



# CSP Level Up In-Person Technical Training





Level Up CSP

# Microsoft 365 Copilot update

[Technical Training](#)



# Introducing Copilot Chat



## Copilot Chat

**Free AI chat with pay-as-you-go agents**

Web Chat

Pages

Agents (pay-as-you go)

IT controls



## Microsoft 365 Copilot

**Your AI assistant for work (\$30)**

- Copilot chat
- + Agents (included)
- ✓ Personal Assistant
- ✓ Advanced Management
- ✓ Copilot Analytics

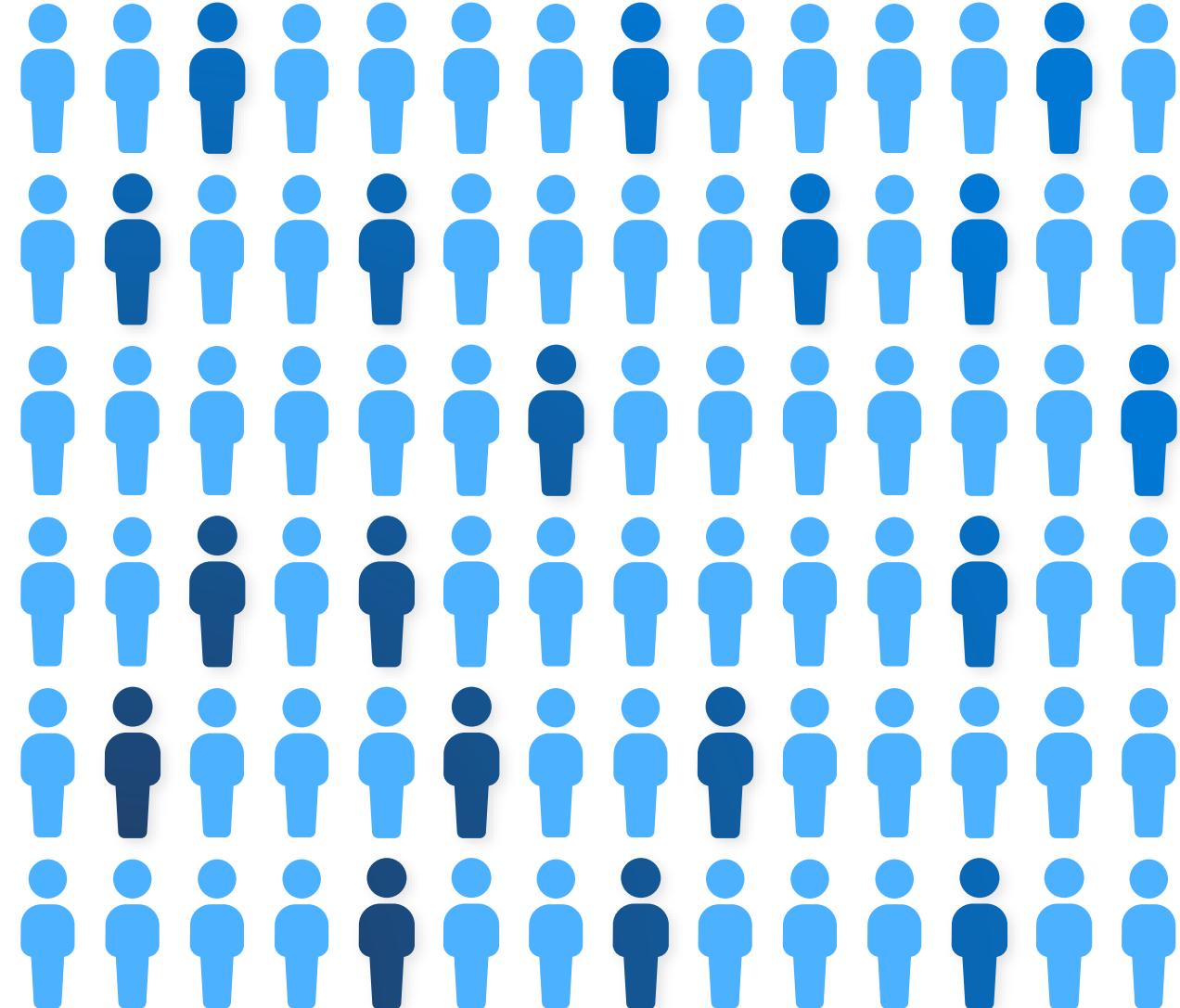
# Flexible purchase and deployment options

		Microsoft 365 Copilot Chat	Microsoft 365 Copilot
		Free + Consumption	\$30 pupm
Chat	● Included	● Included – Metered	
	Copilot Chat – Web grounded (powered by GPT 4o)	●	●
	Copilot Chat – Work grounded (shared tenant Graph data, 3rd party data via graph connectors, personal data)		●
	Copilot Pages	●	●
	File upload <sup>1</sup>	●	●
	Code Interpreter <sup>1</sup>	●	●
Agents <sup>2</sup>	Image generation <sup>1</sup>	●	●
	Create agents using Copilot Studio <sup>3</sup> , including SharePoint agents	●	●
	Discover and pin agents	●	●
	Use agents grounded on web data	●	●
	Use agents grounded on shared tenant Graph data and 3 <sup>rd</sup> party data via graph connectors	●	●
	Use agents that act independently and autonomous actions	●	●
Personal assistant	Access to personal Graph for additional context, personalization (e.g. Outlook, OneDrive, meeting transcripts)		●
	Copilot in Teams (Copilot in Meetings and Meeting Recap)		●
	Copilot in Outlook (Prioritize my inbox, message summaries, draft email)		●
	Copilot in Word (Document summaries, draft documents, commands)		●
	Copilot in Excel (Python, formula creation, commands)		●
	Copilot in PowerPoint (Narrative Builder, designer, draft slides, deck summaries)		●
	Copilot Actions		In preview
	Pre-built M365 agents (Interpreter, Facilitator, Project Manager, Employee Self-Service)		In preview
Copilot Control System	Enterprise Data Protection (EDP)	●	●
	IT management controls	●	●
	Agent management	●	●
	SharePoint Advanced Management		●
	Copilot Analytics to measure usage and adoption <sup>4</sup>		●
	Pre-built reports and advanced analytics to measure ROI		●

1. Limits apply. 2. Applies to employee-facing agents only. 3. Learn more about the full capabilities of Copilot Studio [here](#). 4. Basic reporting in Microsoft Admin Center available for Copilot Chat.



## Your customer's Organization



● M365 Copilot   ● Copilot Chat

# Go to market in CSP with Copilot

Hero motion

## Microsoft 365 Copilot

Acquire new customers and drive continuous upsell from Copilot Chat

## Microsoft 365 Copilot Chat

Acquire new customers and drive organization wide AI adoption with M365 Copilot customers



## Agents

Attach to M365 Copilot and Copilot Chat customers

# Go to market with Copilot in CSP

1

## Get customers AI ready

Assess customer's use cases, technical readiness and security posture and deploy M365 Premium SKUs

2

## Onboard and engage

Build packaged offers and position M365 Copilot as the hero motion, drive organization wide AI adoption with Copilot Chat and build and deploy agents. Execute end user training

3

## Deliver impact

Provide ongoing managed services and drive continuous M365 upsell from Copilot Chat

# Key Ingredients to showcase Copilot customer value

## High Value Scenarios

1

### Immersion

Help customers unlock broad and sticky **productivity value** from Copilot through curated immersion experiences with executives

2

### Extensibility

Help customers that have a foundation of productivity value extend financial benefit by automating key business processes with agents

3

### ROI

Help customers discover compelling scenarios, aligned to their business priorities. Ensure they can **measure ROI** for these scenarios across Productivity and Extensibility

[Be Customer Zero](#)

[Attach agents](#)

[Engage BDMs](#)

# Securing Copilot

## Secure and govern Copilot with Microsoft Security



Security



Compliance



Privacy



Responsible AI



### Secure access

Manage organization-wide search

Restrict or block risky access

Control the use of Copilot on devices



### Protect sensitive data

Protect access to sensitive data in Copilot interactions

Keep confidential information within your business

Understand user activities and detect risky access to Copilot



### Govern Copilot usage

Retain and log Copilot interactions

Find information on Copilot interactions

Manage cases and apply legal hold

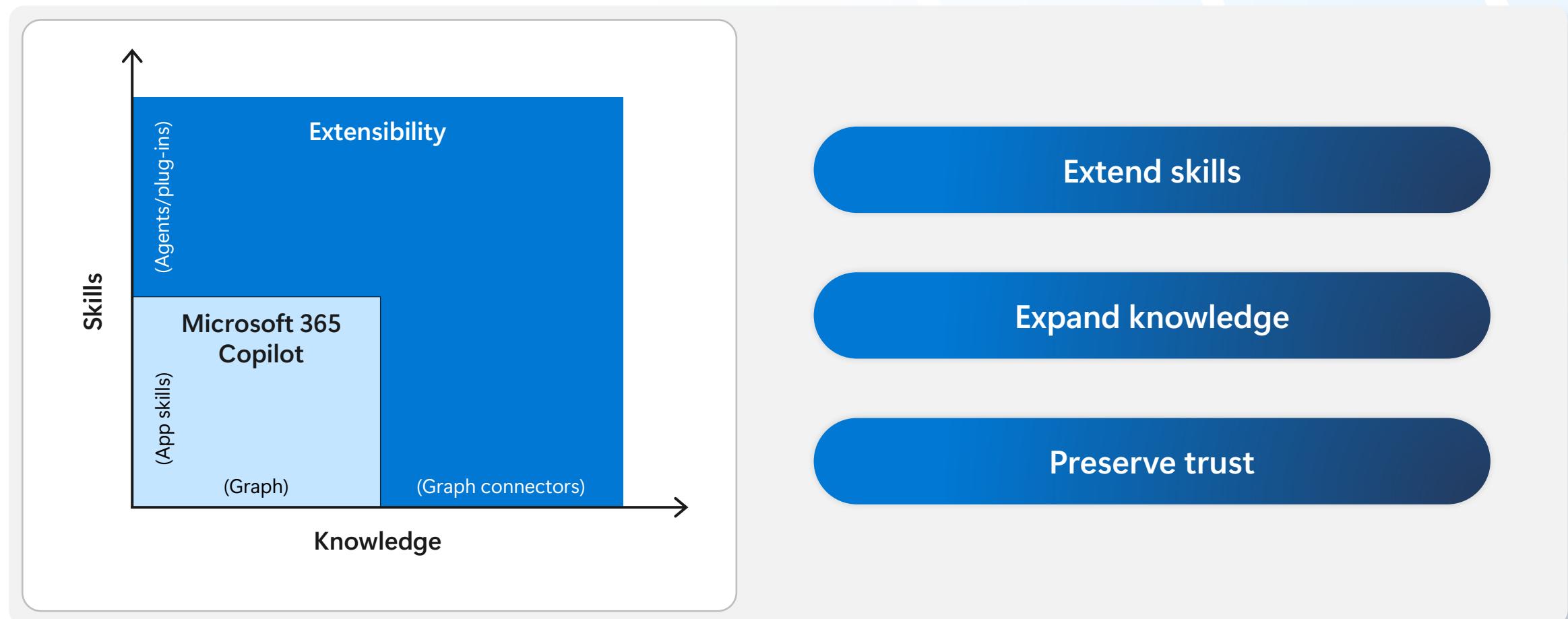
Out-of-box Copilot Extensibility

# Microsoft 365 Copilot



# Extend & customize Copilot

Extending and customizing Copilot experiences enables you to expand your organization's AI-powered productivity, skills, and creativity



## Buy and Use

# Out-of-box (OOB) Copilot extensions

Copilot extensions help enhance and customize Copilot with your apps, data and workflows

Users can **find extensions** from 3<sup>rd</sup> party and line of business extensions **enabled by IT** in the store

The screenshot shows the Microsoft AppSource store interface. On the left, there's a sidebar with a search bar and sections for 'Apps' (selected), 'Built for your org', 'Featured' (Copilot extensions), 'Popular', 'Categories' (Productivity, Project management, Social, Training & tutorial), and 'Manage your apps'. On the right, under the heading 'Copilot extensions', there are 12 cards for various extensions:

- Perfect Wiki** by OOO RD17: Build and organize your knowledge base of com... (4.7 stars)
- Mural** by Mural: Take ideas from imagination to activation with M... (4.5 stars)
- Priority Matrix** by Applience Inc: Focus on high-impact tasks. Do the work that m... (4.4 stars)
- Viva Goals** by Microsoft Corporation: Achieve purpose and alignment with Microsoft... (4.0 stars)
- Jira Cloud** by Atlassian.com: Empower your team to track, update, and manag... (4.2 stars)
- Confluence Cloud** by Atlassian.com: Capture rich meeting notes, share pages, & stay... (2.0 stars)
- ALVAO** by ALVAO s.r.o.: Connect agents and users within one workspace... (5.0 stars)
- Designer** by Microsoft Corporation: Designer: Collaborative AI-driven Image Creator i... (5.0 stars)
- Iris** by Microsoft Corporation: Iris provides support to Microsoft Consulting and... (5.0 stars)
- Dropbox** by Dropbox, Inc.: Share files and upload content to Dropbox witho... (4.7 stars)
- 1Page** by OAYAW, Inc.: Supercharge your meetings with 1Page summary... (5.0 stars)
- Booking Room Pro** by Witivio: Organize and manage your office occupancy. (4.3 stars)
- Autopilot Accounts...** by Autopilot Workflow Solutions: (Open)
- Priority Matrix HIPAA** by Applience Inc: (Open)
- Embark by Hermis** by Hermis Inc: (Add)

[appsource.microsoft.com](https://appsource.microsoft.com)

Public Preview

# Microsoft Graph connectors

## Make the most of your external data

by giving Copilot the ability to access and summarize your diverse datasets from different sources, enabling more comprehensive insights

## Use Copilot as a research aid

letting Copilot find, summarize, and perform Q&A natively by leveraging the dataset of your choice

## Surface the intelligence of Copilot

in Microsoft Search, ContextIQ, and more to enhance the ways your users are already searching for answers

## Three main steps to set up a Graph connector

01

Create a connection

02

Register your schema

03

Ingest your content to the Microsoft Graph

# Sample response from Copilot, utilizing data from Graph connector

Show me GitHub issues ready for content review



Here are some GitHub issues that are ready for content review:

- "Testing fix to breadcrumb by adding Learn at first level" is ready for content review. ①
- "Patch 3" is ready for content review. ②
- "Update subscription-post-subscriptions.md" is ready for content review. ③
- "Update presence-setpresence.md" is ready for content review. ④
- "Update subscription-post-subscriptions.md" is ready for content review. ⑤
- "Update docs: Update profilePhoto" is ready for content review. ⑥
- "Update workinghours.md" is ready for content review. ⑦

Is there anything else you would like to know?

Copy

7 references

# Microsoft Graph connectors vs Plugins

## Microsoft Graph connectors

Microsoft Graph connectors deeply integrate *large scale* 3<sup>rd</sup> party data into Microsoft 365 Copilot for reasoning under Semantic Indexing

### Example prompts:

- "Summarize the types of cases managed by Robert and include insights and findings found"
- "Build a table with cases which include issues with incorrect connections, with severity, status and owner columns"
- "From M365 and offline files, what changed in the strategy between January and February?"

Ticketing System



File Share Archives

.csv

ServiceNow  
Knowledge Base

Custom database

## Agents/Plug-ins

Plugins connect in real-time to 3<sup>rd</sup> party data into Microsoft 365 Copilot. Allows read/write access and offer more control over responses

### Example prompts:

- "Which Air India flights were delayed more than 150 minutes?"
- "What items in the warehouse have low inventory, below 100 units?"
- "Show case # 317721 status and update to: Resolved "

Airline Flight  
Operations Table



Inventory data

Jira Ticketing  
System

Introduction to

# Copilot Agents





**Microsoft 365 Copilot**

**Productivity AI**  
for your employees

**"Your AI Assistant for Work"**



**Microsoft Copilot Studio**

**Process AI**  
for your teams, depts  
and company

**"Extend or build a custom agent"**



**Azure AI Foundry**

**AI Platform**  
for your developers

**"Your PaaS for AI"**



# Microsoft 365 Copilot for Information Workers

## Copilot Studio embedded builder

- Seamlessly integrated into M365
- Easy, natural language creation
- AI productivity and automation on the existing user workflow

The screenshot shows the Microsoft 365 Chat interface. On the left, there's a sidebar with icons for Home, Copilot (highlighted), Create, OneDrive, Feed, Pages, and Apps. The main area has tabs for Work and Web, and a search bar. A Copilot card is prominently displayed, titled "Copilot: Your AI assistant for work". It features six cards: "Catch up on meetings", "How to", "Help me write", "Get key info", "Generate idea", and "What did they say?". Below these is a message input field with "Message Copilot" and "+ Add content" buttons, and a "View prompts" button. To the right, a sidebar lists recent chats: "Copilot" (with "Show more"), "Explore agents", "Create a Copilot agent", "Recent chats" (with entries like "Fabrikam opportunity" from 8:03 AM, "What's hot in my inbox" from Yesterday, "What's my day look like?" from 2 days ago, and "Northwest Traders Project" from 2 days ago), and a "Show more" link.



# Microsoft Copilot Studio for Makers

- Extend Microsoft Copilot
- Build your own agents
- Bring your enterprise data, APIs and knowledge sources
- Add actions and create autonomous agents

The screenshot shows the Microsoft Copilot Studio web interface. At the top, there's a search bar with the placeholder "Describe your copilot to create it" and buttons for "Helpdesk", "Expense tracking", "Human Resources", and a copy icon. Below the search bar is a text input field with the placeholder "Use everyday words to describe what your copilot should do ...". A note below the input says "This AI-powered feature is in preview. See terms".  
**Recent**: A table showing recent copilots:

Name	Type	Modified by	Last published	Owner
Copilot for Microsoft 365	Copilot	Mona Kane	2 weeks ago	Mona Kane
Copilot for Sales	Copilot	Pedro Armijo	2 months ago	Mona Kane

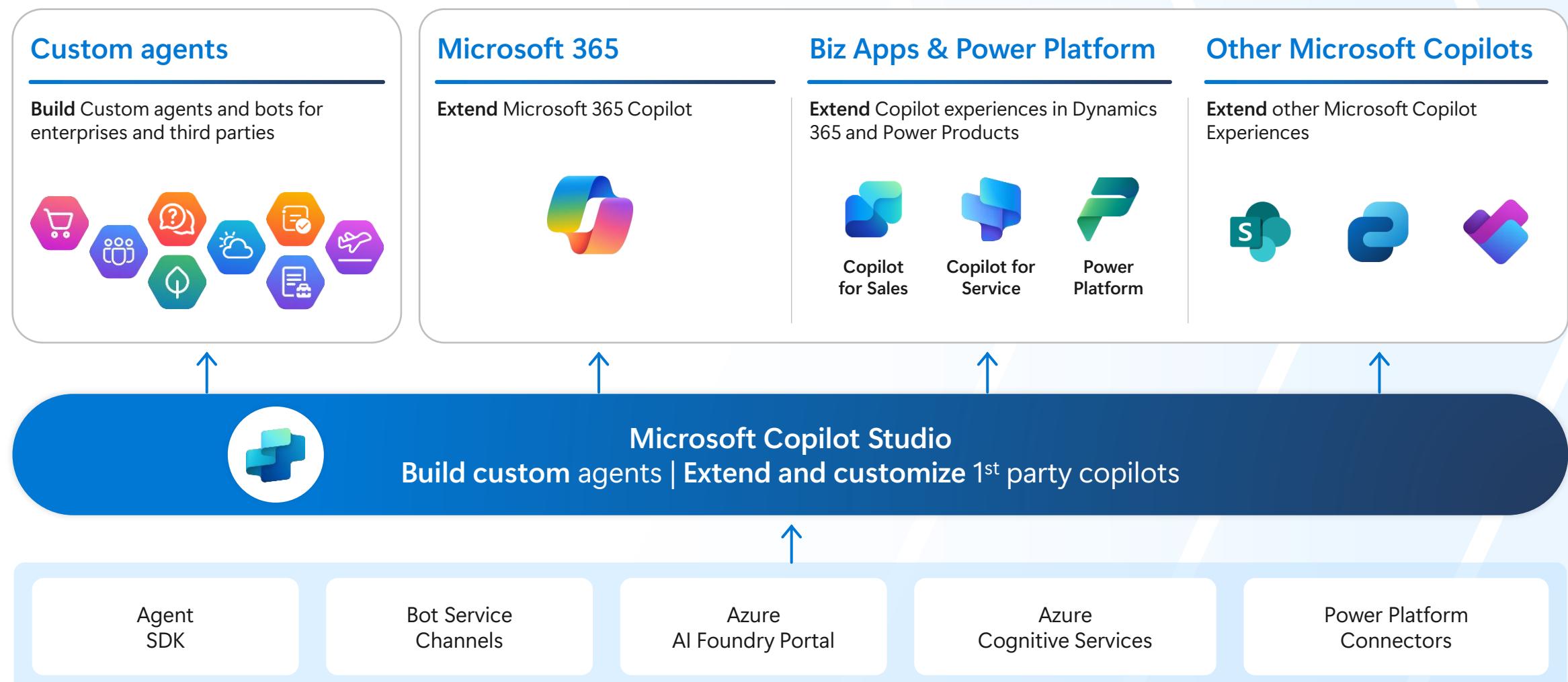
  
**Start with a template**: A grid of eight template cards:

<b>Approval Manager</b> Streamline your approval process across multiple systems with summarized requests	<b>Job Craft</b> Revolutionize your HR approach with AI-constructed job descriptions and refined interview questions	<b>Organization Navigator</b> Assists employees in finding colleagues and their hierarchy within the organization with Microsoft Tea...	<b>Safe Travels</b> Provides employees the travel assistance in terms of travel inquiries and health and safety guides.
<b>Store Operations</b> Revolutionize your HR approach with AI-constructed job descriptions and refined interview questions	<b>Sustainability Insights</b> Enables users to easily get insights and data about a company's sustainability goals and progress	<b>Weather</b> Your go-to assistant for getting weather forecasts across regions where your company operates	<b>Website Q&amp;A</b> A copilot that can answer common questions from users using the content on your web site.

  
**Learning resources**: A grid of six resource cards:

<b>Quick start: Create and deploy a copilot</b>	<b>Documentation</b>	<b>Responsible AI FAQs</b>	<b>Extend your copilots with plugins and extension</b>
<b>Quick start: Use Generative AI in a copilot</b>	<b>Support community</b>	<b>Try Copilot Agents</b>	<b>Security and governance in Copilot Studio</b>

# Copilots and Agents in the Microsoft Ecosystem



# Why organizations are using Copilot Studio



## Time to market

with a managed SaaS service and no infra to deploy



## ROI

with rapid prototyping, deployment and cost savings



## Enterprise Knowledge

with easy access and control of multiple knowledge sources



## Connectors

with 1,400 connectors to external applications and systems



## Flexibility

State of the art generative models and orchestration with no-cliffs extensibility in Azure AI

# Spectrum of agents

Simple

Advanced



## 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



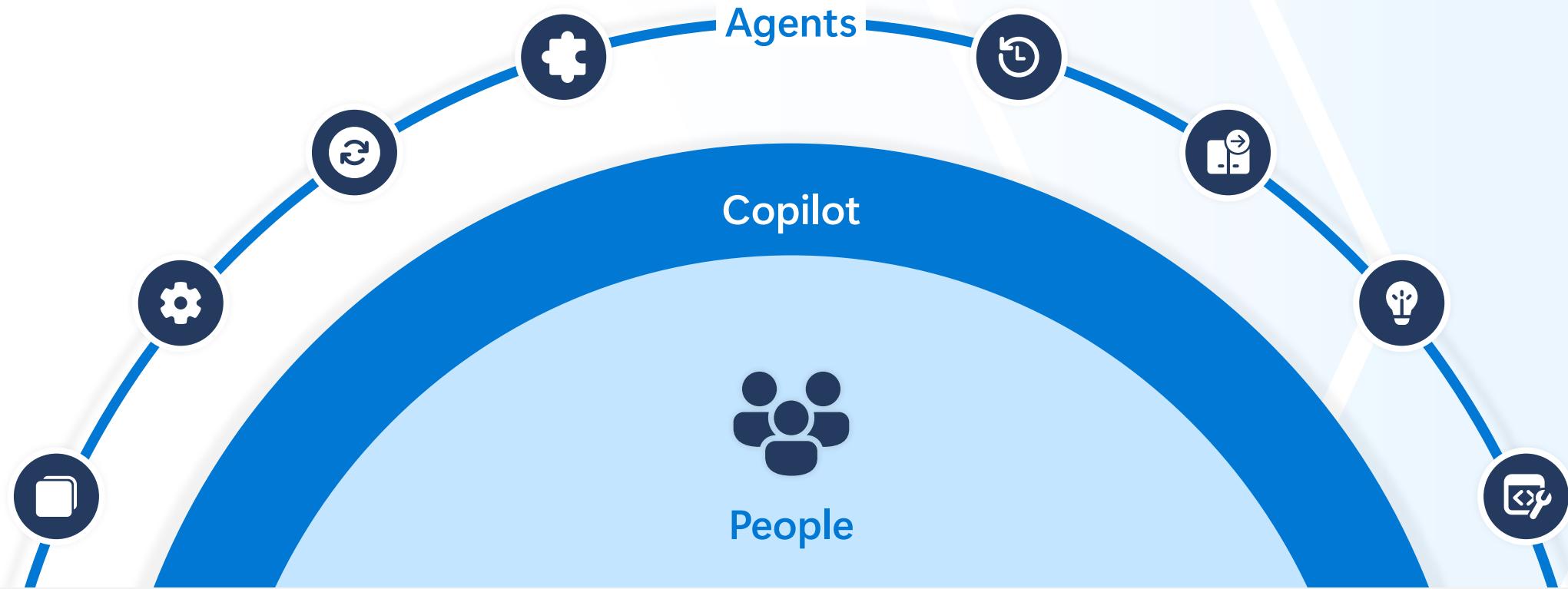
## Autonomous

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

Preview

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

# Transform the way you work with Copilot + Agents



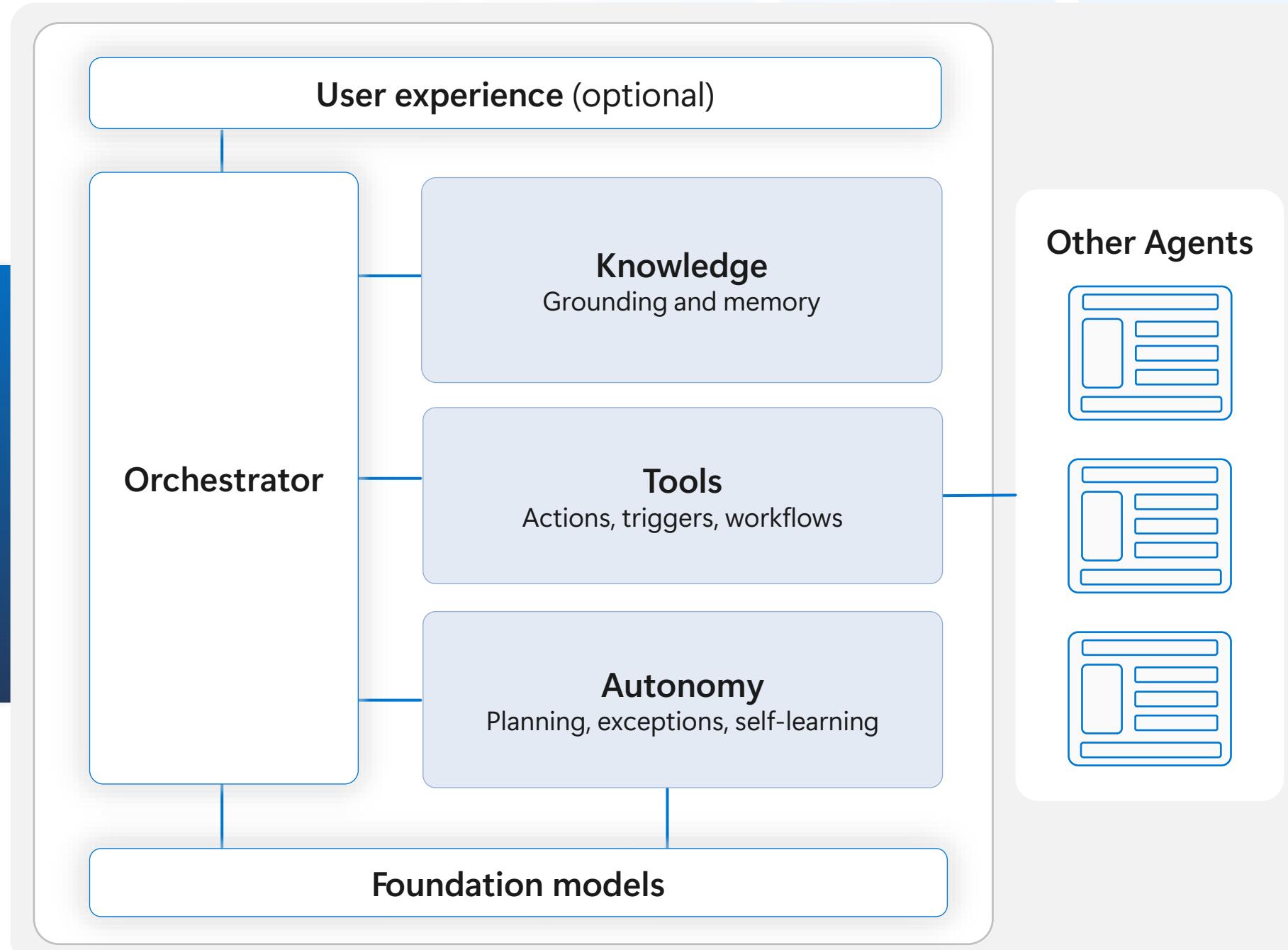
Copilot makes agents more personal to you

Agents make Copilot more capable

Together, they benefit from consistent security, governance & management

## What are *Copilot agents*?

AI assistants designed to automate and execute business processes, working with or for a human.



Create as an end-user

## Copilot Agents



# Extend the power of Copilot end-users with agents

Create Copilot agents from the apps you use every day



Build an agent directly from Microsoft 365 Copilot Chat and seamlessly integrate your organization's knowledge

Create agents in SharePoint based on select SharePoint files scoped for specific business needs

Native access to your Microsoft 365 data sources

Adheres to Microsoft 365 security, permissions, policies and admin controls

Grounded solely in your selected content

# Microsoft 365 Copilot

## Copilot Studio

### Agent builder

The screenshot shows a Microsoft 365 Copilot Studio interface for creating a 'Field Service agent'. The browser address bar indicates the URL is <https://www.microsoft365.com/M365/Chat>. The main area displays a card titled 'Copilot Studio' with the sub-section 'Field Service agent'. A blue button labeled 'Configure' is highlighted with a cursor. Below it, there's a 'Details' section with fields for 'Name' (set to 'Field Service agent') and 'Description' (set to 'Troubleshooting information for on-site visits'). Under the 'Instructions' section, a box contains text about providing step-by-step guidance to field agents. The 'Knowledge' section includes a 'SharePoint' subsection where users can select folders and file types (.docx, .doc, .txt, .pptx, .ppt, and .html) or add a SharePoint site. A sidebar on the left lists various Microsoft services: Home, Copilot, Create, OneDrive, Feed, Pages, and Apps.

# Your own Copilot agent, right in the flow of work

Create agents in SharePoint based on select SharePoint files scoped for specific business needs



## Easy to create

Choose your grounding data to create a Copilot agent in just a few clicks



## Easy to share

Just like other Microsoft 365 apps, share the link via email or Teams chat



## Increase collaboration

Add to a Microsoft Teams chat and @mention the agent for instant interaction



## Extensibility

Launch Microsoft Copilot Studio directly from SharePoint for deeper customizations



## Secure

Defaults to your existing SharePoint permissions and sensitivity settings

The screenshot shows a SharePoint 'Product Maintenance' site. The left navigation bar includes Home, Documents (selected), Pages, Site contents, Recycle bin, and Edit. The main content area displays a grid of documents with columns for Name, Modified, and Modified By. The documents listed are:

Name	Modified	Modified By
Current Deployments	Monday at 3:31 PM	Mona Kane
Parts & Inventory	Monday at 3:31 PM	Mona Kane
Product Failure Reports	Monday at 4:30 PM	Kat Larson
Service Manuals & Documentation	Wednesday at 8:30 PM	Kat Larson
City ordinances checklist.docx	July 27	Lee Gu
PSE regional cost analysis.xlsx	Yesterday at 1:40 PM	Adele Vance
RMC 21.40.030 - EV Charging Stations.pdf	August 20	Pradeep Gupta
Rollout announcements.docx	Yesterday at 2:10 PM	Lynne Robbins
Site deployment process.pptx	September 3	Megan Bowen

**See Copilot agents in action!**

# Use the built-in Copilot agent in SharePoint or define your own



## A Copilot agent built-in to each SharePoint Site

Use the Copilot agent scoped to an entire SharePoint site (*e.g., SharePoint for a product launch*)

- Grounded to a SharePoint site
- “What is the final decision on the product launch date?”
- The agent can be used by every member of the site



## A Copilot agent scoped to specific SharePoint content

Create a Copilot agent based on selected sites, files or folders focused on a particular purpose (*e.g., licensing and pricing documents for the new product launch*)

- Grounded to selected sites, files, folders
- Can be customized
- “Compare the different SKU features?”
- Share the agent with any members of the site



*Maria manages the Team SharePoint site, which includes a Copilot agent grounded to the team site. Each time a team member comes to the SharePoint site, they can leverage the Copilot agent to quickly access the SharePoint site content they need*



*Patrick manages the budget for the team and creates a Copilot agent for himself and his manager that is scoped to all his critical forecasting and budget monitoring documents*



# In a few clicks, accelerate sharing and collaboration

1

Select the specific content your Copilot agent is scoped to

2

Customize your Copilot agent's brand and behavior

3

Share your Copilot agent via a link or add to a Teams chat

1

# Select the specific content your Copilot agent is scoped to



Site owners can enable any site to get a built-in Copilot agent, scoped to the content of that site. Or select specific files you want the agent to leverage



You choose the folders or files and your Copilot agent will only reason over those selections when responding



Begin using the Copilot agent right away or customize using the agent builder

Name	Modified	Modified By
Current Deployments	Monday at 3:31 PM	Mona Kane
Parts & Inventory	Monday at 3:31 PM	Mona Kane
Product Failure Reports	Monday at 4:30 PM	Kat Larson
Service Manuals & Documentation	Wednesday at 8:30 PM	Kat Larson
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Rollout announcements.docx	Yesterday at 2:10 PM	Lynne Robbins
Site deployment process.pptx	September 3	Megan Bowen

2

# Customize your Copilot agent's brand and behavior



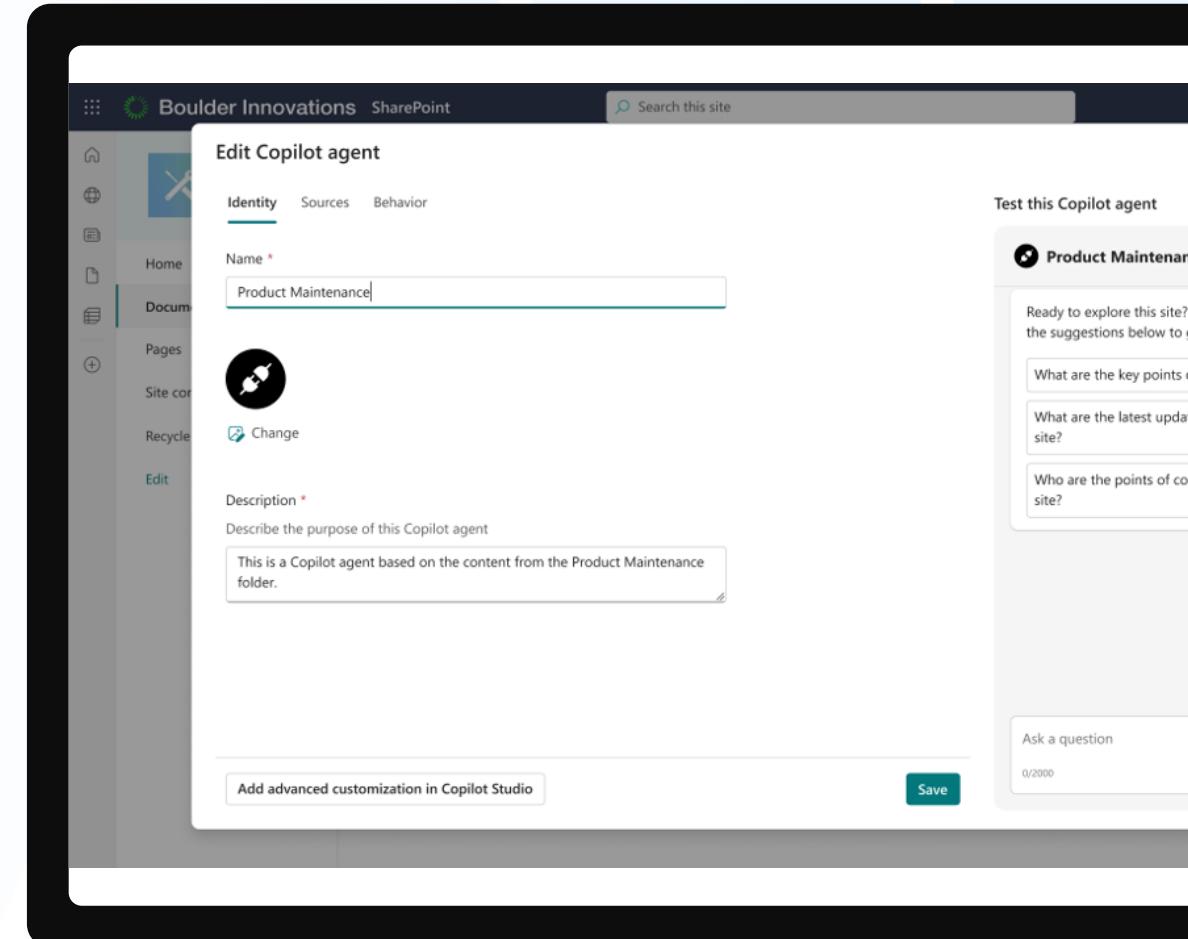
Give your Copilot agent a name, image, and description to help users easily recognize it and its purpose



Provide additional guidance to users so they know how to maximize the value of the Copilot agent

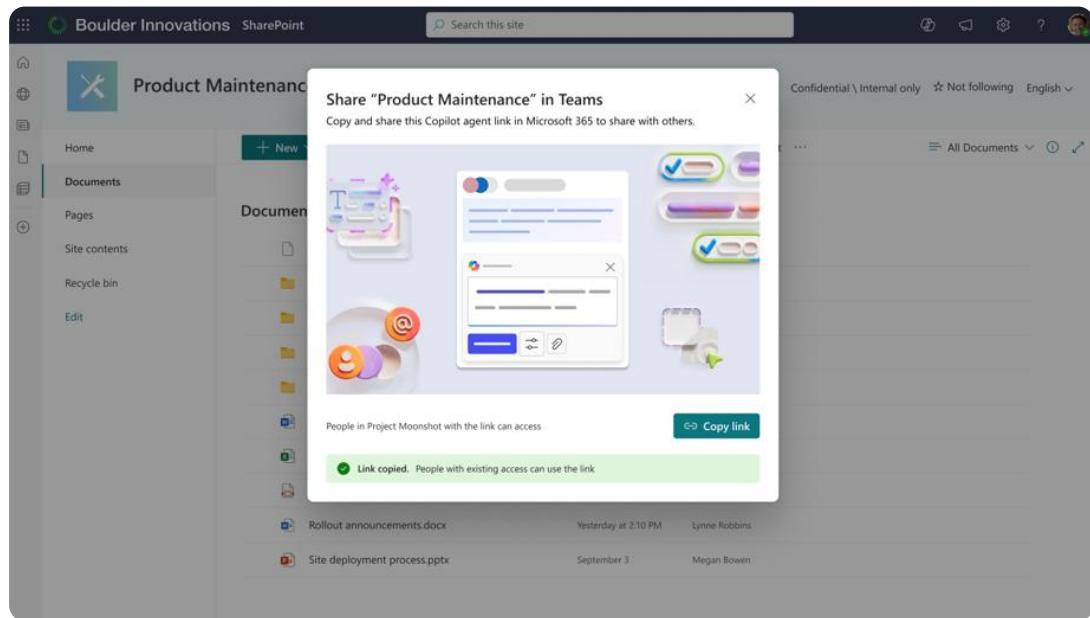


Set the behavior to help answer questions, summarize information, or find files

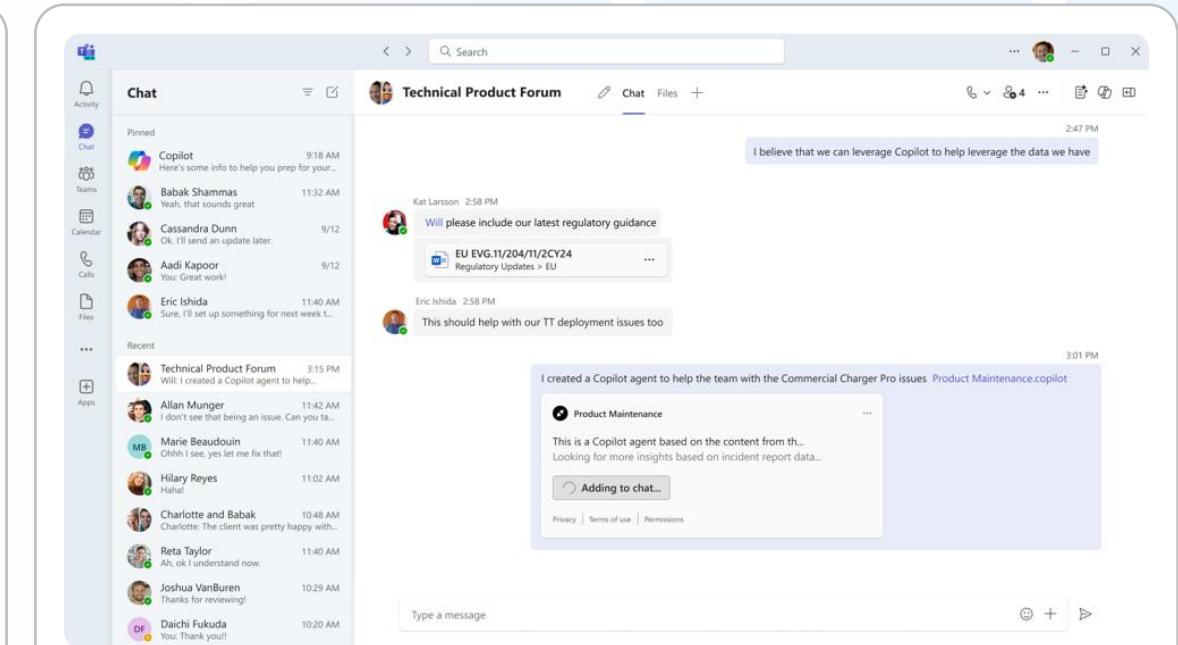


3

# Share your Copilot agent via a link or add to a Teams chat



Just like other Microsoft 365 apps, create a link to your Copilot agent to share via email or Teams chat



Add the Copilot agent to a Teams chat and @mention to facilitate direct collaboration and knowledge sharing

# Customize further with Microsoft Copilot Studio



Launch Copilot Studio directly from SharePoint to further customize and add actions to automate workflows



Expand the content of our Copilot agent with over 1,000 different data connectors



Optionally, publish via Copilot Studio, to make available across SharePoint, Teams, and Microsoft 365 Copilot for your organization

Boulder Innovations SharePoint

Edit Copilot agent

Sources

Outputs from this custom copilot are based on the sources selected. Users will only receive outputs from sources for which they have permissions.

Add a site

Search by site title or enter a URL

Not all members of this site may have access to the selected site.

Product Maintenance

Remove

Sourced from document libraries, folders or files

Documents

Remove

Add document libraries, folders or files

Add additional knowledge from public websites, third-party knowledge bases, and more in Copilot Studio

Add advanced customization in Copilot Studio

Save

Demo

Create agents as an end-user

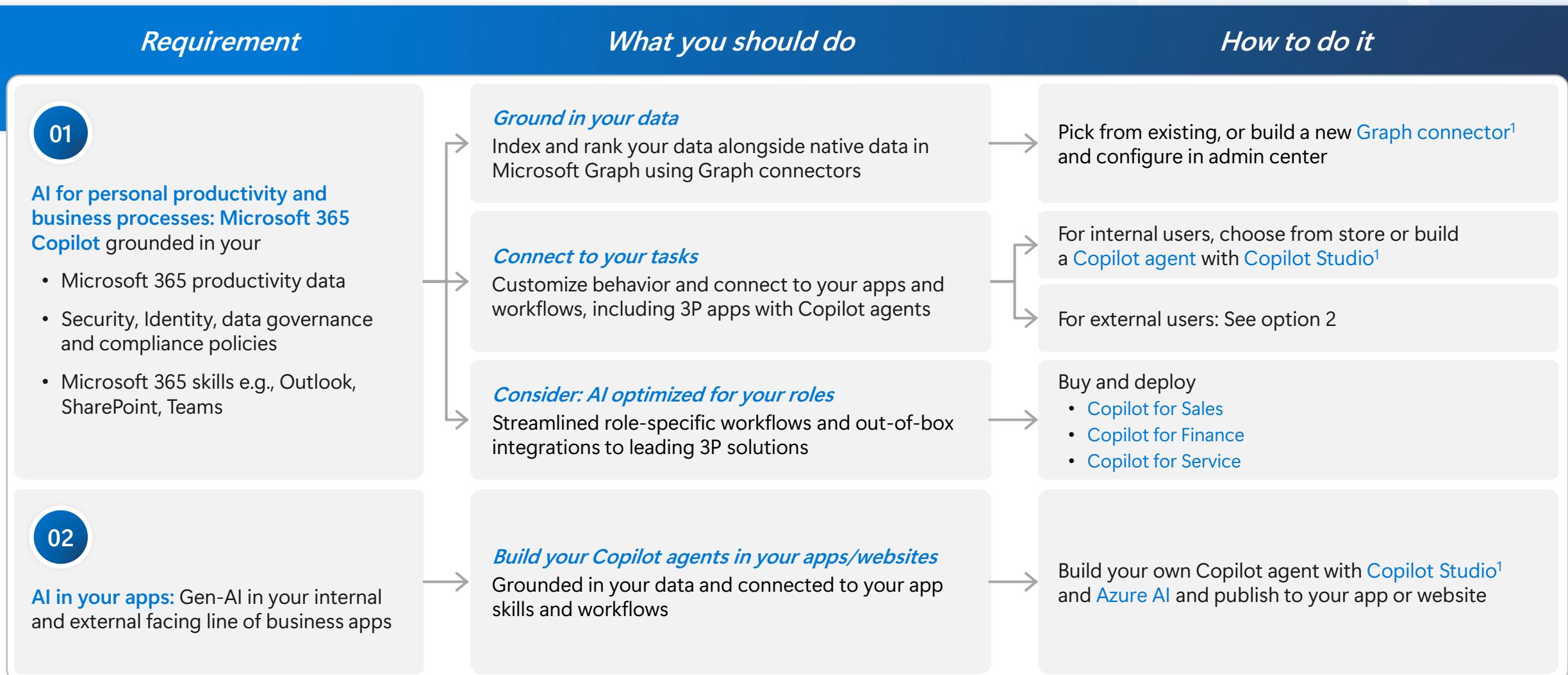


Create

# Copilot Agents



# Getting started guide



# Simple Gen-AI decision guide

## I want a generative AI solution

I want to build a solution with custom data and UI and deploy internally or externally

I want full control over PaaS services and customize with code

I want a SaaS tool to build with natural language and GUI

I want insights and actions on Microsoft 365 data and products

I want role-specific insights and actions for sales, service, and financial professionals that integrate with external CRM and ERP systems that also connect data to Microsoft 365 productivity apps



Azure AI Studio



Copilot Studio



Microsoft 365 Copilot



Copilot for Sales



Copilot for Service



Copilot for Finance

Enhanced Together

Add-ons to Copilot for Microsoft 365



Azure Service Meter



Tenant Capacity Pack



Per User



Per User



Per User



Per User

Foundations

# Copilot Studio



# Copilot Studio is the platform for Copilot agents

Deploy and use Copilot agents in any system



## Microsoft 365

Add Copilot agents that give Copilot focused knowledge and new skills.



## Your applications

Deploy Copilot agents to your website and other line of business applications.



**Build and customize**  
your agents using  
Copilot Studio



## Dynamics 365

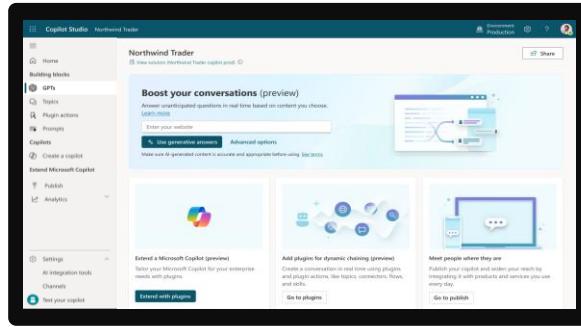
Build Copilot agents that integrate and improve business processes.



## Power Platform

Extend Power Platform with Copilot agents that transform your low code apps and pages.

# What's in Copilot Studio?



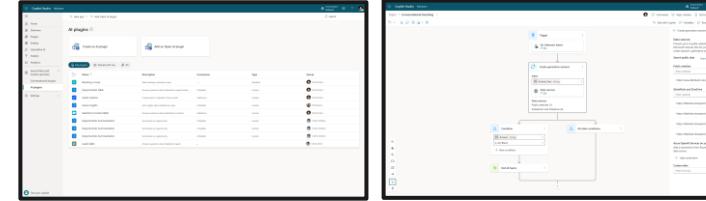
## Copilot Building Studio

Use the **new studio** to create, test and deploy conversational copilots.

Including **advanced capabilities** of Azure Bot Framework natively in Copilot Studio.

## Workspaces

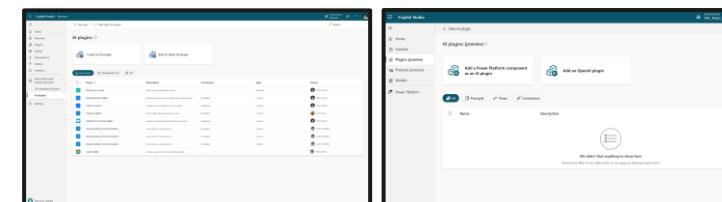
### Build Your Own Copilot



Topics, GPTs & Plugins

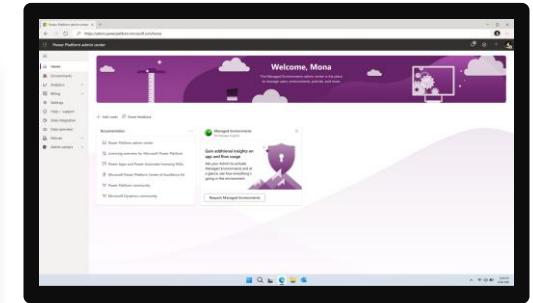
Generative AI

### Extend Microsoft Copilot



Conversational Plugins

AI Plugins

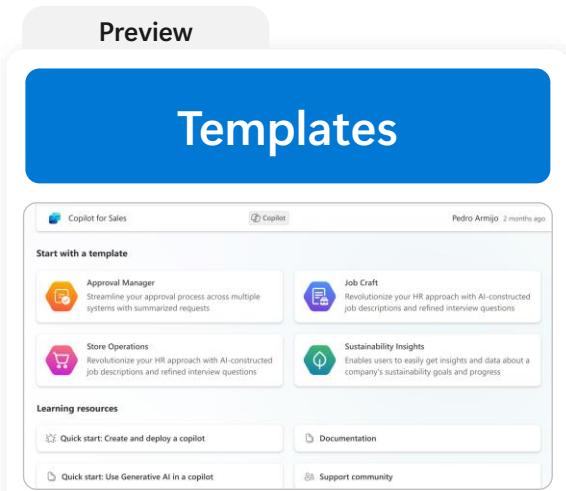


## Admin Studio

Deploy copilots securely using **central administration**, built-in security roles, and simple management across environments to maintain compliance and governance.

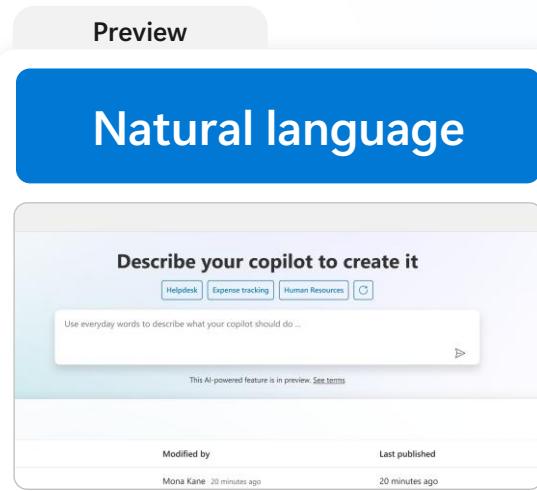
# Build the way you want

Users of all skill levels can create and test together



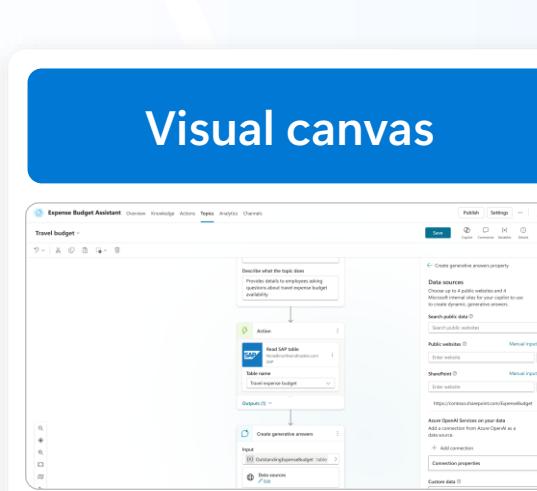
## Get started quickly

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



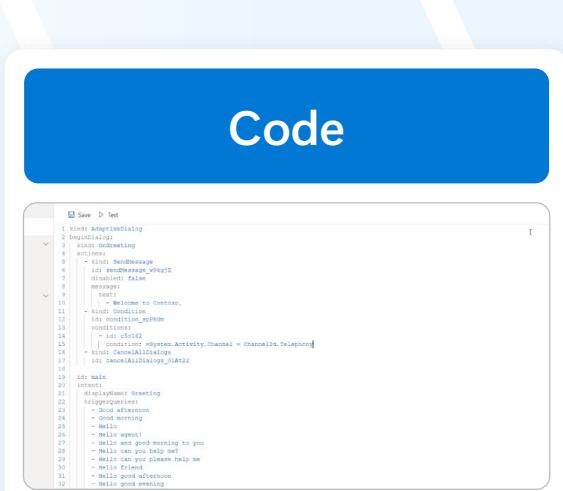
## Build conversationally

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



# Navigate a modern UX

Design your conversation by following the low code graphical interface.



## Switch to YAML

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

Demo

# Copilot Studio Walkthrough



# Copilot Studio licensing options

Copilot Studio became a pay-go service on December 1<sup>st</sup>, 2024



Full feature parity across message pack and metered offering



Burn rate parity across message pack and metered offering



Leverage your existing Azure commitments (MACC)

New!

## Message packs

- ✓ Tenant-wide message packs
- ✓ 25,000 messages/month
- ✓ \$200 per pack/month

## Pay-as-you-go

- ✓ New PAYG meter in Azure
- ✓ \$0.01/message
- ✓ Can decrement MACC

# Utilization rates depend on type of agent and prompt

	M365 Copilot Users	All other scenarios
<b>Classic answers</b> Predefined responses manually authored by agent makers that are static unless manually updated, & used when a precise or controlled response is desired output	0	1 message
<b>Generative answers</b> Dynamically generated responses based on knowledge sources & context that provide flexible and natural interactions	0	2 messages
<b>Tenant Graph grounding for messages</b> Grounding for agents with relevant, secure, and up-to-date information from tenant-wide Graph, including external data synced into Microsoft Graph through Graph connectors	0	30 messages
<b>Autonomous actions</b> Generatively orchestrated triggers, topics, PowerPlatform connectors and Power Automate flows used to automate complex business processes	25 messages	25 messages

*Each interaction with an agent could utilize multiple utilization rates simultaneously i.e., an agent grounded in Tenant Graph could use 32 messages (30 for the graph grounding and 2 for Generative Answer) to respond to a single complex prompt from the user*

# Planning licensing and capacity

## Aligning product, user licenses and add-ons to technical and business requirements

### Example answers

Product	Quantity	Capacity	Comments
Copilot Studio Users	50	50 users	For Copilot Studio bot authors
Copilot Studio Messages	100	2,500,000 messages/month	To allocate per environment
Dataverse Database Storage	50	50 GB	+ 10 GB Database base capacity
Dataverse File Storage	5	5 GB	+ 20 GB Database base capacity
Dataverse Log Storage	5	5 GB	+ 2 GB Database base capacity
Power Platform Requests	1	50,000 requests/24h	+ 250,000 requests/24h base capacity
Power Automate Processes	4	4 processes/month	To run flows with service principals
Azure OpenAI	1	Standard	1 gpt-35-turbo model
Azure AI Search Service	1	Basic Tier	1 Replica, 1 Partition, 1 Search unit
Azure Storage	1	StorageV2	RA-GRS
Azure Application Insights	50	50 users	For Copilot Studio bot authors

- Understand what you have purchased in terms of capacity for the project
- Determine the potential impact of design on capacity and licensing (e.g., keeping conversation transcripts will grow database storage)
- Additional services such as Azure OpenAI and AI Search (if used as the Azure OpenAI 'on your data' data source in generative answers), Data Lake (if used to store conversation transcripts) or Application Insights (to log additional telemetry) require an Azure subscription
- Power Automate cloud flows owned by service principals require a Power Automate Process license. If owned by a user, they're covered for premium connectors and come with a base capacity of 250,000 requests per month.

# Manage message capacity

A *message* is an interaction between a customer and a copilot, representing one unit of consumption. A message is defined as any request or message sent to the copilot that triggers an action or a response from the copilot.

The purchase of a Microsoft Copilot Studio license includes a specific number of billed messages capacity. This capacity is pooled across the entire tenant but it must be assigned to an environment in to enable Microsoft Copilot Studio features for copilots in the environment.

Allocation happens in the Power Platform Admin Center

The screenshot shows the Power Platform Admin Center interface. On the left, a navigation sidebar lists various admin center categories like Home, Environments, Environment groups, Advisor, Security, Analytics, Billing, Licenses (which is highlighted with a red box), Settings, Copilot, Resources, Help + support, Data integration, Data (preview), Policies, and Admin centers. The main content area is titled 'Licenses' and shows a 'Copilot Studio' section. Below it is a 'Licensing summary' table:

License type	Category	Purchased	Assigned	Consumed
Capacity Manage capacity	Messages capacity	625,025,000	10,000	63
Capacity (Legacy) Manage capacity	Sessions capacity	2,004,000	0	0

Below the table are two cards: 'Messages capacity assignment (MAU)' and 'Messages capacity consumption (MAU)'. The assignment card shows a total of 625,025,000, assigned to 10,000 environments, and 625,015,000 unassigned. It also includes a circular progress bar labeled '625M Total' with segments for 'MyEnv1 IS - 10K' (blue) and 'Unassigned - 625M' (grey). The consumption card shows a chart titled 'Month to date' with a total count of 63 units consumed out of 625,025,000. The x-axis shows dates from 1. Aug to 6. Aug, and the y-axis shows a count from 0 to 800M. The legend indicates: Total (dark purple line), Assigned to environments (light purple line), Consumed (pink dots), and Over capacity (red dots).

# Manage message capacity – Overage

In an environment, when consumption exceeds available capacity, the environment is in overage and some features are progressively blocked. We allow some level of overage consumption, similar to a grace period, to avoid blocking business processes.

If your environment has no more capacity, you have the following options:

- Reallocate existing capacity from the org (tenant) or environment level
- Purchase more capacity and make it available to your environment
- **Now available:** Set up a consumptive meter ("Pay-as-you-go" meter) to handle any overage

Licensing summary

License type	Category	Purchased	Assigned	Consumed
Capacity Manage capacity	Messages capacity	0	0	⚠ 121
Capacity (Legacy) Manage capacity	Sessions capacity	29,000	500	0

# Monitor message consumption as an admin

Admins can view message consumption reporting in the Power Platform Admin Center

The screenshot shows the Power Platform Admin Center interface. The top navigation bar includes 'Summary' (selected), 'Environments', and 'Intelligent recommendations'. On the left sidebar, under 'Summaries', the 'Copilot Studio' item is selected, while 'Power Apps', 'Power Automate', 'Power Pages', and 'Finance And Operations' are listed below it.

The main content area displays the 'Copilot Studio' section, specifically the 'Licensing summary' and 'Messages capacity' tabs.

**Licensing summary:**

License type	Category	Purchased	Assigned	Consumed
Capacity Manage capacity	Messages capacity	625,025,000	10,000	63
Capacity (Legacy) Manage capacity	Sessions capacity	2,004,000	0	0

**Messages capacity:**

Messages capacity assignment (MAU):  
Displaying data as of 08/07/2024 12:00:00 AM

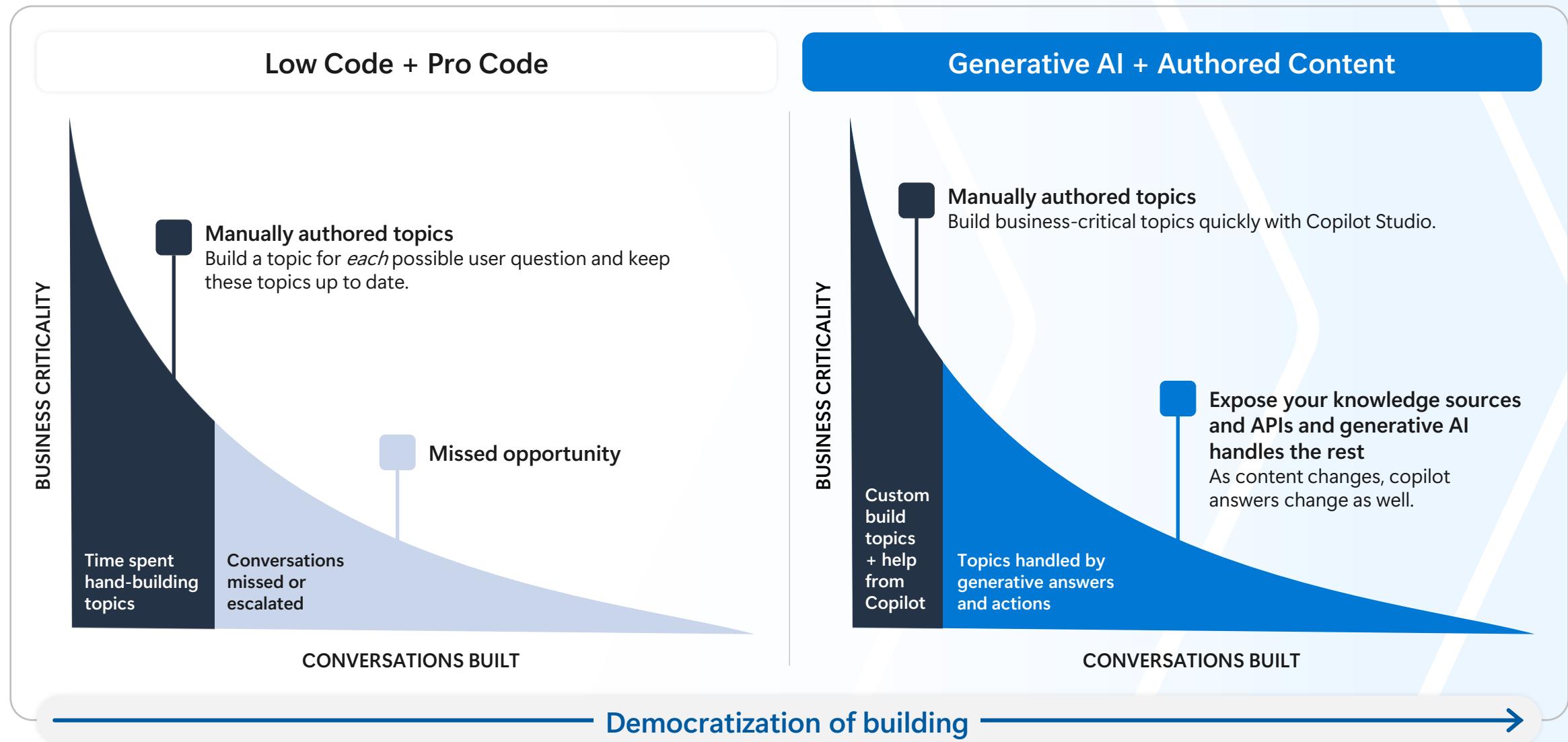
625,025,000	10,000	625,015,000
Total	Assigned	Unassigned

A donut chart indicates the distribution of capacity: 625M Total, with 10K assigned to MyEnvUS and 625M unassigned.

Messages capacity consumption (MAU):  
Month to date: 63/625,025,000 units consumed

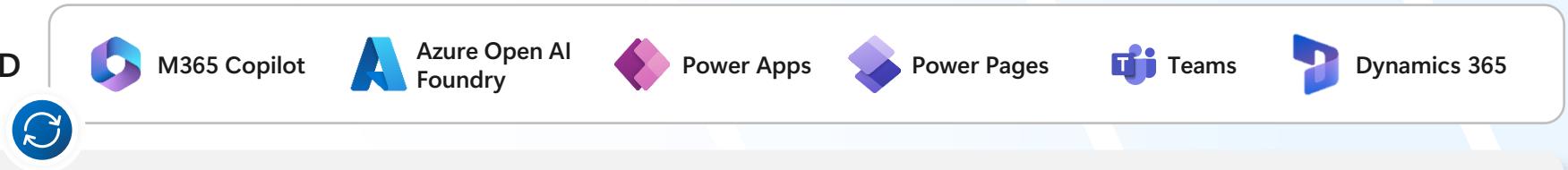
A line chart shows the count of messages consumed over time from 1. Aug to 6. Aug. The chart includes a legend for 'Total' (dark blue line), 'Assigned to environments' (light blue line), 'Consumed' (purple circle), and 'Over capacity' (red circle).

# Generative AI is changing conversational AI



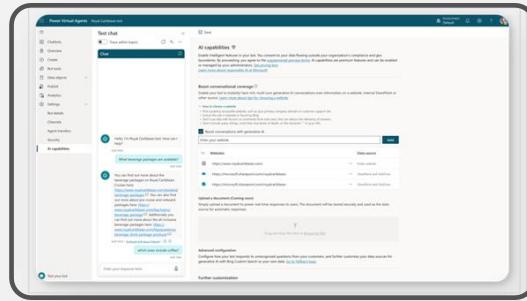
# Generative AI in Copilot Studio | Powered by Azure OpenAI Service

## CONNECT AND EXTEND



## Generative Conversations

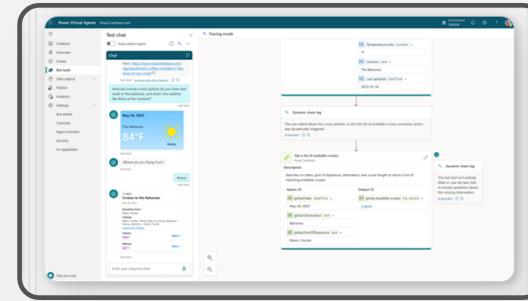
### To Answer



### Generative Answers

Copilot Studio boosts conversational coverage by dynamically generating multi-turn answers based off an organization's content in real-time in response to unanticipated questions.

### To Act

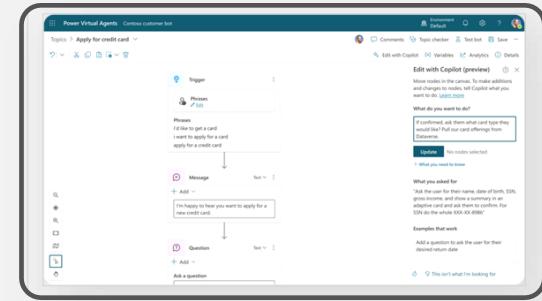


### Generative Actions

Copilot Studio generates dialog and takes action through dynamically chaining existing building blocks which can handle queries that were not anticipated or previously built.

## Generative Assistance

### To Build



### Generative Builder

Copilot Studio Copilot assistant helps build, design and modify Copilot topics through natural language.

## External

3P Search APIs

External URL

## Internal

OneDrive URL

Documents

SharePoint URL

## Tools

Power Platform Connectors

Copilot Topics

Skills

Power Automate Flows

## Edit & Refine

Topics

Trigger Phrases

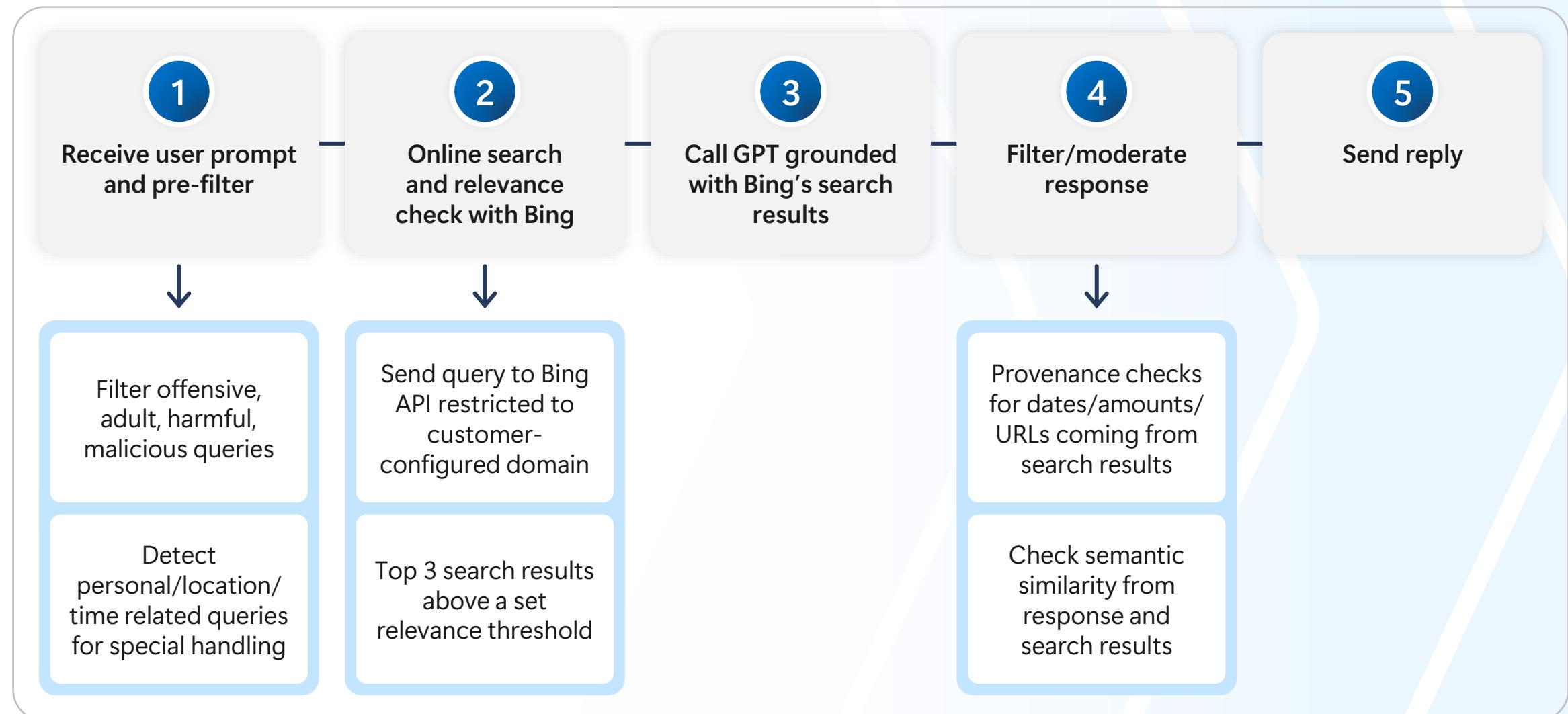
Entities

Variables

Adaptive Cards

Branching

# Generative Answers: How does it work?



# Generative building: How does it work?

1

Maker describes what to build with natural language

2

Copilot Studio constructs prompt and calls GPT

3

GPT returns Copilot Studio's YAML code and loads graphical and text-based Copilot Studio editor

4

Maker can refine the topic with natural language

5

Maker provides feedback

What do you want to build?  
Ask the user for their name, date of birth, SSN, gross income, and show a summary in a card. And ask them to confirm. Get SS in XX-XX-XXXX format

```
20 - kind: Question
21 id: Question_i3vZgv
22 variable: Topic.Name
23 prompt: What is your name?
24 entity: PersonNamePrebuiltEntity
25
26 - kind: Question
27 id: Question_nJv0Rk
28 variable: Topic.DOB
29 prompt: What is your date of birth?
30 entity: DatePrebuiltEntity
31
32 - kind: Question
33 id: Question_dCev4W
34 variable: Topic.SSN
35 prompt: What is your Social Security Number (XXX-XX-XXXX)
36 entity: StringPrebuiltEntity
37
38 - kind: Question
39 id: Question_jSvAka
40 variable: Topic.GrossIncome
41 prompt: What is your gross income?
42 entity: NumberPrebuiltEntity
43
44 - kind: SendMessage
45 id: SendMessage_qp5yEs
46 message:
47 attachments:
48 - kind: AdaptiveCardTemplate
```

# Next steps

1	<b>Get trained</b>	<p>Power Platform webinar series: <a href="https://aka.ms/LevelUpCSPPowerPlatform">aka.ms/LevelUpCSPPowerPlatform</a></p> <p>Partner deck: <a href="https://aka.ms/PowerPlatformCSPdeck">aka.ms/PowerPlatformCSPdeck</a></p> <p>Level Up CSP Power Platform Page <a href="https://aka.ms/LevelUpCSPPowerPlatformtab">aka.ms/LevelUpCSPPowerPlatformtab</a></p>
2	<b>Engage your customers</b>	<p>1:1 needs assessment: <a href="https://aka.ms/lowcodeneedsassessment">aka.ms/lowcodeneedsassessment</a></p> <p>Customer ready content: <a href="https://aka.ms/LowCode_Partner">https://aka.ms/LowCode_Partner</a></p>
3	<b>Show the value</b>	<p>Leverage the new simulated demos: <a href="https://aka.ms/powerplatformsimulateddemos">aka.ms/powerplatformsimulateddemos</a></p> <p>Copilot Studio Partner Starter Offer Kit: <a href="https://aka.ms/CopilotStudioCSPOfferKit">aka.ms/CopilotStudioCSPOfferKit</a></p>



# Get started today



[aka.ms/trycopilotstudio](https://aka.ms/trycopilotstudio)

## Learn more

**Website**

[aka.ms/copilotstudio](https://aka.ms/copilotstudio)

**Blog**

[aka.ms/copilotstudio-blog](https://aka.ms/copilotstudio-blog)

**Product documentation**

[aka.ms/copilotstudiodocs](https://aka.ms/copilotstudiodocs)

**Learning resources**

[aka.ms/copilotstudiolearn](https://aka.ms/copilotstudiolearn)

**Community page**

[aka.ms/copilotstudiocommunity](https://aka.ms/copilotstudiocommunity)

**Implementation guide**

[aka.ms/copilotstudioimplement](https://aka.ms/copilotstudioimplement)

**D365 agents FAQ**

[aka.ms/Dynamics365agentsFAQ](https://aka.ms/Dynamics365agentsFAQ)

**D365 blog**

[aka.ms/D365blog](https://aka.ms/D365blog)

# Sessions at Microsoft Ignite 2024

1

## **What's new with Copilot Studio**

Omar Aftab | Tuesday 19<sup>th</sup> at 2:45–3:30 PM CST

2

## **Better together: Copilot Studio and Azure AI**

Mads Bolaris and Gio Della Libera | Wednesday 20<sup>th</sup> at 11:15 AM–12:00 PM CST

3

## **Extending Microsoft 365 Copilot with Copilot agents: Best practices**

Dewain Robinson and Hazim Sharafeldin | Thursday 21<sup>st</sup> at 8:30–9:15 AM CST

4

## **Reinventing business processes with autonomous agents**

Ray Smith and Karan Nigam | Thursday 21<sup>st</sup> at 11:00–11:45 AM CST

5

## **Developers guide to building your own agents**

Jeremy Thake, Matt Barbour and Sebastien Levert | Thursday 21<sup>st</sup> at 5:00–5:45 PM CST

6

## **The spectrum of agents with Copilot Studio**

Thomas Abel and Jack Rowbotham | Friday 22<sup>nd</sup> at 9:00–9:45 AM CST

Find more Copilot Studio sessions here: [aka.ms/CopilotStudioAtIgnite](https://aka.ms/CopilotStudioAtIgnite)

# NEW! Customer Ready Power Platform Simulated Demos



Demo Copilot Studio, Power Apps and Power Automate to your customers to help envision the value. Watch the short instruction [video](#) to get started.

Copilot Studio	Power Apps & Automate
Custom Copilot: <a href="#">Product discovery</a>	<a href="#">Execute a site inspection</a>
Custom Copilot: <a href="#">Customer return</a>	<a href="#">Onboard new employees</a>
Plug-in: <a href="#">Enhance Copilot for M365</a>	Service desk (coming soon!)
	<a href="#">Track inventory</a>

# NEW! Partner training simulations: How to build the customer scenarios



Learn how to build the customer scenarios. Watch the short instruction [video](#) to get started.

Copilot Studio	Power Apps & Automate
Custom Copilot: <a href="#">Product discovery</a>	<a href="#">Execute a site inspection</a>
Custom Copilot: <a href="#">Customer return</a>	<a href="#">Onboard new hires</a>
Plug-in: <a href="#">Enhance Copilot for M365</a>	<a href="#">Service desk</a>
	<a href="#">Track inventory</a>

# Get hands on with Copilot Studio in a day

The Copilot Studio in a Day (Copilot StudioAD) events are free one-day workshops where you will learn how to create, integrate, extend, deploy and monitor conversational bots

Join these free events run by our partners  
[aka.ms/Copilot StudioADevent](https://aka.ms/Copilot StudioADevent)



 Instructor: [aka.ms/Copilot StudioinadayInstructor](https://aka.ms/Copilot StudioinadayInstructor)

 Student: [aka.ms/Copilot StudioinaDayPackage](https://aka.ms/Copilot StudioinaDayPackage)



## Labs include:

1. Build your first Copilot
2. Topic suggestions
3. Improve your Copilot with entities, variables and topic redirect
4. Integrate with prebuilt Power Automate flows
5. Build Power Automate flows for your Copilot
6. Authentication
7. Export and import bots using solutions
8. Create a Copilot in Microsoft Teams
9. Topic Design
10. Extend your Copilot using Copilot Framework Composer
11. Add a telephone number to your Copilot

# Looking for an in-depth implementation guide?

Walk through customers this guide

## In-depth guidance, best practices, and reference architectures

- An overview of the project
- Architecture overview
- Language
- AI functionalities
- Integrations & channels
- Security, monitoring & governance specifications
- Application lifecycle management
- Analytics & KPIs
- Gaps & top requests
- Dynamics 365 Omnichannel (optional)

The tablet screen shows a section titled "Engagement and outcomes" with the question "How do you track engagement rates & session outcomes?". Below this is a yellow box containing the text "Example answer (you can delete this)" followed by a bulleted list:

- Every conversation path, including Generative Answers ones, end with the End of Conversation topic.
- End of Conversation topic is customized to make the resolution validation as simple as possible for the end-user.
- Conversation outcomes are also set at specific node levels (in the YAML).

To the right of the tablet, a vertical stack of four conversational messages from a bot named "Retail Bot" is shown:

- 1 Hello, I'm Retail Bot. How can I help?  
When are you open?  
Just now
- 2 I'm happy to help with store hours.  
The Redmond hours are:
  - Mon-Sat: 9am to 6pm
  - Sun: ClosedJust now
- 3 Did that answer your question?  
Yes  
Just now
- 4 Great! Please rate your experience.  
1 2 3 4 5  
Thanks for your feedback.  
Just now

### Why do we ask these questions?

- Tracking conversation engagement and outcomes is crucial to **measure** the **copilot performance metrics** and spot areas for improvements in the analytics dashboard.
- A **conversation** with a Copilot Studio copilot can generate one or multiple **sessions**.
- A conversation can have multiple sessions when a user has new questions after an initial conversation completed (1).
- Sessions are either **Unengaged** or **Engaged**. Unengaged sessions always have an outcome of **None**.
- A session is engaged (1) by either triggering a **custom topic** or the **Escalate** topic.
- Engaged sessions outcome can be either:
  - ✓ **Abandoned**
  - ✓ **Resolved**
  - ✓ **Escalated**
- It's important to end conversation with the **End of Conversation** topic (2) so that the end-user can confirm their issue was resolved or not (and potentially escalate).
- The **Confirmed Success** topic displays a **CSAT survey** (3) to capture a 0-5 score.
- A 'conversationOutcome' can also be set at the node level in the code editor view.

### Useful resources:

- [Key concepts – Analytics](#)
- [Measuring copilot engagement](#)
- [Measuring copilot outcomes](#)

<https://aka.ms/CopilotStudioImplementationGuide>





# Resources

Copilot Studio trial	<a href="https://aka.ms/TryCopilotStudio">aka.ms/TryCopilotStudio</a>
Blog	<a href="https://aka.ms/CopilotStudioBlog">aka.ms/CopilotStudioBlog</a>
Demo	<a href="https://aka.ms/CopilotStudioDemo">aka.ms/CopilotStudioDemo</a>
Product documentation	<a href="https://aka.ms/CopilotStudioDocs">aka.ms/CopilotStudioDocs</a>
Ignite on-demand session	<a href="https://aka.ms/CopilotStudioAtIgnite">aka.ms/CopilotStudioAtIgnite</a>
Community page	<a href="https://aka.ms/CopilotStudioCommunity">aka.ms/CopilotStudioCommunity</a>
Feature Requests	<a href="https://aka.ms/CopilotStudioFeatureRequest">aka.ms/CopilotStudioFeatureRequest</a>
How To Videos	<a href="https://aka.ms/CopilotStudioVids">aka.ms/CopilotStudioVids</a>