



Copilot Studio and Azure AI Workshop

Lab 6: AI-Powered Contract Search &
Insights using Azure Search.

Hands-on Lab Step-by-Step Guide

April 2025

Lab Overview and Pre-requisites

Learning Objectives

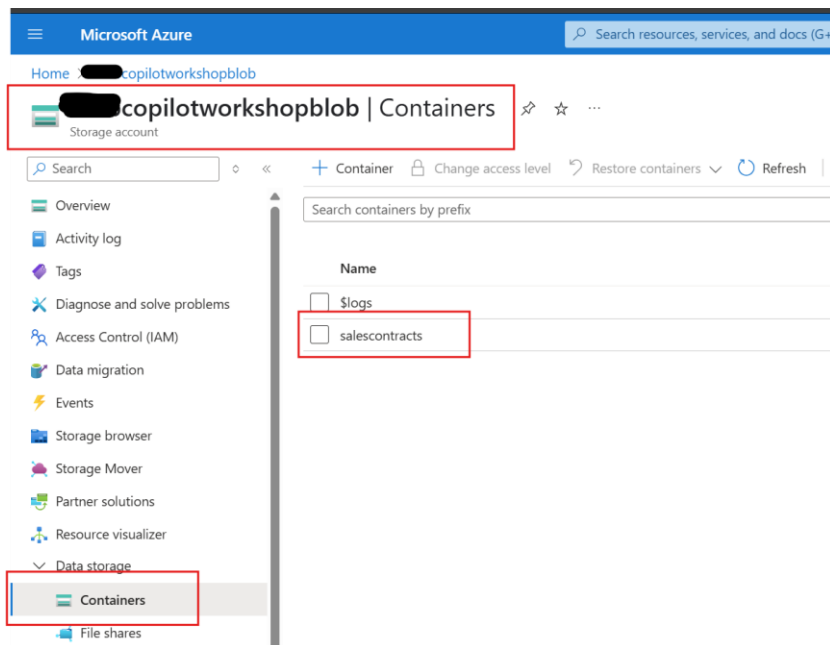
In this lab, participants will learn how to store and index customer contracts in Azure Blob Storage and make them searchable using Azure AI Search. They will configure the search index, apply AI-driven semantic search, and retrieve key contract details such as payment terms, SLAs, and renewal dates.

Pre-requisites

- You will need credentials to a demo tenant that has Copilot Studio and AI Builder trial enabled.
- You will need access to Azure portal with an Azure subscription
- You should have completed Lab 5 (As some of the Azure resources are created in Lab 5)
- Access to Lab 5 Assets (If all 4 contract documents are not already uploaded to Blob in Lab 5)

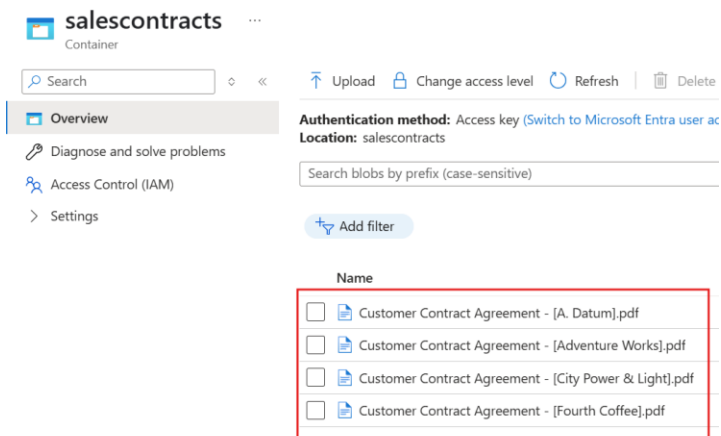
Lab 6: Enhance the agent to use Azure AI Search to index a large set of customer contract documents and enable semantic search for insights.

1. Sign into **Azure Portal** (<https://portal.azure.com>) and open the **storage account** created in **Lab 5** and click on **Containers** under **Data storage** and select your container where all contracts are stored.

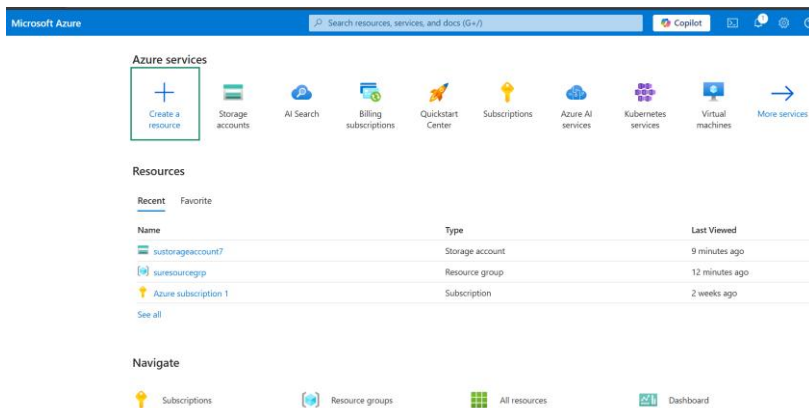


Commented [RL1]: Hi, I've added a new screenshot below as the Container's name is different in Lab5. Can you please check?

2. Ensure your container has all 4 sample contracts available. If not, upload the contracts from **Lab 5 assets** folder

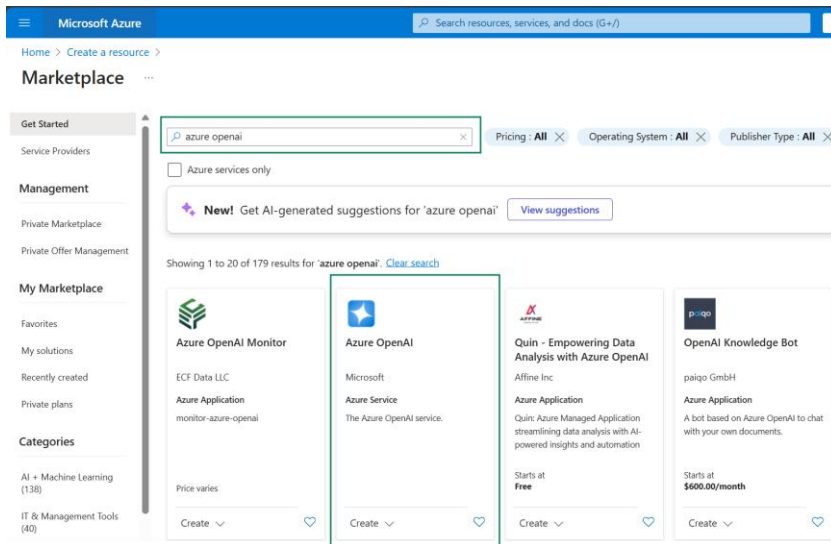


- Go back to the **Azure Portal** home screen and click on **Create a resource**

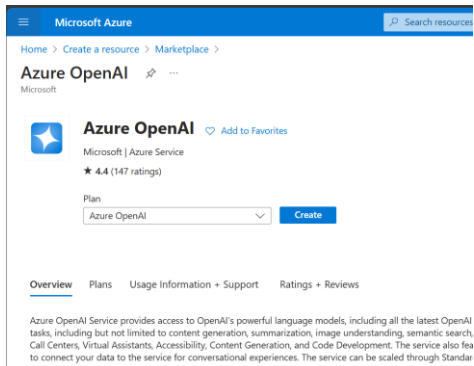


- Search for **Azure OpenAI** and select it to create a new **Azure OpenAI** resource

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5. Select Create



6. Select the available resource group, region, provide a resource name, select pricing tier as S0 and click on Next

Microsoft Azure Search resources, services, and docs

Home > Create a resource > Marketplace > Azure OpenAI >

Create Azure OpenAI ...

1 Basics 2 Network 3 Tags 4 Review + submit

Azure OpenAI Service provides access to OpenAI's powerful language models, including all the latest OpenAI models. These models can be easily adapted to your specific tasks, including but not limited to content generation, summarization, image understanding, semantic search, and natural language to code translation. Top use cases include Call Centers, Virtual Assistants, Accessibility, Content Generation, and Code Development. The service also features the Assistants API, Fine Tuning capabilities and many ways to connect your data to the service for conversational experiences. The service can be scaled through Standard (tokens) and Provisioned (PTUs) deployment types.

[Learn more](#)

Project Details

Subscription * Azure subscription 1

Resource group * suresourcegrp [Create new](#)

Instance Details

Region East US

Name * openairesource07 ✓

Pricing tier * Standard S0

[View full pricing details](#)

Content review policy

To detect and mitigate harmful use of the Azure OpenAI Service, Microsoft logs the content you send to the Completions and image generations APIs as well as the content it sends back. If content is flagged by the service's filters, it may be reviewed by a Microsoft full-time employee.

[Learn more about how Microsoft processes, uses, and stores your data](#)

[Apply for modified content filters and abuse monitoring](#)

Previous Next

Open

- Click **Next > Next** and **Create**. The **Azure OpenAI** resource should get deployed in few minutes.

Microsoft Azure

Search resources, services, and docs (G+/)

Copilot

Home > Create a resource > Marketplace > Azure OpenAI >

Create Azure OpenAI

✓ Basics
✓ Network
✓ Tags
4 Review + submit

[View automation template](#)

TERMS

By clicking "Create", I (a) agree to the legal terms and privacy statement(s) associated with the Marketplace offering(s) listed above; (b) authorize Microsoft to bill my current payment method for the fees associated with the offering(s), with the same billing frequency as my Azure subscription; and (c) agree that Microsoft may share my contact, usage and transactional information with the provider(s) of the offering(s) for support, billing and other transactional activities. Microsoft does not provide rights for third-party offerings. See the [Azure Marketplace Terms](#) for additional details.

Basics

Subscription	Azure subscription 1
Resource group	suresourcegrp
Region	East US
Name	openairesource07
Pricing tier	Standard S0

Network

[Previous](#)
[Next](#)
[Create](#)

- Go back to the Azure portal home screen and select the newly created Azure OpenAI resource

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Azure services

[Create a resource](#)
[Storage accounts](#)
[AI Search](#)
[Billing subscriptions](#)
[Quickstart Center](#)
[Subscriptions](#)
[Azure AI services](#)
[Kubernetes services](#)
[Virtual machines](#)
[More services](#)

Resources

Recent Favorite

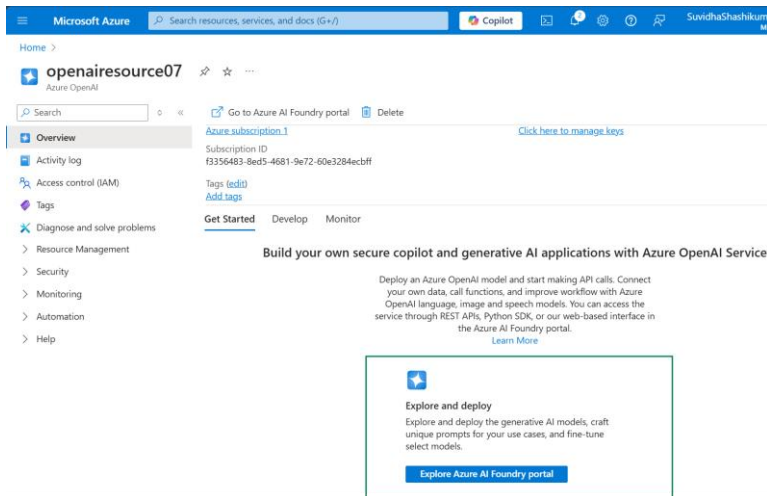
Name	Type	Last Viewed
openairesource07	Azure OpenAI	a few seconds ago
suresourcegrp	Resource group	a minute ago
sustorageaccount7	Storage account	26 minutes ago
Azure subscription 1	Subscription	2 weeks ago

[See all](#)

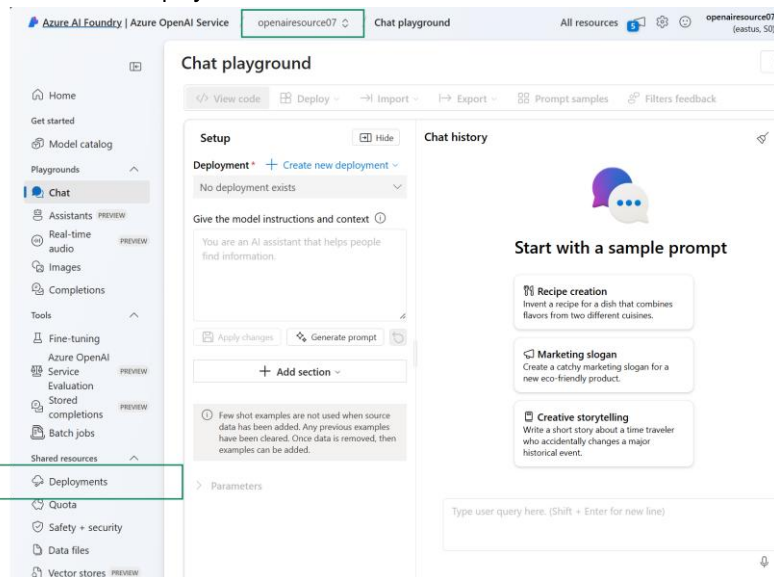
Navigate

- Inside the Azure OpenAI resource, select **Explore Azure AI Foundry portal** and this should open the **Azure AI Foundry** portal in new tab.

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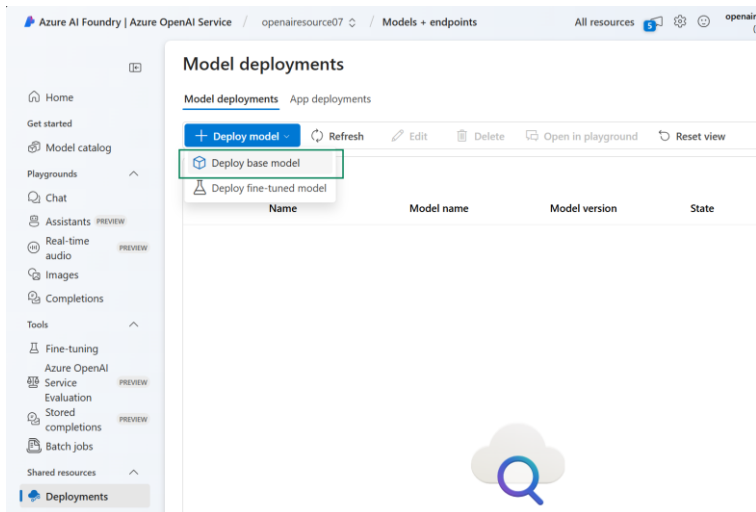


10. In the Azure AI Foundry, make sure your Azure OpenAI service is selected at the top. Next, click on **Deployments**

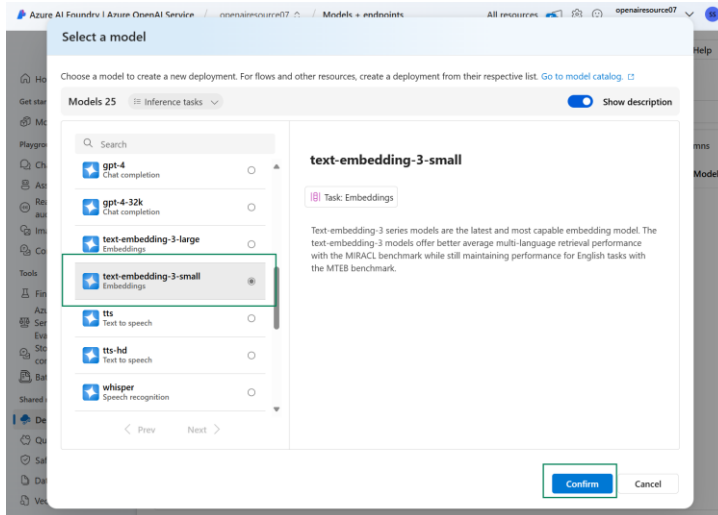


11. In **Model deployments** screen, Select **Deploy Model** > **Deploy base model**.

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12. In the pop-up window, scroll down to select **text-embedding-3-small** and click on **Confirm**.



13. Change the **Deployment type** to **Standard**.

Deploy model text-embedding-3-small

Deployment name *

text-embedding-3-small

Deployment type

Standard

Global Standard

Standard

14. Select **Deploy** to deploy the text embedding model to Azure OpenAI service.

Model deployments

Deploy model text-embedding-3-small

Deployment name *

text-embedding-3-small

Deployment type

Standard

Standard: Pay per API call with lower rate limits. Adheres to Azure data residency promises. Best for intermittent workloads with low to medium volume. Learn more about [Standard deployments](#).

Deployment details

Model version: 1

AI resource: openairesource07

Capacity: 120K tokens per minute (TPM)

Resource location: East US

Content safety: DefaultV2

Deploy

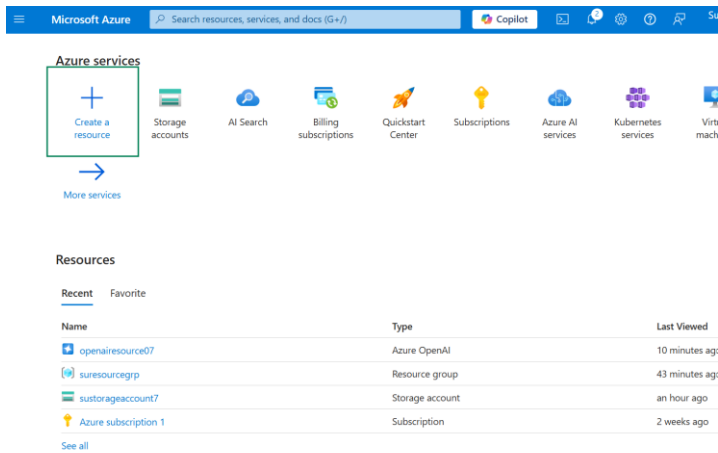
Cancel

15. Go to Azure portal and select **Create a resource**

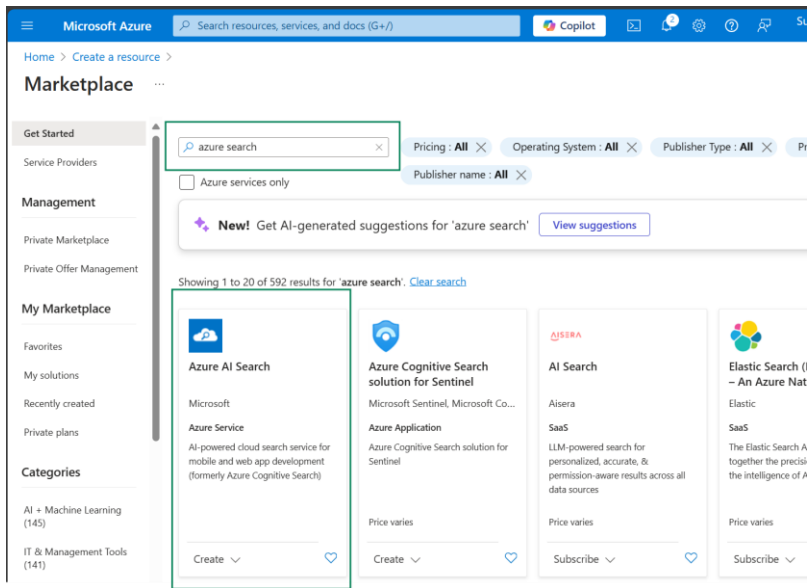
Commented [BB2]: @Suvidha Shashikumar - I notice you have selected Standard as the Deployment type. Mine defaulted to Global Standard. Looks like the difference is lower rate calls. I added a note to change the Deployment type to Standard as a step above. Can you confirm this is correct?

Commented [SS3R2]: Global Standard offers broader availability and potentially better latency for global workloads, while Standard is region-specific.

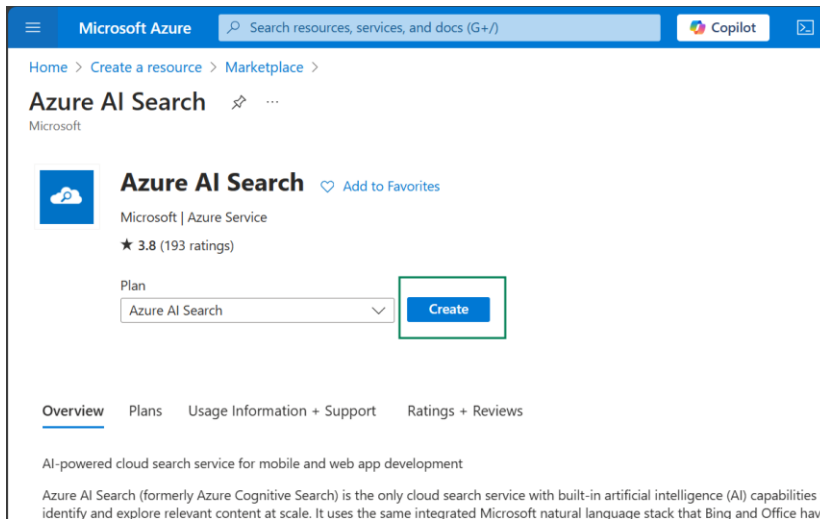
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16. Search for *Azure Search* and select *Azure AI Search*



17. Select **Create**

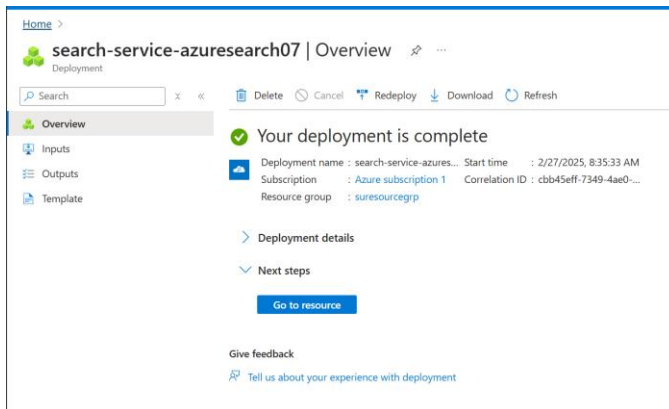


18. In the Create Search Service window, select your **resource group**, provide a **name** for search service, select **region** and click **Change Pricing Tier** to **select Free pricing tier**. Next, **select Review + Create**.

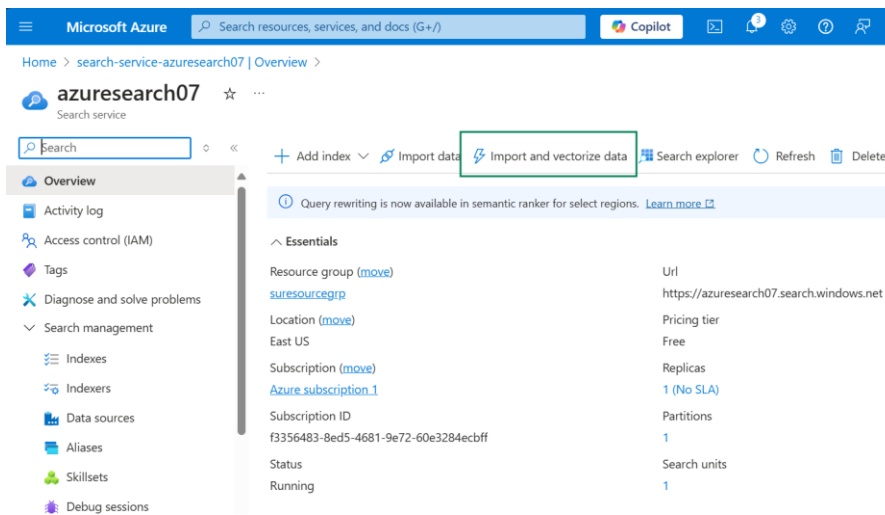
Commented [RL4]: I've put in red :)

The screenshot shows the 'Create a search service' wizard in the Azure portal. It has four tabs: 'Basics', 'Scale', 'Tags', and 'Review + create'. The 'Basics' tab is active. Under 'Project details', 'Subscription' is 'Azure subscription 1' and 'Resource group' is 'cgsworkshop'. Under 'Instance Details', 'Service name' is 'aisearchcgsworkshop', 'Location' is '(US) Central US', and 'Pricing tier' is 'Free'. The 'Free' tier is highlighted with a red box, and the 'Change Pricing Tier' link is also highlighted with a red box. At the bottom, the 'Review + create' button is highlighted with a red box.

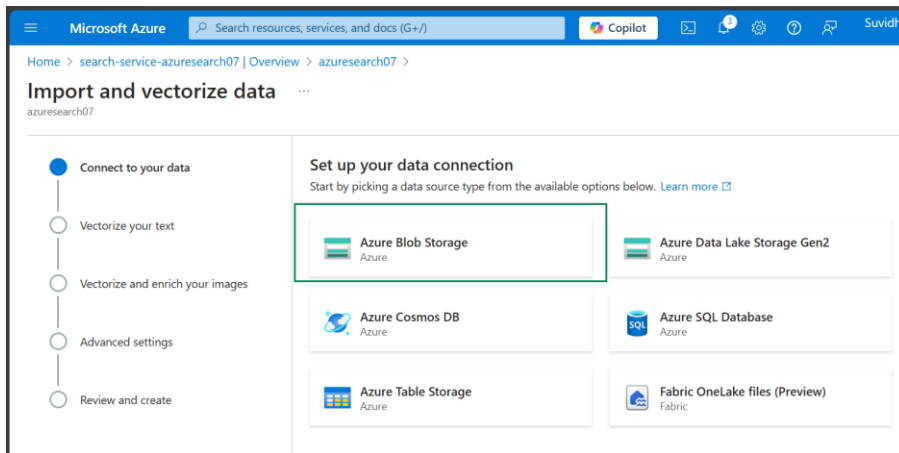
19. Select **Create** again to deploy Azure search service. Once deployed, select **Go to resource**.



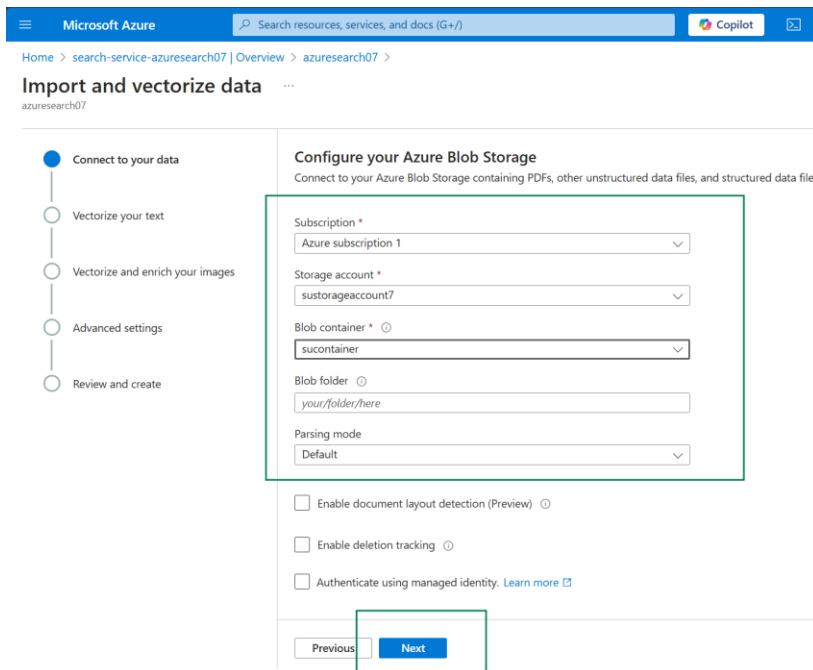
20. In the Azure search service, select **Import and vectorize data**



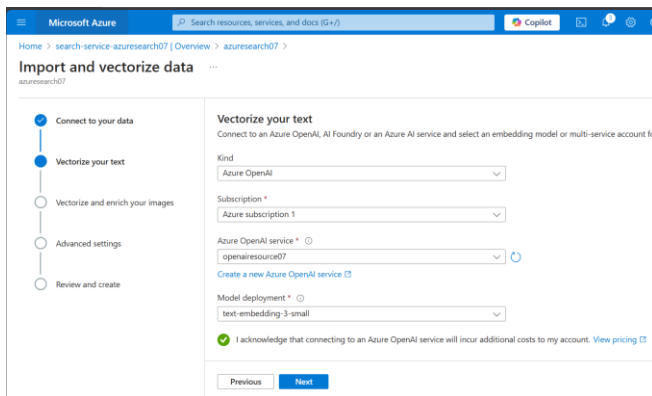
21. Select **Azure Blob Storage**



22. Select the subscription, storage account and container where all contract documents are stored, and click on **Next**



23. In the next screen, choose Kind as Azure OpenAI, your Azure subscription, newly created Azure OpenAI service, the text embedding model values. Click on the box to acknowledge that connecting to an Azure OpenAI service will incur costs and select **Next**



Microsoft Azure Search resources, services, and docs (G+/) Copilot

Home > search-service-azuresearch07 | Overview > azuresearch07 >

Import and vectorize data ...

azuresearch07

- Connect to your data
- Vectorize your text**
- Vectorize and enrich your images
- Advanced settings
- Review and create

Vectorize your text
Connect to an Azure OpenAI, AI Foundry or an Azure AI service and select an embedding model or multi-service account for

Kind
Azure OpenAI

Subscription *
Azure subscription 1

Azure OpenAI service *
openairesearch07

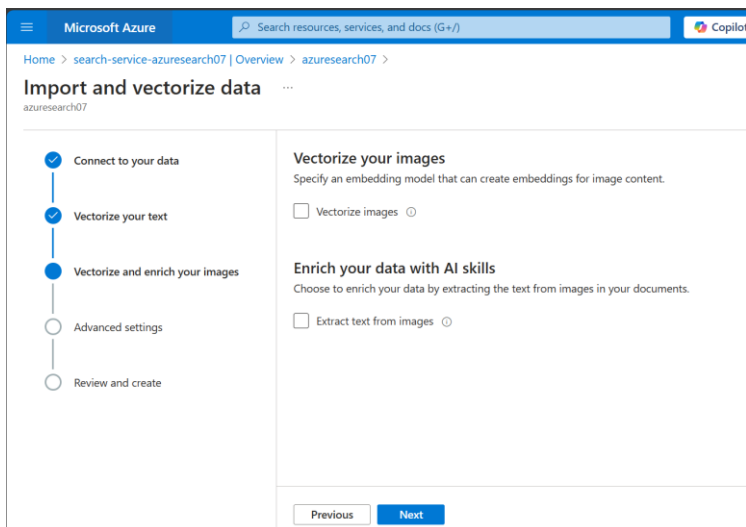
Create a new Azure OpenAI service

Model deployment *
text-embedding-3-small

I acknowledge that connecting to an Azure OpenAI service will incur additional costs to my account. [View pricing](#)

Previous Next

24. Select **Next**



Microsoft Azure Search resources, services, and docs (G+/) Copilot

Home > search-service-azuresearch07 | Overview > azuresearch07 >

Import and vectorize data ...

azuresearch07

- Connect to your data
- Vectorize your text
- Vectorize and enrich your images**
- Advanced settings
- Review and create

Vectorize your images
Specify an embedding model that can create embeddings for image content.

☒ Vectorize images

Enrich your data with AI skills
Choose to enrich your data by extracting the text from images in your documents.

☐ Extract text from images

Previous Next

25. Select **Next**

Microsoft Azure

Search resources, services, and docs (G+)

Copilot

Home > search-service-azuresearch07 | Overview > azuresearch07 >

Import and vectorize data

azuresearch07

- Connect to your data
- Vectorize your text
- Vectorize and enrich your images
- Advanced settings
- Review and create

Index fields
Shows a preview of the index fields and allows you to make updates. [Learn more](#)

[Preview and edit](#)

Schedule indexing

Schedule
Once

Previous Next

26. Update the **Objects name prefix** to `indexcustomersalescontract` and click **Create** to create a vector index.

Home > searchservice-1743359129488 | Overview > aisearchgpsworkshop >

Import and vectorize data

aisearchgpsworkshop

- Connect to your data
- Vectorize your text
- Vectorize and enrich your images
- Advanced settings
- Review and create

The wizard generates an index, indexer, data source, and skillset on your search service. You can view and independently manage these objects once the many other properties are fixed for the lifetime of the object. To customize the name, change the object name prefix.

Objects name prefix
indexcustomersalescontract

Review your configuration

Vectorize your text

Attached Azure OpenAI service	openaigpsworkshop
Deployment model	text-embedding-3-small

Others

Extracting text from images	Disabled
Semantic ranker	Enabled
Indexer run schedule	Once

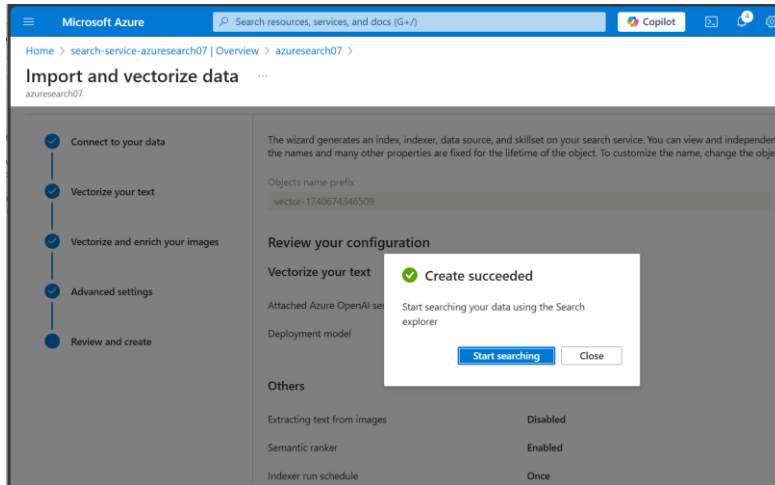
Previous Create

Commented [RL5]: what do you think of naming this index to something like 'indx_Customer_Contract Agreement' ?

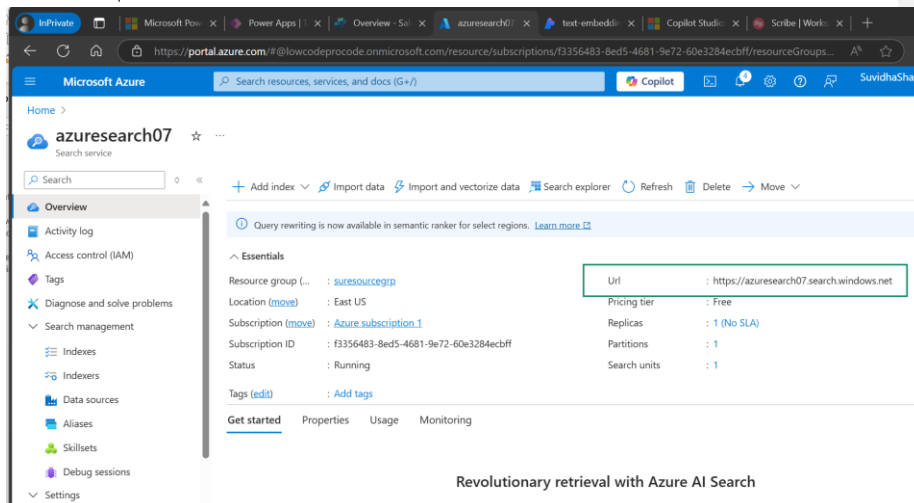
Commented [BB6R5]: @Rodrigo Cristelli Lugarinho and @Suvidha Shashikumar . I added a screen shot if we want to rename. Must be all small letters no underscores. If we do want to rename - need to add a sentence about that.

Commented [RL7R5]: looks great

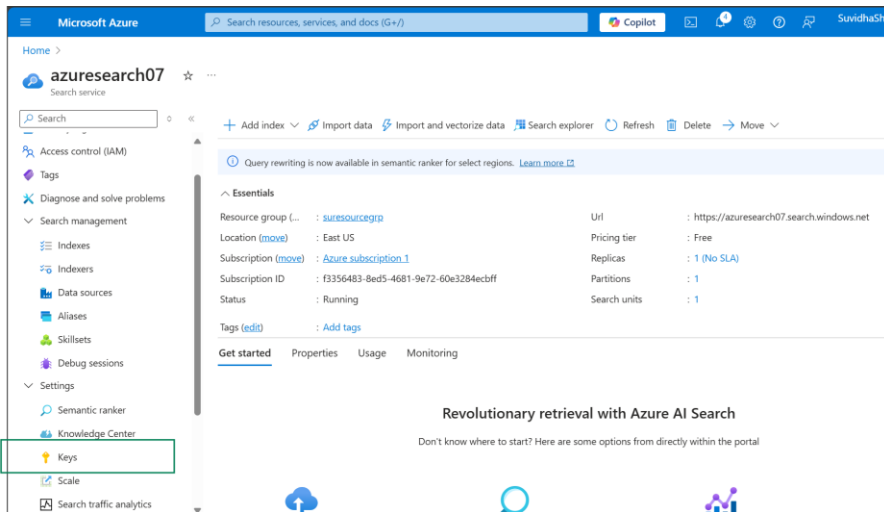
27. You should see a success message –



28. Go to **Home** page and open the **Azure search service** again. Copy the endpoint URL into a notepad.

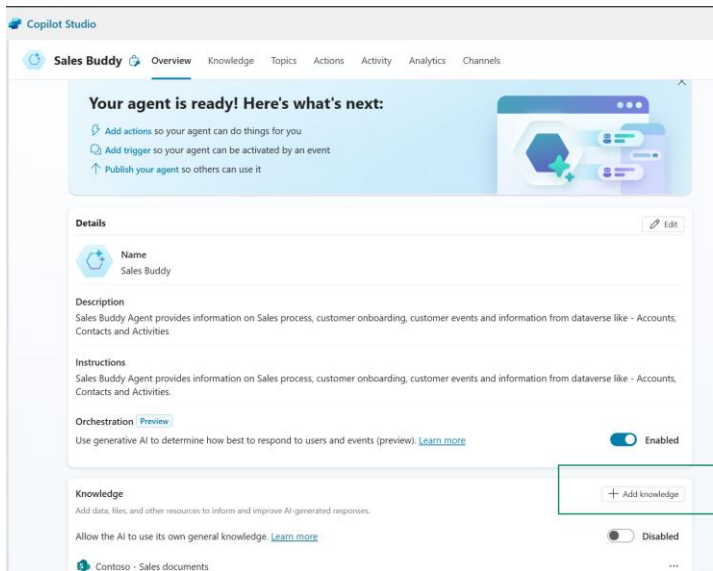


29. In the same window, under **Settings** select **Keys** and copy one of the 2 keys into a Notepad.

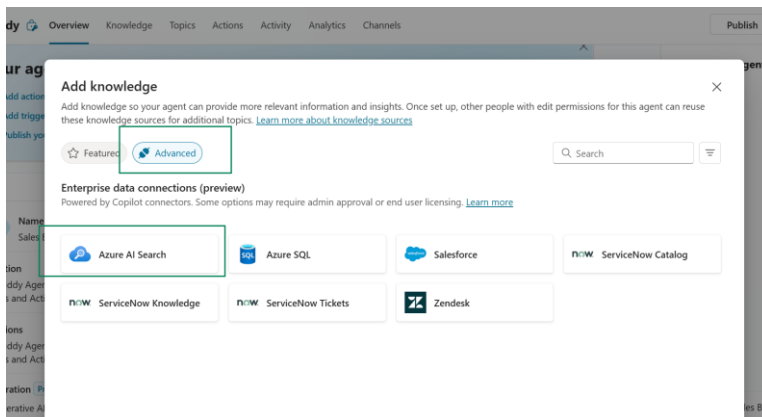


Now, your search service is ready to be used.

30. Open **Copilot Studio** and select the **Sales Buddy** agent. Under **Knowledge**, click on **Add Knowledge**.



31. In the Knowledge window, select **Advanced** tab and select **Azure AI Search**



32. Update **Knowledge name** = *Sales Buddy - Azure AI Search Contracts*;
Knowledge Description =

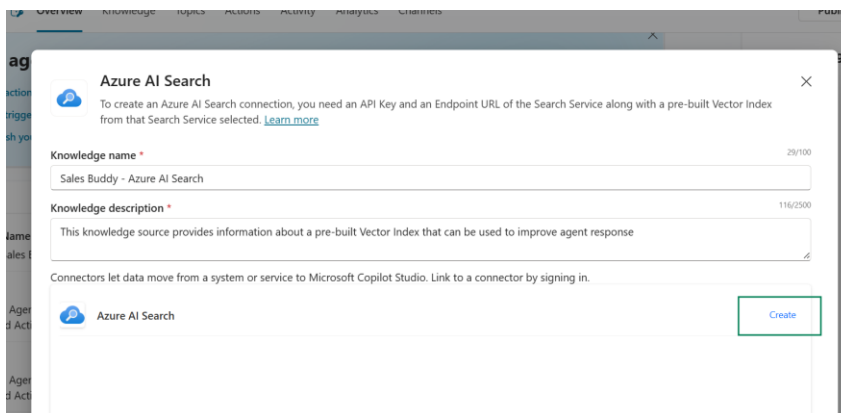
"This knowledge source provides access to customer contract agreements. Each contract file follows the format:

Customer Contract Agreement - [Customer Name].docx

Each contract contains essential details, including:

- **Scope of Services:** Defines the services provided
- **Payment Terms:** Specifies the total contract value, milestone-based payments, and due dates.
- **Service Level Agreement (SLA):** Outlines uptime guarantees, response times, and escalation procedures.
- **Data Privacy & Compliance:** Ensures compliance with regulations like GDPR, CCPA, and defines data ownership.
- **Contract Term & Renewal:** States the contract duration, renewal policies, and termination conditions.
- **Governing Law:** Specifies applicable legal jurisdiction "

Next, click on **Create** to create a connection to **Azure search service**



The screenshot shows a dialog box titled "Azure AI Search" with a close button (X) in the top right corner. Below the title, there is a brief instruction: "To create an Azure AI Search connection, you need an API Key and an Endpoint URL of the Search Service along with a pre-built Vector Index from that Search Service selected. [Learn more](#)".

The dialog contains two text input fields:

- Knowledge name *** (with a character count of 29/100): The text "Sales Buddy - Azure AI Search" is entered.
- Knowledge description *** (with a character count of 116/2500): The text "This knowledge source provides information about a pre-built Vector Index that can be used to improve agent response" is entered.

Below the description field, there is a line of text: "Connectors let data move from a system or service to Microsoft Copilot Studio. Link to a connector by signing in." followed by a small icon of a person.

At the bottom of the dialog, there is a section titled "Azure AI Search" with a "Create" button highlighted by a green border.

33. Paste the endpoint URL and Key from Notepad and select **Create**. Once the connection is successful, select **Next**.

Azure AI Search

To create an Azure AI Search connection, you need an API Key and an Endpoint URL of the Search Service along with a pre-built Vector Index from that Search Service selected. [Learn more](#)

Knowledge name * 29/100
Sales Buddy - Azure AI Search

Knowledge description * 116/2500
This knowledge source provides information about a pre-built Vector Index that can be used to improve agent response

Connectors let data move from a system or service to Microsoft Copilot Studio. Link to a connector by signing in.

* Authentication type Access Key

* Azure AI Search Endpoint URL https://azuresearch07.search.windows.net

* Azure AI Search Admin Key *****

Create

Back Next Cancel

34. Select the available vector index and select **Add**

Azure AI Search

Select a Vector Index and see Index details. The Vector Index is created using integrated vectorization. [Learn more](#)

Select a Vector Index *
vector-1740674346509

Document count
8

Storage size
182.03 KB

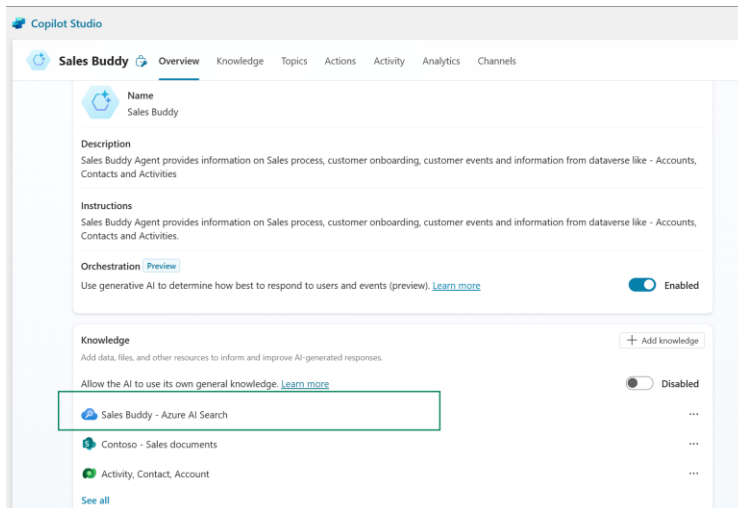
Vector Index size
145.71 KB

Add

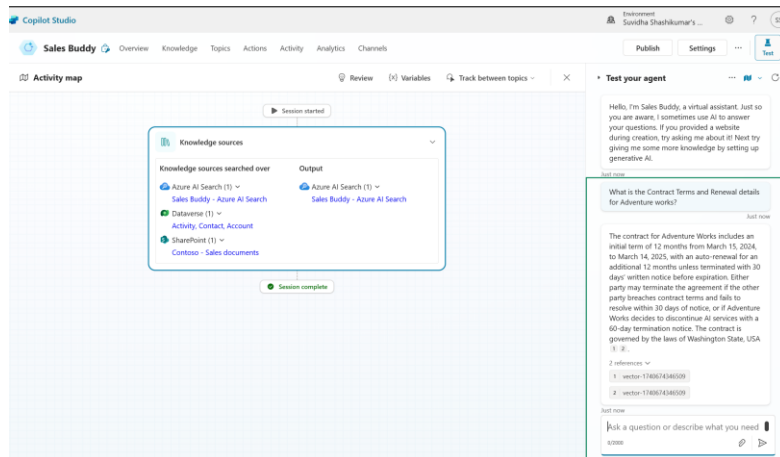
Back Add Cancel

35. You should see a new Azure AI Search knowledge in your Agent.

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36. Now, we're ready for the test. Open **Test window** and ask question – “*What are the Contract Terms and Renewal details for Adventure works?*”



Congratulations. You have completed Lab 6.