

# BUILDING AND EXTENDING COPILOTS

TO ACCELERATE  
PRODUCTIVITY



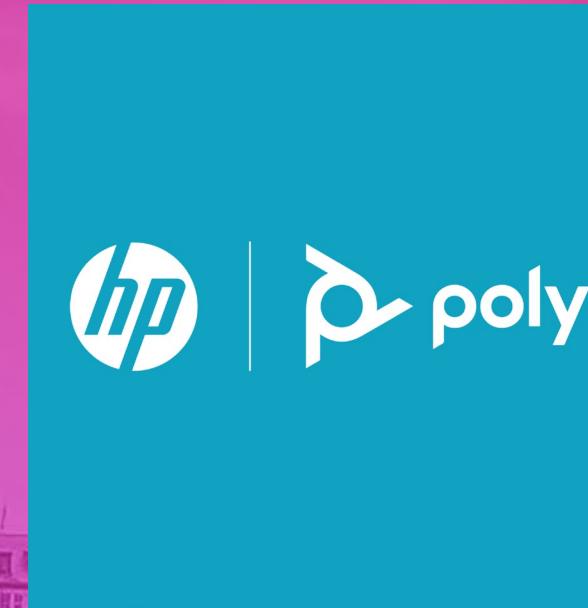
**DANIEL LASKEWITZ**  
MICROSOFT



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# Agenda

- 1 Microsoft Copilot Studio overview
- 2 Building custom copilots
- 3 Extending Microsoft Copilot

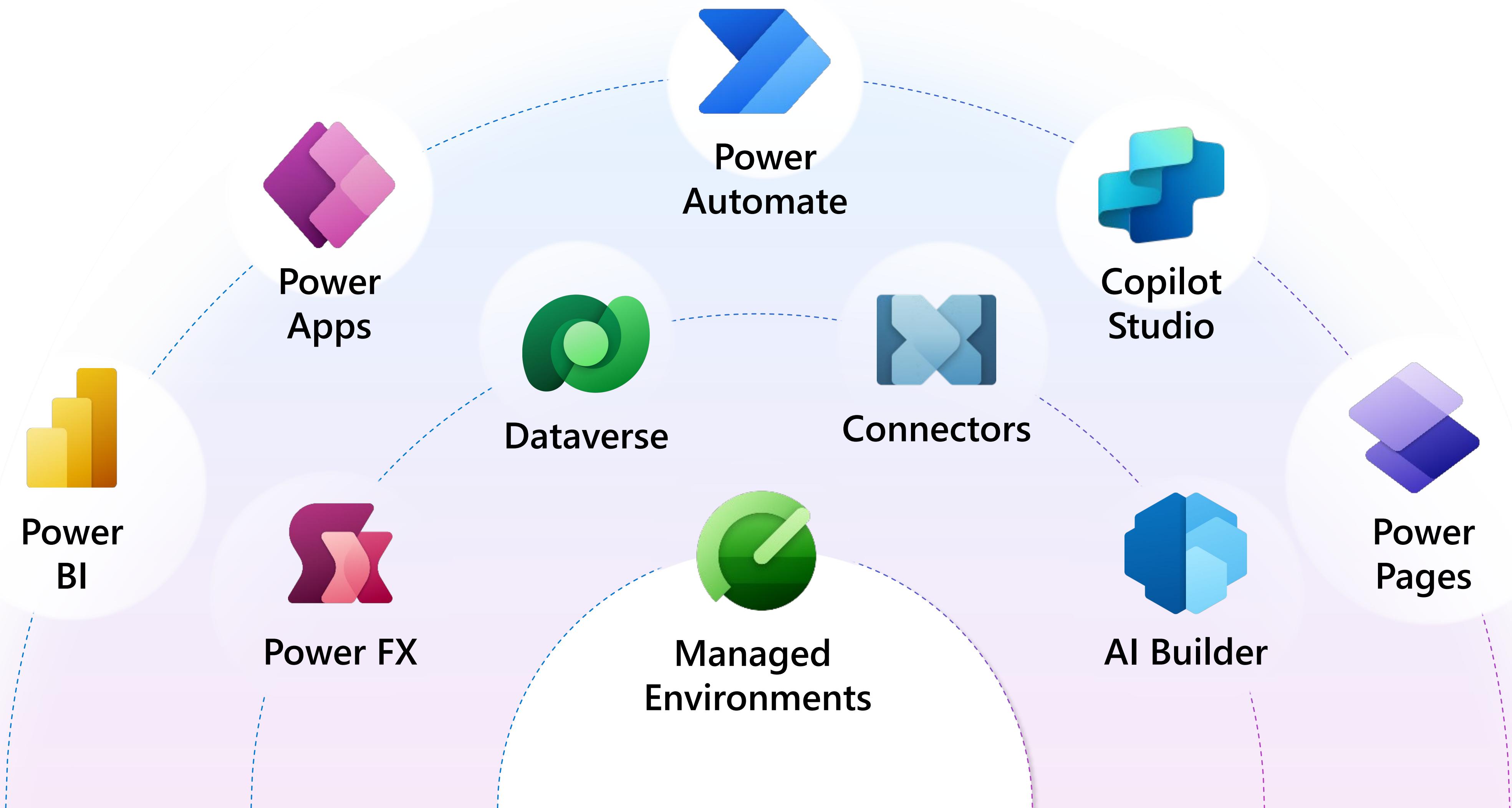
# Copilot Studio

Overview



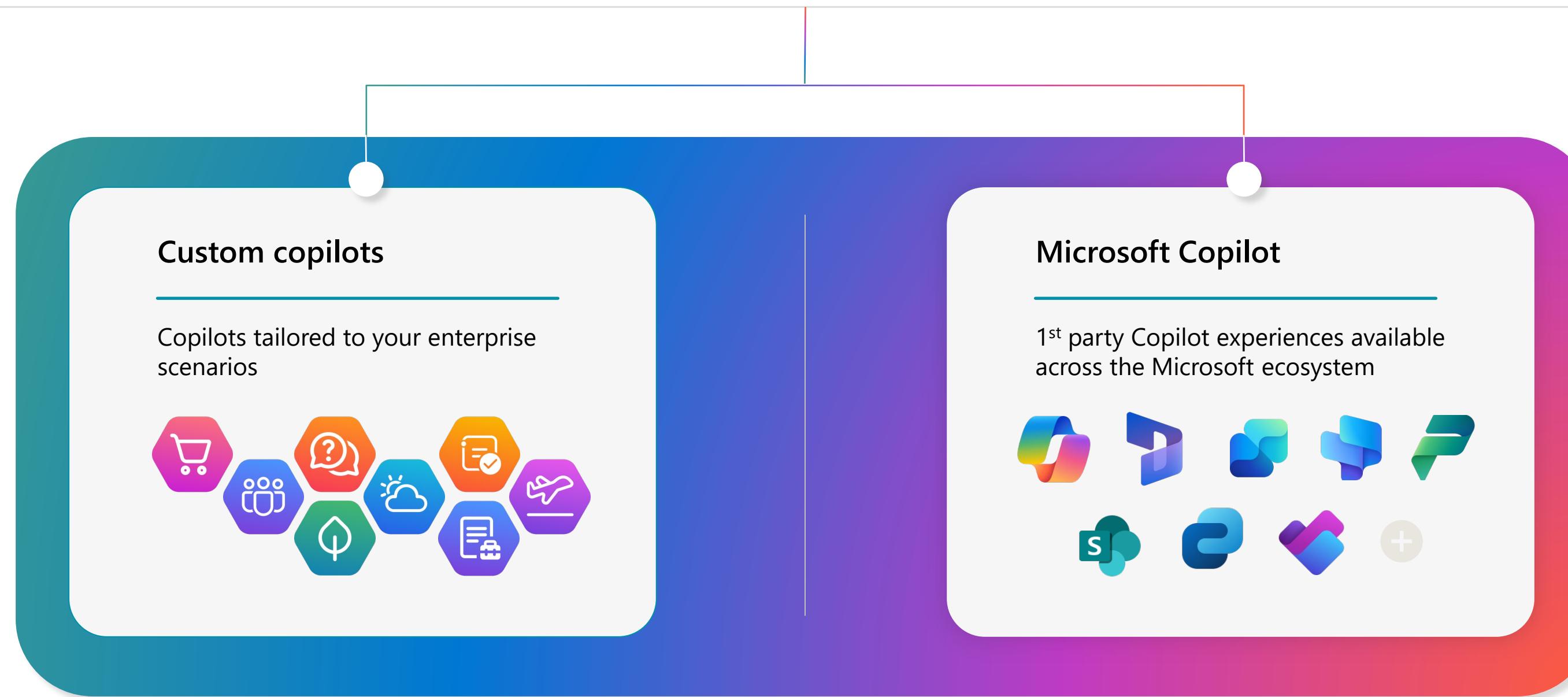
# Microsoft Power Platform

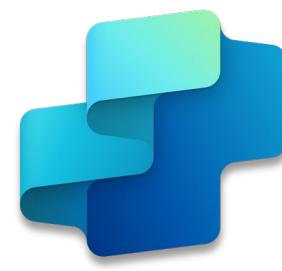
## AI-Enabled Low-Code Platform



# What is a copilot?

Intelligent AI assistants that use generative AI and large language models to assist humans with complex cognitive tasks.





# Microsoft Copilot Studio

## Your copilot, your way

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

The screenshot shows the Microsoft Copilot Studio web interface. At the top, there's a search bar with the URL <https://www.copilotstudio.microsoft.com>. Below the search bar, the title "Copilot Studio" is displayed with a small icon. On the left, a sidebar has options for "Home", "Create", "Copilots", and "Library". The main area starts with a section titled "Describe your copilot to create it" with a text input field and a button. Below this is a "Recent" section listing two items: "Copilot for Microsoft 365" and "Copilot for Sales". There are "See more" buttons for both sections. Under "Start with a template", there are eight cards: "Approval Manager", "Job Craft", "Organization Navigator", "Safe Travels", "Store Operations", "Sustainability Insights", "Weather", and "Website Q&A". At the bottom, there's a "Learning resources" section with links like "Quick start: Create and deploy a copilot", "Documentation", "Responsible AI FAQs", "Extend your copilots with plugins and extension", "Quick start: Use Generative AI in a copilot", "Support community", "Try Copilot Agents", and "Security and governance in Copilot Studio". The interface uses a light blue and white color scheme with rounded corners.

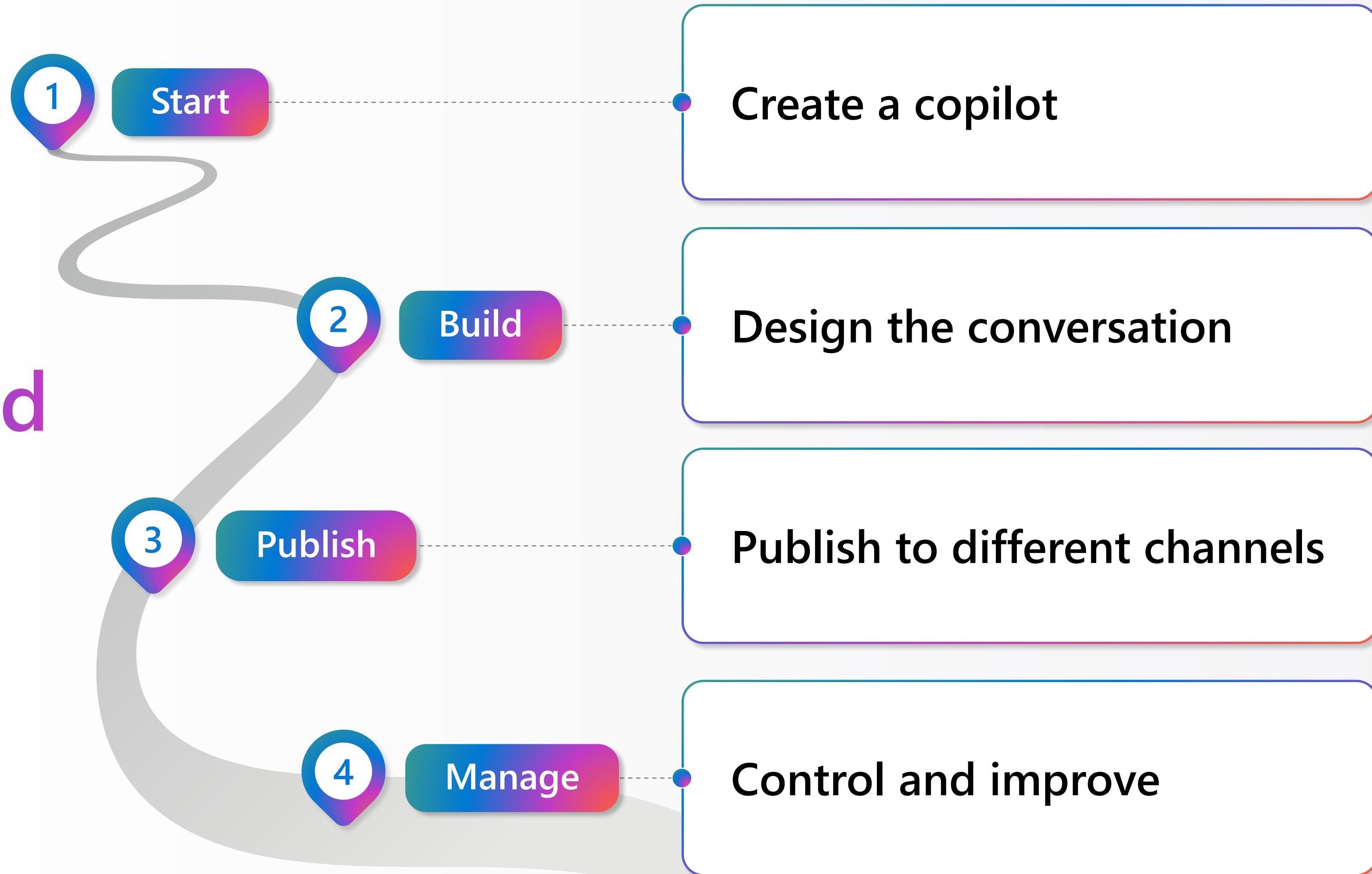
# Building

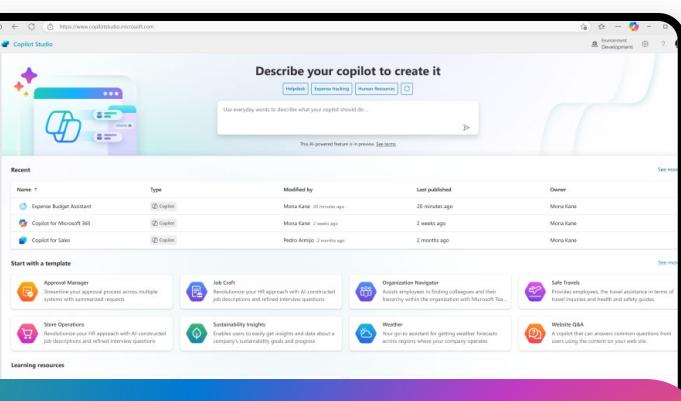




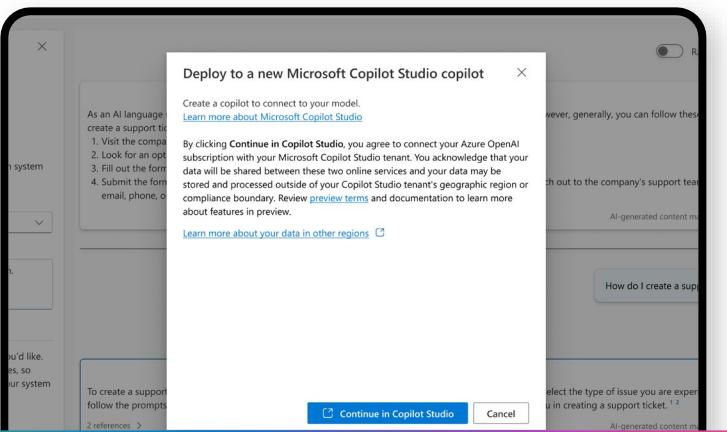
# How to build a custom copilot

Create powerful  
custom copilots

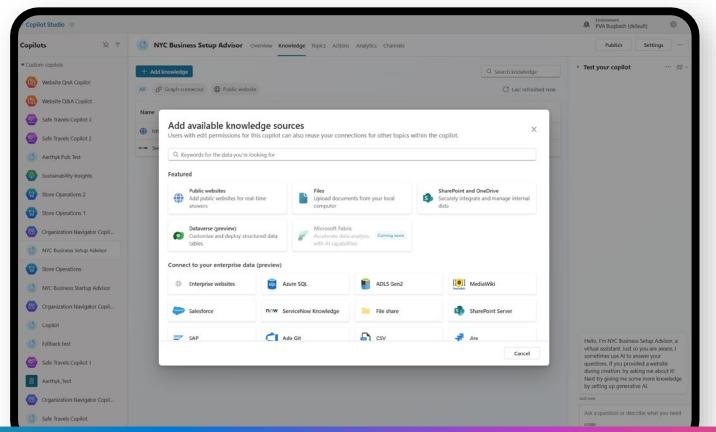




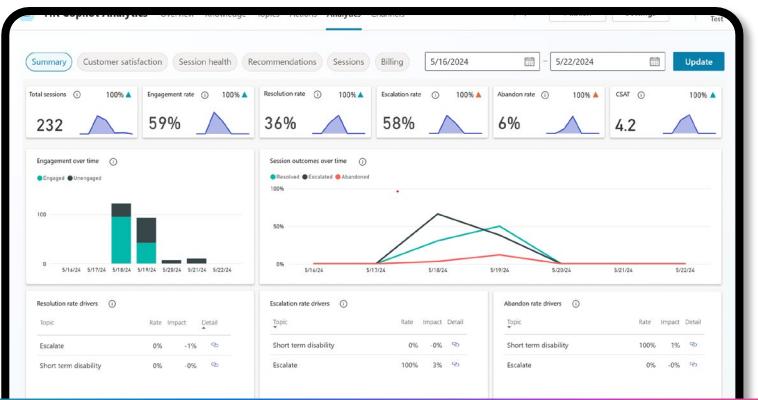
Create a copilot



Extend with Azure



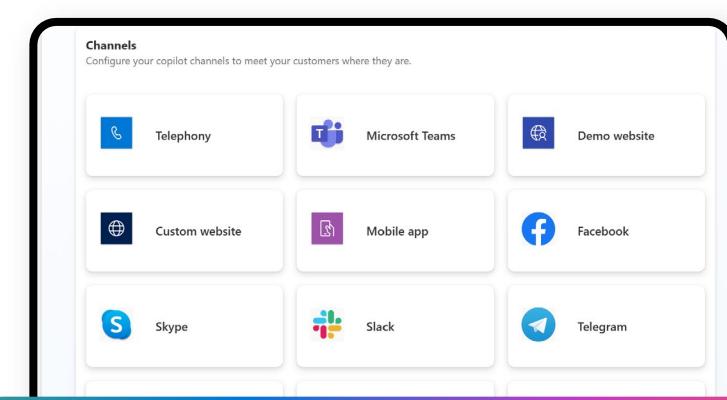
Chat over knowledge



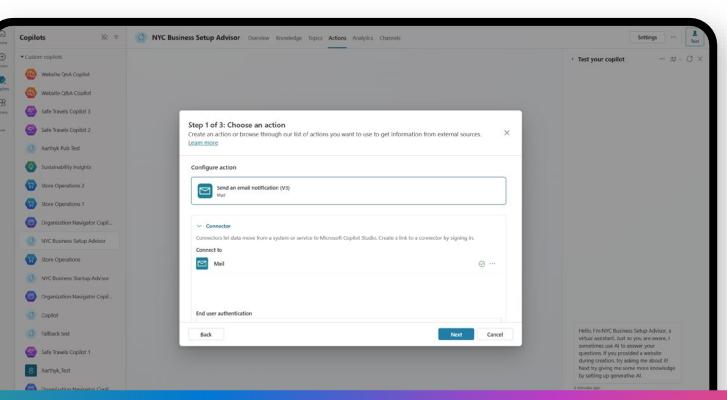
Monitor and Improve



Copilot Studio  
Your copilot, your way



Multiple channels



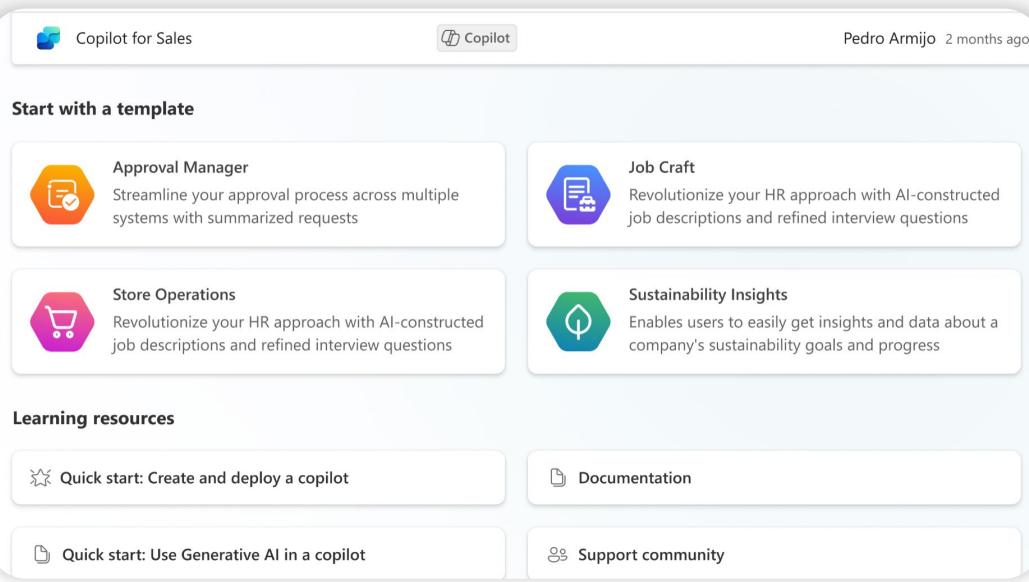
Actions & Plugins

# Build the way you want

Users of all skill levels can create and test together

Preview

## Templates

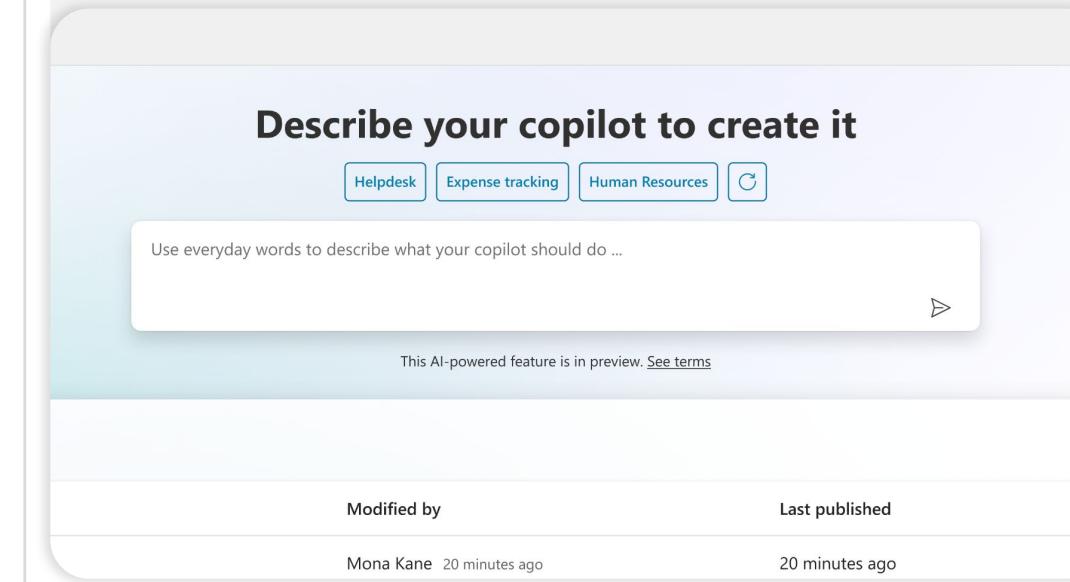


### Get started quickly

Choose from a diverse set of pre-built scenarios across popular industries and functions.

Preview

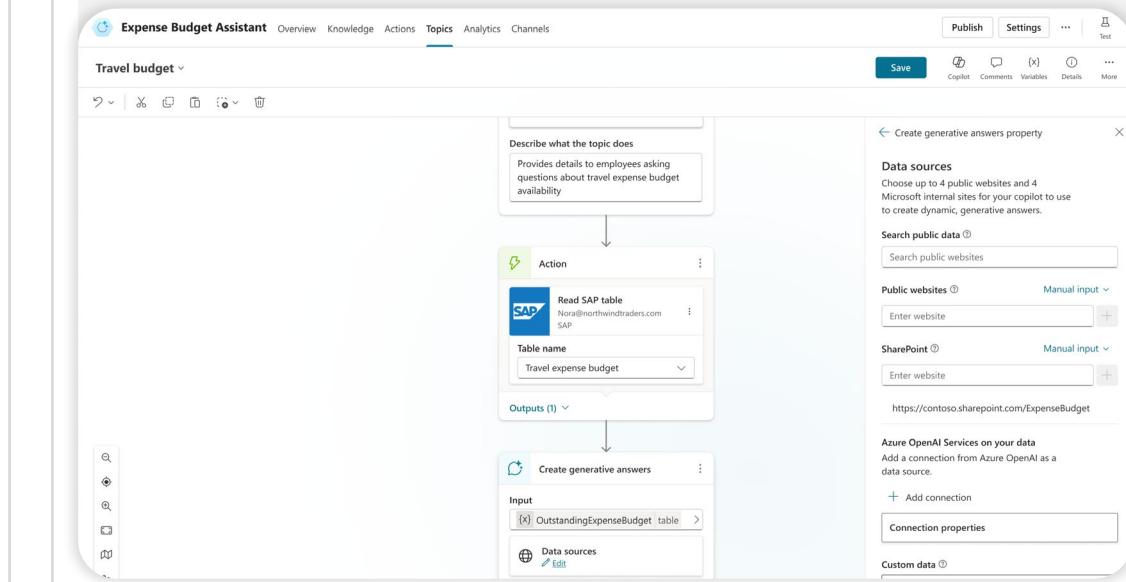
## Natural language



### Build conversationally

Build copilots by engaging in a conversational, natural, human-like experience.

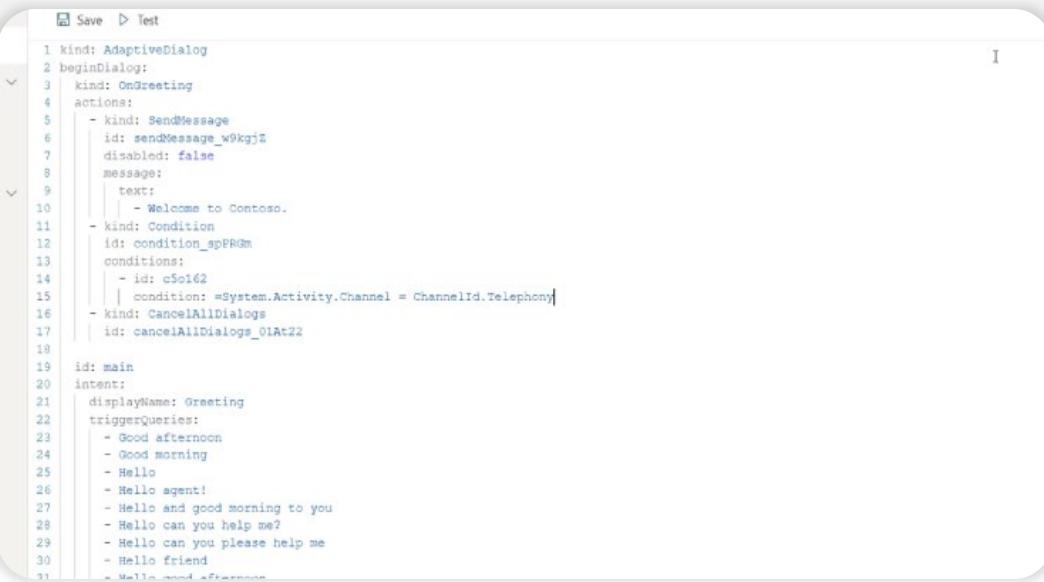
## Visual canvas



### Navigate a modern UX

Design your conversation by following the low code graphical interface.

## Code



### Switch to YAML

Share and re-use topic logic between developers and copilots in a side-by-side view.

# DEMO

CREATE FROM TEMPLATE



# Knowledge

Add your **public and enterprise data** sources using copilot connectors.

Your copilot will be able to **dynamically generate multi-turn answers** in real time using your enterprise data.

Allows you to create an **immediately useful** copilot.

Permissions are always respected to ensure your data **remains secure**

Supported data sources include:

Public websites

SharePoint / OneDrive

Dataverse

Microsoft Fabric (coming soon)

File uploads

Microsoft Graph

## Add available knowledge sources (Powered by Copilot connectors)

Users with edit permissions for this copilot can also reuse your connections for other topics within the copilot. [Manage security settings](#)

Keywords for the data you're looking for

### Featured

#### Add existing knowledge

→ Converts previous data sources to knowledge for this copilot

#### Public website

Incorporate any relevant web content found on Bing

#### Files

Upload documents from your local computer

#### SharePoint and OneDrive

Securely integrate and manage internal data

#### Dataverse

Customize and deploy structured data tables

#### Microsoft Fabric

Accelerate data analysis with AI capabilities

### Bring your enterprise data (16)

#### Enterprise website (preview)

#### Azure DevOps (preview)

#### Custom connector (preview)

#### Jira (preview)

#### ADLS Gen2 (preview)

#### Oracle SQL database (preview)

#### ServiceNow (preview)

#### File share (preview)

#### CSV (preview)

#### Microsoft SQL (preview)

#### MediaWiki (preview)

#### Salesforce (preview)

#### Confluence (preview)

#### Azure SQL (preview)

#### Zendesk (preview)

#### Power Platform connector

# DEMO

CHAT OVER DATA



# Logic

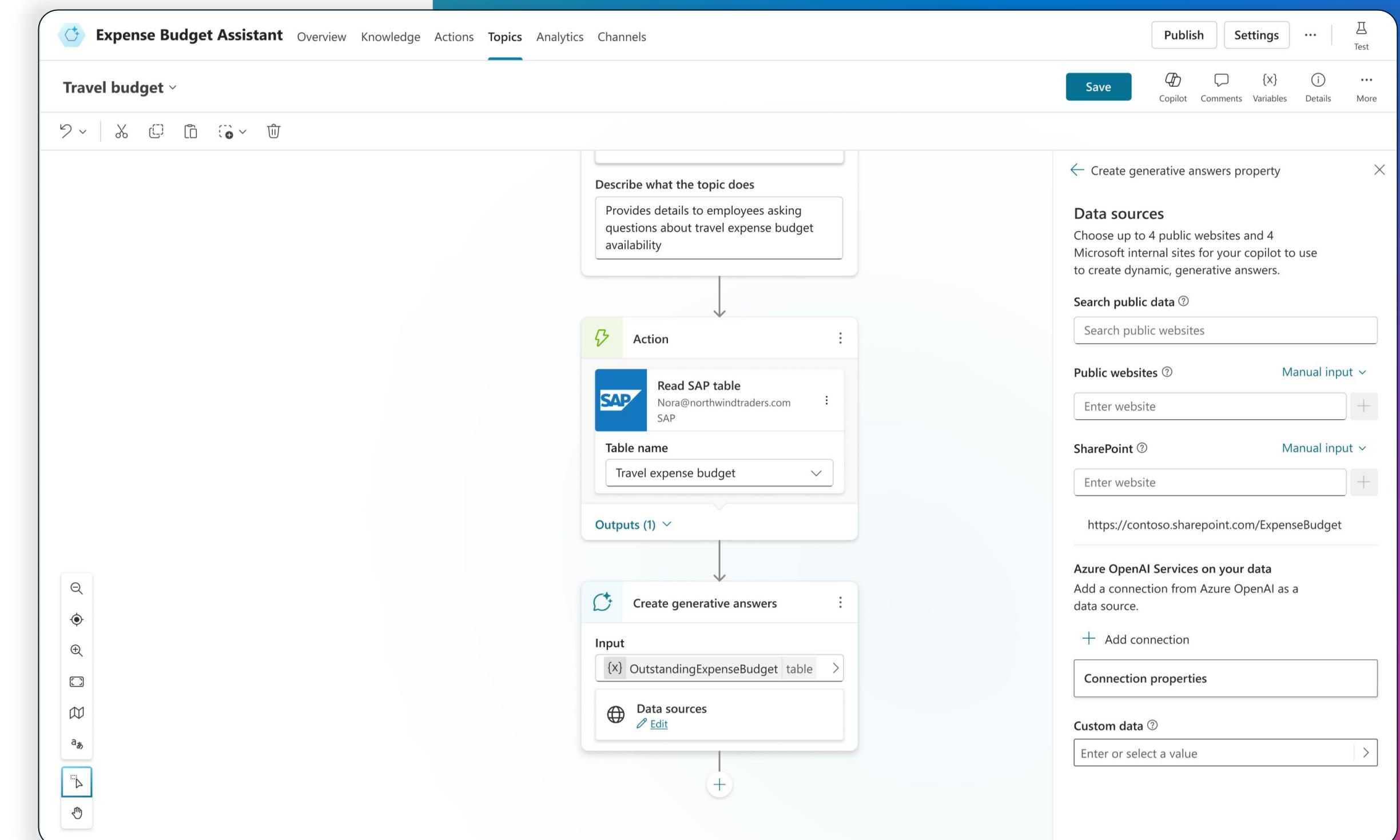
Have **complete control over critical scenarios** by designing specific step-by step topics.

Enable your copilot to **automatically select the most appropriate action or topic** to respond to a user using generative AI.

Easily mix and manage both **generative and custom dialog** in one system.

Ask questions, send messages, branch your conversations and manipulate data with built in Power Fx support

Connect to your contact center so your copilot can escalate and hand off the conversation with full context to a live human agent.



# Customize your chat canvas

Change the UI of your copilot using a custom canvas as a standalone web app

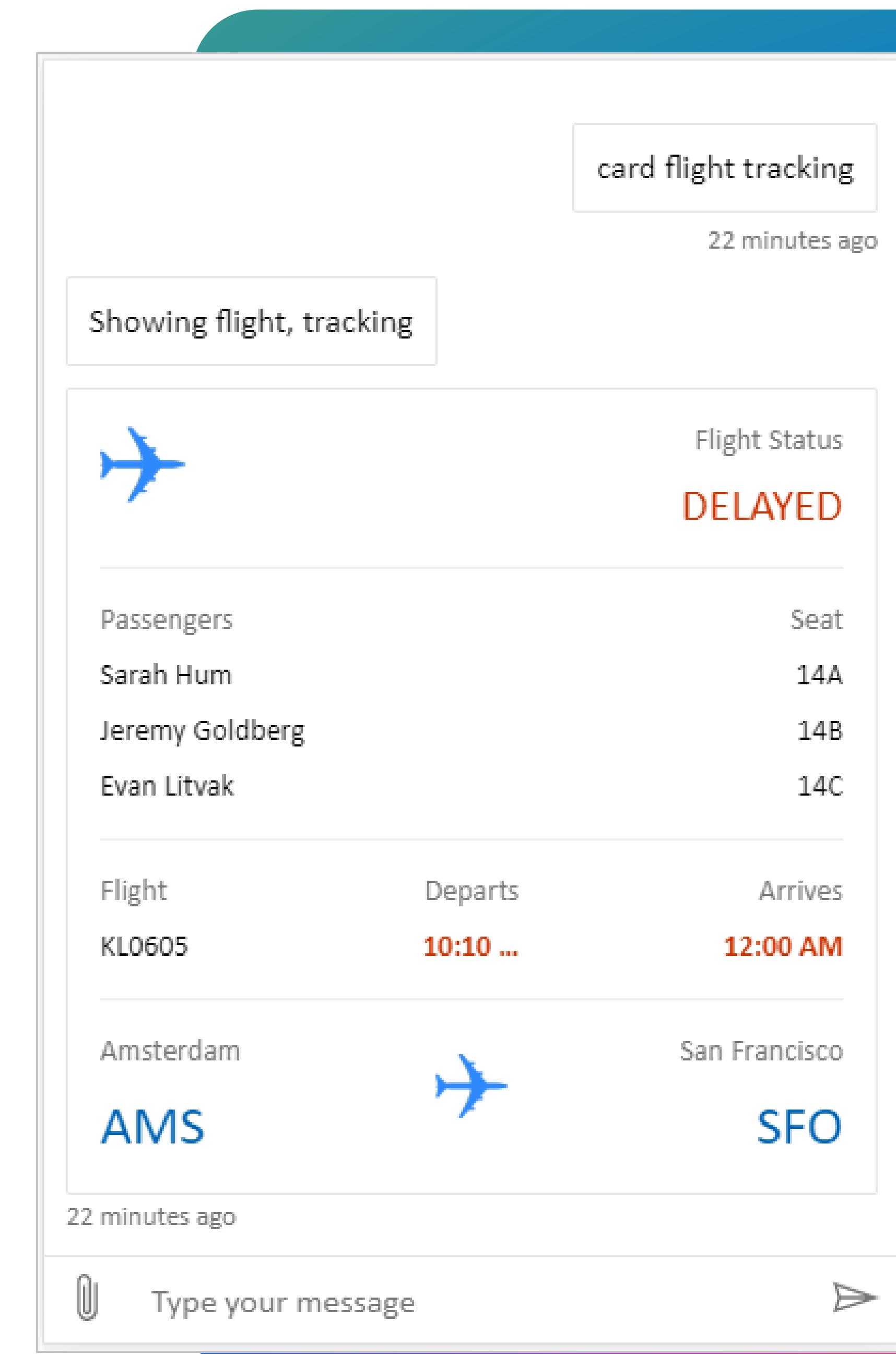
Enables a customized iFrame to be embedded in multiple web pages

Start with a sample:

<https://aka.ms/copilotstudio-customcanvas-sample>

More Info:

<https://aka.ms/copilotstudio-customcanvas>



# Channels

Publish and deploy to your channels of choice with a single click.

Add your copilot to a custom app built with Power Apps or a custom website built with Power Pages.

Make your copilot available to your customers on your web site or mobile app, or to your employees in Microsoft Teams.

You can access even more channels through ISVs, including:



WeChat



WhatsApp  
through Twilio



Google's  
Business  
Messages



Apple  
Messages for  
Business



Azure  
Communication Services



TeleSign



Custom

The screenshot shows the 'Expense Budget Assistant' copilot configuration interface. At the top, there are tabs for Overview, Knowledge, Actions, Topics, Analytics, and Channels, with 'Channels' being the active tab. A message indicates the copilot was published at 9:42 AM on March 36, 2024. Below this, the 'Publish status' section shows it was published on March 20, 2024, with a 'Details' link. The main area is titled 'Channels' and contains a sub-section 'Configure your copilot channels to meet your customers where they are.' It lists various communication channels in a grid:

Teams	Demo website	Custom website	Mobile app	Facebook
Twilio	Skype	Slack	Telegram	Direct Line Speech
Email	Line	GroupMe		

Below this, the 'Customer engagement hub' section allows connecting to customer engagement apps to enable hand-off to live agents or other copilots. It lists:

Dynamics 365 Customer Service	Genesys	Salesforce	LivePerson	ServiceNow
ZenDesk	Customer engagement hub			

# Extensibility



# Actions

Easily connect to your key line of business systems.

Enable your copilot to automate your business processes and complete tasks.

Types of actions:

Prebuilt connectors

Choose from 1400+ prebuilt Power Platform connectors to popular data sources and apps

Custom connectors

Create a custom connector for any publicly available API

Flows

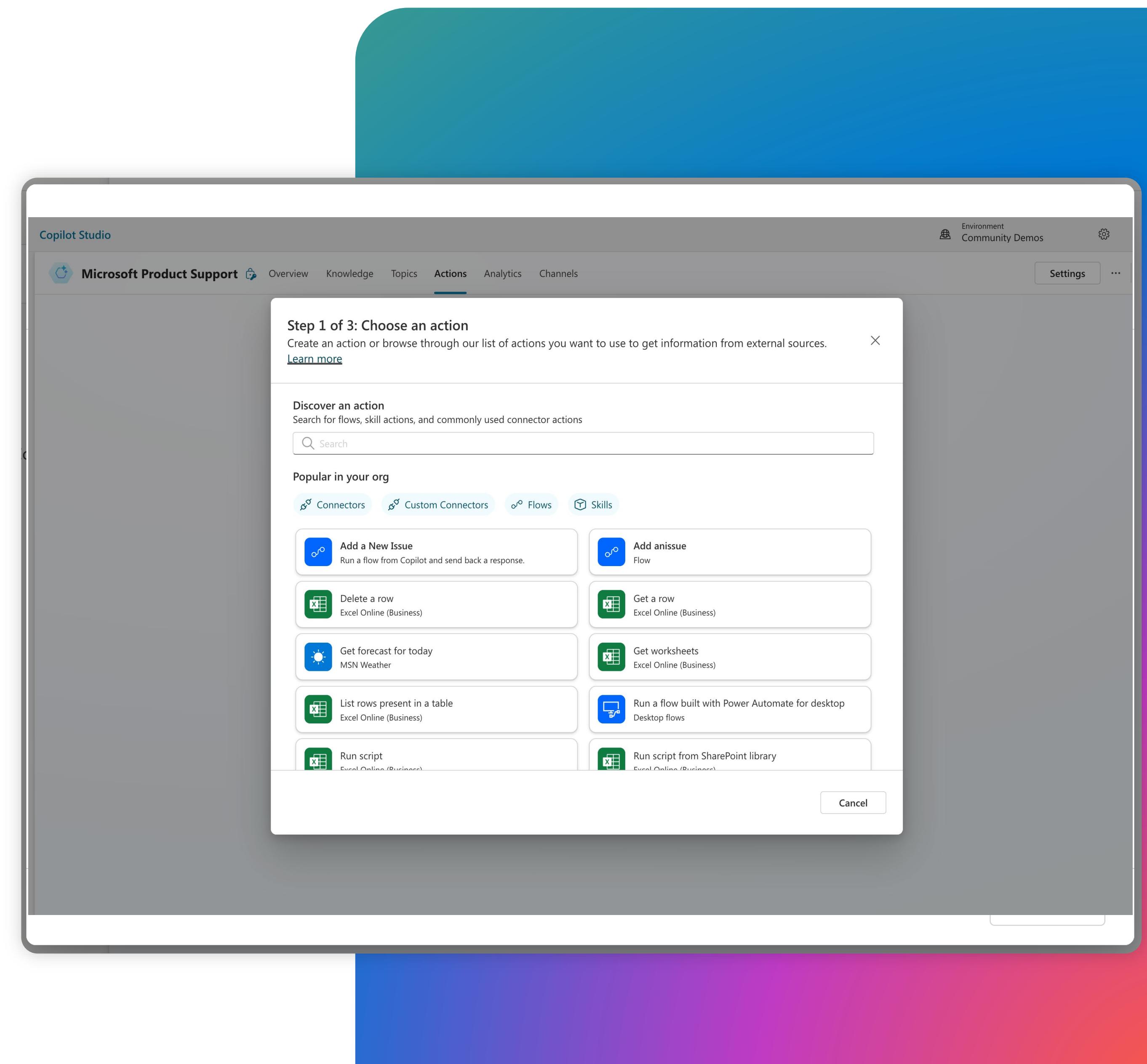
Bring in automated workflows built using Power Automate

Prompts

Provide custom instructions to the GPT model using AI Builder

Skills

Add a bot built using Azure Bot Framework as a skill



1400+

# DEMO

TOPIC + AI PROMPT



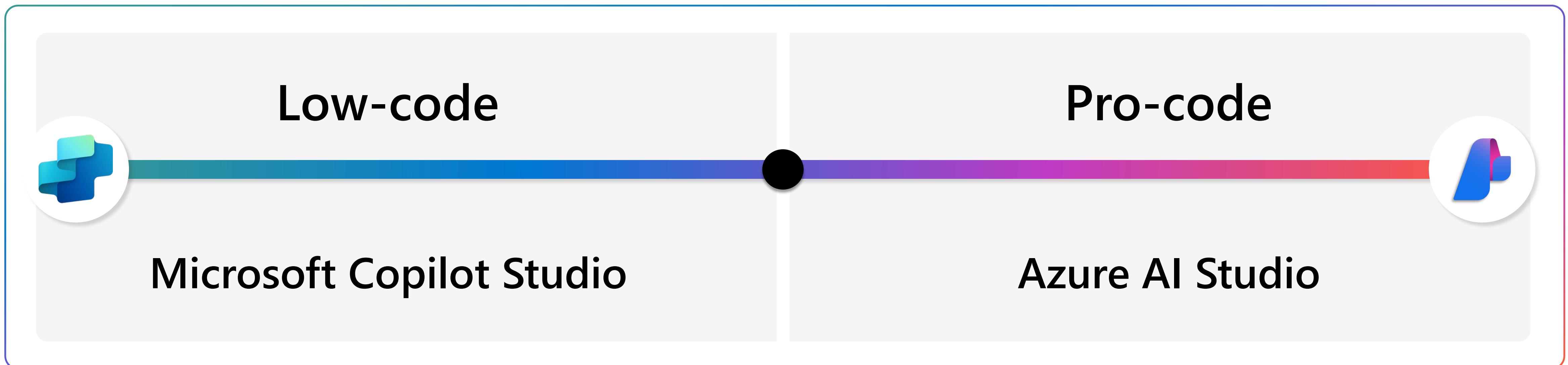
# DEMO

CONNECTOR ACTION



# Customize Microsoft Copilot

with the **most comprehensive** end-to-end AI toolchain



# Copilot for Microsoft 365 Plugins (Power Platform)



## Prompt plugins

### What?

Prompt plugins enable you to generate content with AI and call them via Copilot for Microsoft 365

### Examples

Summarize a long text and extract bullet points, tasks or other useful content

Create a prompt that helps to moderate user-generated content



## Conversational plugins

### What?

Conversational plugins enable you to build a topic about a subject and call them via Copilot for Microsoft 365

### Examples

Get data from SAP via plugin actions so that users can also get data from backend systems

Use generative actions to let Copilot answer questions on public websites, SharePoint and more...



## Connector plugins

### What?

Connector plugins enable you to connect with APIs through Copilot for Microsoft 365

### Examples

The ServiceNow connector plugin can list incidents via Copilot for Microsoft 365

The Salesforce connector plugin can list, and filter leads and accounts via Copilot for Microsoft 365



## Power Automate plugins

### What?

Power Automate flow plugins enable you to call automations through Copilot for Microsoft 365

### Examples

Create an approval and send the adaptive card via Teams

Create content based on a prompt and send an approval

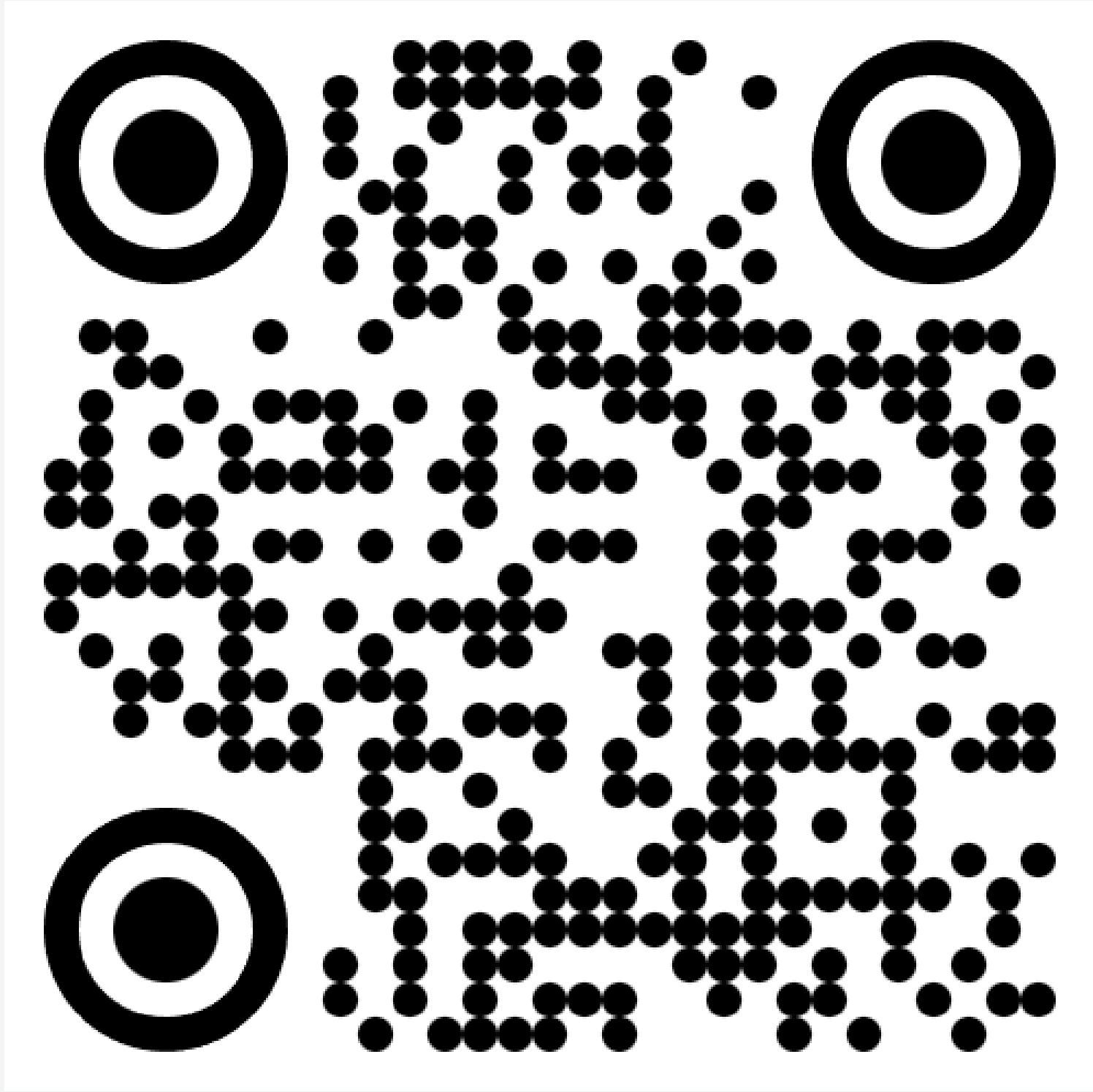
# DEMO

EXTEND COPILOT FOR MICROSOFT 365



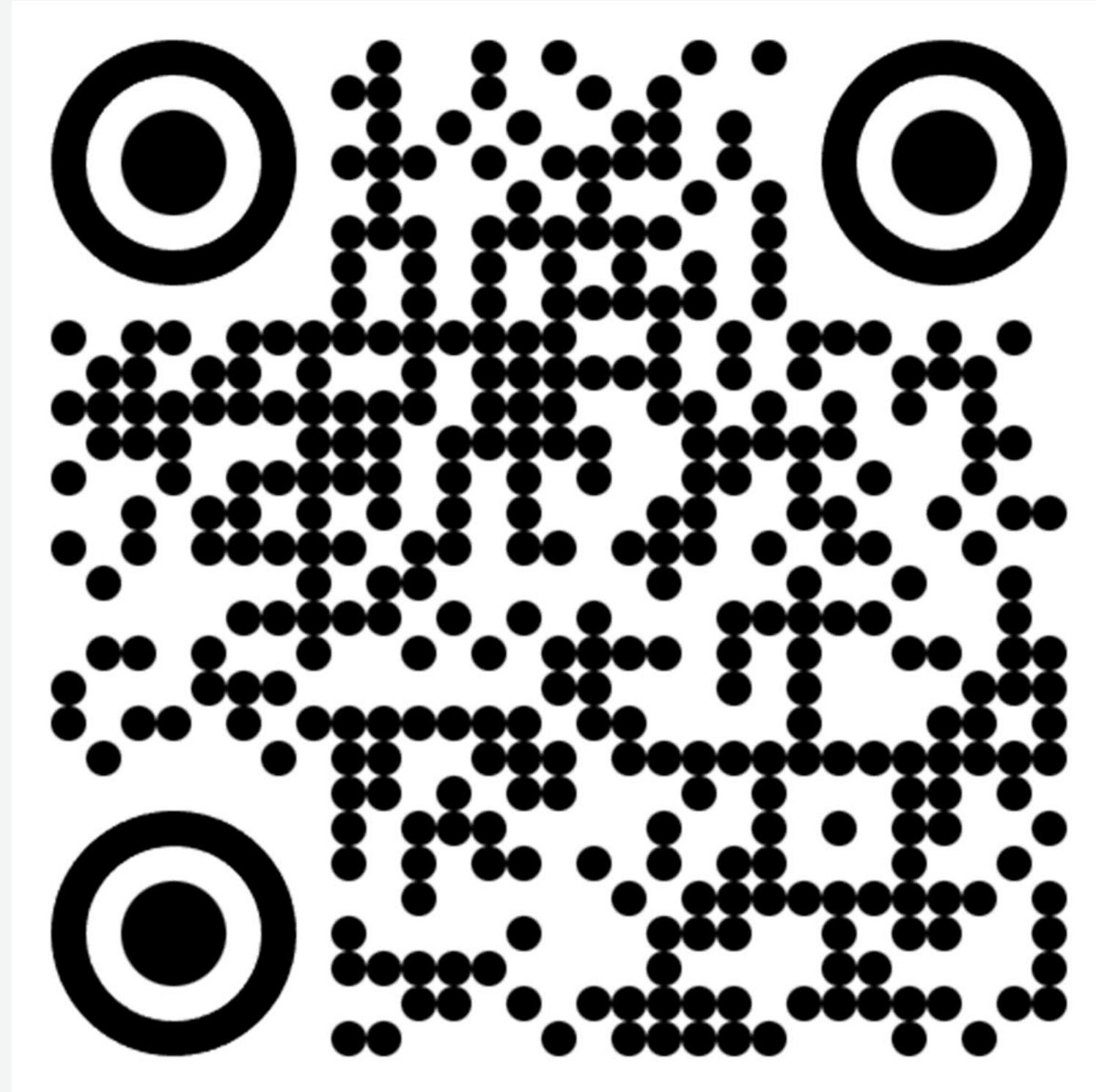


# Connect with me





# Download slides



# Thank you!

