



POWER PLATFORM CONFERENCE 2025



Recipes for success:

How to prep, cook and serve custom
agents

with

Dian Taylor

David Warner



Microsoft





Dian Taylor

Director



LinkedIn Learning
Instructor



<https://D365Goddess.com>

@D365Goddess

<https://www.youtube.com/d365goddess>

<https://www.linkedin.com/in/diantaylor/>



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Director



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<https://D365Goddess.com>

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David Warner II



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WD:WARNER
DIGITAL

<http://warner.digital>

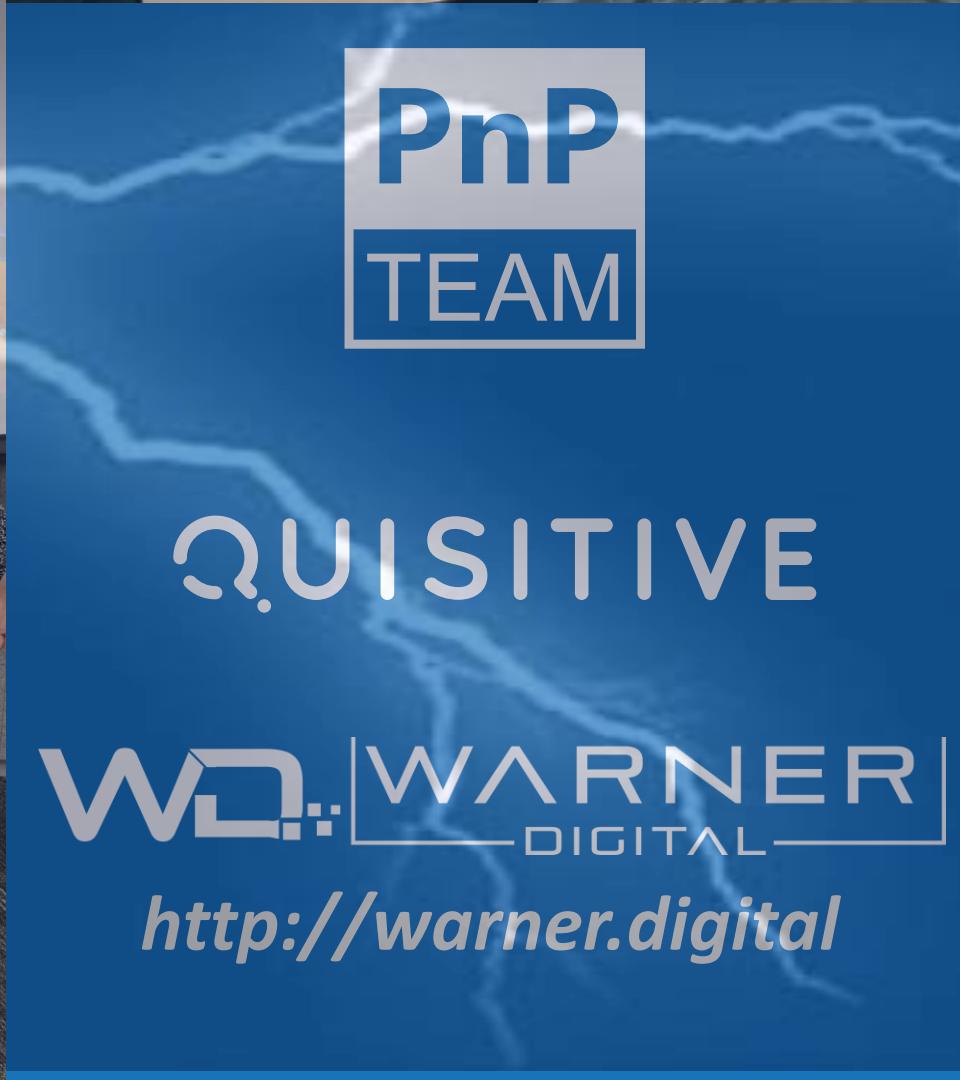
David Warner II



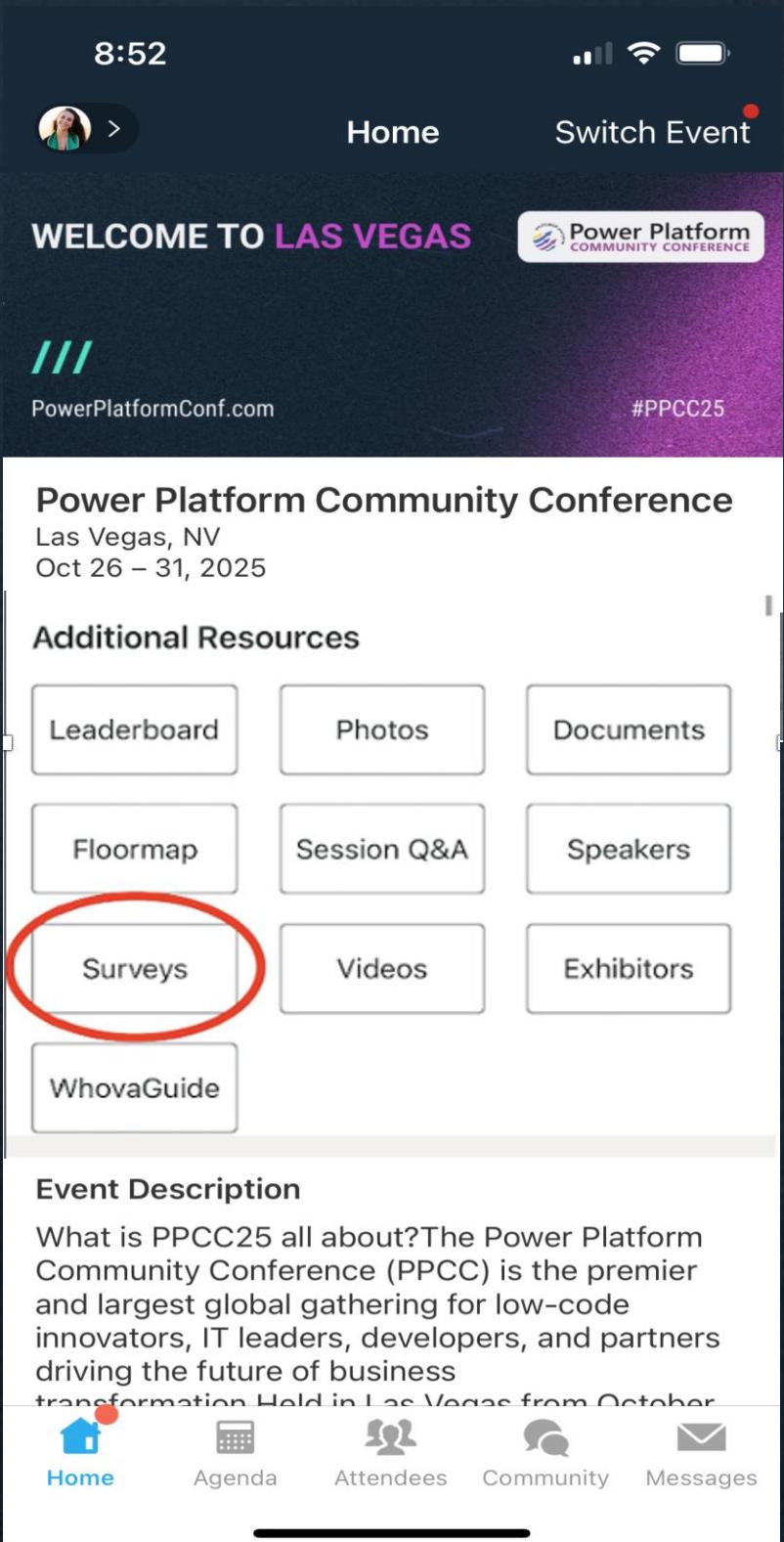
@davidwarnerii



david@warner.digital



Session Feedback Surveys



We really want to hear from YOU!

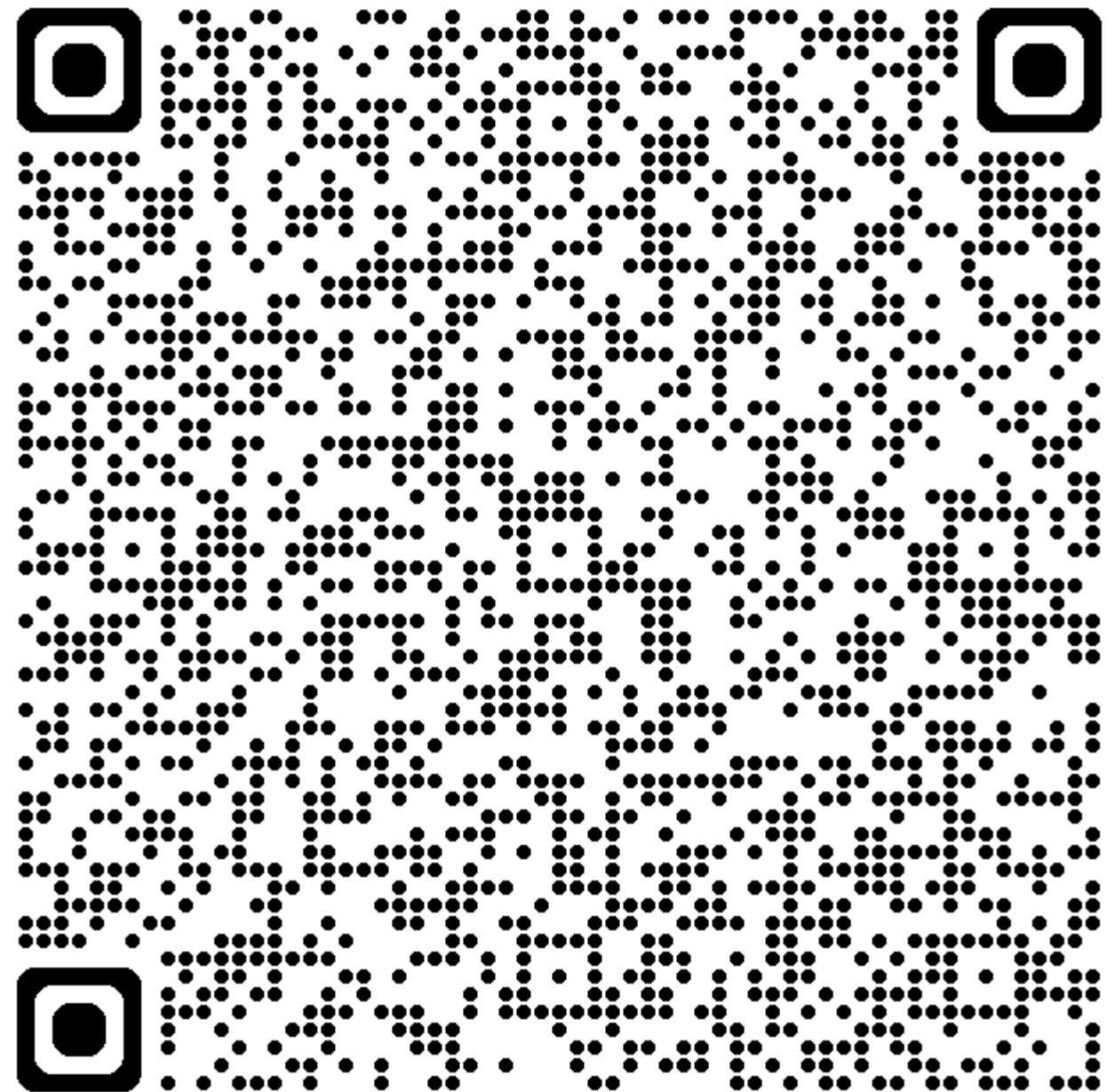
In the pursuit of making next year's Power Platform Community Conference even better, we want to hear your feedback about this session.

Here's How -

- Simply go to the Whova App on your smartphone*
- Scroll down on the Power Platform Community Conference Homepage to 'Additional Resources' to click "Surveys".*
- Click Session Feedback.*
- Scroll down to find this session title.*
- Complete the session feedback survey.*
- Finally, click 'Submit'*
- It's just that easy!*

Join the Team!!!!

<https://ppcc25.m365.ms>



Workshop Agenda



Start	End	Topic	Duration
8:00 AM	8:10 AM	Welcome and Intro	10
8:10 AM	8:20 AM	Login and setup	10
8:20 AM	8:35 AM	Introduction to Copilot Studio	15
8:35 AM	8:50 AM	What is Generative AI	15
8:50 AM	9:00 AM	Using Knowledge in your agent	10
9:00 AM	9:10 AM	BREAK	10
9:10 AM	9:15 AM	Using Knowledge in your agent	5
9:15 AM	9:25 AM	Knowledge Demo	10
9:25 AM	9:35 AM	Lab 1 - Build your first agent with knowledge	10
9:35 AM	9:45 AM	Discussion on lab	10
9:45 AM	10:05 AM	Building Topics	20
10:05 AM	10:20 AM	Topic Demo	15
10:20 AM	10:35 AM	Lab 2: Add a topic to your agent	15
10:35 AM	10:45 AM	Add Conditions to a Topic	10
10:45 AM	11:00 AM	Lab 3: Add conditions to the topic	15
11:00 AM	11:10 AM	Inputs and output variables	10
11:10 AM	11:25 AM	Extend your agent with Tools	15
11:25 AM	12:25 PM	LUNCH BREAK	60
12:25 PM	12:40 PM	Tools Demo	15
12:40 PM	12:55 PM	Lab 4: Add a tool to your agent: Power Automate	15
12:55 PM	1:10 PM	Lab 5: Add a tool to your agent: Dataverse Connector	15
1:10 PM	1:20 PM	Publish your agent to channels	10
1:20 PM	1:35 PM	Channels Demo - Publish agent on Teams	15
1:35 PM	1:40 PM	Autonomous Agents in Copilot Studio	5
1:40 PM	1:55 PM	Autonomous Agents Demo	15
1:55 PM	2:05 PM	BREAK	10
2:05 PM	2:25 PM	Copilot Lite & Sharepoint agents	20
2:25 PM	2:30 PM	Component Collections	5
2:30 PM	2:45 PM	Use case discovery for agents	15
2:45 PM	2:55 PM	Q&A	10
2:55 PM	3:00 PM	End/Thank you/Selfie	5



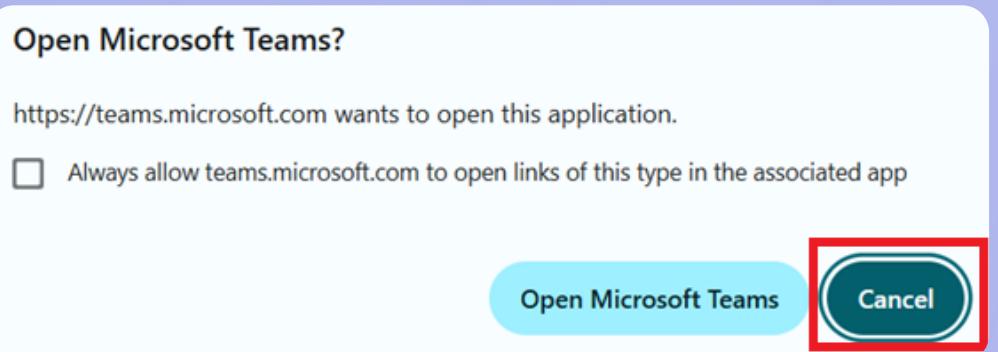
Login and Setup



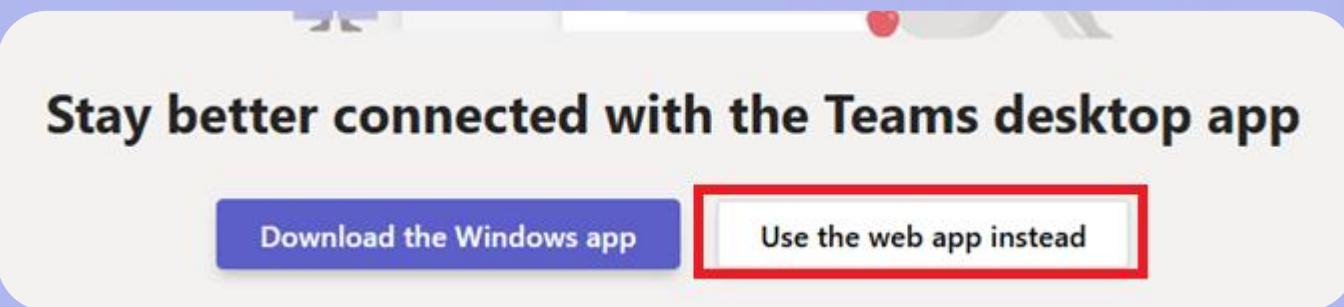
Login and Setup



- Open an in-private browser
- Use the login creds that were shared with you
- Navigate to <https://tinyurl.com/4jrhkcv6>
- When the ‘Open in Microsoft Teams’ window pops up click “CANCEL”



- Then click “**Use the web app instead**”



- The agent will help get you get setup





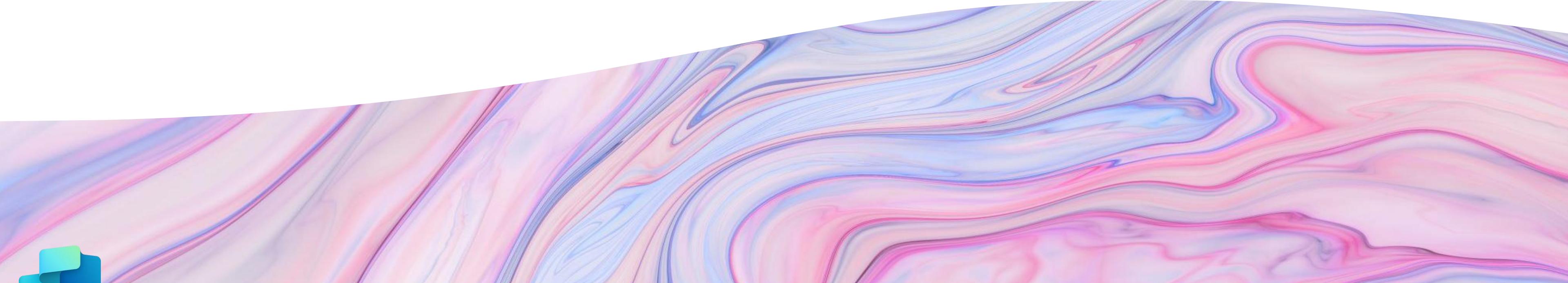
Introduction to Copilot Studio

Branding and Terminology

Microsoft 365 Copilot is the UI for AI – your personal, intelligent assistant for work, grounded in your data and integrated into your Microsoft apps.

Microsoft Copilot Studio is the low code tool for creating agents and extending M365 Copilot.

Agents use AI to automate and execute business processes, working alongside or on behalf of a person, team, or organization. Agents range from simple, prompt-and-response agents to more advanced, fully autonomous agents.



What is an agent?

Agents are AI assistants that can help **optimize business processes** and **enhance productivity** using large language models and generative AI.

Publish to...

Your applications

Deploy agents to your website and other line of business applications



Microsoft 365 Copilot

Add agents that give Copilot focused knowledge and new skills



Copilot for
Sales



Copilot for
Service



Copilot for
Finance



Power Platform

Extend Power Platform with agents that transform your low code solutions.



Power Apps



Power Pages



Dynamics 365

Build agents that integrate and improve business processes



Dynamics 365
Sales



Dynamics 365
Finance



Dynamics 365
Customer Service



CHATBOT vs AGENTS

Agents are the new chatbots (and more).

You use Copilot Studio to build agents.

Capability	Chatbots	Agents
Interactions	Scripted interactions	Natural, conversational interactions Can act autonomously
Responses	Basic rule-based responses Scripted responses	Advanced, adaptive responses Generates responses
Complexity	Simple, pre-defined tasks	Complex, dynamic tasks
Knowledge	Pre-defined knowledge when built	Reasons over provided knowledge Can make decisions based on knowledge

What can an agent do?

- Chat with employees or customers
- Follow instructions about tone and how to behave
- Understand and reason over organisational knowledge
- Take actions such as sending an email
- Interact with business systems – create or retrieve data
- Act autonomously (based on a timer or trigger, like an automation)



Spectrum of agents

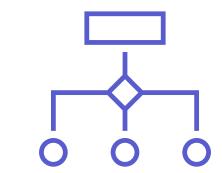
Simple



Retrieval

Retrieve information from grounding data, reason, summarize, and answer user questions

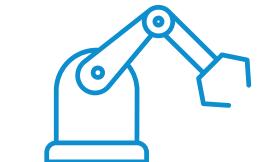
Generally available



Task

Take actions when asked, automate workflows, and replace repetitive tasks for users

Generally available



Autonomous

Operate independently, dynamically plan, orchestrate other agents, learn and escalate

Generally available

Advanced

Agents vary in levels of complexity and capabilities depending on your need

Explore a continuum of solutions

IT Helpdesk agent

How do I connect to the corporate network?



Device Refresh agent

Request a new laptop and send approvals via IT Service tool.



Lead Gen agent

The agent has identified and researched 15 new leads for you to review.



Simple



Advanced

Project Tracker agent

What is the status of phase 2 for project X and the remaining budget?



Budget Management agent

Review outstanding open PO's and begin financial planning.



Customer Support agent

The agent has identified new support issues and triaged to other agents.





Microsoft Copilot Studio

Your agent, your way

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



The screenshot shows the Microsoft Copilot Studio web interface. On the left, there's a sidebar with icons for Home, Create, Agents, Library, and more. The main area has a title 'Describe your agent to create it' with tabs for Helpdesk, Expense tracking, and HR and benefits. Below that is a text input field with placeholder text 'Use everyday words to describe what your agent should do'. A note says 'This AI-powered feature above is currently in preview. See terms and supplemental terms'. Underneath is a section titled 'Recent' with a table of agents:

Name	Type	Last modified	Last published	Owner	Engaged sessions
Autonomous Agent	Agent	Dian Taylor 2 hours ago	3 hours ago	Dian Taylor	0
Copilot for Microsoft 365	Microsoft	2 days ago	Never		--
Sales Copilot Power Virtual Agents Bot	Agent	# Microsoft Copilot Studio 15 hours a...	15 hours ago	SYSTEM	0
CustomerServiceKnowledgeHarvest	Agent	SYSTEM 23 days ago	2 months ago	SYSTEM	0

At the bottom, there's a section titled 'Explore agents' with four cards: Safe Travels, Website Q&A, Team Navigator, and IT Helpdesk.

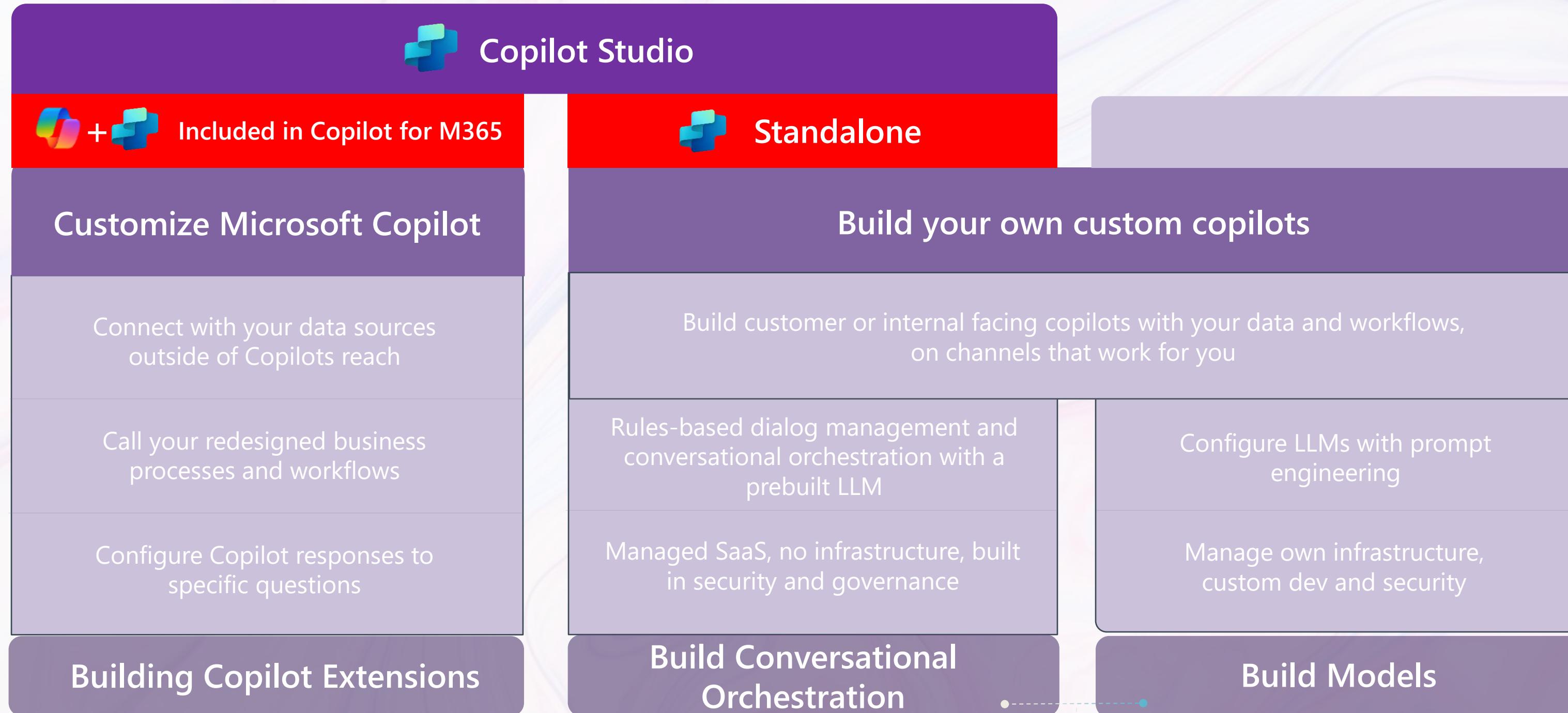
Capabilities of Copilot Studio

	 Post to multiple channels	 IVR/ Telephony	 Extend Copilot for Microsoft 365	
World Class UX	Declarative	Rich Response	Intuitive	Ease of use
Logic + Automation	Power Fx	Generative Answers + Actions		Power Automate
Next-Gen AI	Prebuilt LLM	Generative AI	Proactive suggestions	Bring your own model (Azure CLU)
Connected experience	Microsoft Teams	Dynamics 365	1000+ Connectors	Azure AI Bot Service
Copilot Lifecycle	Test pane	Collaboration	Solution management	ALM Automation
Security + Governance	Trusted identity	Full visibility	Advanced RBAC	Granular DLP control

Microsoft's end-to-end copilot building platform



Different building journeys for different needs



Extend Copilot Studio
with Azure AI Studio

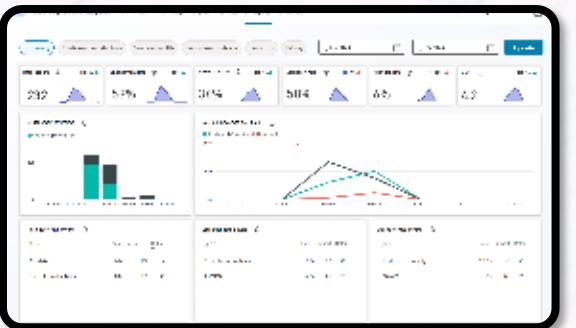
Create, manage, publish and extend agents

Live in minutes - all from one tool
and E2E SaaS service

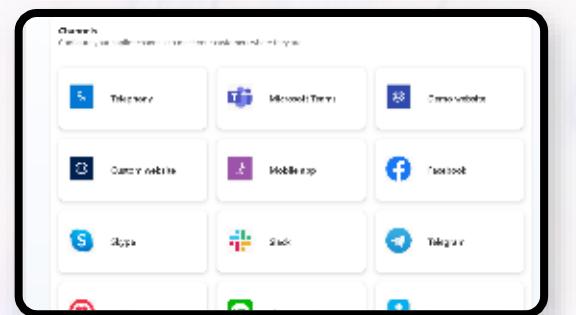
Integrate with AI Services
Integrate with Azure AI Studio,
Azure Cog Services, Bot
Framework and various other
Microsoft conversational services



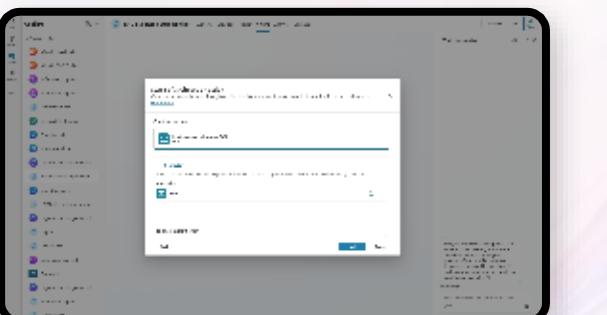
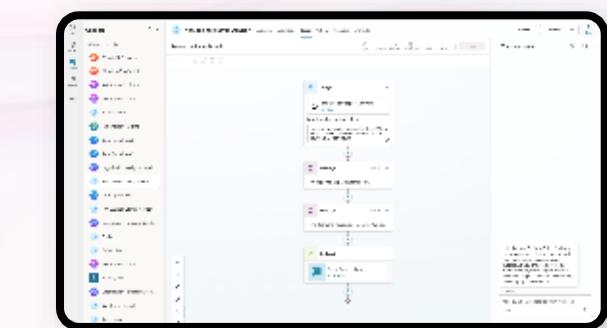
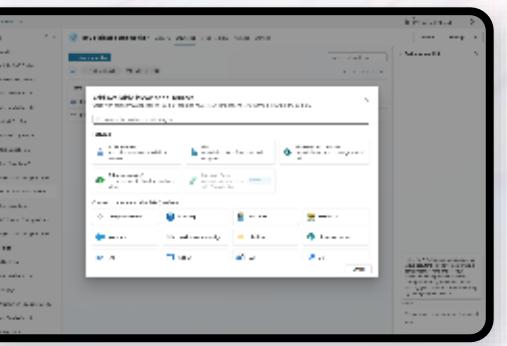
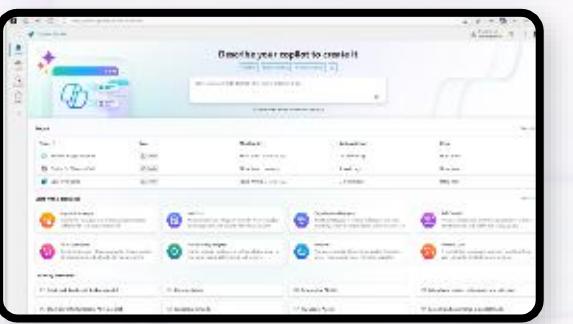
Monitor and Improve
with rich out-of-the-box
insights and analytics



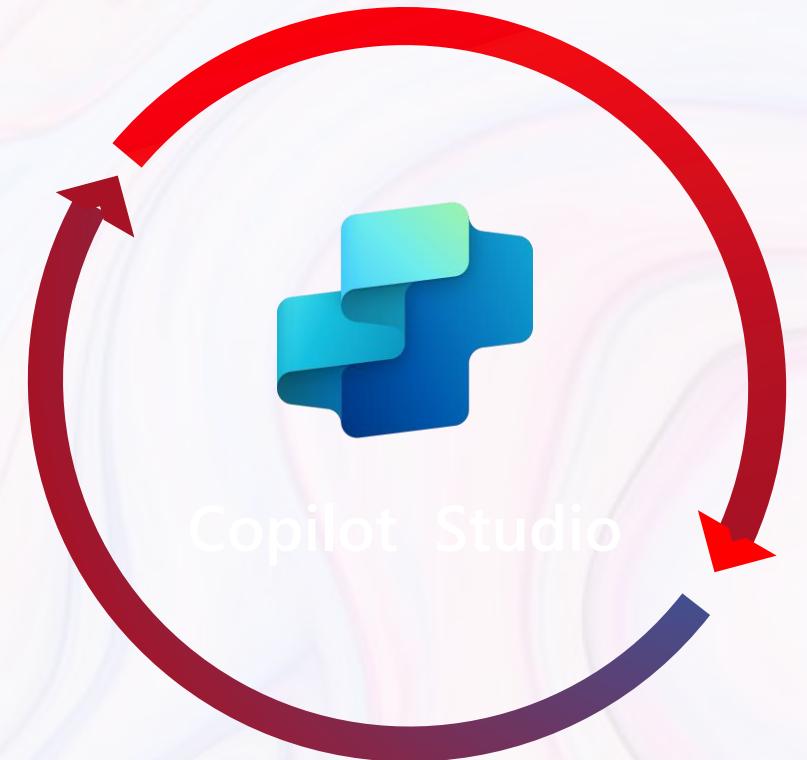
Publish to multiple channels,
and go live instantly on the SaaS
service or choose to extend
Copilot for Microsoft 365 with
your custom capabilities



Analyze & Improve



Build & Publish



Chat over knowledge with Gen AI
Get enterprise specific answers
over your files, websites, internal
shares, Dataverse, third party
systems and more

Create specific topics
Supplement generative
responses with specific, curated
topics where you want tight
control. Build them easily with
the powerful graphical studio

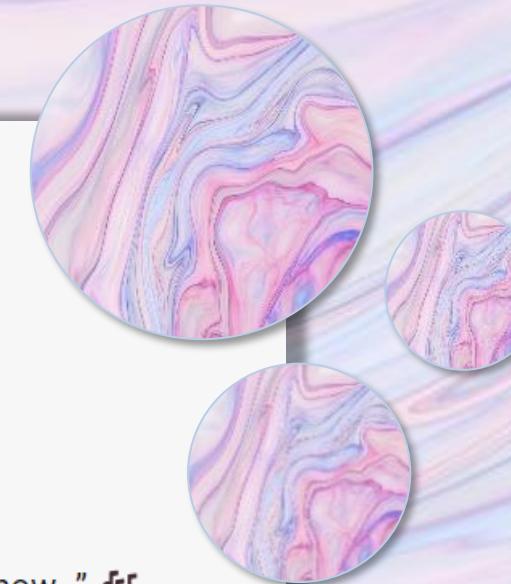
Build actions & Plugins
Create actions, plugins, use
1000s of pre-built connectors
or Power Automate to call your
backends and APIs

Generative AI and Large Language Models

You
Mary had a little

Copilot
It sounds like you're starting the classic nursery rhyme! "Mary had a little lamb, its fleece was white as snow..." 🎵
Is there something specific you'd like to do with this rhyme? Maybe create a fun design or illustration?

1 of 30



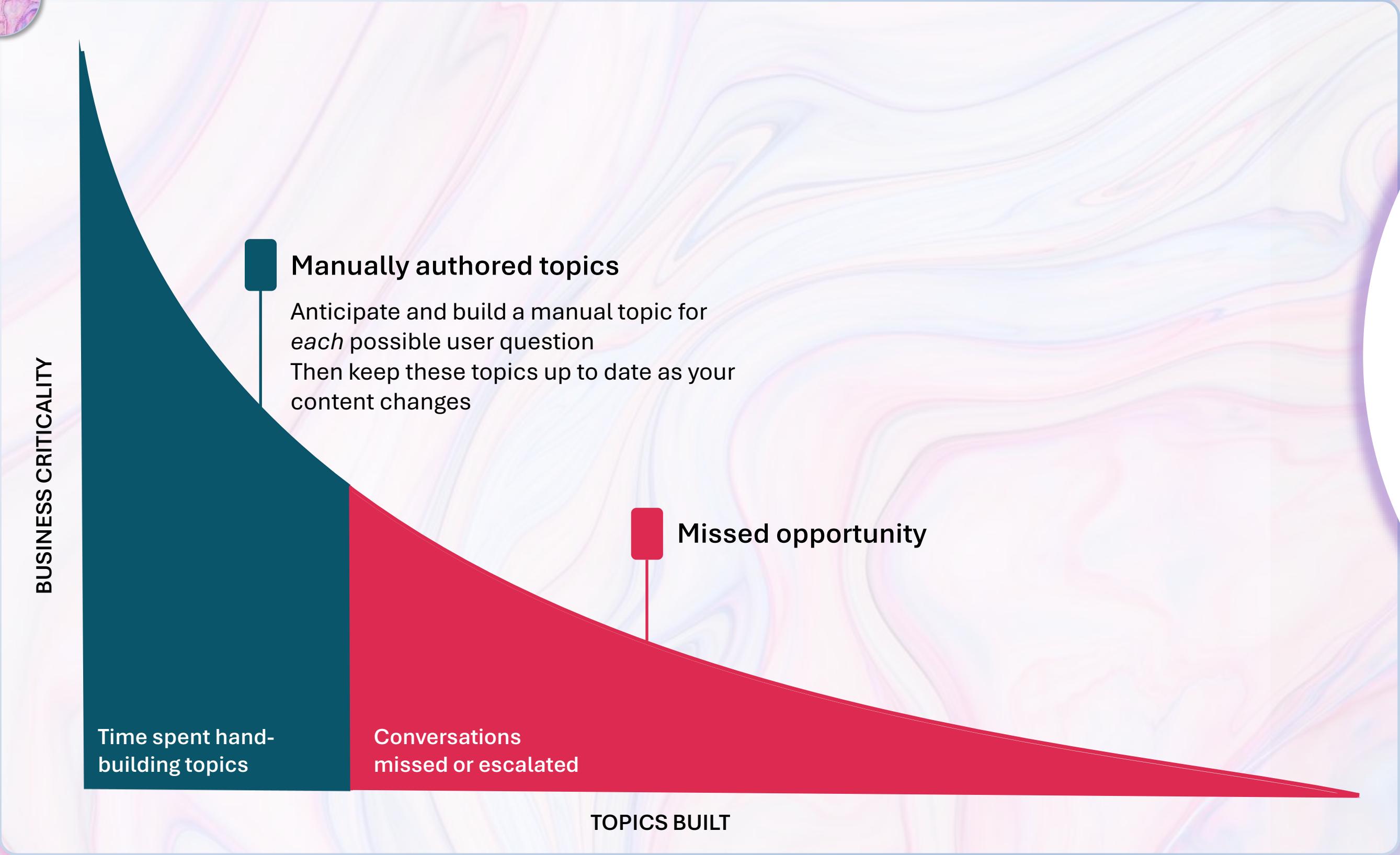
Mary had a little

Copilot
It sounds like you're starting the classic nursery rhyme "Mary Had a Little Lamb"! 🐐
Would you like to hear more about the rhyme, or is there something specific you'd like to know or discuss?

Edit in Pages Copy

AI-generated content may be incorrect

Generative AI is changing conversational AI

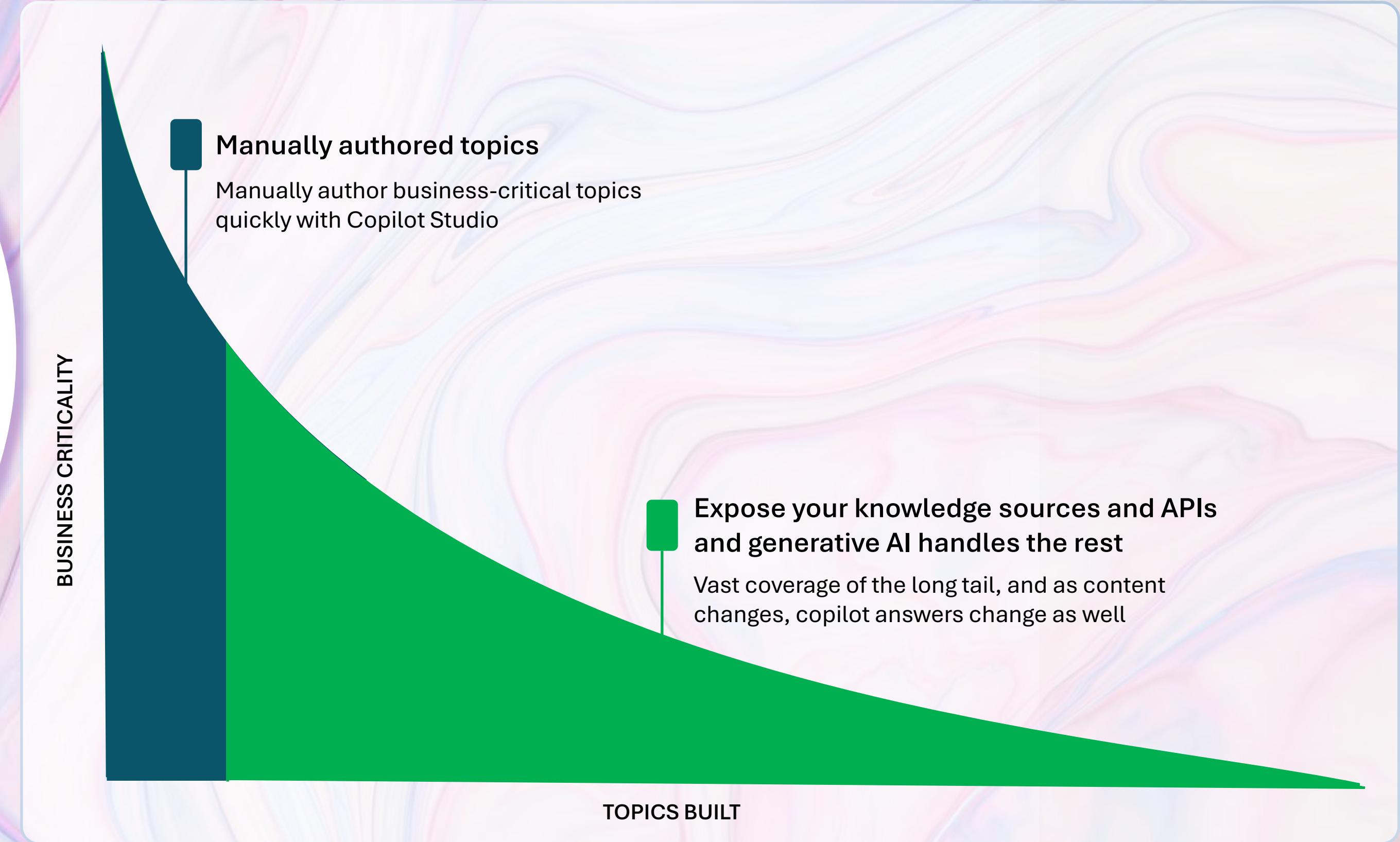


emPOW



Generative AI is changing conversational AI

WER
everywhere



After generative AI

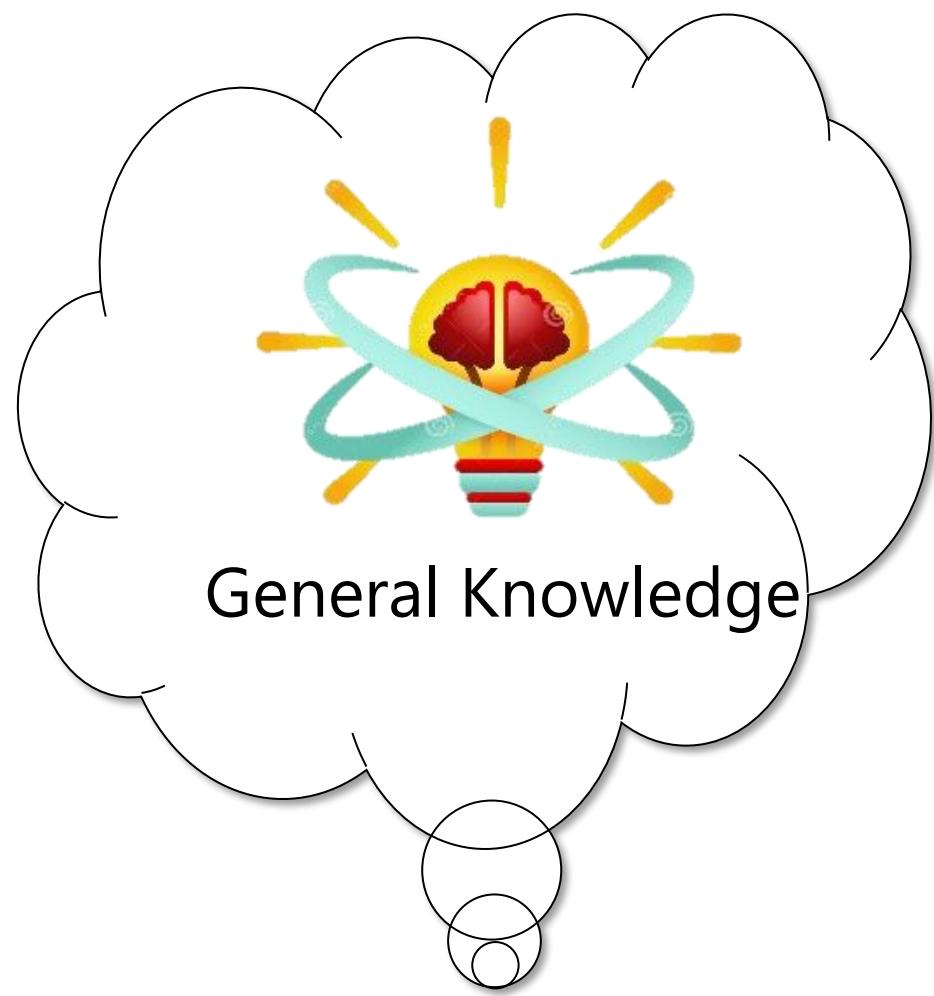
Knowledge is Power



Knowledge is at the heart of AI transformation



What is grounding?



+



Business Data



What is grounding?



Grounding

Why is grounding in your data important?

- Improve accuracy and relevance
- Risk mitigation (fewer hallucinations)
- Tailor the generative AI to your specific context (without a custom LLM)



Exercise : General Knowledge vs Agent Knowledge



Crazy Recipe Agent
Ask him about recipes, ingredients and backstories!

<https://tinyurl.com/mccxe59u>



Discussion: General Knowledge vs Agent Knowledge



Crazy Recipe Agent
Ask him about recipes, ingredients and backstories!

<https://tinyurl.com/mccxe59u>

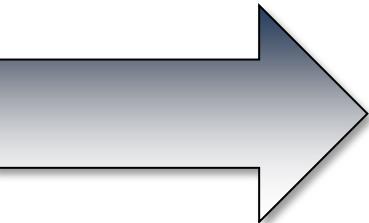


Knowledge Sources



Public websites

Add public websites for real-time answers

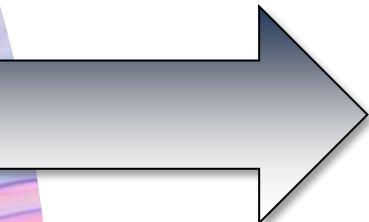


Publicly viewable content
Indexed by Bing
No authentication



Files

Upload documents from your local computer

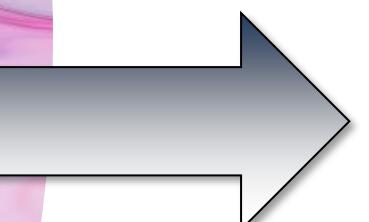


Up to 512 MB per file / 500 files max
No video, audio, executable or encrypted files
Dataverse Search Indexing
Support for annotated images embedded in PDF



SharePoint and OneDrive

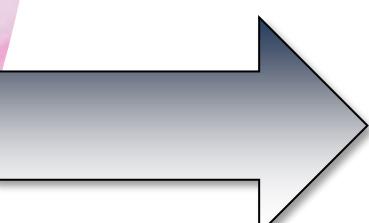
Securely integrate and manage internal data



Only available for authenticated users (Microsoft Entra ID authentication)



Dataverse



Only available for authenticated users (Microsoft Entra ID authentication)

Additional Knowledge Sources



Dynamics 365



Azure SQL



Zendesk



Salesforce



Snowflake



Confluence



Azure AI Search



SAP OData



ADLS Gen2
Microsoft Graph only



ServiceNow



Databricks



Oracle Database

Demonstration 1: Build agent with knowledge



The image shows a laptop screen displaying the Copilot Studio interface. The title bar reads "Copilot Studio" and "MPPC Copilot". The main menu includes "Home", "Create", "Copilots", and "Library". The "Topics" tab is selected, showing a list of custom topics. The list includes:

Name	Trigger	Description	Editing	Last modified	Errors	Enabled
Classic-Order Inquiry	Phrases		Dian Taylor	1 hour ago	On	On
Classic-Restaurant Reservation	Phrases		Dian Taylor	1 hour ago	On	On
Generative-Order Inquiry	Phrases		Dian Taylor	1 hour ago	On	On
Generative-Reservation IN/OUTPUT	Phrases		Dian Taylor	1 hour ago	On	On
Goodbye	Phrases	This topic triggers when the user says good...	Dian Taylor	1 day ago	On	On
Greeting	Phrases	This topic is triggered when the user greets ...	Dian Taylor	1 day ago	On	On
Lesson 1 - A simple topic	Phrases		Dian Taylor	1 day ago	Off	Off
Lesson 2 - A simple topic with a conditi...	Phrases		Dian Taylor	1 day ago	Off	Off
Lesson 3 - A topic with a condition, va...	Phrases		Dian Taylor	1 day ago	Off	Off
Start Over	Phrases		Dian Taylor	1 day ago	On	On
Thank you	Phrases	This topic triggers when the user says thank ...	Dian Taylor	1 day ago	On	On

The interface also features a "Go to Generative AI" button, a search bar, and a status bar indicating "Published 8/13/2024" and "Environment MPPC2024".

Productivity tip #1: Unpin the Copilots pane

The screenshot shows the Copilot Studio interface. On the left is a sidebar with icons for Home, Create, Copilots, Library, and more. The main area is titled "Copilots" and features a pinned copilot named "Snezana Blazevska Copilot". A red box highlights the pinned icon (a pin with a slash) in the top right corner of the pinned card. The pinned card displays a message: "Your copilot is ready! Here's what's next:" followed by three steps: "Add actions", "Build topics", and "Publish your copilot". Below this is a "Details" section with fields for Name (Snezana Blazevska Copilot), Description (None provided), and Instructions (None provided). To the right, there's a "Test your copilot" section with a message from the copilot and a text input field. At the bottom, a note says "Make sure AI-generated content is accurate and appropriate before using. [See terms](#)".

Copilot Studio

Environment
Contoso (default)

Home

Create

Copilots

Library

...

Copilots

Snezana Blazevska... Overview Knowledge Topics +3

Publish Test ...

Copilots

Snezana Blazevska Copilot

Custom copilots

Microsoft

Copilot for Microsoft 365

Copilot for Sales

Coming soon

Snezana Blazevska... Overview Knowledge Topics +3

Your copilot is ready! Here's what's next:

- Add actions so your copilot can do things for you
- Build topics to focus and guide how your copilot answers
- Publish your copilot so others can use it

Details

Name
Snezana Blazevska Copilot

Description
None provided

Instructions
None provided

Just now

Hello, I'm Snezana Blazevska Copilot, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

Ask a question or describe what you need

0/2000

Make sure AI-generated content is accurate and appropriate before using. [See terms](#)

Productivity tip #2: Refresh the conversation between tests

Publish Settings ...

Test

Test your copilot



Hello, I'm Contoso Customer Assistant, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

Just now

Ask a question or describe what you need

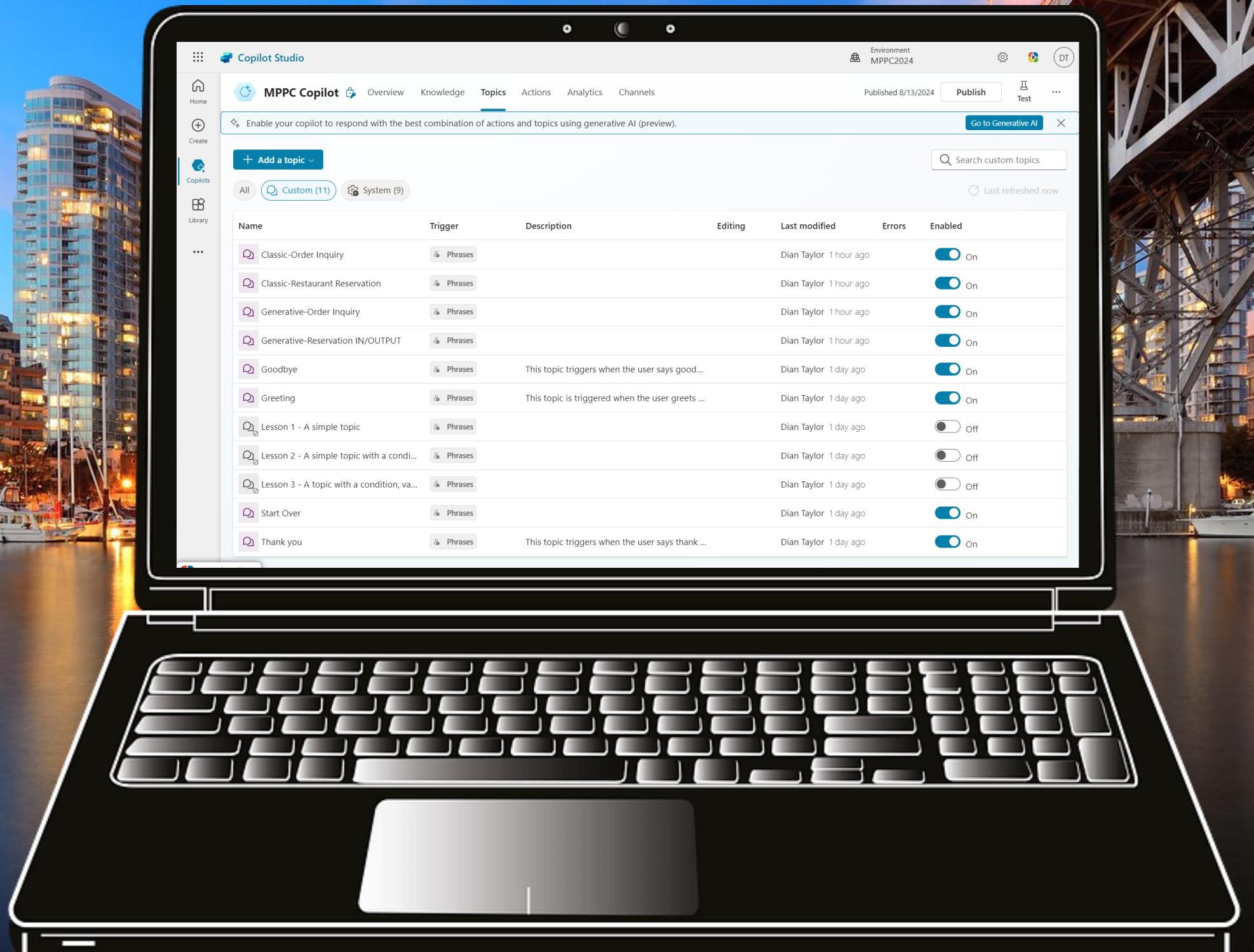
0/2000



Make sure AI-generated content is accurate and appropriate before using. [See terms](#)

Exercise 1

Build an agent connect to website knowledge | 10 mins



Exercise 1: Build an agent connect to website knowledge

Choose your own website, or use ours, test and discuss | 10 mins

1. Navigate to <https://copilotstudio.microsoft.com>
2. Select **your environment – ppcc25workshop16(default)**
3. Click on the '**+Create button**' on the left side of the screen, below 'Home'
4. Click on the '**New Agent**' button
5. Click '**Configure**' on the top
6. Enter the agent's **name** I.E '**My new agent**'
7. OPTIONAL: Add a **description** of what the agent will be used for
8. Instructions: Give your agent proper instructions. I.E You are a restaurant agent for the The Egg Restaurant in Las Vegas and you help with questions about the Restaurant, such as address inquiries, questions about the menu, etc.
9. OPTIONAL: Click the **three dots** next to the create button in the top right corner and select '**Update advanced settings**' to select a solution (I.E '**Copilot Studio Workshop Solutions**' solution) to store the agent in and click '**Update**'
- 10.Click the '**Create button**' and wait until the agent is created
- 11.Click on the '**Knowledge**' tab on the top of the screen and click on '**Add Knowledge**'
- 12.Click on the '**Public Website**' tile and enter a website of your choosing, then click '**Add to Agent**'. If you're not sure feel free to enter <https://theeggworks.com>
- 13.OPTIONAL: Upload one ore more docs as knowledge (download docs from <https://github.com/d365goddess/PPCC2025/>)
- 14.Test your agent by asking questions in the '**Test your agent**' pane. The agent will use the data on the website to answer your questions

- How do I get to the egg works restaurant?
- What is the address?
- What are your hours of operation?
- What type of food do you serve?
- Can you give me a list of all the omelettes you serve

Discussion Exercise 1: Build an agent connect to website knowledge | 10 Mins



Topics

What?

- *Conversation Paths*
- *Define how the conversation flows*
- *Can be created manually or automatically*
- *Authoring Canvas*
- *System Topics*

When?

- *Handling of specific queries*
- *Question must be asked and/or answered in specific way*
 - I.E Legal questions, HR Questions

Triggers

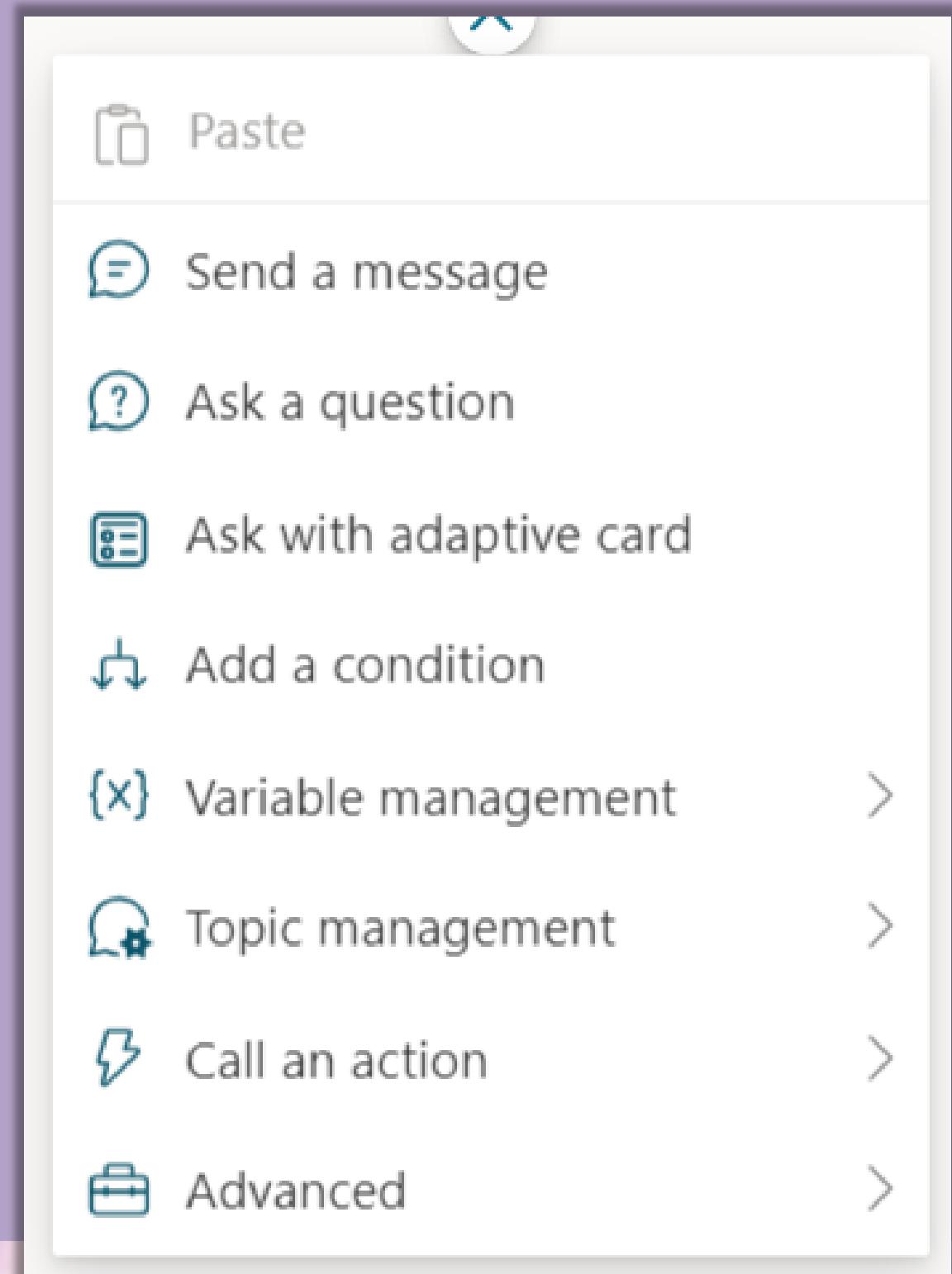
Understand intent

- Classic Orchestration
 - Trigger phrases
 - Keywords/Questions/Phrases
 - Topic Routing
- Generative AI Orchestration
 - Description
 - Agent uses description to select which (mix of) topic/knowledge/action to use



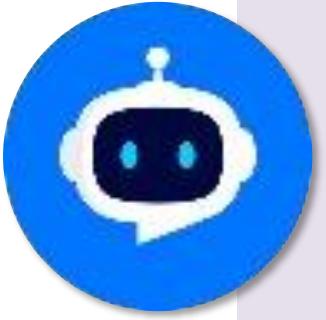
Authoring Canvas

- Send a message
- Ask a question and capture response in a variable
- Ask question with adaptive card
- Add conditions
- Manage variables
- Topic Management
- Trigger Actions from Power Automate or Bot Skills



Entities and Variables

Copilot



What is your
email address?

Store answer in variable
Entity = Email Address

Variable
john@email.com

End User

My email address
is
john@email.com



Prebuilt Entities

Point of interest

Description
Points of interest, extracted as a string

Method
Prebuilt

Usage

User input	Entity	Saved value
I want to climb Mount Everest	Mount Everest	Mount Everest
The airport is 25 miles away	airport	airport
Eiffel Tower is in Paris	Eiffel Tower	Eiffel Tower

Temperature

Description
Temperature, extracted as a number

Method
Prebuilt

Usage

User input	Entity	Saved value
It's 32F outside	32F	32
It's 2° there	2°	2
It's 30 degrees	30 degrees	30

Custom Entities

Create an entity



Make your copilot smarter with entities.

An entity is a piece of information (person, place, thing, or concept) that the copilot might want to pick out from what your customer says.

[Close](#)

Choose a method

Closed list

Define a list. Use when you have an exact list of items that is a manageable size (small to medium).

Example: List of sizes

Extra small
Small
Medium
Large

Regular expression (Regex)

Define a specific logical pattern, such as an ID number, credit card number, IP address, and more.

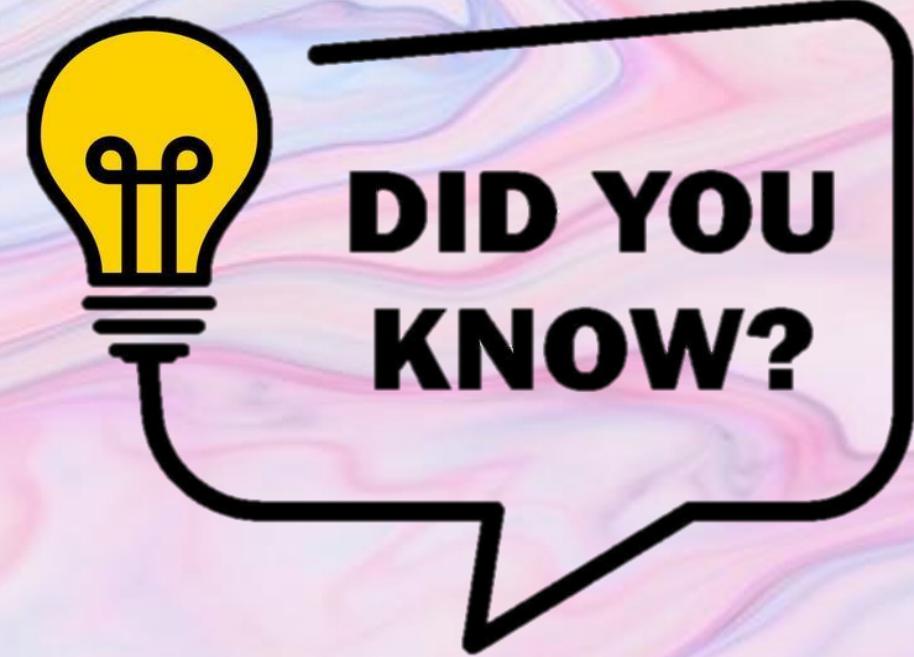
Example: Article ID pattern that starts with "kb" and ends with 6 digits, such as 'kb123456'.

`kb[0-9]{6}`



Topics: Inputs & Outputs (Generative AI Only)

- Less nodes in topic
- Dynamically created questions
- Model Description
- Automatic Entity Extraction (LLM)
- Slot Filling
- Generative Copilots Only



Natural Language Understanding



I want to reserve a table at your restaurant in Seattle next week.

Utterance

I want to reserve a table in Seattle next week

Intent

Entity

Entity

Great choice!



To ensure we get it right, could you confirm the total party size and your email address? I'll take care of the rest!



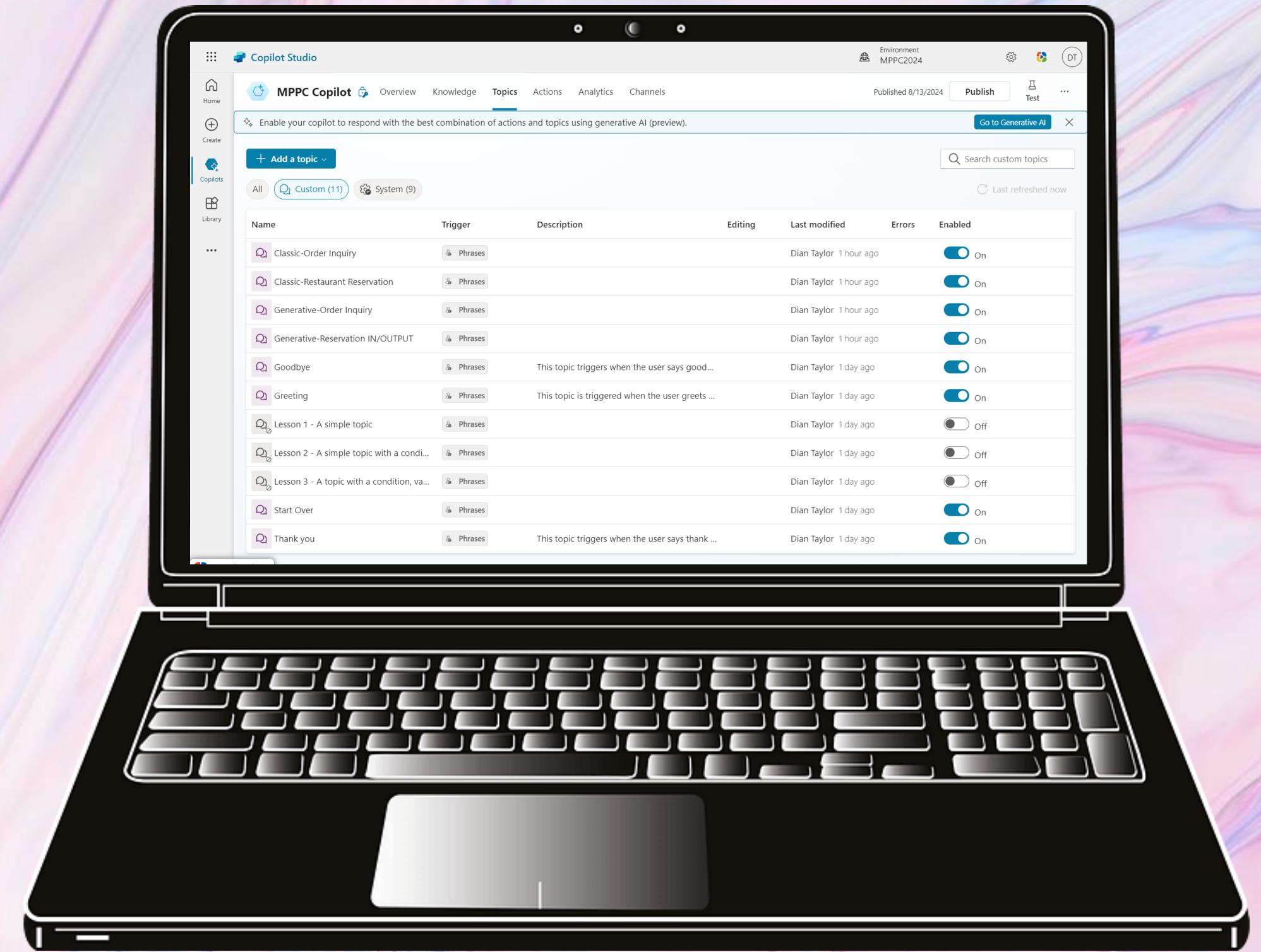
Customer has the intent to 'book a table'

The query already has a 'location', Seattle, and a 'Date', next week.

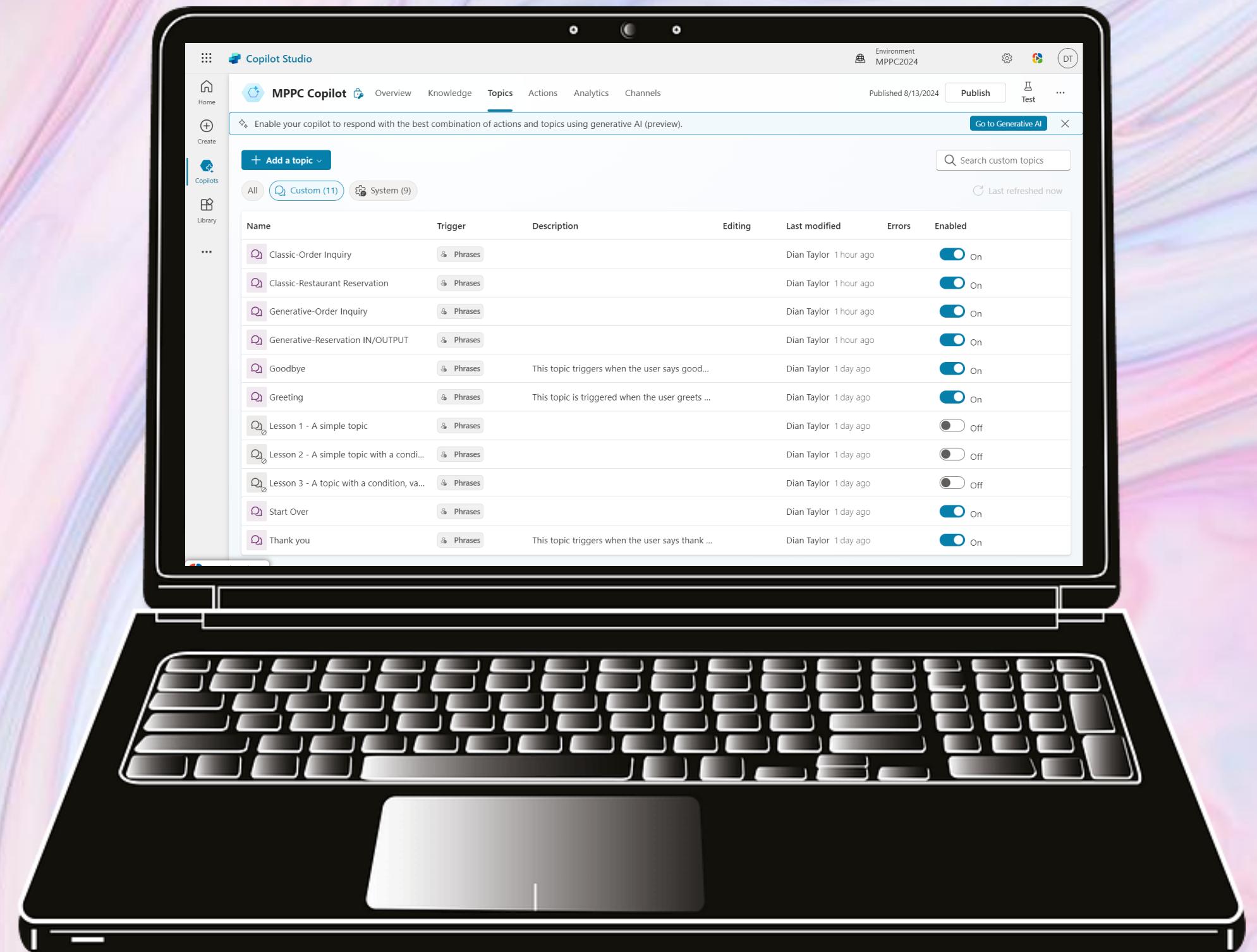


Given this intent, entities, and the context, what would be the best fitting answer?

Demo 2: Show Restaurant Topic without restrictions

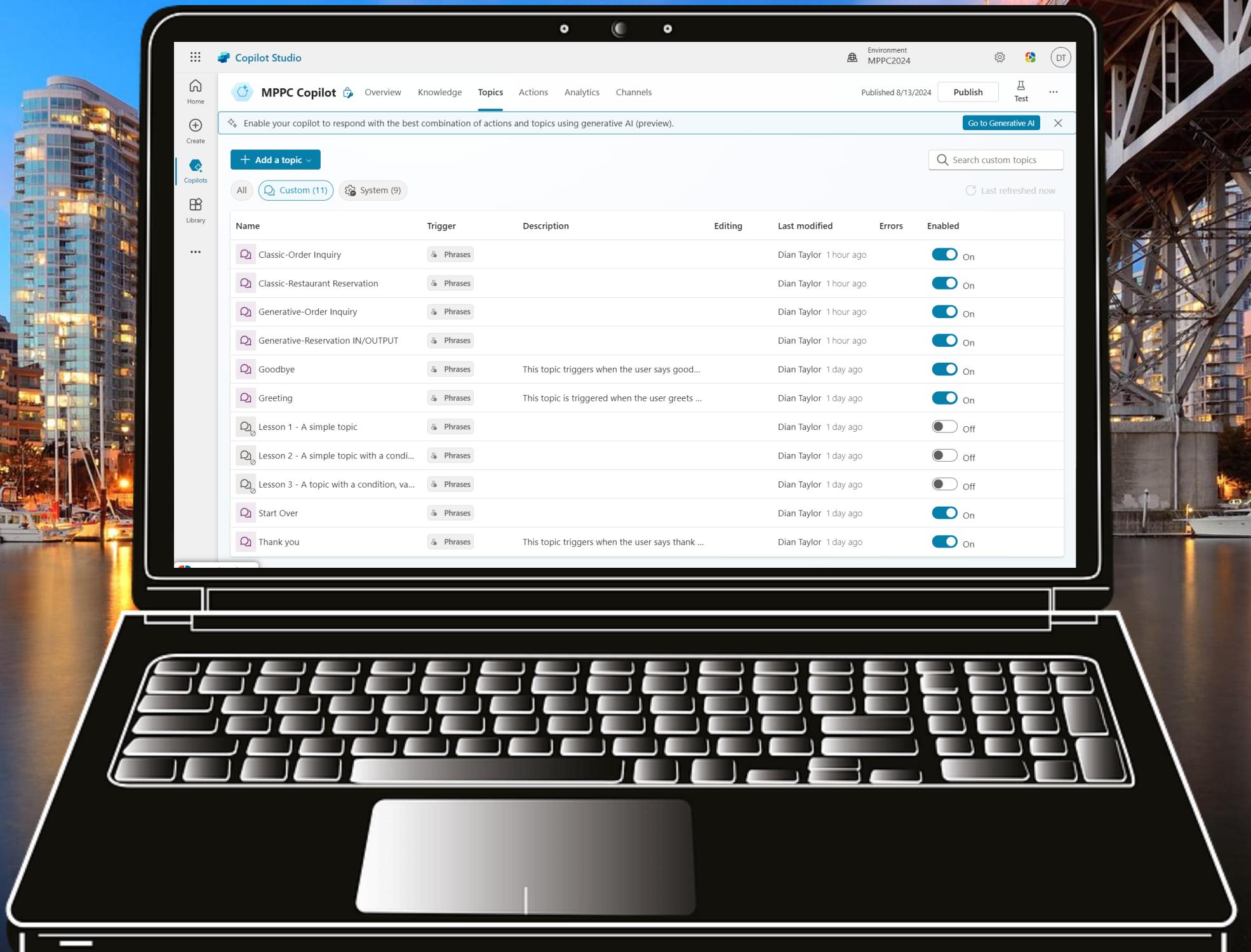


Demonstration 3: Build the topic



Exercise 2:

Create a topic for your agent | 15 Mins



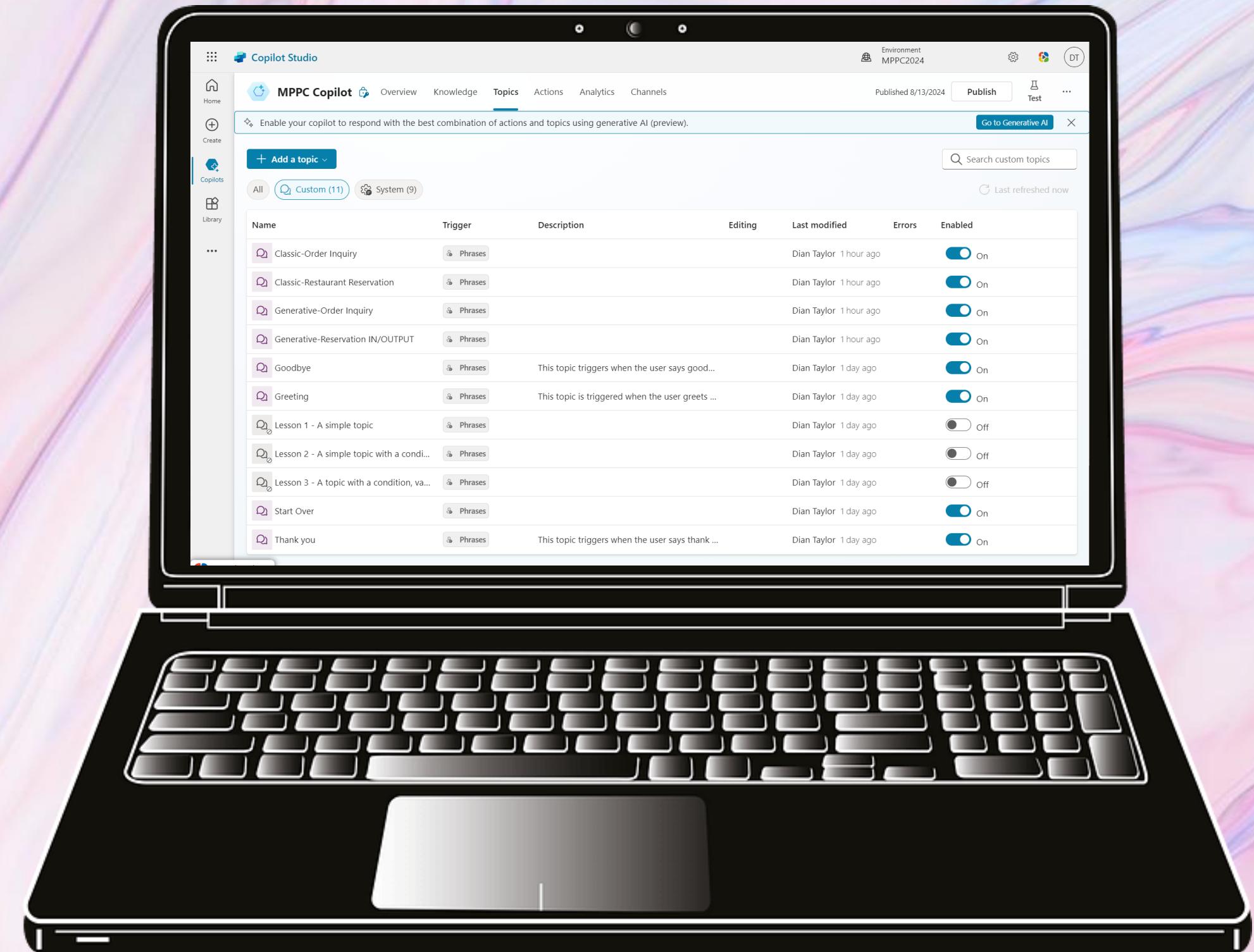
Exercise 2: Create a topic for your agent | 15 Mins

1. Open the agent you previously created
2. Click on the '**Topics**' tab on the top of the screen
3. Click on the '+Add a Topic' button and select '**Create from description with copilot**'
4. In '**Name your topic**' enter: "***Restaurant Reservation***"
5. In '**Create a topic to..**' enter: "***Let a user make a reservation at our restaurant. Ask what name the reservation should be under, their email address, how many people will be in their party, and the date of their reservation. Add an adaptive card at the end that confirms the reservation, listing the name the reservation should be under, the email address, party size and reservation date.***"
6. Click the '**Create**' button
7. When the topic loads, close the '**Edit with Copilot**' pane on the right and review the topic.
8. Scroll all the way down and below the last (message) node, click on the '+' button
9. Select '**Topic Management**' > '**End Conversation**'
10. Click '**Save**' to save the topic
11. Enter 'I want to make a reservation' in the "**Test your agent**" panel
12. On the top of the screen (Activity Map) turn '**Track between topics**' on
13. Click the refresh button in the top of the "**Test your agent**" panel
14. Test the topic: In the '**test your agent**' pane enter "**I want to make a reservation**" again.
15. Follow the prompts

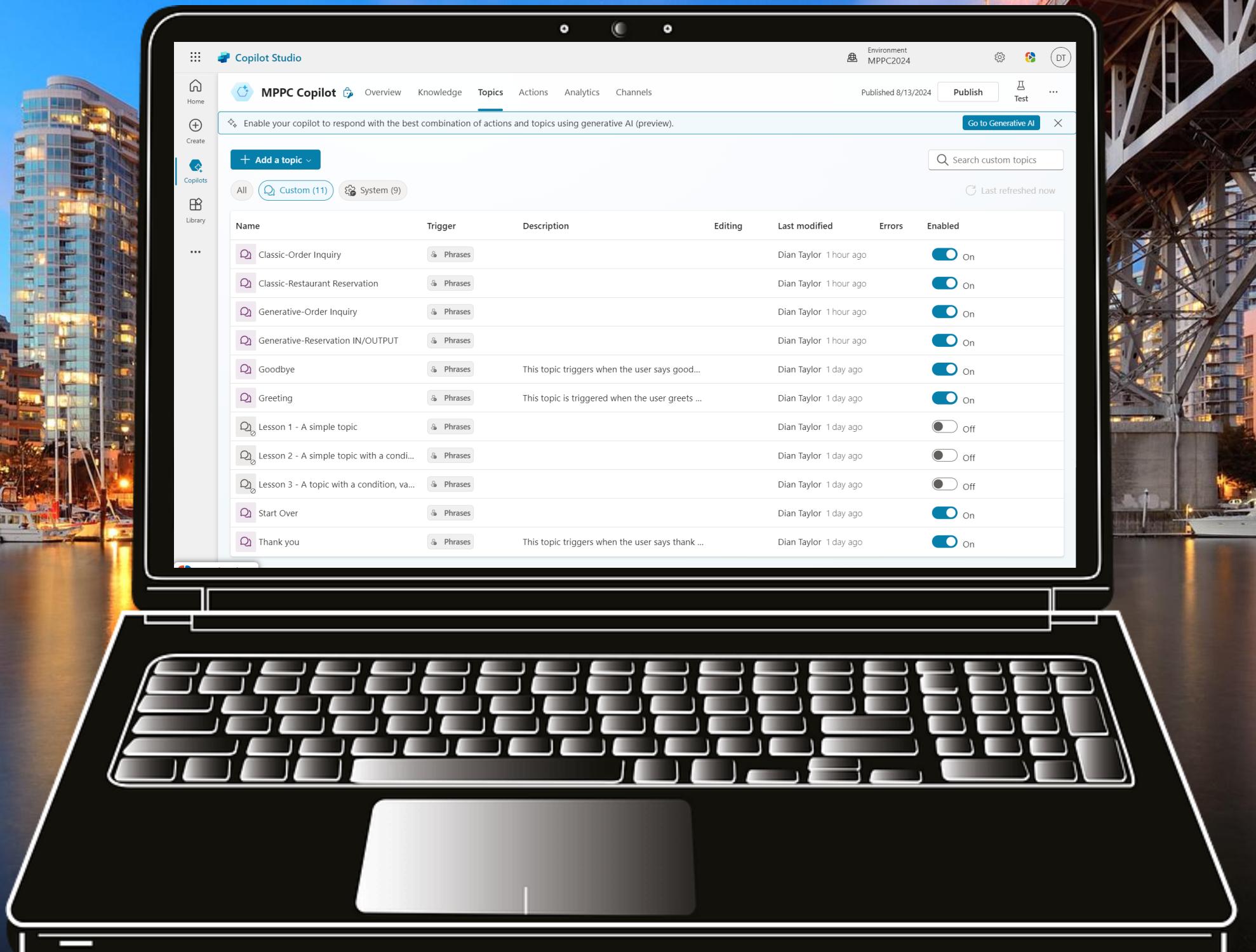


Demo 4: Restaurant Topic with restrictions

Demo 5: Add conditions to the topic



Exercise 3: Add Conditions to the topic | 15 Mins



The image shows a laptop screen displaying the Copilot Studio interface, specifically the 'Topics' section. The interface includes a sidebar with 'Home', 'Create', 'Copilots', and 'Library' options. The main area shows a list of topics under 'Custom (11)'. The columns include Name, Trigger, Description, Editing, Last modified, Errors, and Enabled. The 'Enabled' column contains toggle switches for each topic. Most topics are enabled ('On'), except for 'Lesson 1 - A simple topic' and 'Lesson 2 - A simple topic with a cond...', which are disabled ('Off').

Name	Trigger	Description	Editing	Last modified	Errors	Enabled
Classic-Order Inquiry	Phrases		Dian Taylor	1 hour ago		On
Classic-Restaurant Reservation	Phrases		Dian Taylor	1 hour ago		On
Generative-Order Inquiry	Phrases		Dian Taylor	1 hour ago		On
Generative-Reservation IN/OUTPUT	Phrases		Dian Taylor	1 hour ago		On
Goodbye	Phrases	This topic triggers when the user says good...	Dian Taylor	1 day ago		On
Greeting	Phrases	This topic is triggered when the user greets ...	Dian Taylor	1 day ago		On
Lesson 1 - A simple topic	Phrases		Dian Taylor	1 day ago		Off
Lesson 2 - A simple topic with a cond...	Phrases		Dian Taylor	1 day ago		Off
Lesson 3 - A topic with a condition, va...	Phrases		Dian Taylor	1 day ago		Off
Start Over	Phrases		Dian Taylor	1 day ago		On
Thank you	Phrases	This topic triggers when the user says thank ...	Dian Taylor	1 day ago		On



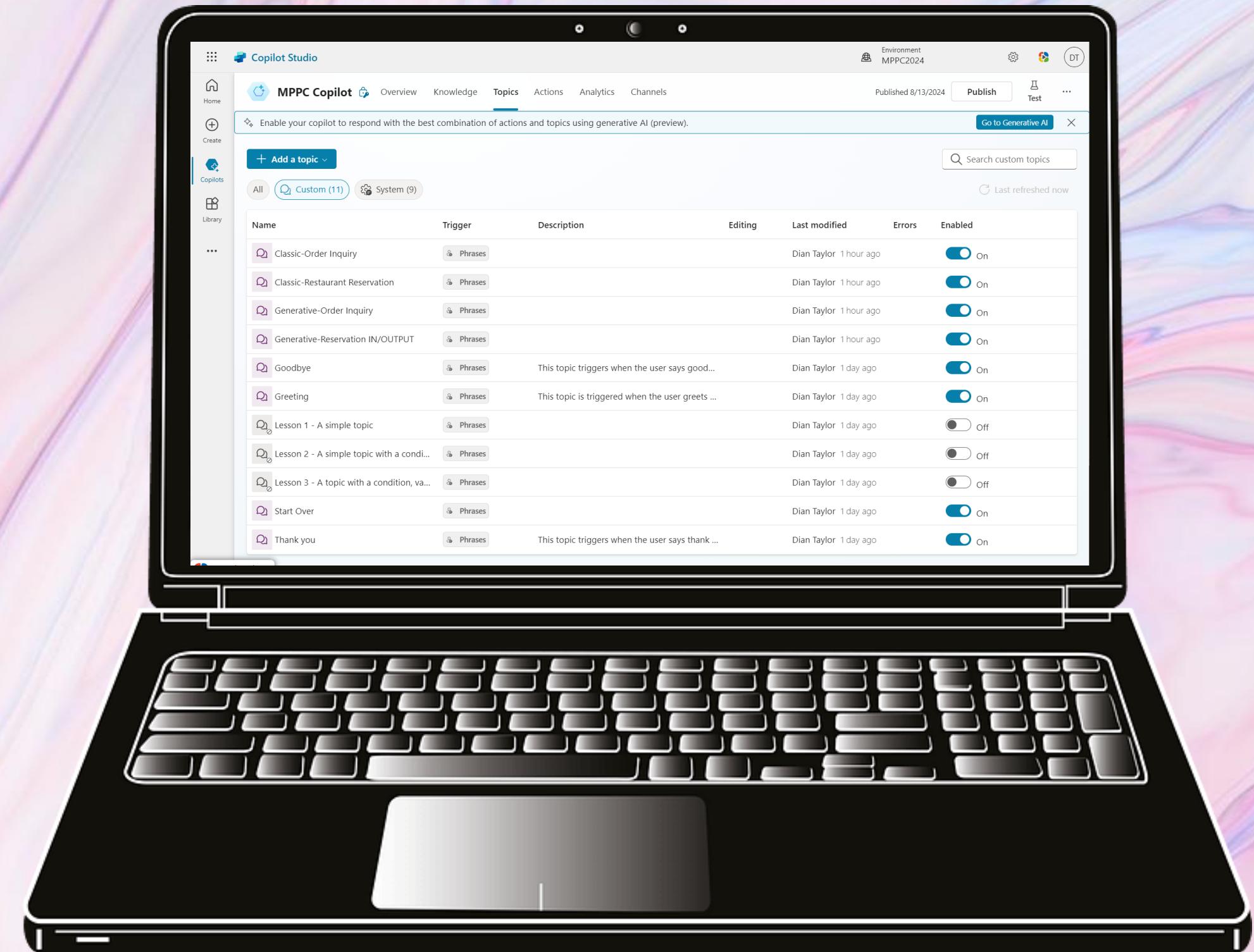
Exercise 3: Add Conditions (PowerFX) | 15 mins

1. Open the 'Restaurant Reservation' topic
2. Scroll down until you see the question node asking for the date and time of the reservation.
3. Click on the tree dots on the left top side of the question node and click on 'Properties'
4. That will open the 'Question Properties' window on the left side.
5. Click on 'Entity Recognition'
6. Under 'Condition' click on 'select a variable' and select the variable from the list (You can find the variable name in the question mode, under 'Save user response as'.)
7. Under the variable name click on the drop down (showing equal) and select 'Is greater than'
8. In the window that opens, click on the 'Formula' tab
9. Enter: 'DateValue(Now())' and click on the 'Insert' button
10. Check the 'Customize' box under 'Condition not met prompt' and click on '+Add'
11. In the text box that opens, enter: "Hey Marty McFly! I would love to time travel, but we can't! Please select a date in the future!"
12. Click the 'Save' button
13. Click the 'refresh' button on the top right of the 'Test your Agent' pane
14. Test your topic again, when the question regarding the date/time of the reservation, enter a date in the past.

The screenshot shows the 'Condition' section of the PowerFX Question Properties window. It displays a conditional logic: {x} DateTime datetime is greater than fx DateValue(Now()). Below this, there are two 'Condition not met prompt' sections. The first is checked and contains the text "Hey Marty McFly! I would love to time travel, but we can't! Please select a date in the future!". The second section is empty and labeled '+ New condition'.



Demonstration 6: Build a new topic with input and outputs (Generative Orchestration Only)



Tools

What?

Predefined tasks that the agent can execute

I.E Getting information from external source

*Updating a rows
Creating rows*

Why?

*Enhance Copilot Functionality
Saves time*

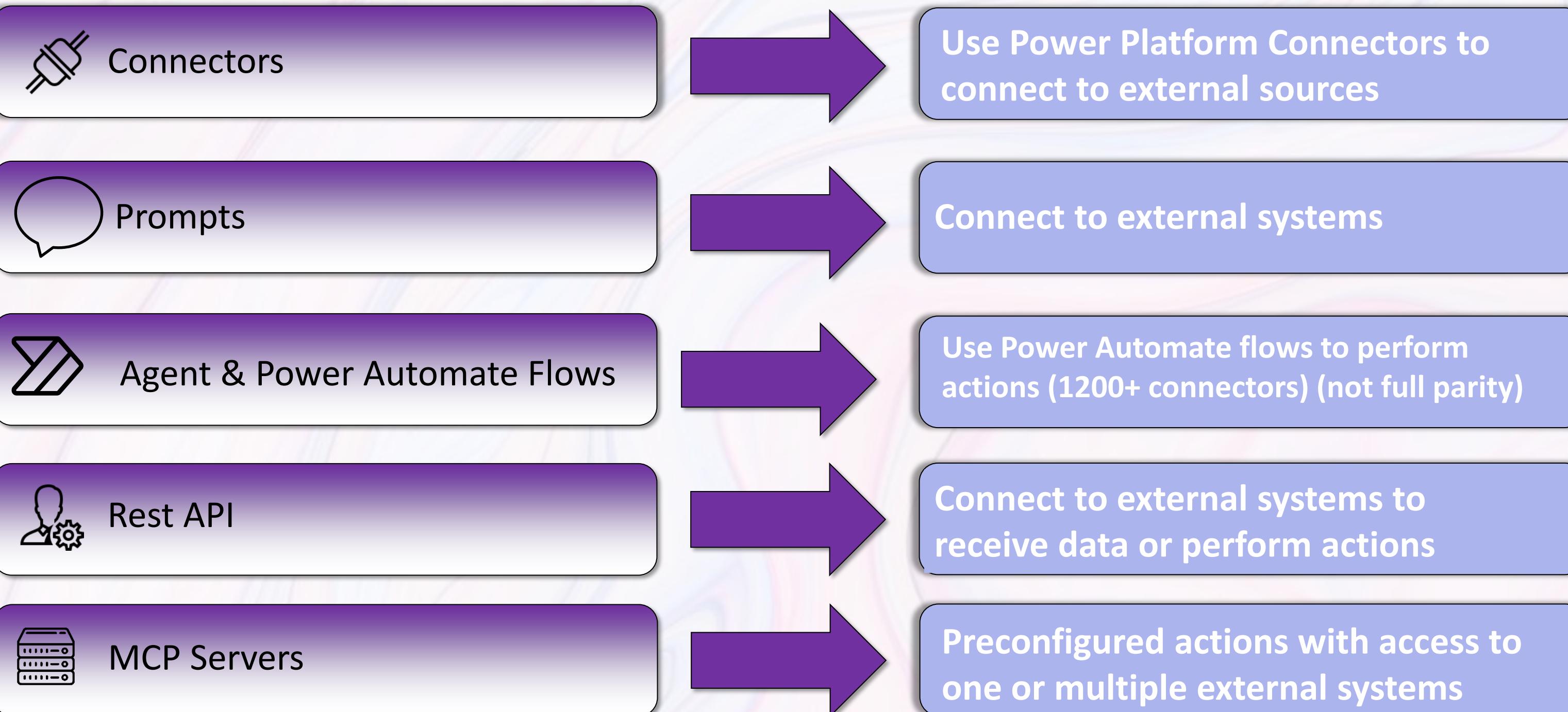
*Improve user experience
Integrate with other systems*



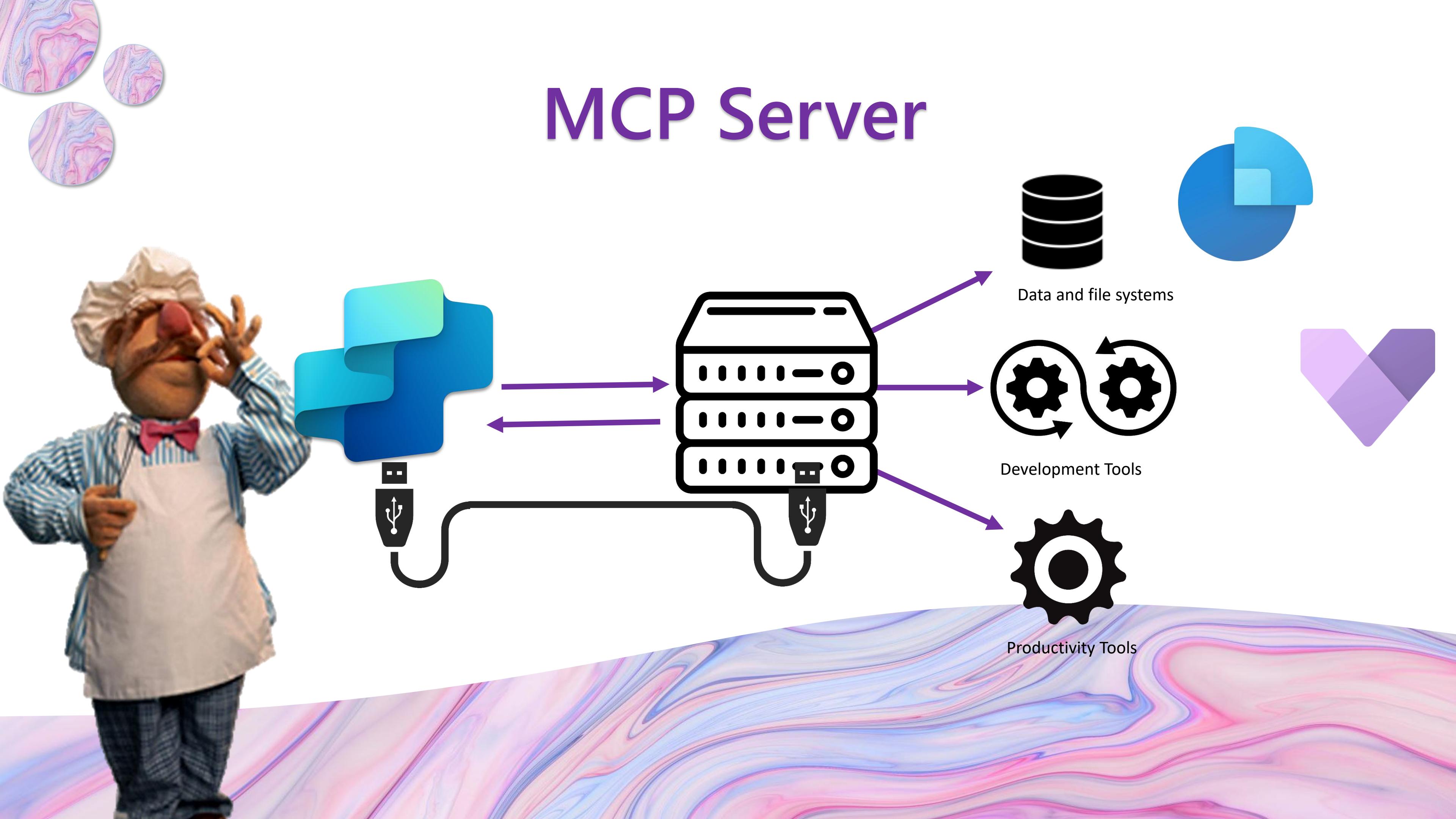
Wurt The Furk?



Tools



MCP Server



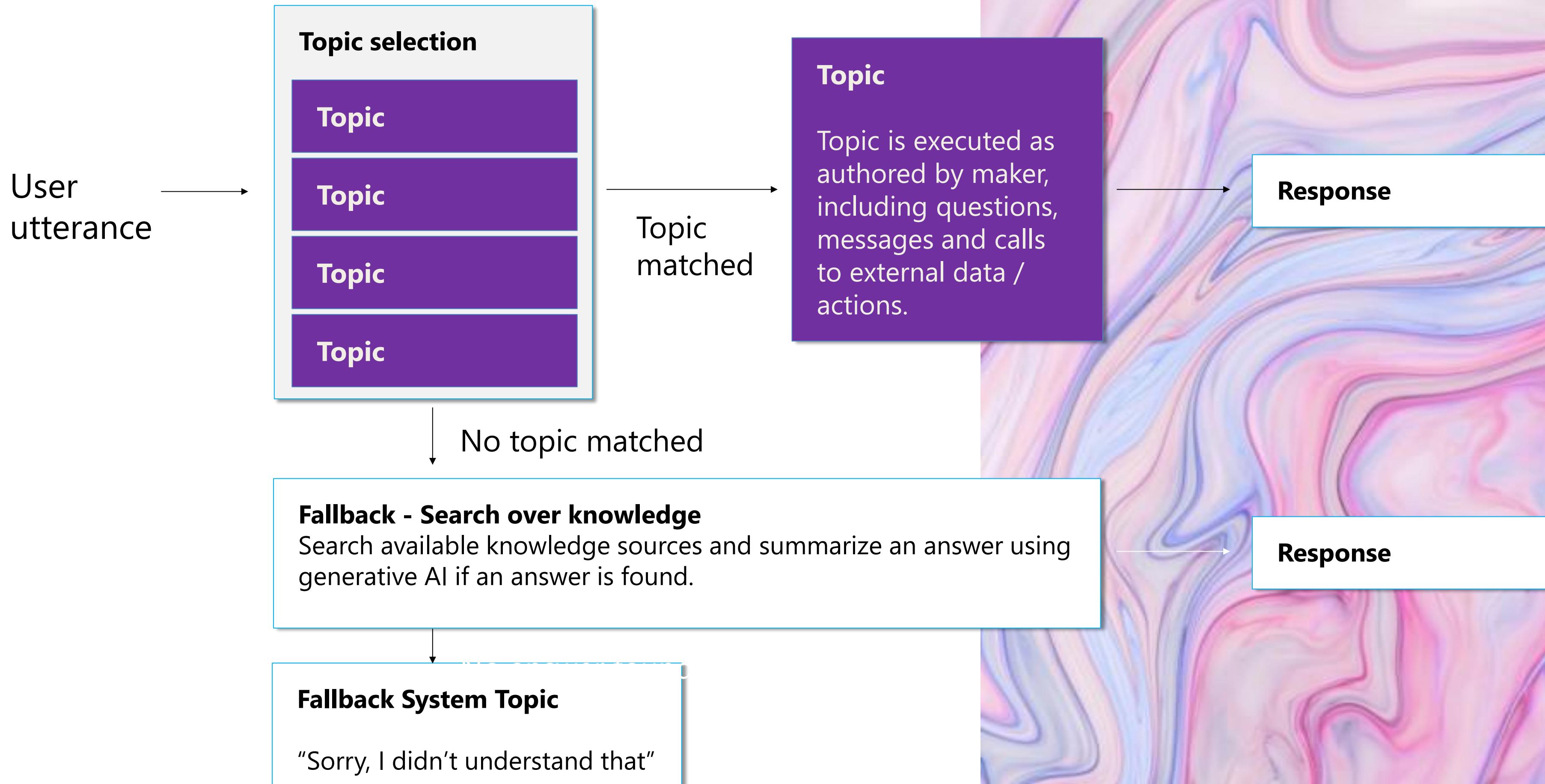
Orchestration

CLASSIC

GENERATIVE

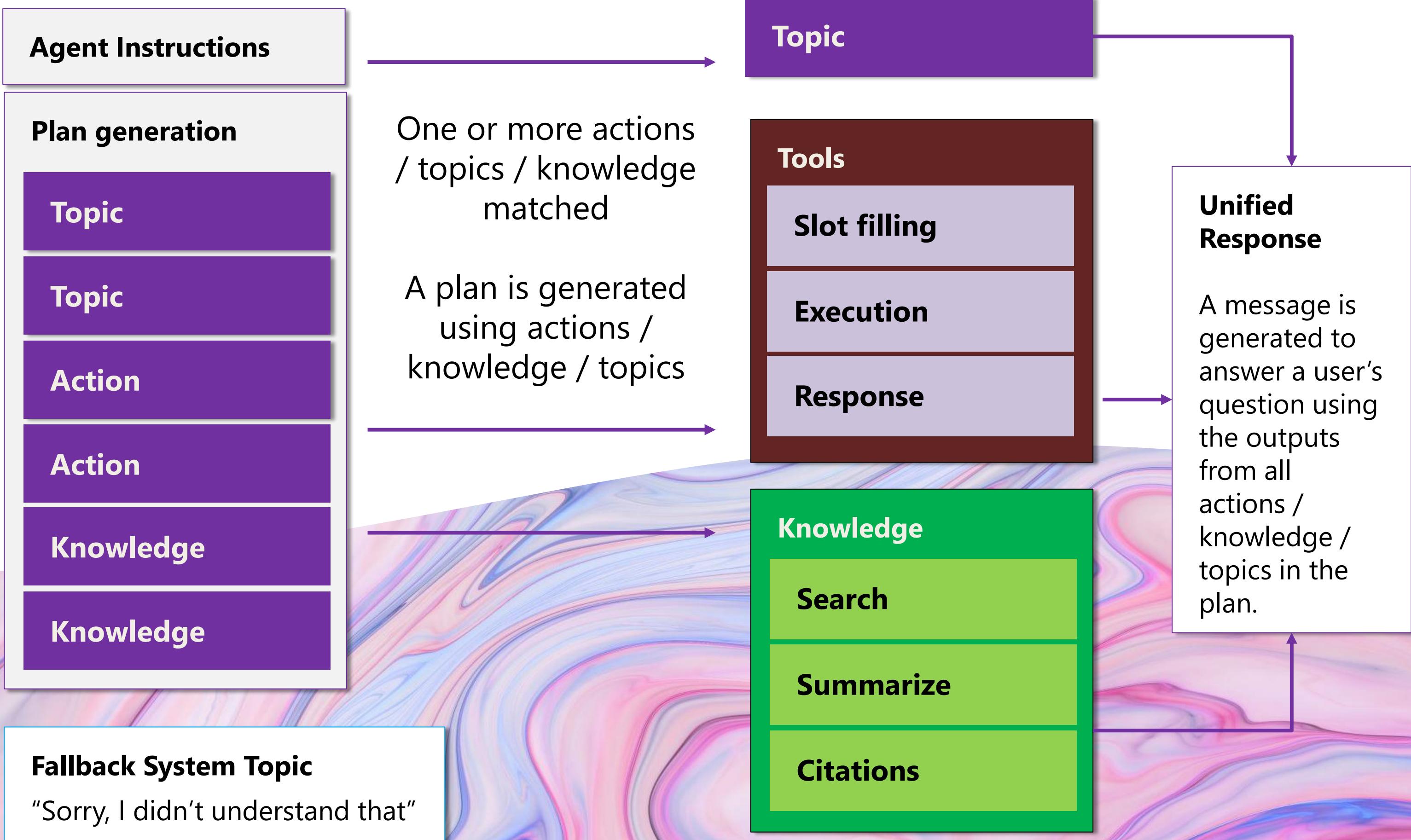


Classic Orchestration



Generative Orchestration

User
utterance



Generative Orchestration

Agent Instructions

- Used by agent to decide which tools or knowledge needs to be called when triggered
- Used to generate a response to the end - user
- Used to fill inputs for tools based on available context

Instructions Context

- Agents can't act on instructions to use tools that aren't available
- Configure your tools first, then update the agent instructions

Instruction Types

- **Constraints:** *I.E. Only respond to messages that are relevant to Contoso corporation and ordering coffee. Otherwise tell the user you can't help with their inquiry.*
- **Response Format:** *I.E. Respond to inquiries in tabular format. Answer in bold and underline fonts as necessary.*
- **Guidance:** *I.E. Search only within specific country folders relevant to the employee's country.*

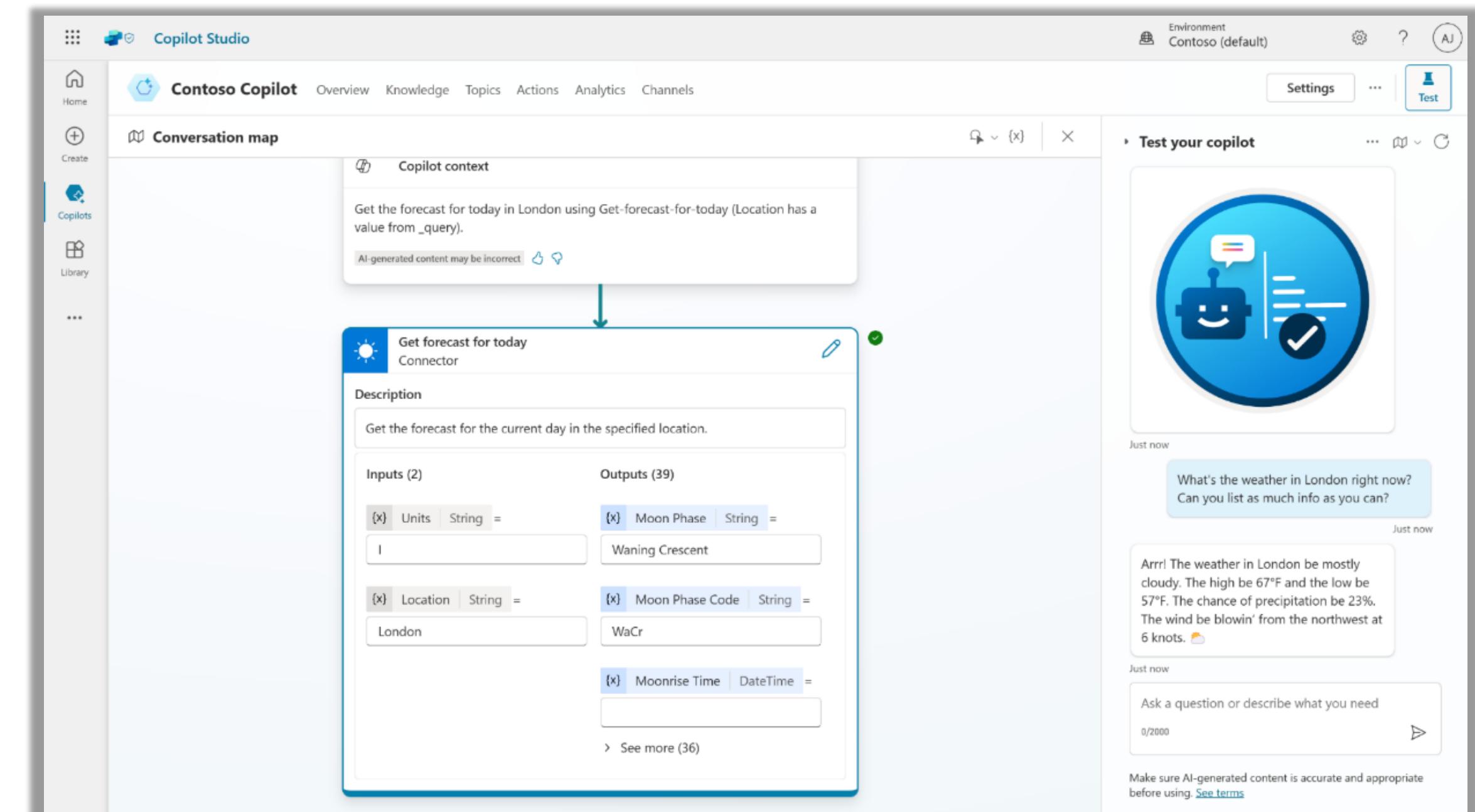
Generative Orchestration

Test and trace feature to see it in action

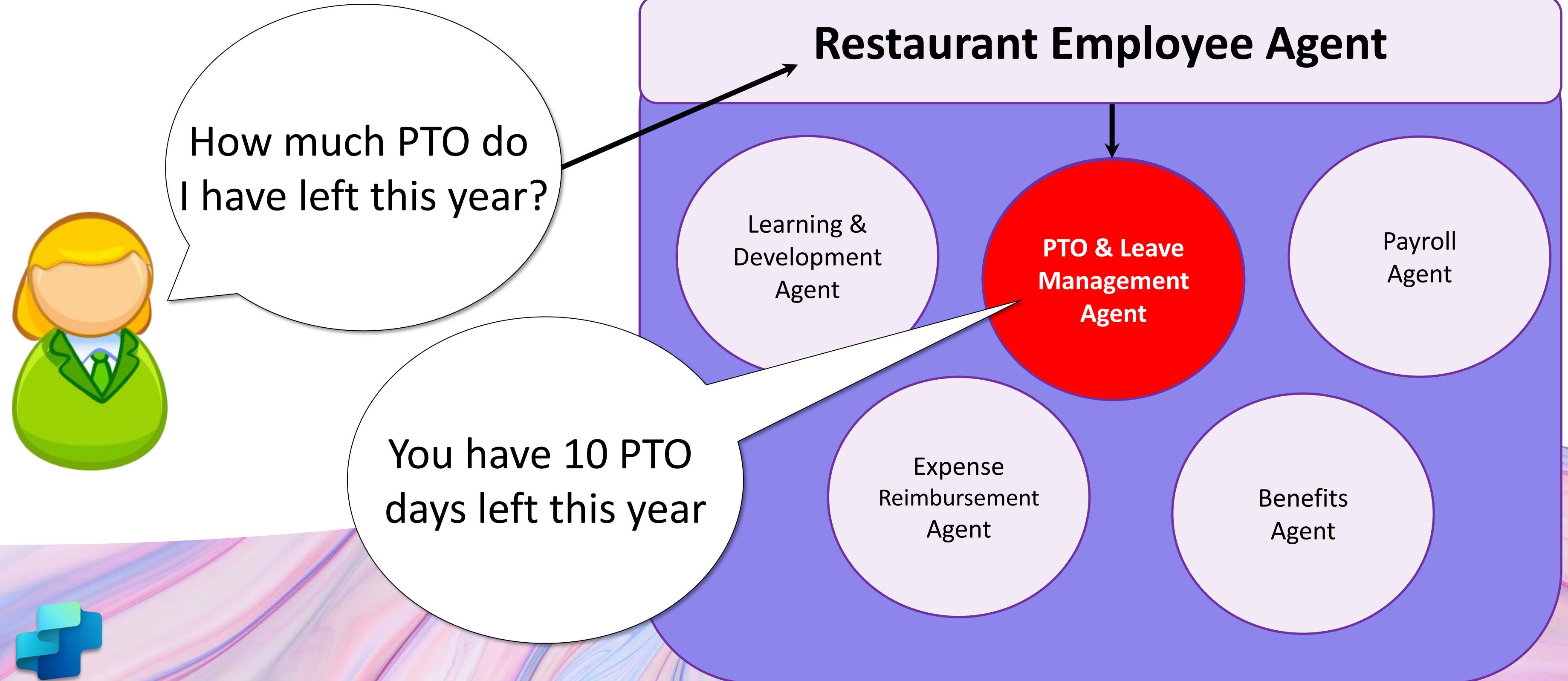
Dynamically chains actions and topics together to produce actionable responses

Handle multi-intent queries that were not anticipated or built by the user

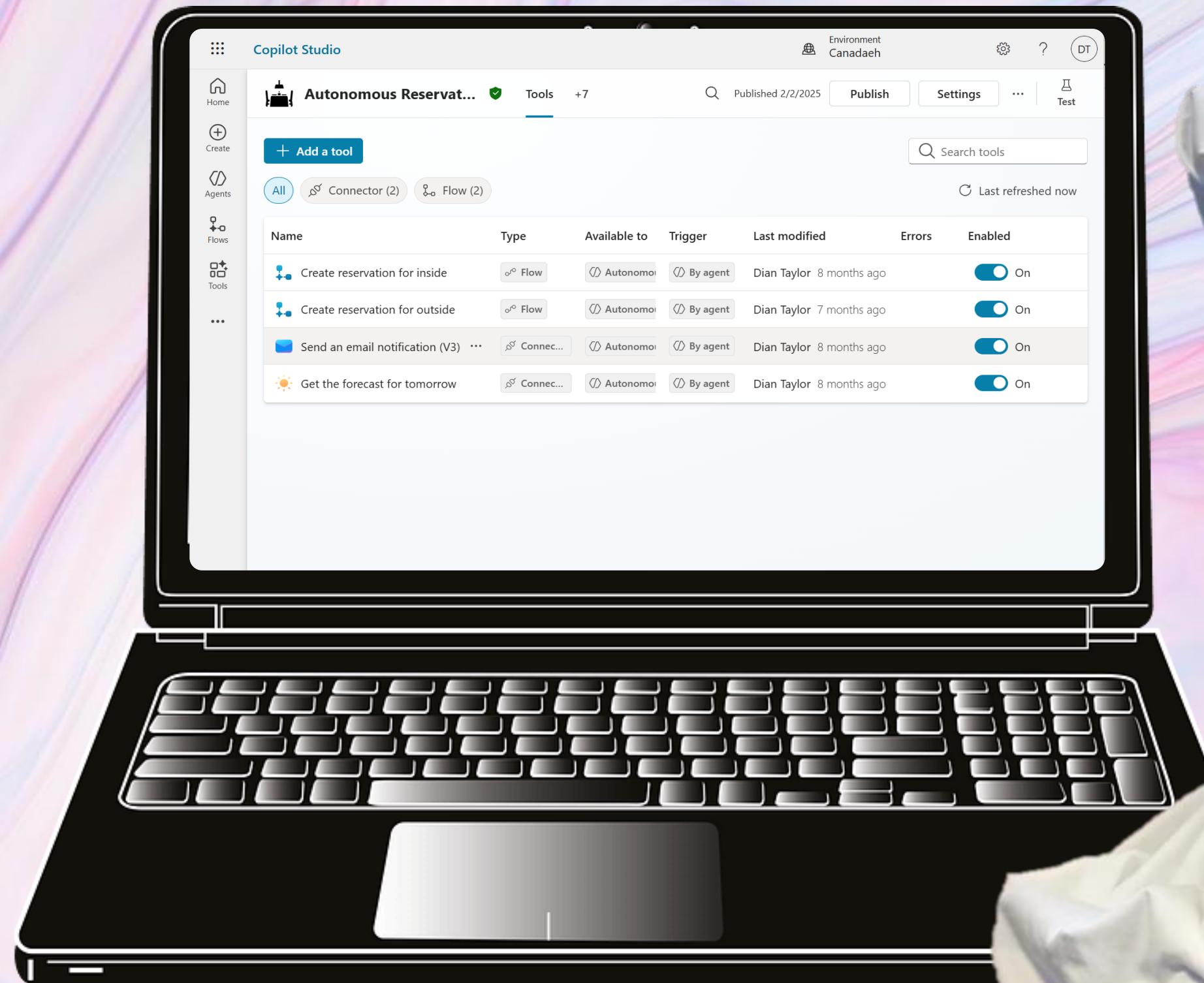
Automatically slot-fill further details to get the information needed for the task



Connect to Agents (preview)



Demonstration 7: Tools



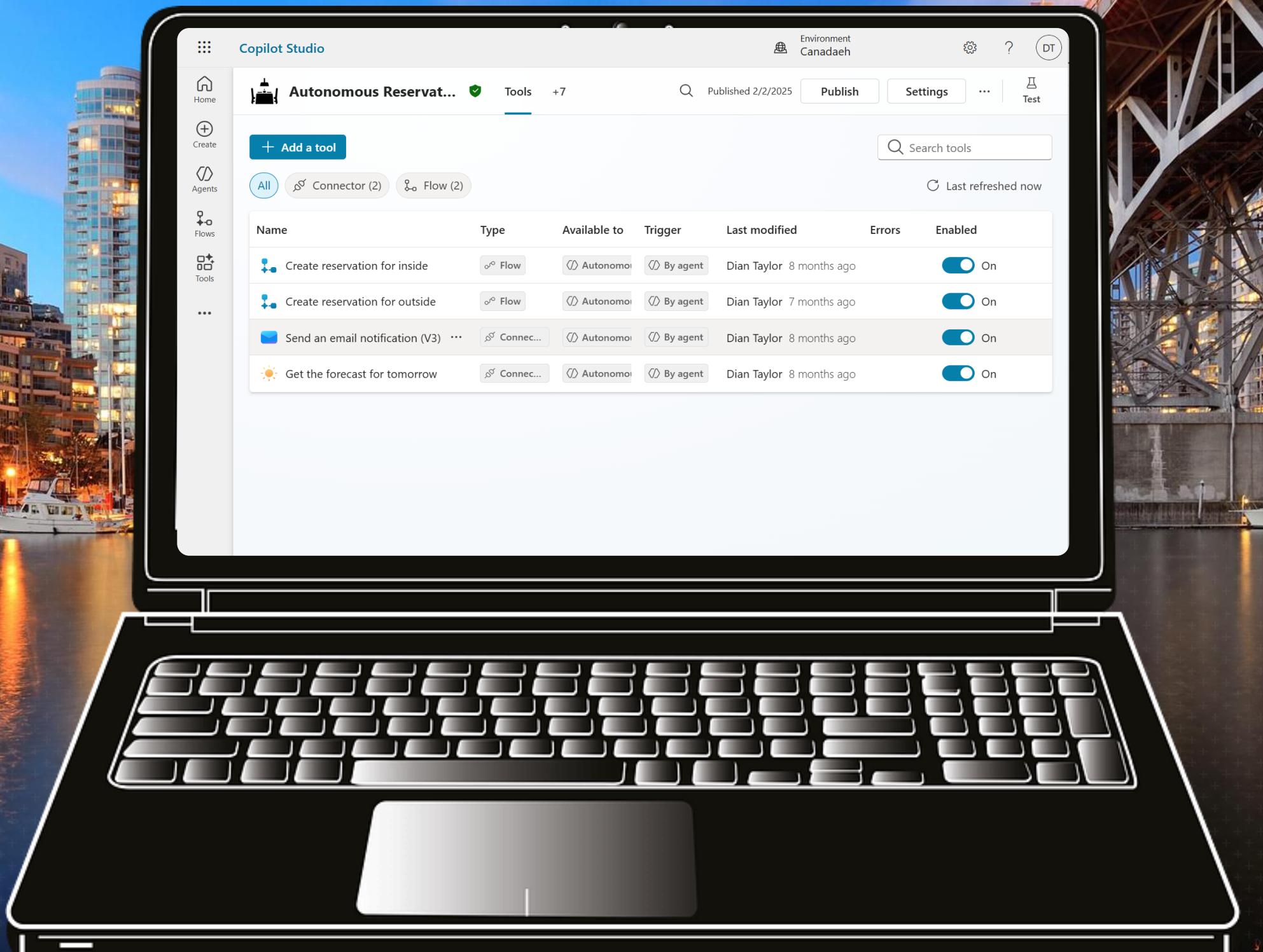
The image shows a laptop screen displaying the Copilot Studio interface. The title bar reads "Copilot Studio" and "Autonomous Reservat...". The main area shows a list of tools under the "Tools" tab. There are four items listed:

Name	Type	Available to	Trigger	Last modified	Errors	Enabled
Create reservation for inside	Flow	Autonomo	By agent	Dian Taylor 8 months ago	0	On
Create reservation for outside	Flow	Autonomo	By agent	Dian Taylor 7 months ago	0	On
Send an email notification (V3)	Connec...	Autonomo	By agent	Dian Taylor 8 months ago	0	On
Get the forecast for tomorrow	Connec...	Autonomo	By agent	Dian Taylor 8 months ago	0	On



Exercise 4:

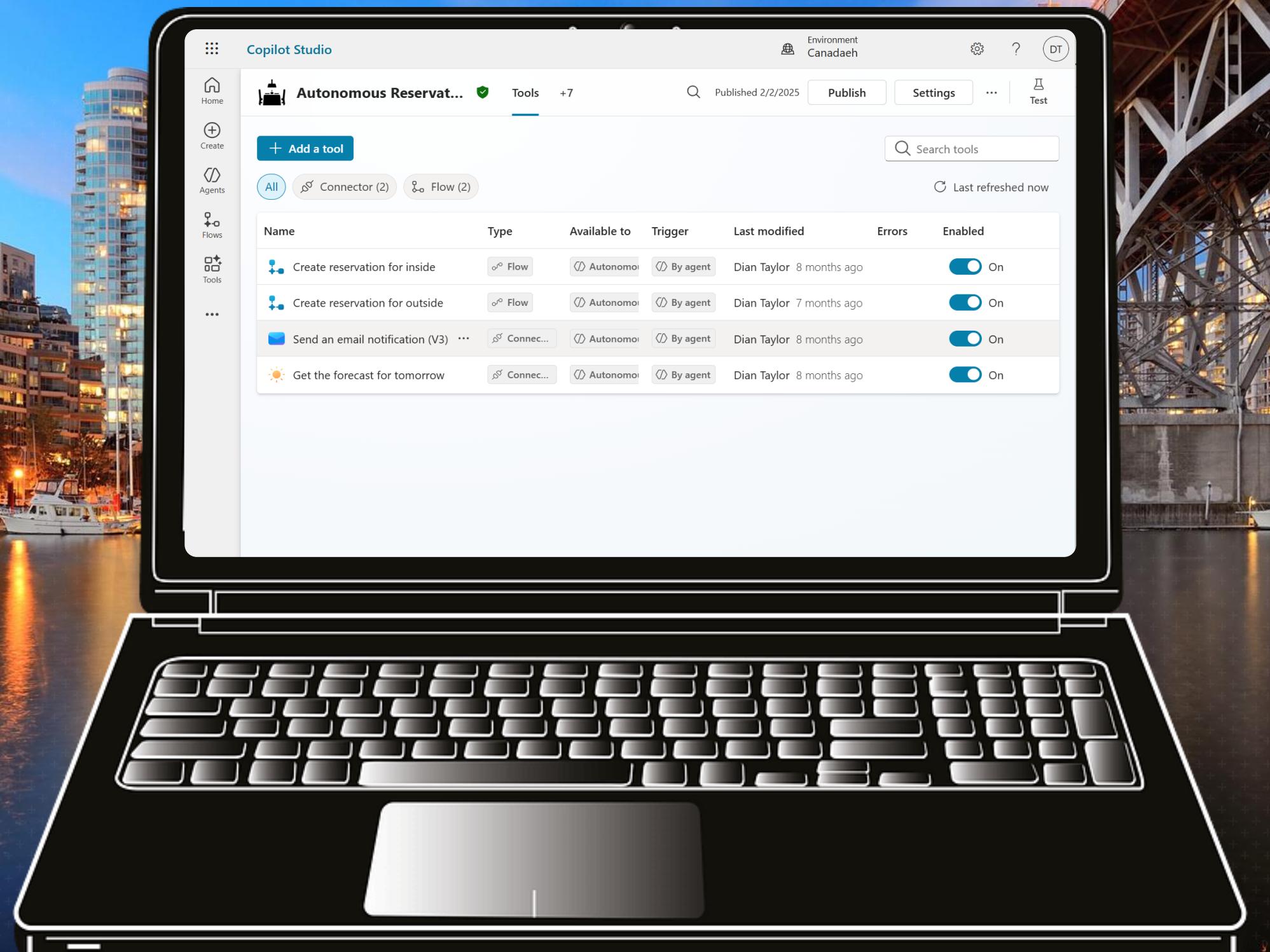
Add a Power Automate Tool | 15 Mins



Exercise 4: Add a Power Automate Tool | 15 Mins

1. In the agent, click on the '**Tools**' tab on the top
2. Click the '**+Add a Tool**' button and select '**Flow**'
3. Click on the '**Copilot – Find Reservation**' flow and click '**Add and configure**'
4. When the Flow window loads, enter in the '**Description**': '*This tool is used to help customers find their reservation. Users can ask 'I am looking for my reservation' or 'I need help with a reservation'. If multiple reservation numbers are entered, please provide the outputs all in one message in a bulleted list.*'
5. Under Additional details select '**Agent may use this tool at any time**'
6. Scroll down to inputs, next to the reservation number input, click '**Customize**'
7. In the description field enter: '*This is the unique reservation number which begins with RES to get the right pattern. An example of a reservation number is RES-01001-S1N6P7*'
8. Click the '**Save**' button (top right) to save the tool
9. Go to the '**Overview**' tab of the agent, scroll down to instructions and click '**edit**' to edit the instructions.
10. Add:"If people have questions about reservations, always use /" then select the Copilot-Find reservation" tool.
11. Click the '**Test**' button on the top right so the '**Test your Agent**' panel opens
12. Enter '*I am looking for reservation RES-01001-S1N6P7*' to start testing the action
13. Now enter:*'I am also looking for reservations RES-01002-J0X9T7 and RES-01004-L4W4X9'*
14. Now enter:*'Lastly I need reservation number 1234546789'*

Exercise 5: Add a Dataverse Connector Tool | 15 Mins



Exercise 5: Add a Dataverse Connector Tool | 15 Mins

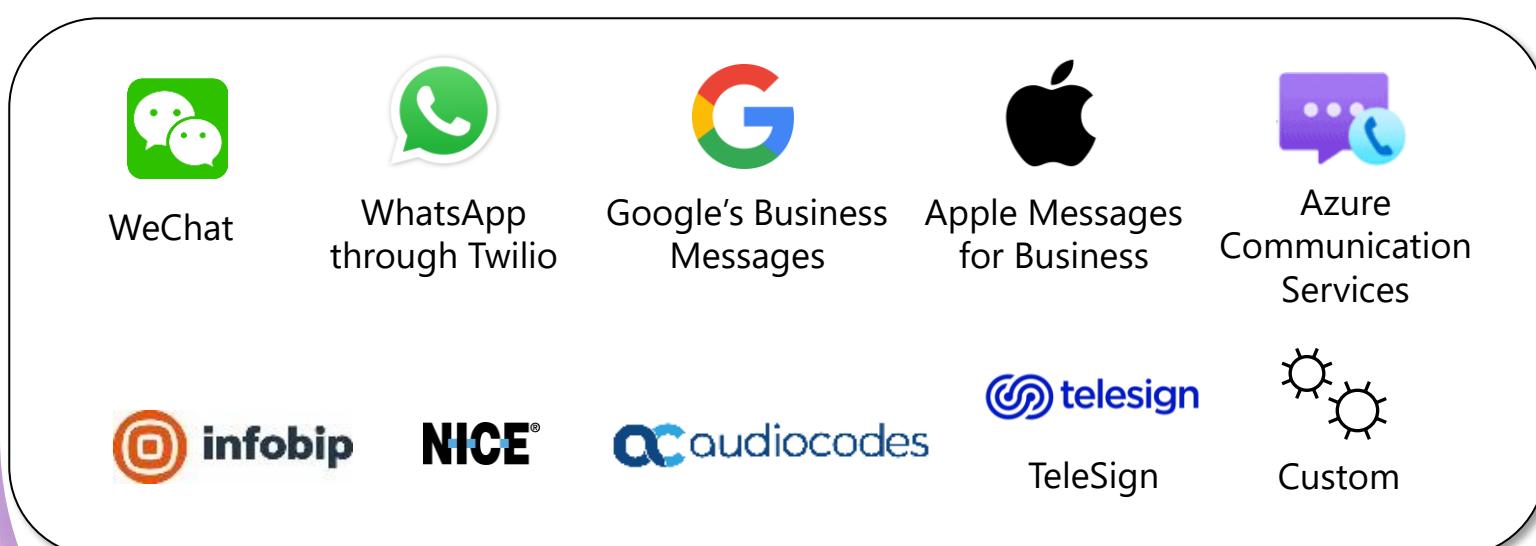
1. In the agent, click on the '**Tools**' tab on the top
2. Click the '**+Add a Tool**' button and in the top search box enter '**Dataverse List Rows**'
3. Click on the '**List rows from selected environment**' connector and click '**Add and configure**'
4. When the window loads, enter in the '**Description**': '*This tool is used to answer general questions about reservations.*'
5. Under inputs next to environment change the 'fill using' dropdown from '*Dynamically fill with AI*' to '*Custom Value*'
6. Below the **Value** row click inside the field and select **your environment**
7. Click the Save button on the top
8. Click the '**Test**' button on the top right so the '**Test your Agent**' panel opens and click '**refresh**' to start a new chat.
9. Ask: '*How many reservations are there for February?*' to start testing the action
10. Ask : '*How many of those were for the patio?*'
11. Ask: '*How many of those were for inside?*'

Publish your agent to one or more channels

Publish and deploy with a single click.

Add your agent to a custom Power App or a Power Pages website.

Access more channels through ISVs, including:



The screenshot shows the Microsoft Copilot interface for the "Expense Budget Assistant" copilot. The top navigation bar includes "Overview", "Knowledge", "Actions", "Topics", "Analytics", and "Channels". A message indicates the copilot was published at 9:42 AM on 3/36/2024. The "Publish" button is visible in the top right. Below, the "Publish status" section shows it was published on March 20, 2024. The "Channels" section lists various publishing options: Teams, Demo website, Custom website, Mobile app, Facebook, Twilio, Skype, Slack, Telegram, Email, Line, GroupMe, Dynamics 365 Customer Service, Genesys, Salesforce, LivePerson, ZenDesk, and Customer engagement hub. A "Customer engagement hub" section also connects to Dynamics 365 Customer Service, Genesys, Salesforce, LivePerson, ZenDesk, and Customer engagement hub.

Security

- Who can access/engage this Copilot?
- Settings > Security

< Authentication

Verify a user's identity during a conversation. The copilot receives secure access to the user's data and is able to take actions on their behalf, resulting in a more personalized experience.[Learn more](#)

Choose an option

- No authentication
Publicly available in any channel
- Microsoft Entra ID authentication in Teams and Power Apps
When selecting this option, all other channels will be disabled.
- Authenticate manually
Set up authentication for any channel

Security

- Who can access/engage this Copilot?
- Connector Tool > Credentials to use



Copilot Studio

Autonomous Reservat... Tools +7 Published 9/11/2025 Publish Test ...

← Send an email (V2) (Rob Vogl) Enabled Save

Tool: Outlook.com Send an email (V2)

Connection: Outlook.com

Available to: Autonomous Reservation Manager

When this tool may be used:

- Agent may use this tool at any time
- Only when referenced by topics or agents

Ask the end user before running: Recommended for sensitive or regulated domains or when making changes for the user

No

Credentials to use: Control whether this action uses credentials you provide, or those of the end user.

Maker-provided credentials

End user credentials

✓ Maker-provided credentials

What the tool accepts in order to run. Inputs will be filled in the order shown.

+ Add input

This screenshot shows the 'Send an email (V2)' tool configuration in Copilot Studio. It highlights the 'Credentials to use' section, which is set to 'Maker-provided credentials'. This section also includes options for 'End user credentials' and a note about the order of inputs.

Data Loss Prevention Policies Enforcement

What?

Admins can define which channels, settings, and connectors agents can use.

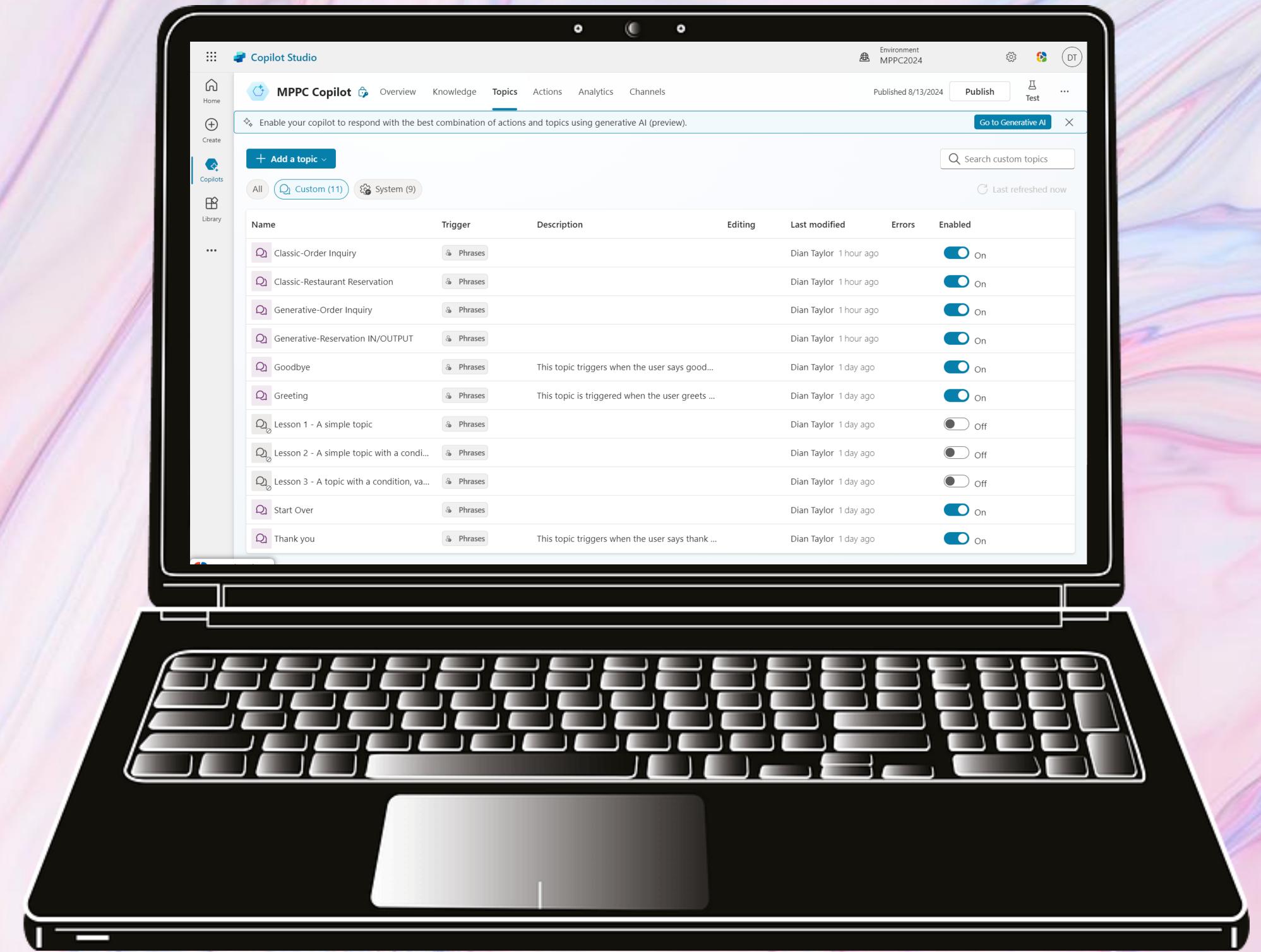


Why?

Users shouldn't be able to create an agent connected to business data they are not allowed to use



Demonstration 6: Publish agent to Teams



Connect your agent to a Customer Engagement App

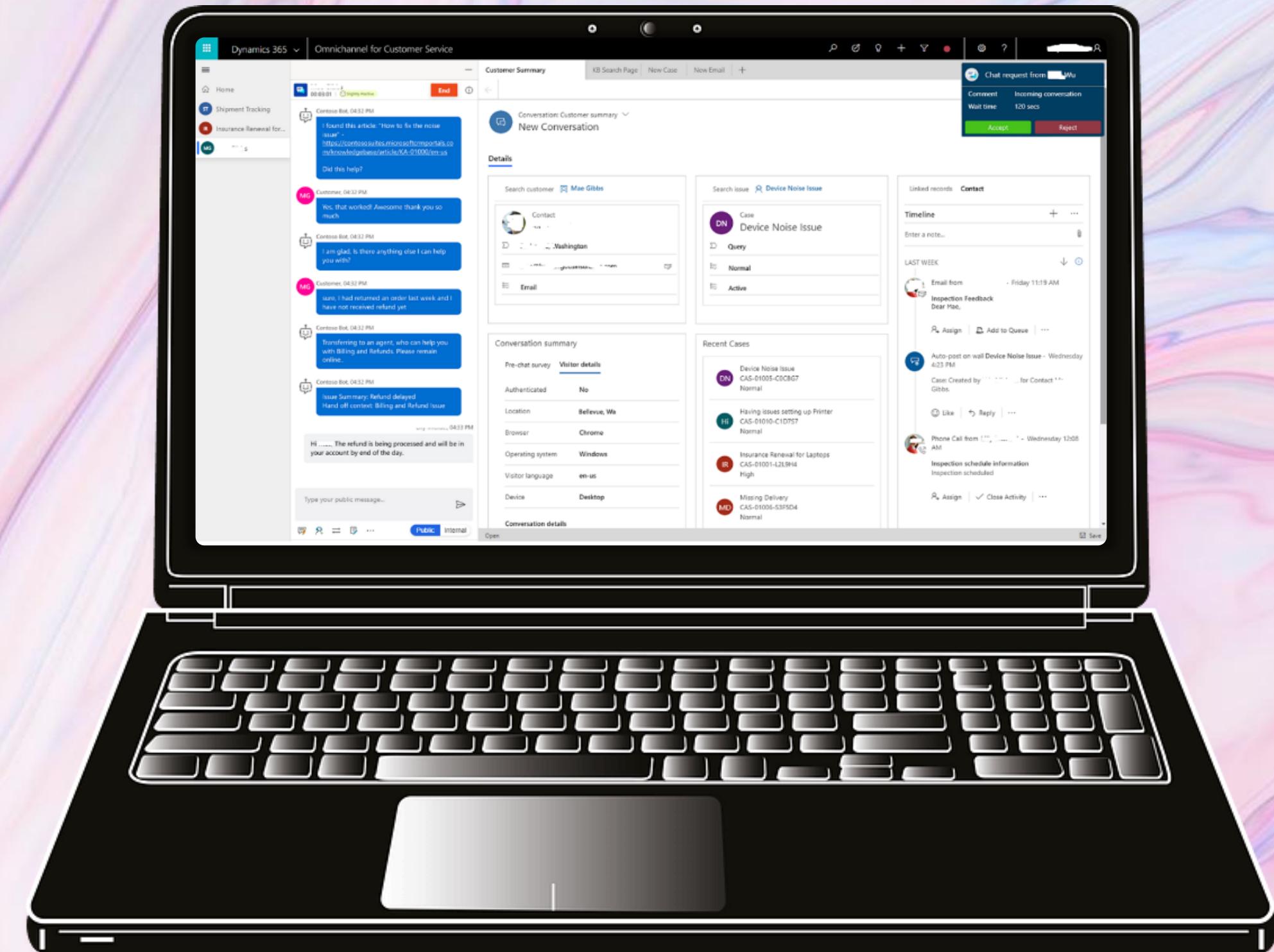
- Seamless Integration
- Handoff to live agents

Customer engagement hub
Connect to a customer engagement app to enable your copilot to hand off a chat session to a live agent or other copilot.

The image shows a collection of logos for different customer engagement platforms, arranged in two rows. The top row includes Dynamics 365 Customer Service (purple heart icon), Genesys (orange person icon), LivePerson (orange gear icon), Salesforce (blue smiley face icon), and ServiceNow (red power button icon). The bottom row includes ZenDesk (teal Z icon) and a placeholder for a 'Custom engagement hub' (blue globe icon).

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

Demonstration 7: Handoff to a live agent



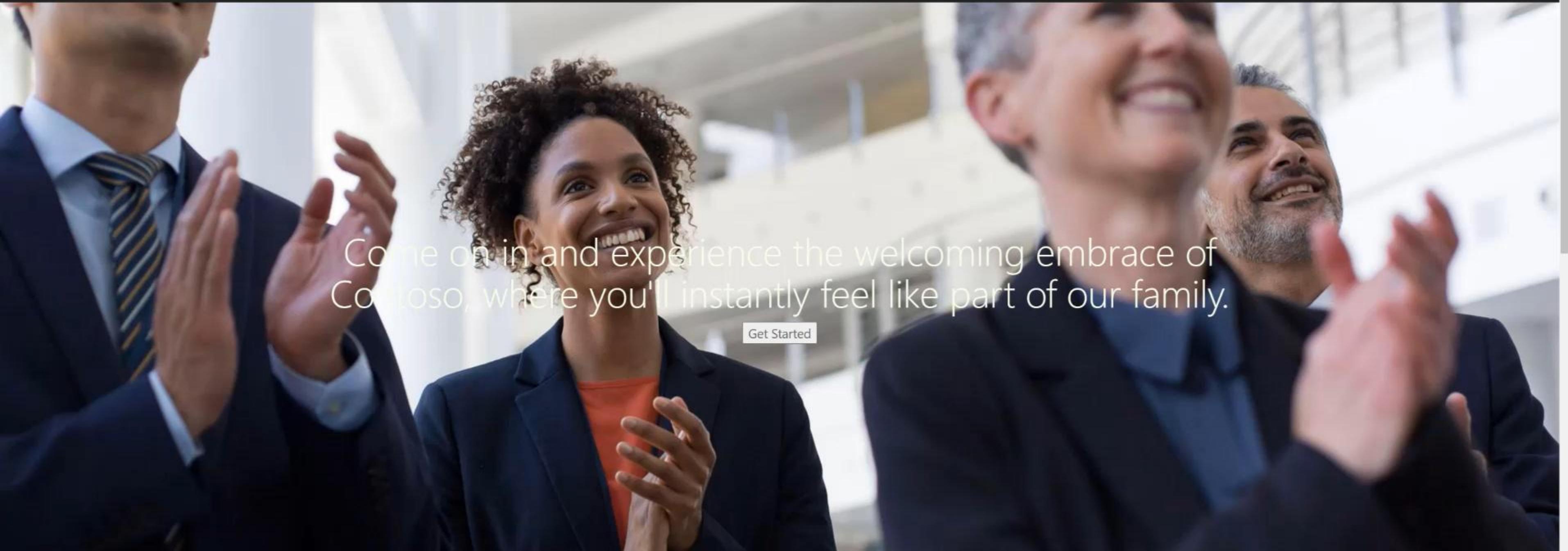
Company Background · Partner Po X +

partner-site.powerappsportals.com/partner-program/Company-Background/

RSM Favorites Dian's PVA - Microsoft Copilot Studio Session PVA RSM Portals User group Montreal Opportunity Power App Dian D365CE Document OneDrive - Shared Files REC Bot Instructions/Training LinkedIn Learning PowerBI

Contoso, Ltd.

Home | Partner Program | Support | Search | Sign in

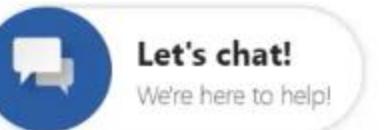


Come on in and experience the welcoming embrace of Contoso, where you'll instantly feel like part of our family.

Get Started

Our Strengths

Trust



Autonomous Agents

Handle variability and complexity at infinite scale

Independently begins work based on autonomous triggers

Automates long running processes

Dynamically reasons over its capabilities

Learns and improves

Follows human guard rails and asks for help

Orchestrate other agents

The screenshot shows the Copilot Studio interface with the following details:

- Header:** Copilot Studio, Environment projectmaven-test (def...), Published 10/8/2024, Publish, Settings, Test.
- Breadcrumbs:** Supply Chain Multi-Agent 1 > Overview, Knowledge, Topics, Actions, Activity, Analytics, Channels.
- Callout:** Your copilot is ready! Here's what's next:
 - Add actions so your copilot can do things for you
 - Build topics to focus and guide how your copilot answers
 - Publish your copilot so others can use it
- Details:**
 - Name:** Supply Chain Multi-Agent 1
 - Description:** None provided
 - Instructions:** When you receive the Invoice Discrepancy Report, perform the following tasks 1 to 5 without asking the user for confirmation or re-evaluation.
 1. Use Read Excel Content flow for 'InvoiceData.xlsx' to get the existing invoice data.
 2. Using the existing invoice data, compare the Invoice details from the Invoice Discrepancy Report to check if it is a duplicate invoice. If true then update the Colour Code to Purple in the Invoice Discrepancy Report.
 3. Convert the Invoice Discrepancy Report to html content.
 4. Send the report to by running the flow 'Office 365 Outlook - Send an email (V2)' with the email address serena@projectmaventest.onmicrosoft.com. Note: Don't wait for user to confirm, send the email regardless.
 5. Update Excel with Invoice Data and the calculated costs by running 'Add a row into Excel' flow to add a new row to the excel table with the following columns: Invoice Number (this will be an ID pulled from the excel content flow), Invoice Date, Origin, Destination, Freight Type, Invoice Rate (\$), Actual Rate (\$), Invoice Fuel Charge (%), Actual Fuel Charge (%), Total Billed (\$), Expected Cost (\$), Discrepancy (\$), Colour Code, Comments
 - Triggers (preview):** Add trigger
 - Add a trigger based on an event to enable your copilot to act automatically.
 - Lesson 1 - A simple topic
 - Greeting
 - Right Panel:** Test your agent, Chat history (Hello, I'm Supply Chain Multi-Agent 1, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.), Ask a question or describe what you need (0/2000), Make sure AI-generated content is accurate and appropriate before using. See terms.

What are Autonomous Agents

Automates Processes

Can act autonomously without human interaction

HR Assistant Agent

IT Support Agent

Device procurement agent

Expense Agent

Begins work independently based on event triggers

Event triggers: Actions that start an agent without user input

New file created in Onedrive

Record created in Dataverse

Email message received

Recurring schedule (reminders)

Reasons over its own abilities

Reasons over its own abilities

Chooses the right tools

Creates a plan

Recognizes when more info is needed

Follows guard rails

Uses descriptions in the agent and tools/knowledge



What are Autonomous Agents

Topic Triggers vs Event Triggers

Activated by what user input

Enables conversation-like responses

Users starts conversation

Automatically slot-fill further details to get the information needed for the task

Activated by events or schedules

No user input required

Allow for autonomous behaviors

Runs without user interaction

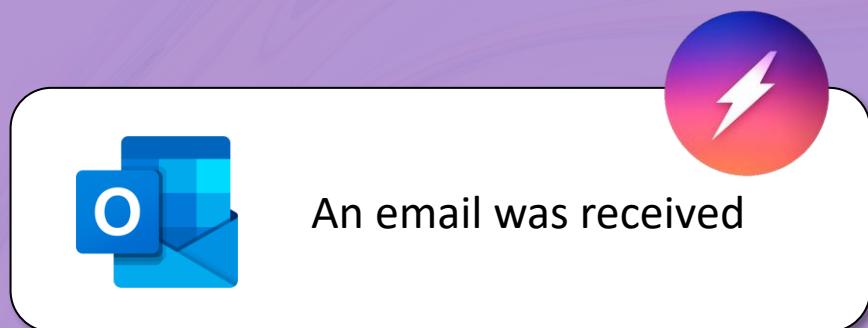
What are Autonomous Agents

Trigger

Instruction

Plan & Execute

The agent automatically gets triggered by an event



An email was received

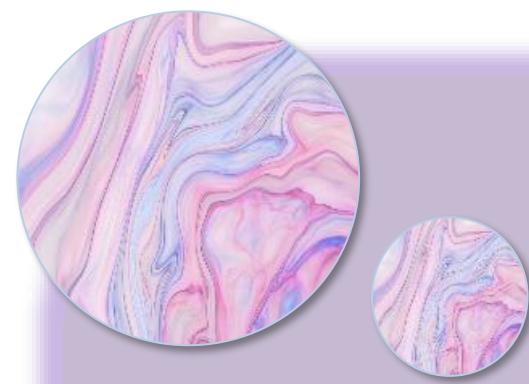
Agent reviews instructions
(Payload & Agent Instructions)

Instructions

Check the weather forecast
Create Reservation
(decide inside/outside based on weather)
Send confirmation email

Agent generates a plan using tools, knowledge, topics, ect and executes

- Check the weather
Decide inside or outside seating
- Create reservation
- Send email notification



Copilot Autonomous Agents

Key Benefits

- Proactive Problem Solving
- Operational Efficiency & Scalability
- Continuous Context Awareness
- Seamless Integration with Power Platform
- Always-On Availability

Copilot Autonomous Agents

Key Considerations

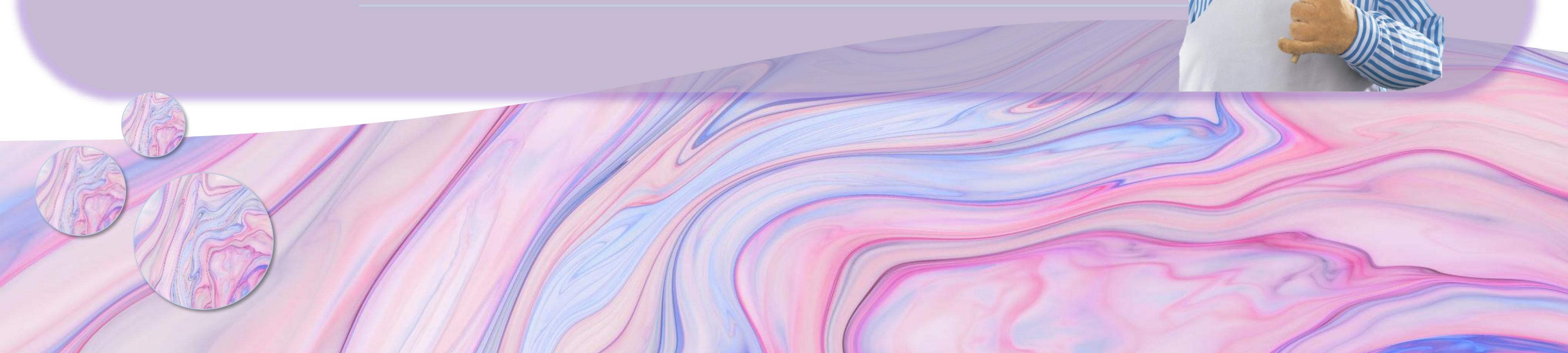
Governance & Control Boundaries

Ethical & Compliance Oversight

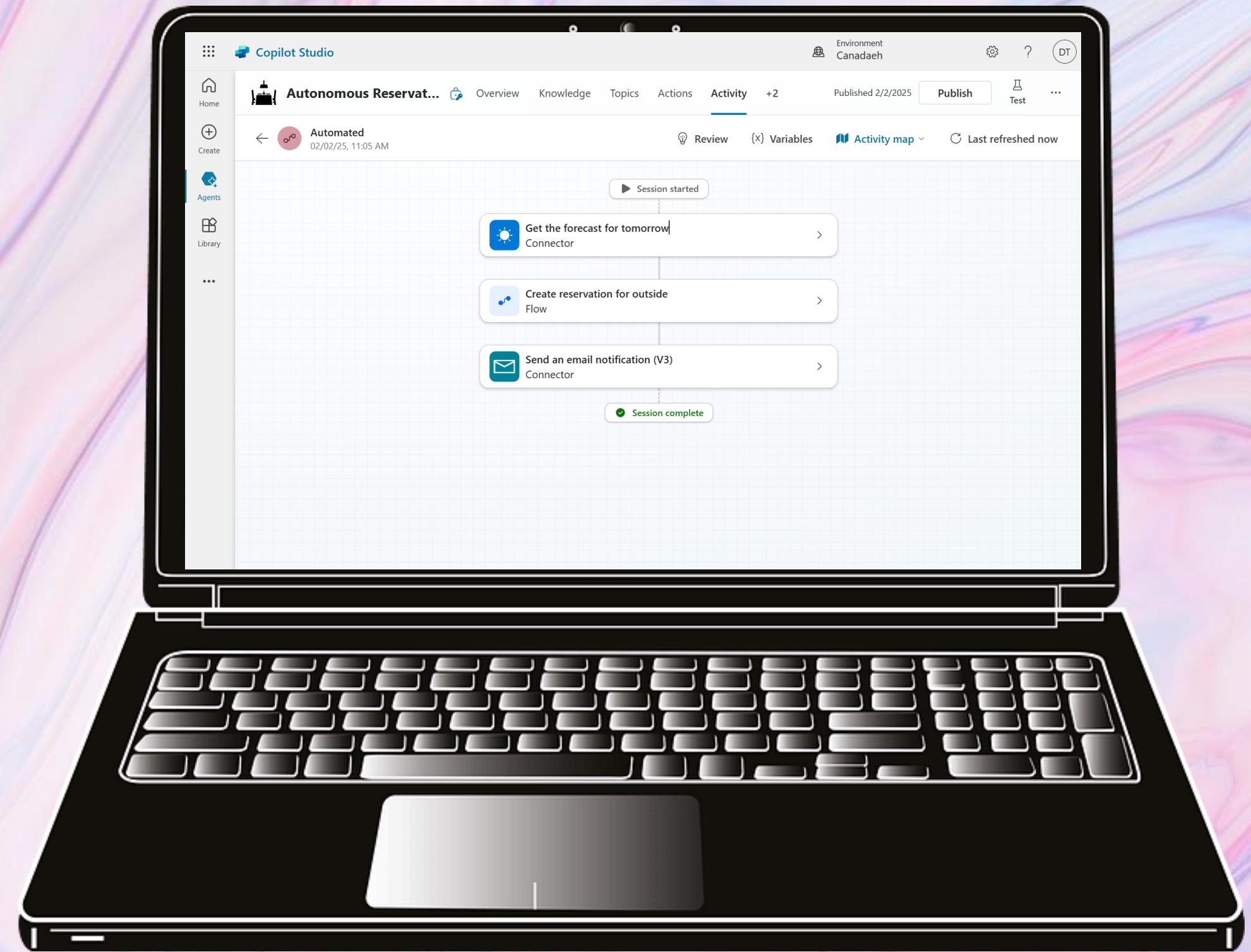
Complexity in Design & Monitoring

Data Quality & Context Dependency

User Trust & Adoption



Demonstration 8: Autonomous Agent



Microsoft 365 Copilot Lite

(More things you can do with your Copilot Studio skills)

Copilot Studio Lite Agents

Microsoft 365 Copilot Chat

Create an agent for a specific purpose or domain in Microsoft 365 Copilot Chat

SharePoint Agents & Knowledge Agents

Extend and customize agents in SharePoint



WERT DER FERKE

Copilot Studio Lite

Key Benefits

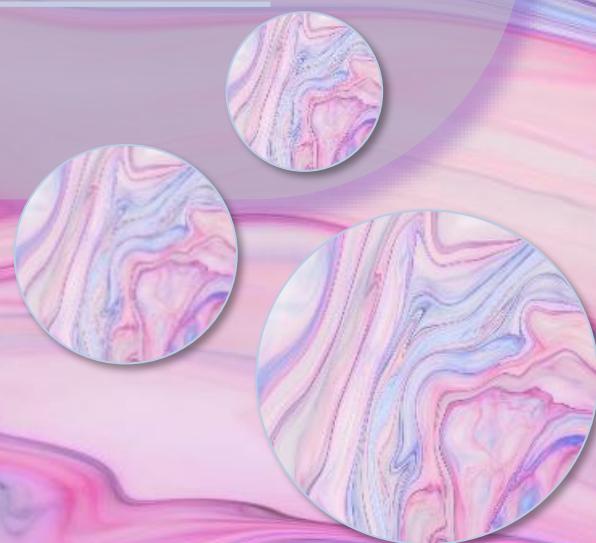
Fast Setup & Accessibility

Empowers Business Users

Integrated with Microsoft 365 Data (*Usually*)

Rapid Prototyping & Iteration

Pathway to Scale



Copilot Studio Lite

Key Considerations



Limited Data & Extensibility

Governance & Compliance Boundaries

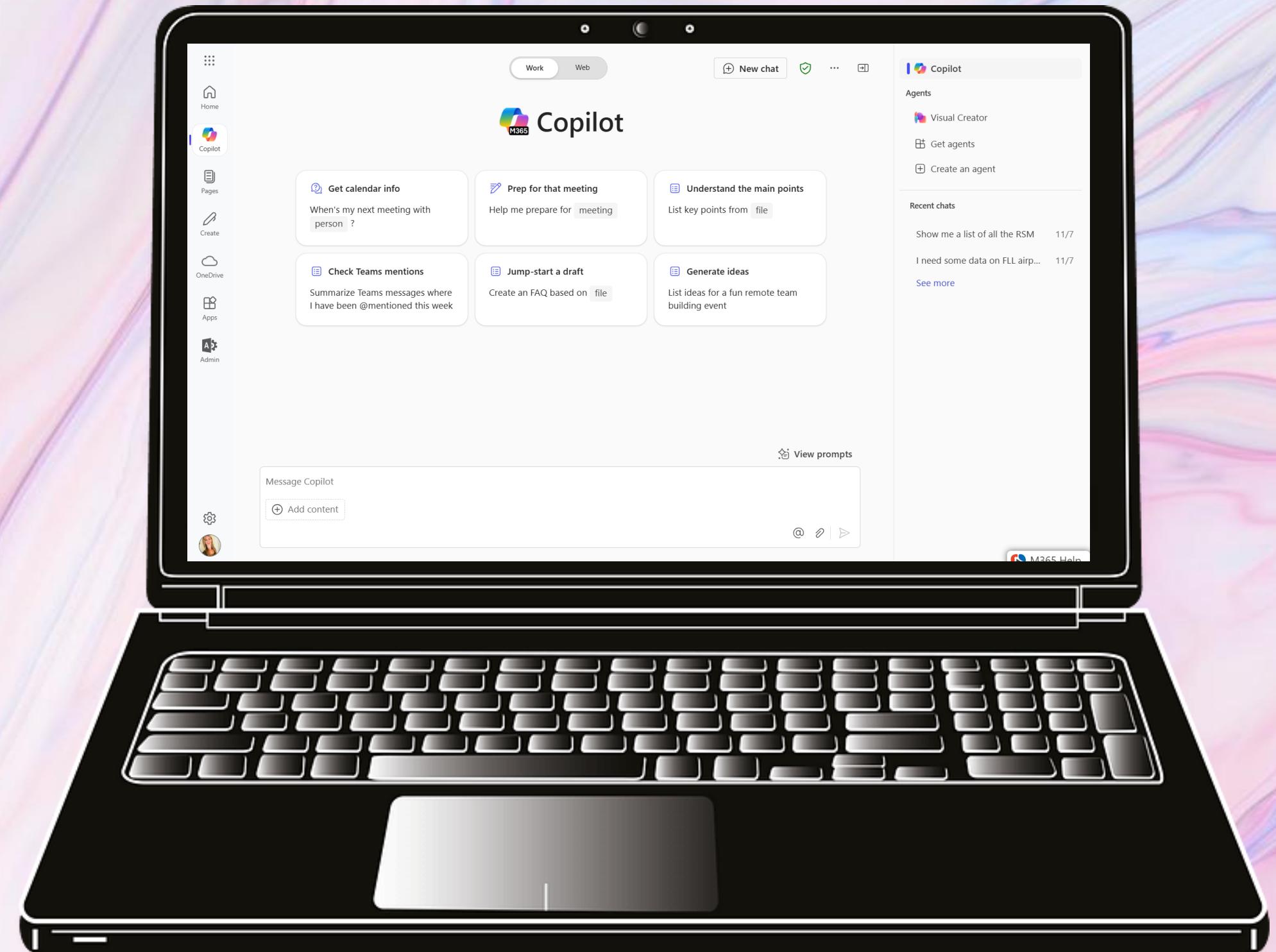
Licensing & Cost Planning

Migration Planning to Full Copilot Studio

Skill & Expectation Alignment



Demonstration 9: Create agent in M365 Copilot Lite



Copilot Studio Alternatives

SharePoint AI for SharePoint content

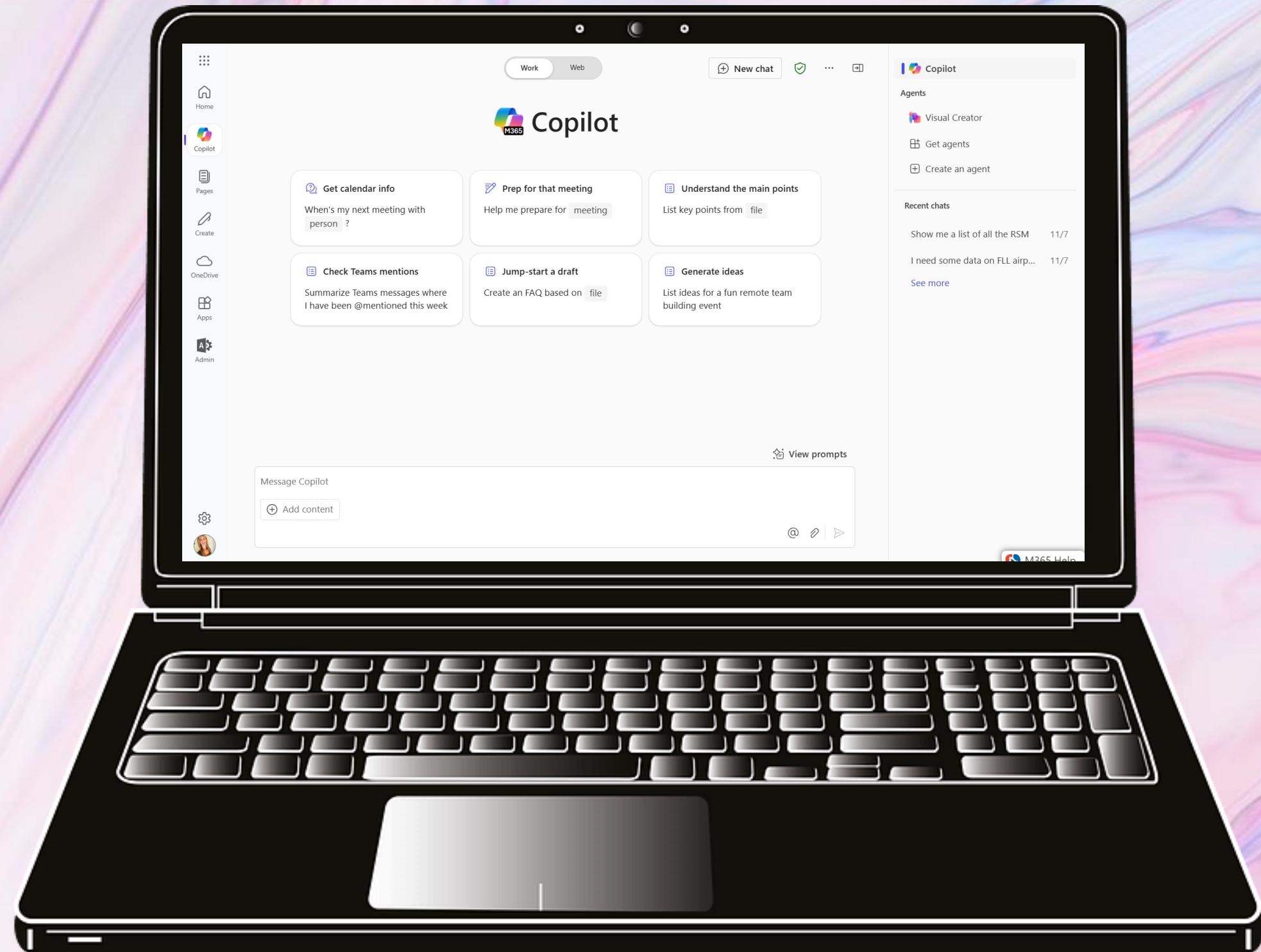
Agents Works with lists & libraries

Answers, summarizes, automates

Boosts self-service & discovery



Demonstration 10: Create a SharePoint Agent



Copilot Studio Component Collections

(Making your Agents more scalable with reusable assets)



Component Collections - Benefits

Reusability & Consistency:
Create once, re-use in other agents

Topic/Action/Entity/Knowledge Level Support

Centralized Governance

Version Control & Lifecycle Management

Standardization Across Teams

The screenshot shows the Copilot Studio interface with a dark theme. The top navigation bar includes the Copilot Studio logo, environment name "Environment Canadaeh", and various settings icons. The main area is titled "Component collections" and features a "Create new" button. A search bar labeled "Search collections" is also present. The main content area displays a table with two rows of component collections:

Name	Description	Installed on
AppCopilot_ComponentCollection_V1	Component collection for App Copilot V1	Copilot in Power Apps
Intent-based suggestions (preview)	Allow copilots to identify, interview, and resolve ...	Canada Agent



Component Collections - Considerations

The screenshot shows the Copilot Studio interface with a dark theme. On the left is a sidebar with icons for Home, Create, Agents, Flows, Tools, and three dots. The main area has a header 'Copilot Studio' and 'Environment Canadaeh'. Below is a 'Component collections' section with a 'Create new' button and a search bar. A table lists two collections:

Name	Description	Installed on
AppCopilot_ComponentCollection_V1	Component collection for App Copilot V1	Copilot in Power Apps
Intent-based suggestions (preview)	Allow copilots to identify, interview, and resolve ...	Canada Agent

Scope and Access

Governance Overhead

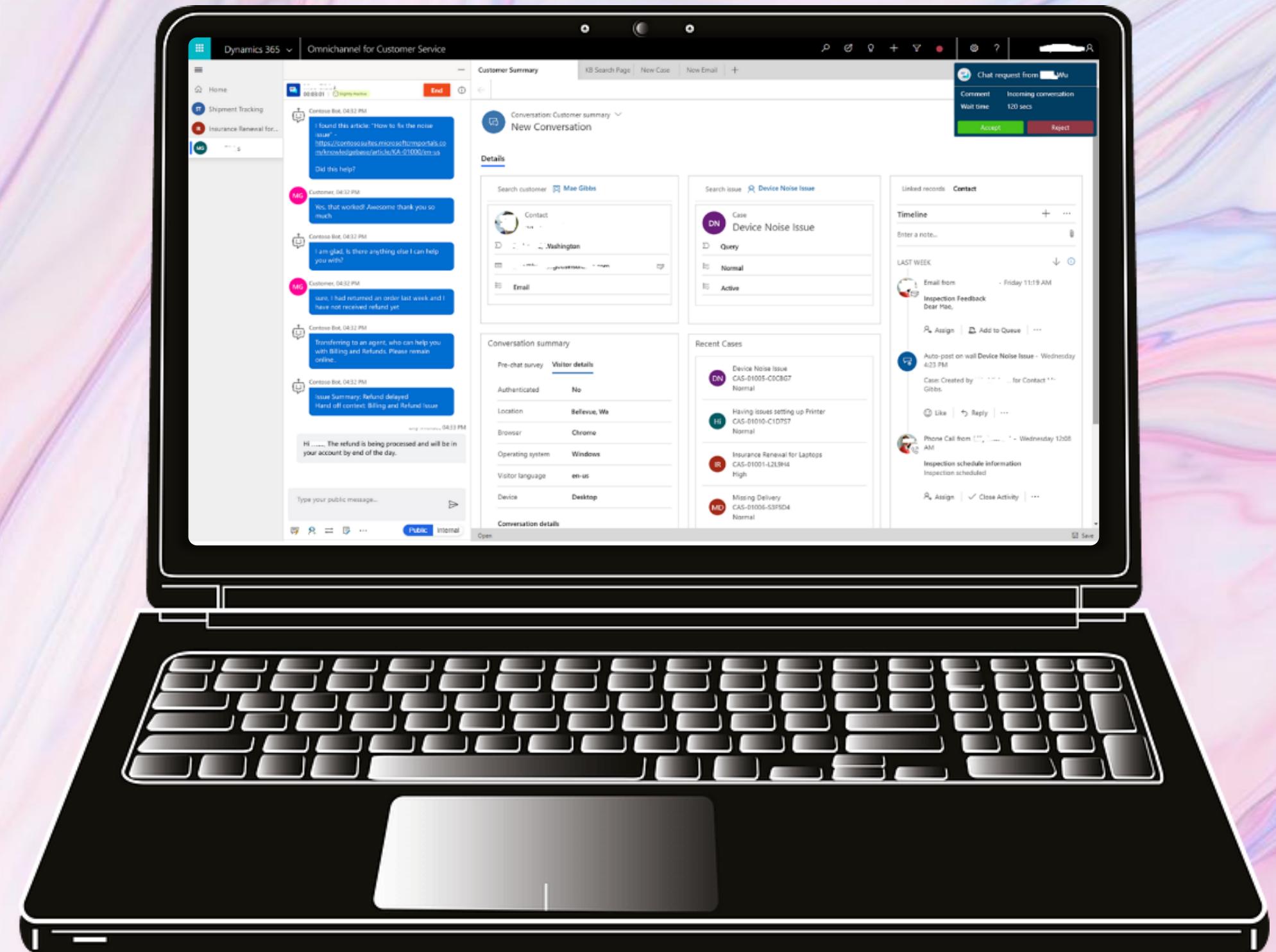
Dependency Management

Version Control & Lifecycle Management

Naming and Documentation Discipline



Use case Discovery for Agents



SELFIE TIME!



Thank you!



🌐 <https://warner.digital/>

𝕏 @davidwarnerii

YT <https://www.youtube.com/@Warner-Digital>

LN <https://www.linkedin.com/in/davidwarnerii/>

🌐 <https://D365Goddess.com>

𝕏 @D365Goddess

YT <https://www.youtube.com/d365goddess>

LN <https://www.linkedin.com/in/diantaylor/>

