is just right or needs a bit more fine-tuning.

Copilot content moderation ⓘ
<b>High (default)</b> Copilot generates fewer answers, but responses are mor... ▾
<b>High (default)</b> Copilot generates fewer answers, but responses are more relevant
<b>Medium</b> Copilot generates more answers, but the responses may be less relevant
<b>Low</b> Copilot generates the most answers, but responses can have inaccuracies



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# Public Website Constraints

When setting up **public websites** for your Copilot:

- Limit to **four** sources
- Choose websites with a maximum of **two depth levels**
- **No URLs redirect** support
- Publicly accessible **subdomain content** is supported
- For reliable answers, **don't use forums or social networks**
- Search **engines** like Bing **aren't suitable**



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# Internal sources Constrains

When setting up **internal resources** for your Copilot:

- Limit to **four** sources  
(**in addition** to the public websites)
- Only **SharePoint** or **OneDrive for Business** are valid
- SharePoint/OneDrive **require authentication**  
(we'll delve into more details in a future series)
- The **No authentication** and **Only for Teams** authentication options can't retrieve information from SharePoint or OneDrive for Business
- **Omit https://** from the URL
- Keep files to a **reasonable size** (for very large files, consider dividing them into smaller, more manageable ones)



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# Uploaded Documents Streamlining Copilot's Knowledge Base

Uploading documents for your Copilot's Generative Answers is just as easy as adding web sources.

On the [Generative AI](#) page, it's a few clicks away:

1. Use the [Drag and drop files here](#) area or click [click to browse](#) to select files
2. Choose from supported formats
3. Once uploaded, hit Save

Upload a document (preview)

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

✓ File upload complete. Files have been successfully uploaded to Dataverse. They will be available for generative answers shortly

Name	Size
2023-12 Power Platform Licensing Gui...	968.26 KB



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# Uploaded Documents

## User experience

When Copilot generates answers from uploaded documents, it includes a **citation** from the source.

This citation, part of the document used for the answer, is accessible via a link. Clicking on this citation link displays a pop-up with the **source content**, directly connecting users to the original document for context and verification.

The screenshot shows a Microsoft Copilot interface titled "Test copilot". The message input field contains the question "What is Power Automate?". A blue circular profile picture is next to the message. Below the message is a timestamp "Just now". A yellow star icon is on the left of the response area. The response text is: "Power Automate is a platform that allows users to create and automate workflows across various applications and services. It enables users to streamline and automate repetitive tasks, integrate different systems, and improve productivity [1].". Below the text is a "1 reference" section with a link "Citation-1". At the bottom of the response area, there is a timestamp "Just now | Surfaced with Azure OpenAI | ⌂ ⌂" and a "Type your message" input field with a send button.



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# Uploaded Documents Constraints

When **adding documents** to your Copilot:

- Files must be under **3MB** each
- Documents are stored in **Dataverse**, subject to **storage capacity**
- New uploads may take a **few minutes** to become live
- **All users** can access the contents of uploaded files
- Uploaded files create **new copies**, not replacing existing ones
- Uploaded documents are integrated into the copilot **solution**, influencing both export and import processes
- You can **specify nodes** to exclude uploaded documents (details in upcoming series)



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# Uploaded Documents

## Supported formats

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



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# Custom Data Personal Touch

Data not in the supported sources?

No stress! You've got the power to customize.

Here's a nifty trick to personalize your data inputs directly in a topic:

1. Whip up a **variable** and fill it with your **JSON array**
2. In the **Generative Answer** node, select **Edit**
3. Choose your crafty variable in the **Custom data** field

The screenshot shows the configuration interface for a Generative Answer node. It includes sections for setting variable values, creating generative answers, input parameters, data sources, and custom data. A numbered callout indicates three specific steps: 1. The 'To value' field where a JSON expression is defined. 2. The 'Data sources' section with an 'Edit' button. 3. The 'Custom data' section where a variable is selected.



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# Custom Data Format data

Your custom data should be in a [table](#) format with these columns:

- [ContentLocation](#): A URL that references your content.
- [Content](#): The actual data to be shared.

Format this data using [Power Fx](#).

Keep in mind, sources defined in Generative answers take the [lead](#) at the copilot level, with copilot level sources as your backup plan.

Enter formula

```
1 Table(
2   {
3     ContentLocation: "https://wikipedia.org",
4     Content: "Wiki"
5   },
6   {
7     ContentLocation: "https://www.gartner.com/en/glossary",
8     Content: "Gartner"
9   }
10 )
```

Type

Table

Output

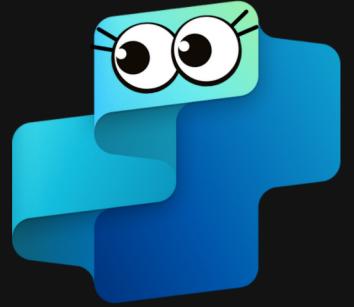
Table( { ContentLocation: "https://wikipedia.org", Content: "Wiki" } ), { ContentLocation: "https://www.gartner.com/en/glossary", Content: "Gartner" } )

Insert Cancel



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# Today's Task: Test Drive Generative AI

## 1. Enable Generative Answers

Turn on this feature in your Copilot.

## 2. Add Data Sources

Add up to four public websites and/or upload a document.

## 3. Configure Content Moderation

Adjust moderation settings in Generative AI to balance relevance and variety.

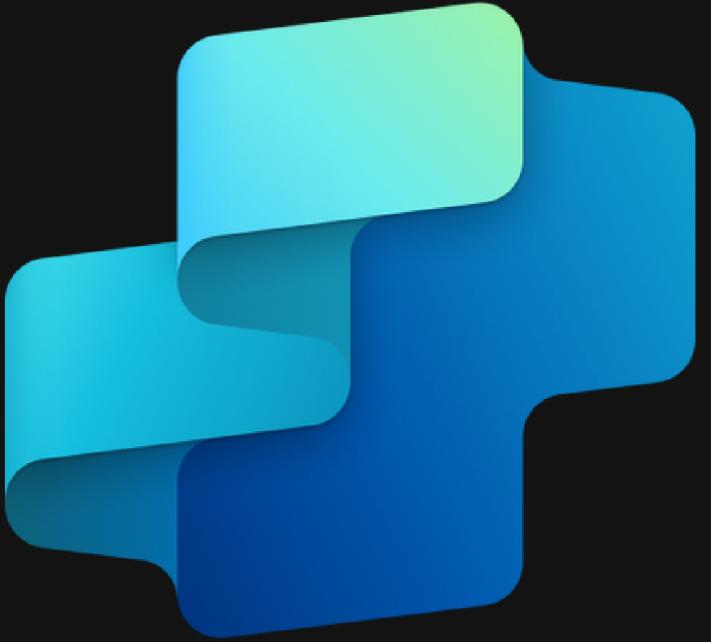
## 4. Test Your Copilot

Ask questions to see how it utilizes these new sources for answers.



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