**Build your own copilot with   
Microsoft Copilot Studio**



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| **Scenario** | Demo script for session “Build your own copilot with  Microsoft Copilot Studio” |
| **Date Updated** | 9/13/2024 |
| **Products Covered** | Microsoft Copilot Studio |

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**Overview**

This document will step you through how to setup and deliver the demos for the “Build your own copilot with Microsoft Copilot Studio” session.

There are 2 demo segments to be delivered in this session.

1. The first is focused on creating a new copilot with templates in Copilot Studio and how those templates can be customized during setup.
2. The second segment focuses on how copilots can be extended further with topics, focusing on using AI Prompts to extend the copilot.

**BOM**

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| Item | Description | Location |
| Live Environment | You are responsible for your own account to do the demos |  |

# Preparation

Before delivering your session it’s a good idea to complete the setup steps below and familiarize yourself with the flow of the demo.

## Setup Steps

You will need to complete the following steps prior to delivering your demo

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| **Steps** | **Reference/Visuals** |
| 1. Open Edge and create a new profile to use for your demo 2. Select **Start without your data** 3. Click **Confirm and start browsing** |  |
| 1. Navigate to <https://CopilotStudio.Microsoft.com> 2. Login with your credentials |  |
| 1. Switch to your developer environment for your account |  |

# Demo scripts

## 1: Create a copilot from a template

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| **Steps** | **Talk Track** | **Reference/Visuals** |
|  | Let’s start by showing you how quickly you can get started building your own copilots with templates in Microsoft Copilot Studio. |  |
| 1. Scroll down to the templates section and select “See All” | On the Copilot Studio home page, if you scroll down, you’ll see a section that lists some templates that you can start with. If you select “See All” then you can browse all of the available templates |  |
| 1. Select the “Safe Travels” template | To get started you can choose any one of these templates which are fully setup with the data you need to get started but are also customizable.  Let’s choose the “Safe Travels” copilot template which assists us in getting travel related information |  |
| 1. Show the Safe Travels Copilot Config Screen    1. Optional: Point out the Template Instructions Link at the top which points to Learn and has more details about the template setup | Here we can make changes to the template before we create it. You’ll notice this template provides custom instructions for what the copilot is supposed to do, “You are an assistant that helps answer questions about traveling safe both domestically and internationally. Please respond in a polite manner.”  And it includes a knowledge source for us to the US travel website. All of this is customizable though  \*\*You’ll see a link at the top with template instructions that goes to a Learn page with more information about how to use and configure this template |  |
| 1. Select the “Add Knowledge” button | For example, we can add additional knowledge to the safe travels copilot by selecting the “Add Knowledge button |  |
| 1. Select “Public Website” | In the dialog box, you can select the type of knowledge that you want to add, whether that be public websites or SharePoint or OneDrive sites.  Since this is a travel copilot, I want to give it knowledge of other locations so I’m going to select “Public Website” here |  |
| 1. Enter another travel site URL and select “Add” | Now I can put in a URL to another public website, and I’ll put in the link to the Canada travel website (<https://travel.gc.ca>) and then click “Add”  \*\*Please feel free to replace this extra website with the travel website for the region that you are delivering the session from. For example, if you are delivering from Europe, you can use this website (<https://europa.eu/youreurope/citizens/>) |  |
| 1. Change the Name of the website | Now we’ll just confirm the settings for this new public website knowledge source. It suggests a name and a description for what the website is which will be used for generative answers to know how to route conversations. You can change the name here to something more descriptive like “Canada Travel Site” and then click “Add” to make that site available as a knowledge source |  |
| 1. Test the US data source | Now we can see that the knowledge has been added and we can begin testing. In the Test pane on the right-hand side, we can type a question: “What is the US Visa Policy?”  And the copilot will return an answer with a link to the site that it got it from. |  |
| 1. Test the Canada data source 2. Click Create to provision the copilot | We can do one more test to see if it’s also getting data from the Canada travel site that we added by asking:   “What is the best location in Canada for a ski trip?”  And it will come back with an answer  Now that we know everything is working, we can create the copilot by clicking the Create button in the upper right-hand corner |  |

## 2: Create a topic and add an AI Prompt

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| **Steps** | **Talk Track** | **Reference/Visuals** |
|  | Earlier we created a copilot that can chat over our data to answer questions about travel. Now let’s see how we can extend this by creating a custom topic that we can add an AI Prompt in. |  |
| 1. Open the Safe Travels copilot you created in the demo above | We’re going to be using something called an AI Prompt to extend the capability of our copilot. |  |
| 1. Go to the **Topics** tab 2. Click the **Add a topic** button 3. Select From Blank | We want to extend our copilot by adding a custom topic that can create a travel plan for a user who is looking for ideas for a new trip. To do this we need to go to the topics section of our copilot. We’ll select “Add a topic” and choose the “From blank” option, although, depending on what you are wanting to do, you can also have copilot help you create a topic from a description. | A screenshot of a computer  Description automatically generated |
| 1. Name the topic **Travel Plans** 2. Enter the trigger phrases | Now we are in the topic builder. Let’s first name our topic “Travel Plans” so that we know what this topic is about. Every topic has a trigger where you can add topic phrases to. These phrases are instructions for Copilot Studio to know when to trigger the topic. Although you don’t have to add a lot of different options, it helps to at least enter a couple of phrases. In our case, lets add “Travel Plan” and “Can you help me build a travel plan?”. |  |
| 1. Click the **plus button** below the trigger 2. Select **Ask with adaptive card** 3. Paste the adaptive card | Now that we have defined our trigger, we want to ask the user some questions. To avoid asking the questions one by one, we will add an adaptive card that will ask two questions at once. To do that we can click on the plus button below the trigger to add a new node. Then we can choose Ask with an adaptive card. Select the icon on that card to open the sidebar. Paste the following adaptive card there:  {  "type": "AdaptiveCard",  "$schema": "http://adaptivecards.io/schemas/adaptive-card.json",  "version": "1.5",  "body": [  {  "type": "TextBlock",  "size": "Medium",  "weight": "Bolder",  "text": "Travel plan"  },  {  "type": "TextBlock",  "text": "We need a little bit more info from you to get you some recommendations",  "wrap": true  },  {  "type": "Container",  "items": [  {  "type": "Input.Text",  "placeholder": "Enter your destination",  "label": "Where are you going to?",  "id": "destination",  "isRequired": true,  "separator": true,  "errorMessage": "Please enter the destination of your travel."  },  {  "type": "Input.Text",  "placeholder": "Enter the amount of activities",  "label": "How many activities are you looking for?",  "id": "number",  "isRequired": true,  "separator": true,  "errorMessage": "Please enter a number of activities."  },  {  "type": "ActionSet",  "actions": [  {  "type": "Action.Submit",  "title": "Submit"  }  ]  }  ],  "style": "emphasis"  }  ]  } |  |
| 1. Click on the **Expand** icon to be able to show the adaptive card you just posted. 2. Select the **X** to exit out of the adaptive card JSON viewer. 3. Select the **X** to close the Adaptive Card Node properties sidebar. | Now we have pasted the adaptive card in the sidebar, let’s expand the view a bit, so that you can see the adaptive card JSON better. Let’s close out of the adaptive card JSON viewer and the sidebar to show you how the adaptive card looks. As you can see, the card has a title, a little description, two questions and a submit button. It’s much like a form. |  |
| 1. Click the **plus button** below the ask with adaptive card action. 2. Select **Call an action** > **Create a prompt** 3. Name the prompt **“Travel Plan”** 4. Enter **the prompt** 5. Open the **Input** section in the prompt settings 6. Create an input with the name Number and add 3 as sample data 7. Create an input with the name Destination and add Seattle, USA as sample data 8. Replace **placeholder** **[Number]** with the Number input 9. Replace **placeholder [Destination]** with the Destination input 10. Select **Test prompt** button 11. Select **Save custom prompt** button | Next, we want to do something with the input we get from the user. For this, we are going to use an AI Prompt. An AI Prompt can help us generate content by sending a prompt to a Large Language Model (LLM) with one or more inputs.  Let’s create a new AI prompt by selecting Create a prompt. This will open the Prompt Builder.  Naming the prompt is always a good idea – since you can easily identify it later.  Next, we need to work on our prompt. Paste the following prompt: “Please give me [Number] options for activities in [Destination] for people who are there for the first time. Please return a numbered list with emojis in the name of the activity and give it a brief description.”.  This prompt contains a couple of placeholders like [Number] and [Destination]. These are placeholders for inputs, so let’s first create these inputs before we can replace them.  Open the input section and create the inputs. The first input is called Number and will have 3 as the sample data. The second input is called Destination and will have Seattle, USA as the sample data. The sample data is being used for testing.  Replace the placeholders by removing the text and adding the inputs by selecting insert and the input name.  Now I can hit the “Test Prompt” button, and it will run the prompt. This enables me to test out my prompt before saving. If I’m not happy, I can iterate on the prompt, but if I am happy, I can continue by saving the prompt. Let’s do that now. Save the prompt by selecting the “Save custom prompt” button. |  |
| 1. Select the destination output from the adaptive card as the input for the destination input for the prompt 2. Select the number output from the adaptive card as the input for the number input for the prompt 3. Create a new variable as the output of the prompt and name it “promptOutput” 4. Click the **plus button** below the prompt action. 5. Select **Send a message** 6. Select the **variable icon** 7. Select **promptOutput.text** in the select a variable sidepanel 8. **Save** the topic 9. **Test** the topic by sending “Can you help me build a travel plan?” in the test pane | Now we need to configure the prompt in Copilot Studio. Let’s link the outputs from the adaptive card to the inputs from the prompt. We can do this by selecting the arrow to the right and selecting a variable in the select a variable pop out.  Next, the output needs to be stored. To do this, we need to add a variable. After creating the variable, let’s rename it to something useful like “promptOutput”.  Now we have the output, we want to send the generated content to the user. Let’s create a “send a message” node for that. Next, select the generated text from the prompt – which is named promptOutput.text.  And now we’re done! Let’s test it out! Let’s trigger our topic by sending “Can you help me build a travel plan?” to our copilot in the test pane.  This will show us the adaptive card. |  |

# Appendix

## ZoomIt Setup

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| **Steps** | **Description** | **Reference/Visuals** |
|  | If you are on a PC, you can make the demos go more smoothly by using the DemoType feature in ZoomIt. Review the instructions below for how to install and use this feature |  |
| 1. Setup DemoType on PC | You need to install ZoomIt on your PC to use DemoType. DemoType enables you to paste all text in the demo script with a shortkey while it looks like you’re typing. We prepared a file for you which you can use as an input for DemoType.  First, go to the Microsoft Store on your device and install [Sysinternals Suite](https://www.microsoft.com/store/productId/9P7KNL5RWT25?ocid=pdpshare). ZoomIt is part of the Sysinternals Suite.  When installed, search for ZoomIt and open it. Make sure that both “Show tray icon” and “Run ZoomIt when Windows starts” are checked.    Download the input file for DemoType [here](https://microsoft.sharepoint.com/:t:/t/AITourPowerPlatform/EXIHHfMOb_hMkFY5LMLrYWYBXHQjrzz8tGFbMBY2z2bqCQ?e=bqYmfG) (Microsoft only). Review the file and make sure to replace the URLs if needed.  Select the DemoType tab in ZoomIt and select the input file you just reviewed.    Remember the DemoType toggle (Ctrl+7), because this is the shortkey you have to use for pasting the texts. |  |

# Version history

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| --- | --- | --- | --- |
| Date | Version | Resources Updated | Notes |
| 9/13/2024 | **1.0** |  | **Initial Creation** |