

CSP Level Up In-Person Technical Training



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

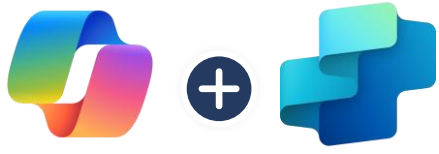
**"Extend or build a
custom agent"**



Azure AI Foundry

AI Platform
for your developers

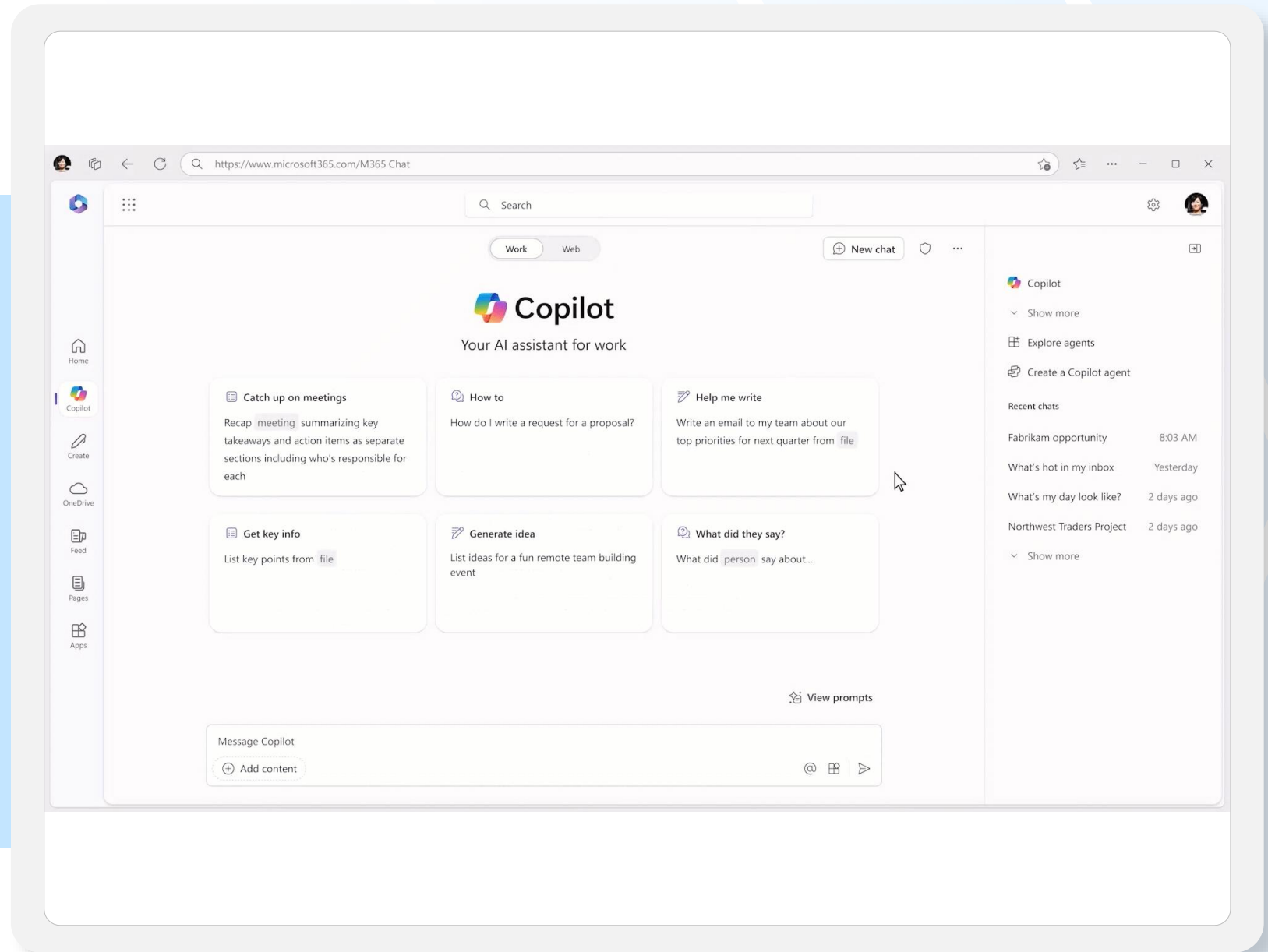
"Your PaaS for AI"



Microsoft 365 Copilot for Information Workers

Copilot Studio embedded builder

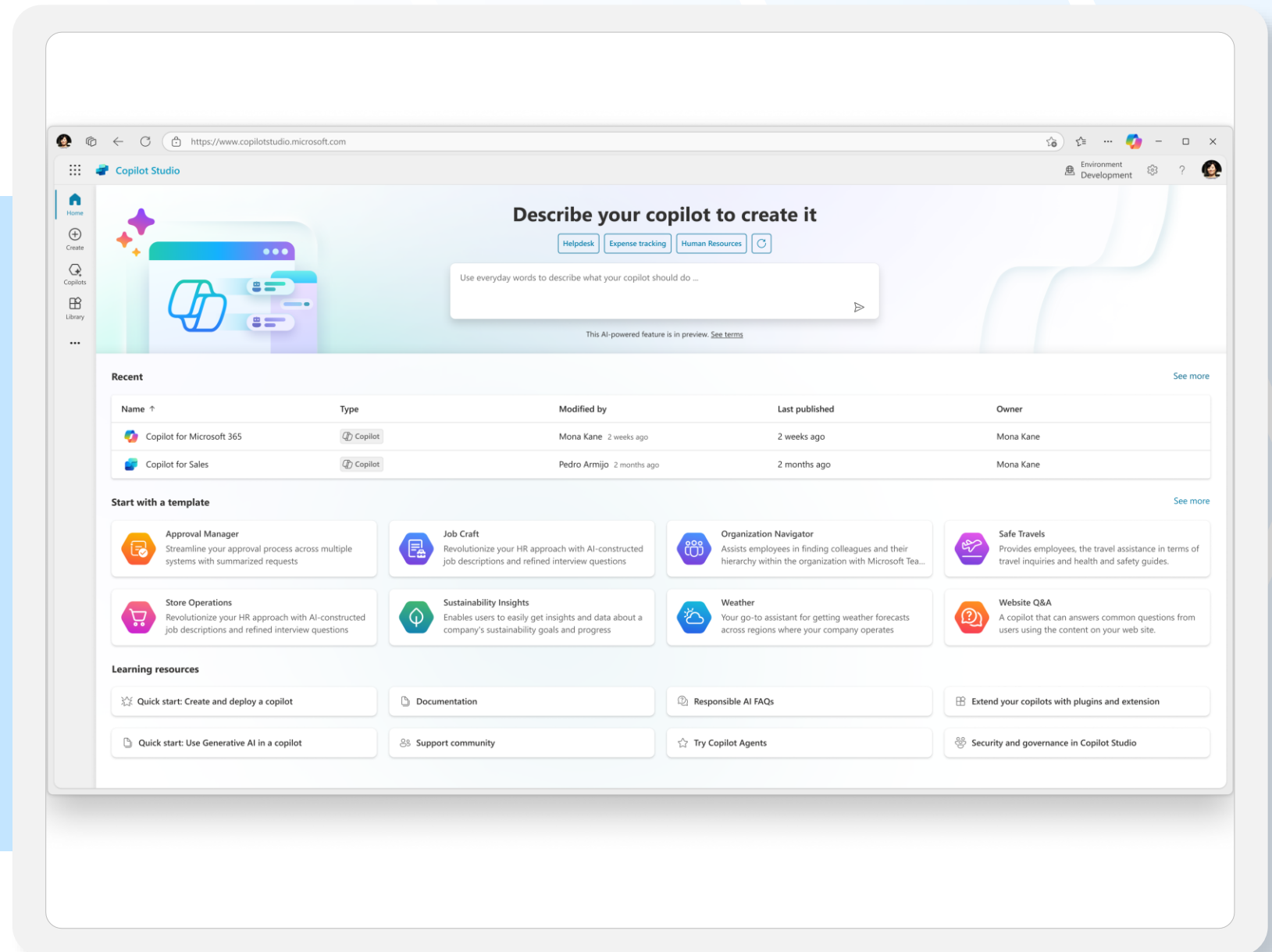
- Seamlessly integrated into M365
- Easy, natural language creation
- AI productivity and automation on the existing user workflow



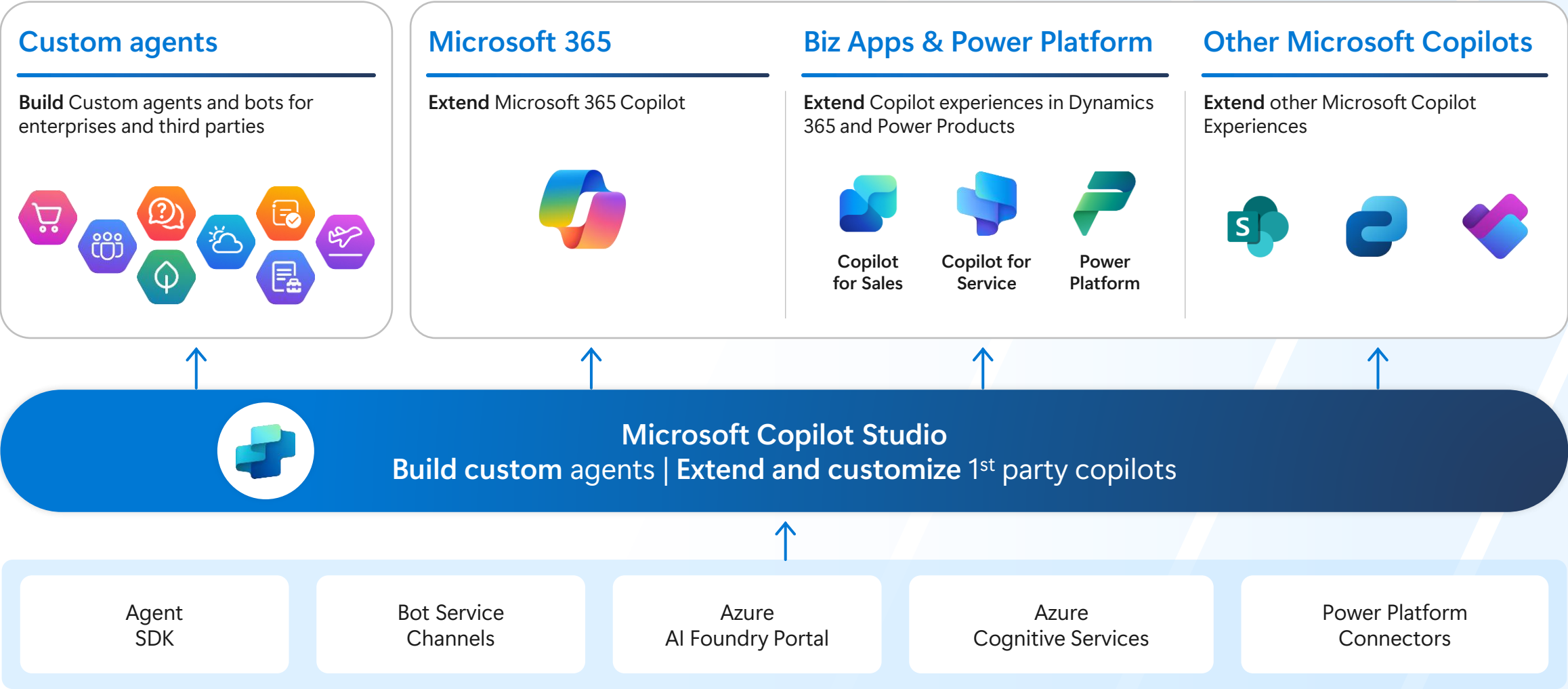


Microsoft Copilot Studio for Makers

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



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

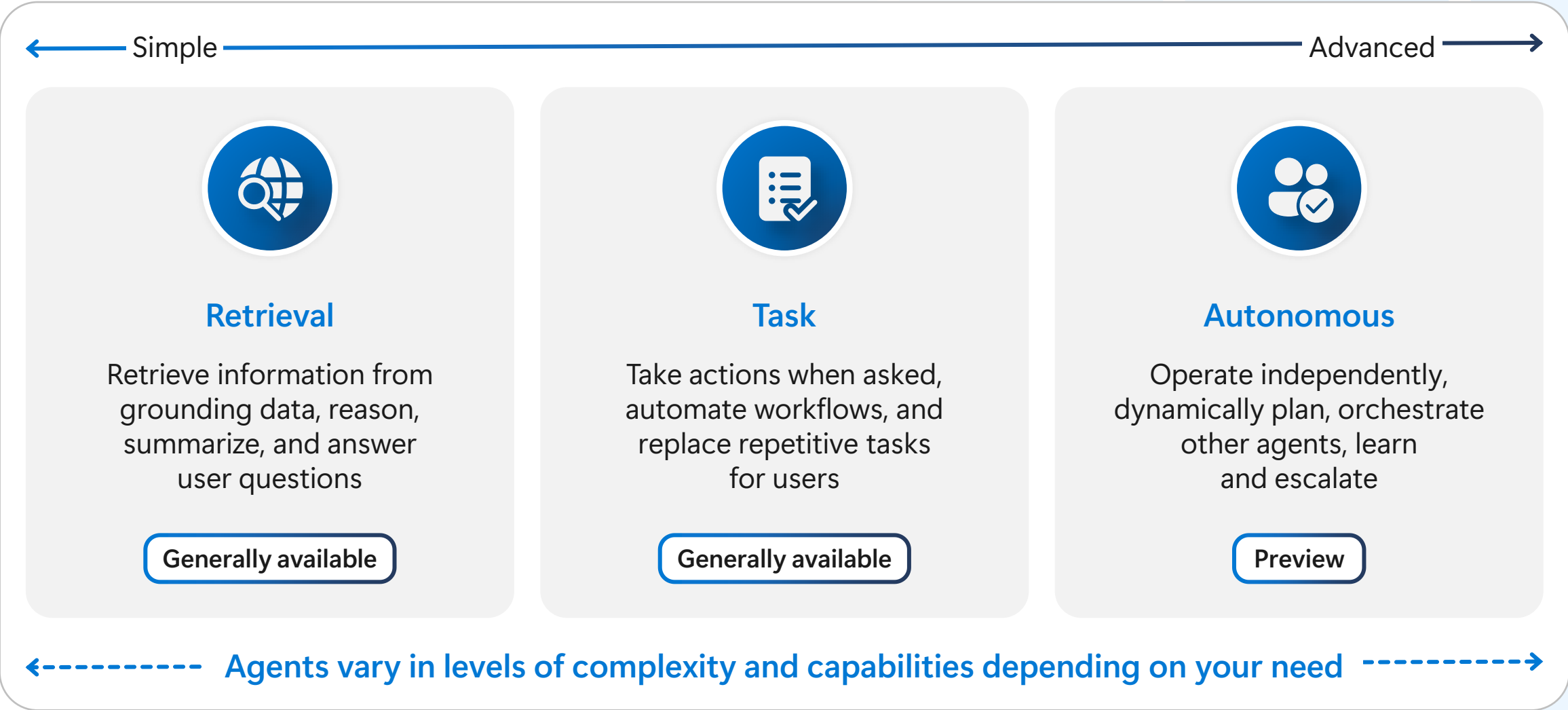
with 1,400 connectors to external applications and systems



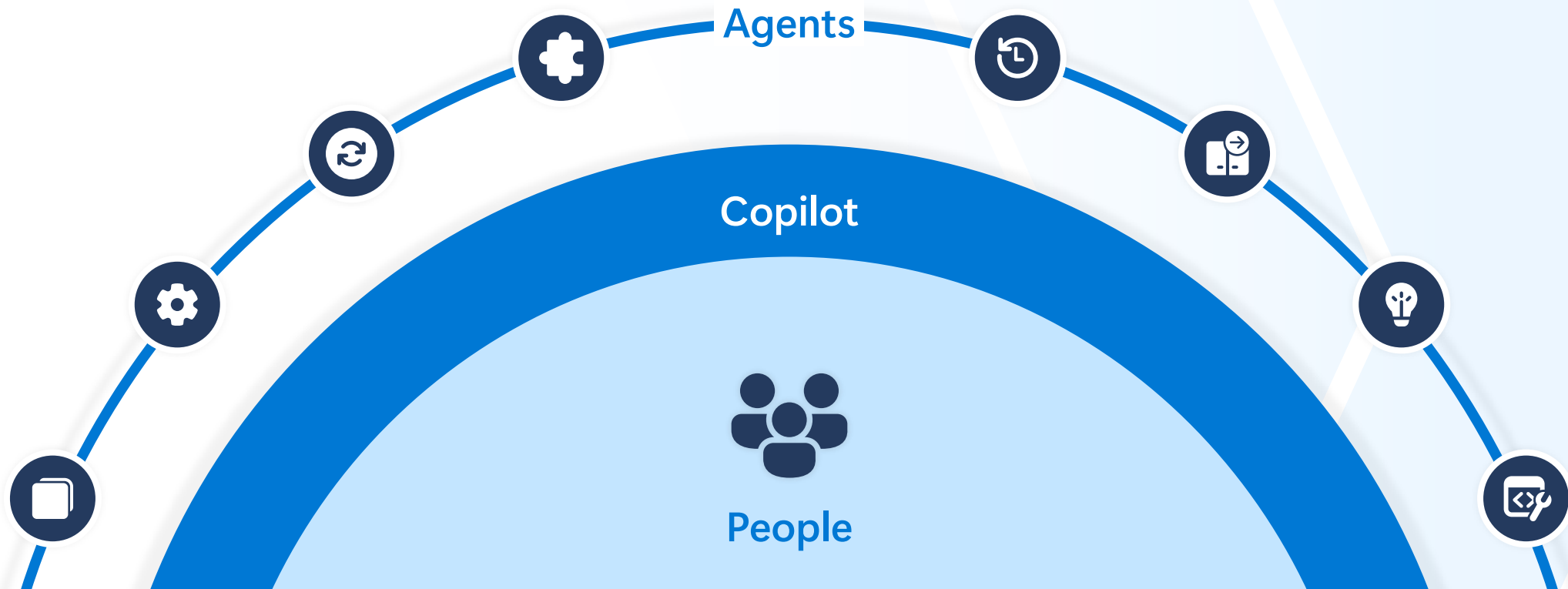
Flexibility

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

Spectrum of agents



Transform the way you work with Copilot + Agents



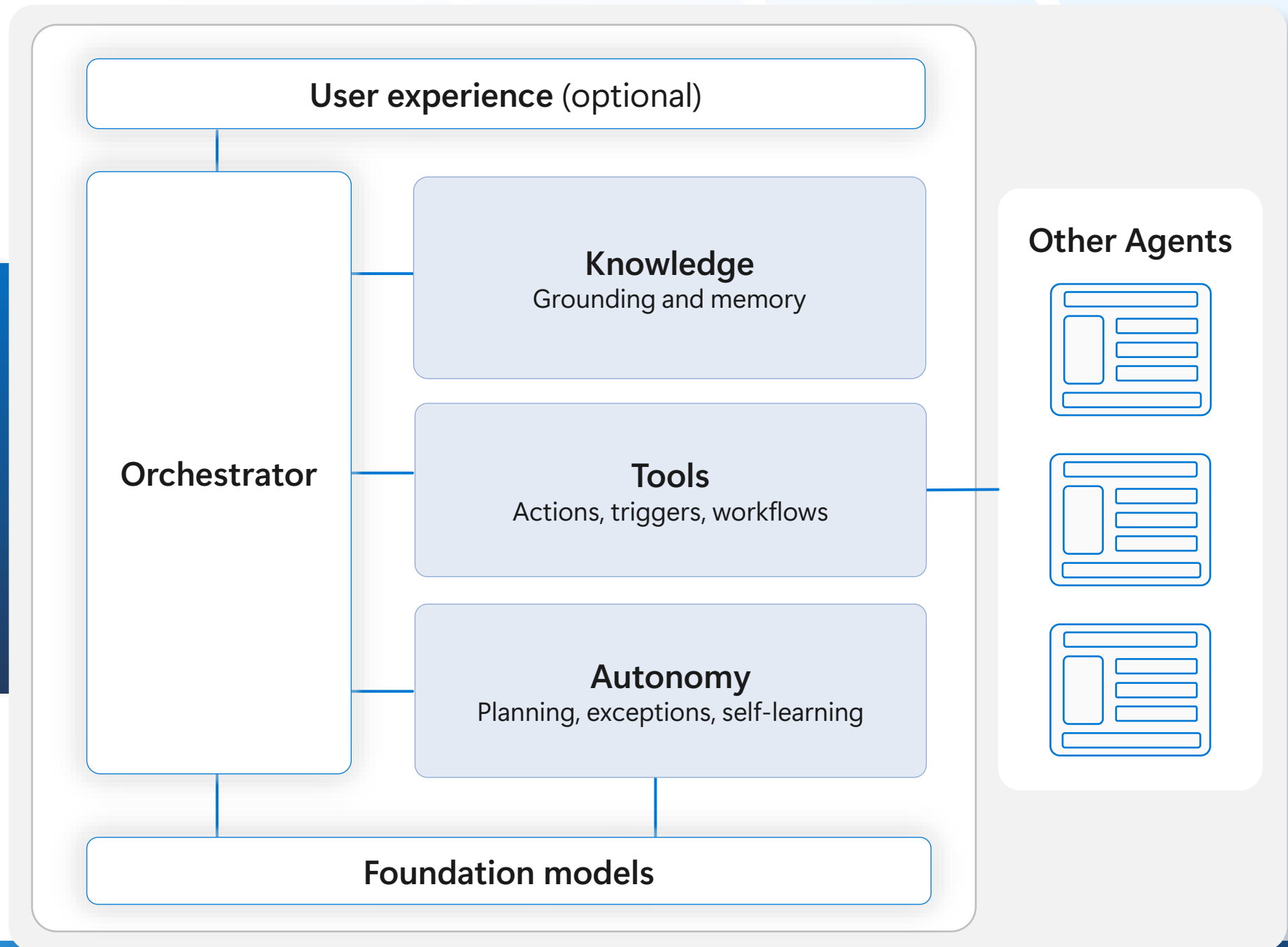
Copilot makes agents more
personal to you

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



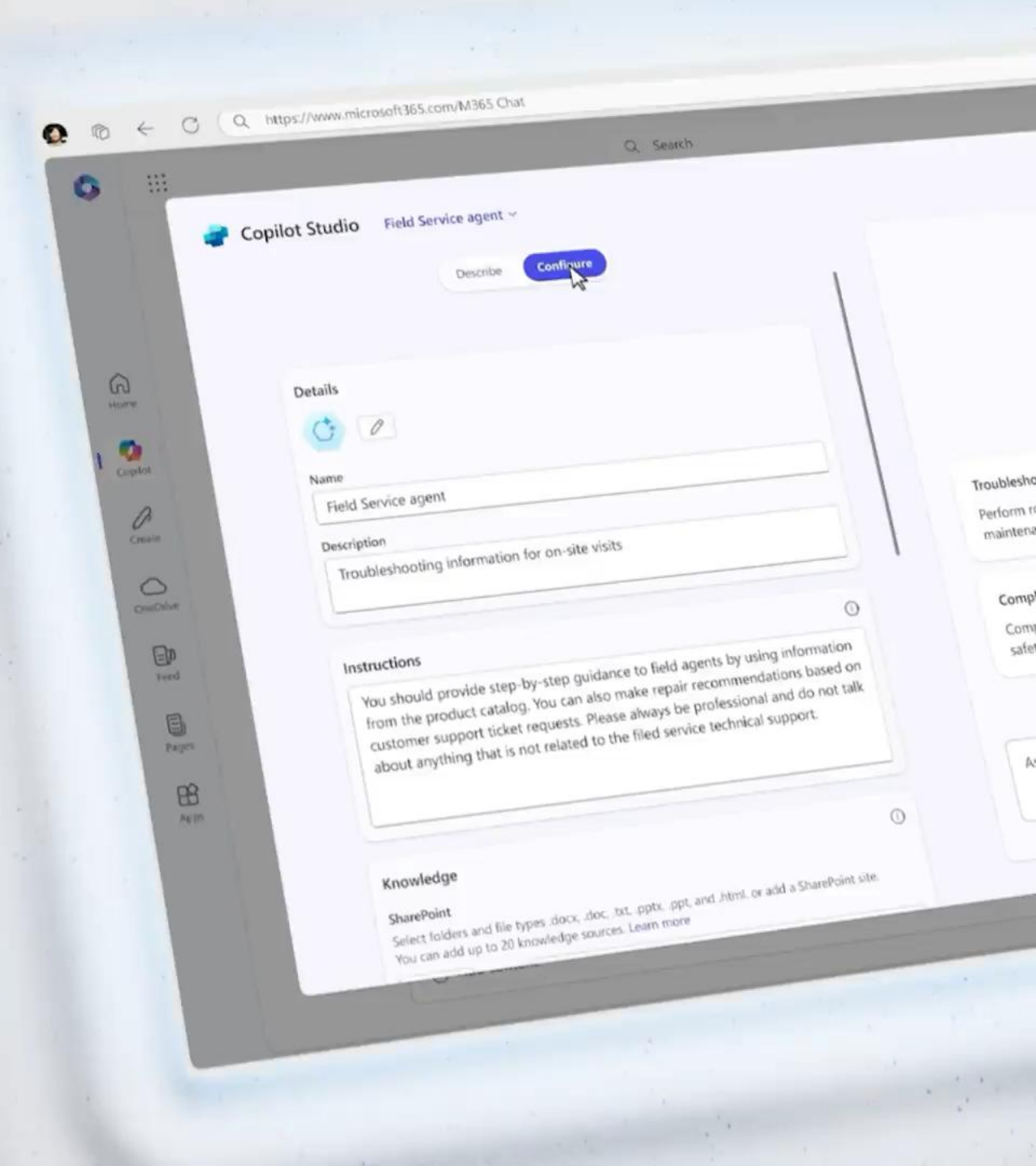
Create agents in SharePoint based on select SharePoint files scoped for specific business needs

**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



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



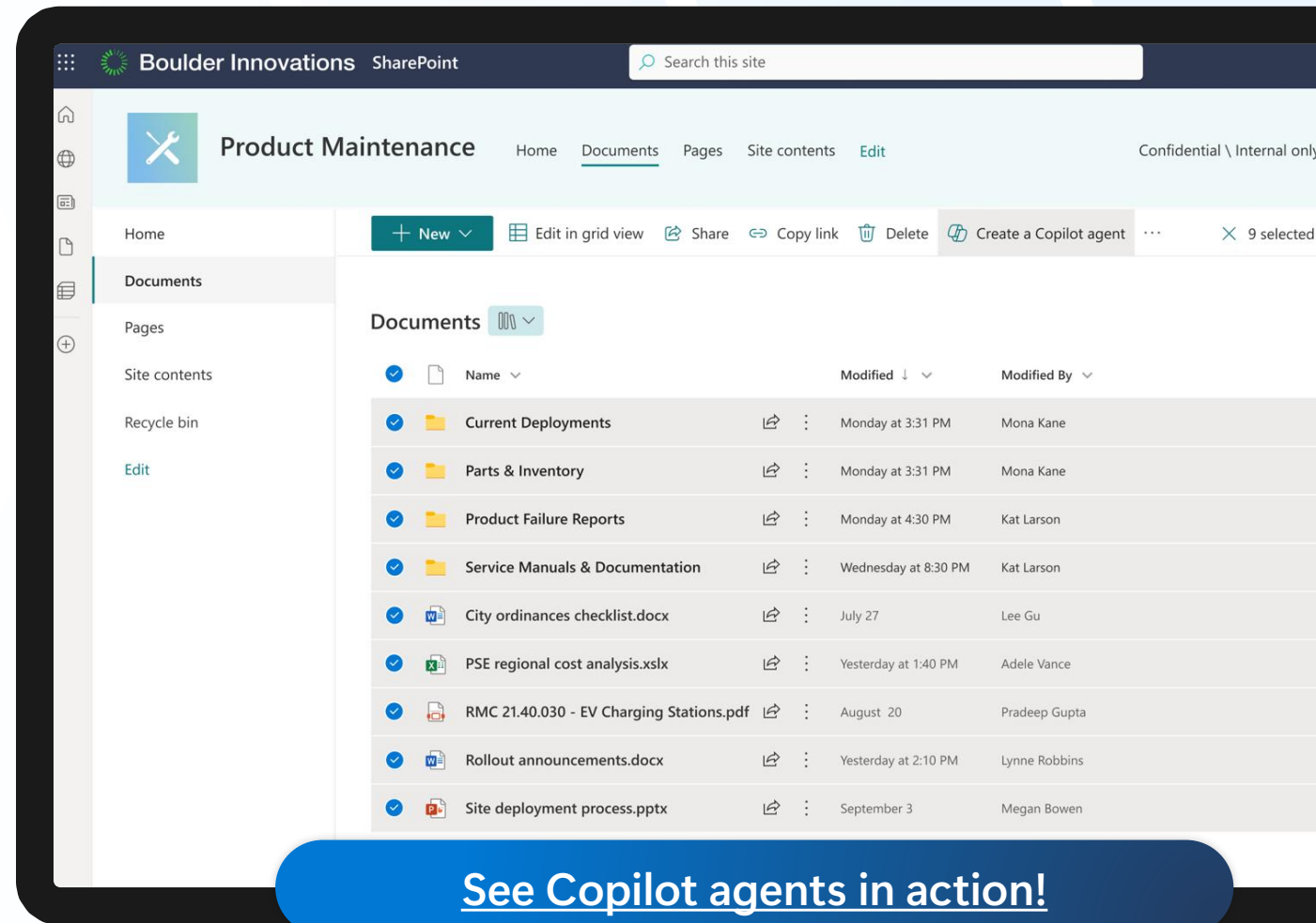
Extensibility

Launch Microsoft Copilot Studio directly from SharePoint for deeper customizations



Secure

Defaults to your existing SharePoint permissions and sensitivity settings



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



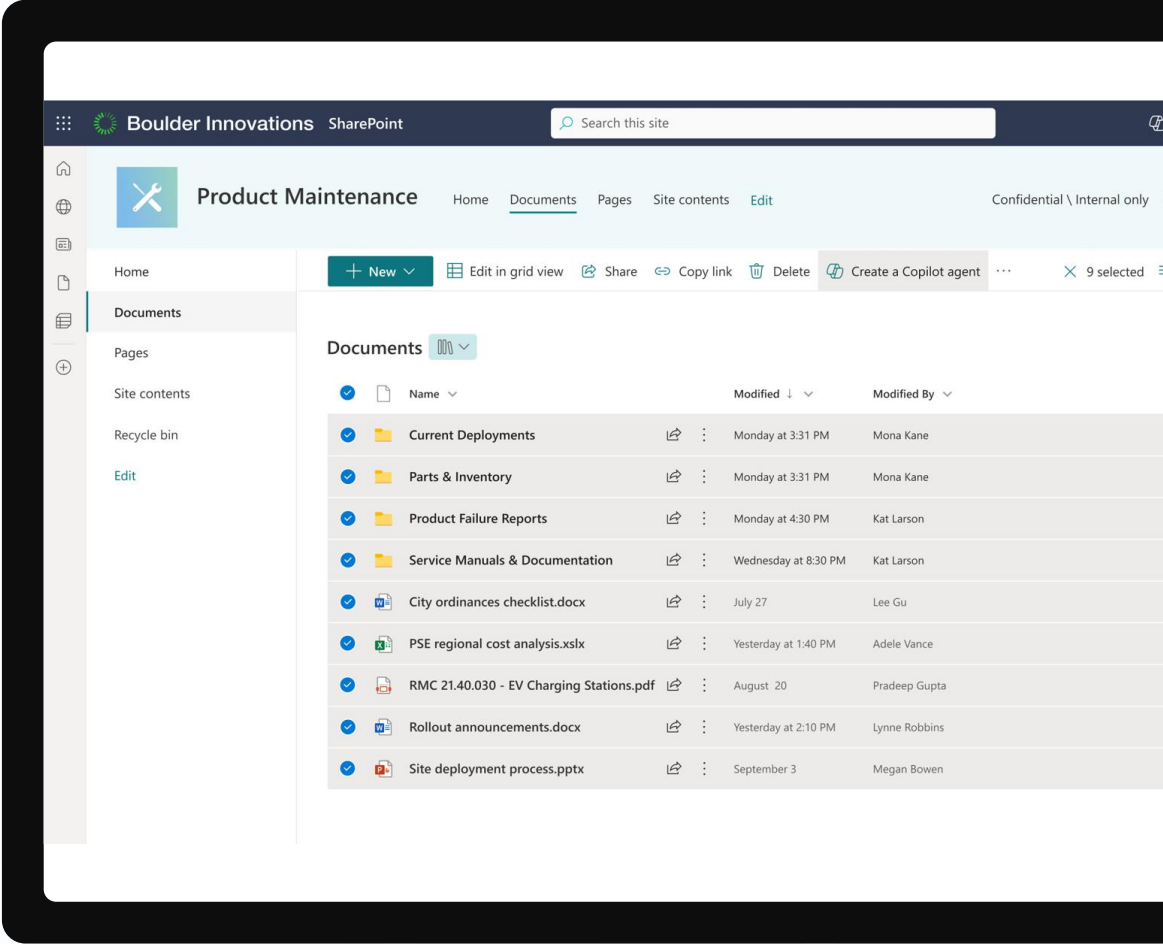
Site owners can enable any site to get a built-in Copilot agent, scoped to the content of that site. Or select specific files you want the agent to leverage



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



* Product images subject to change

2

Customize your Copilot agent's brand and behavior



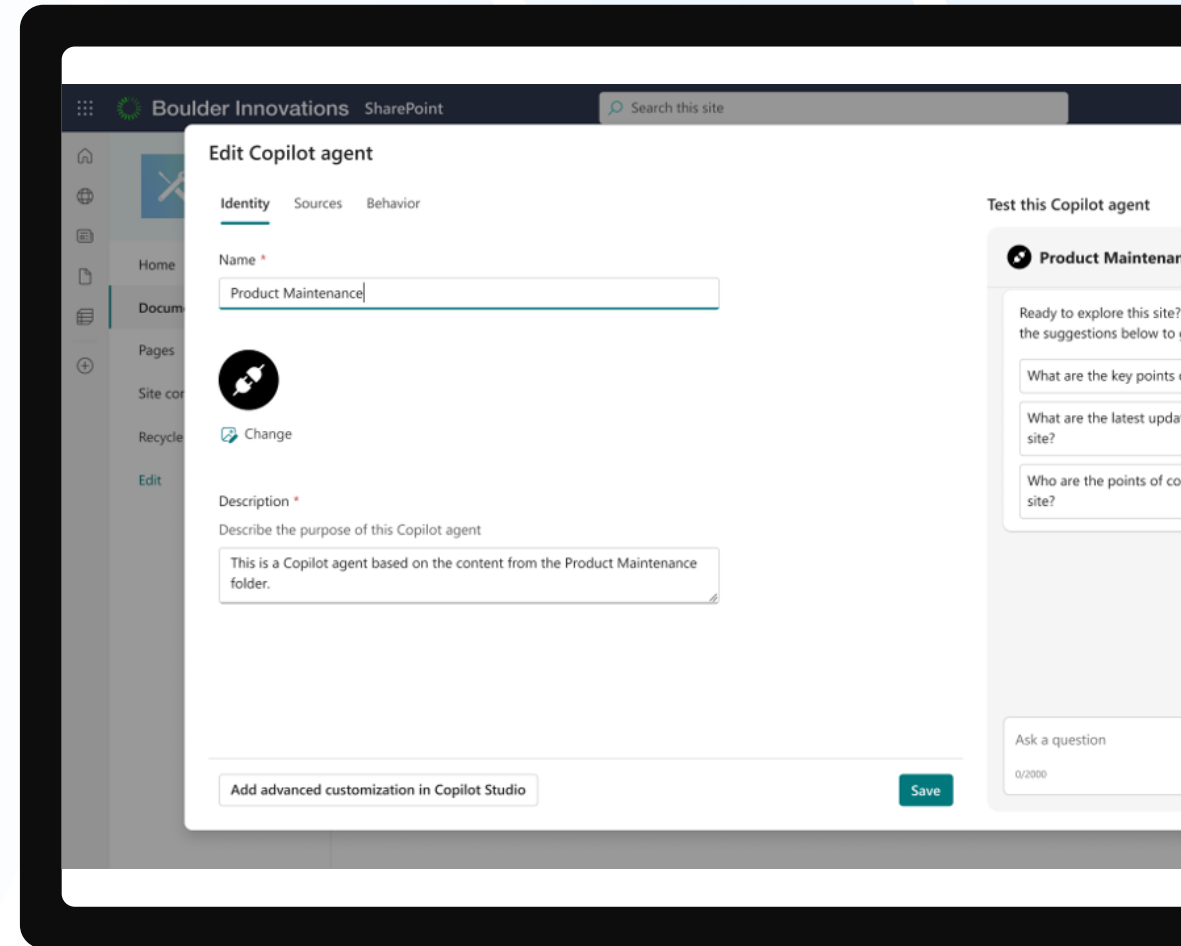
Give your Copilot agent a name, image, and description to help users easily recognize it and its purpose



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

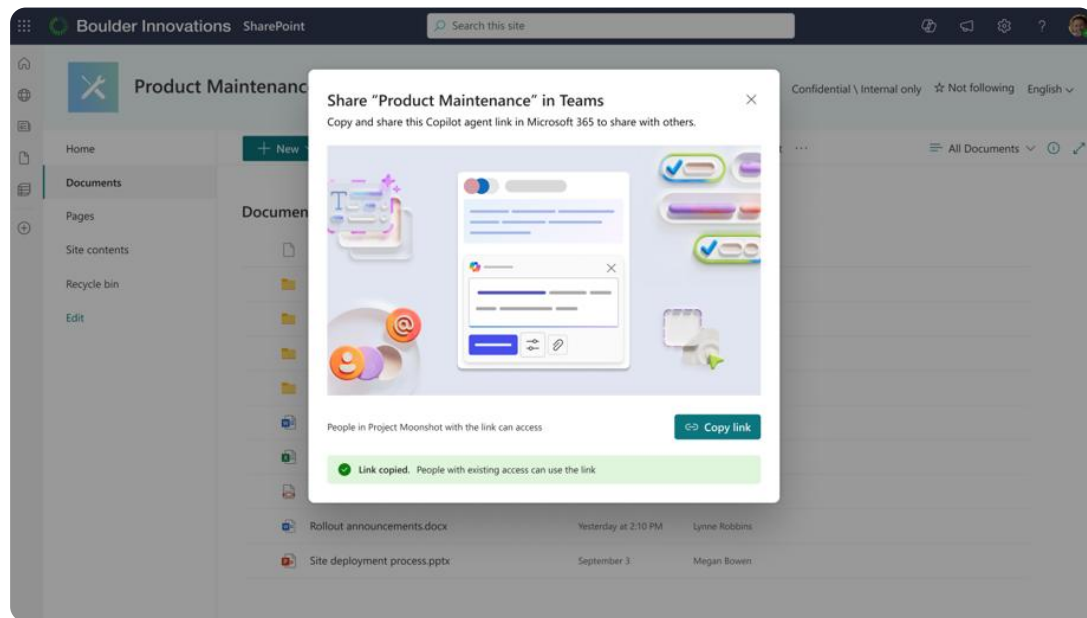


Set the behavior to help answer questions, summarize information, or find files

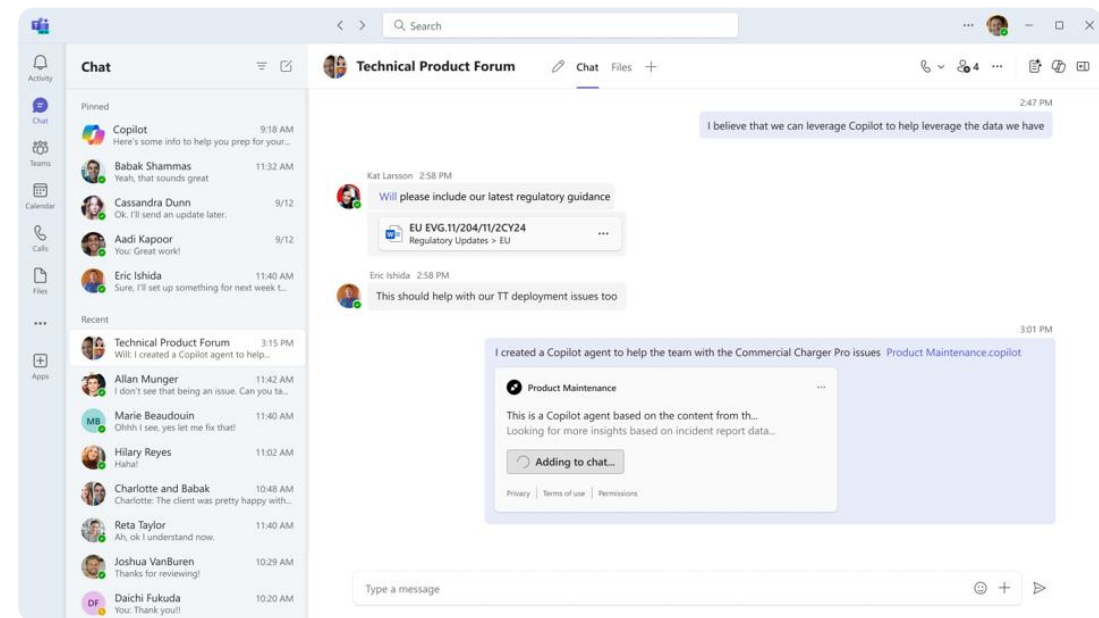


3

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



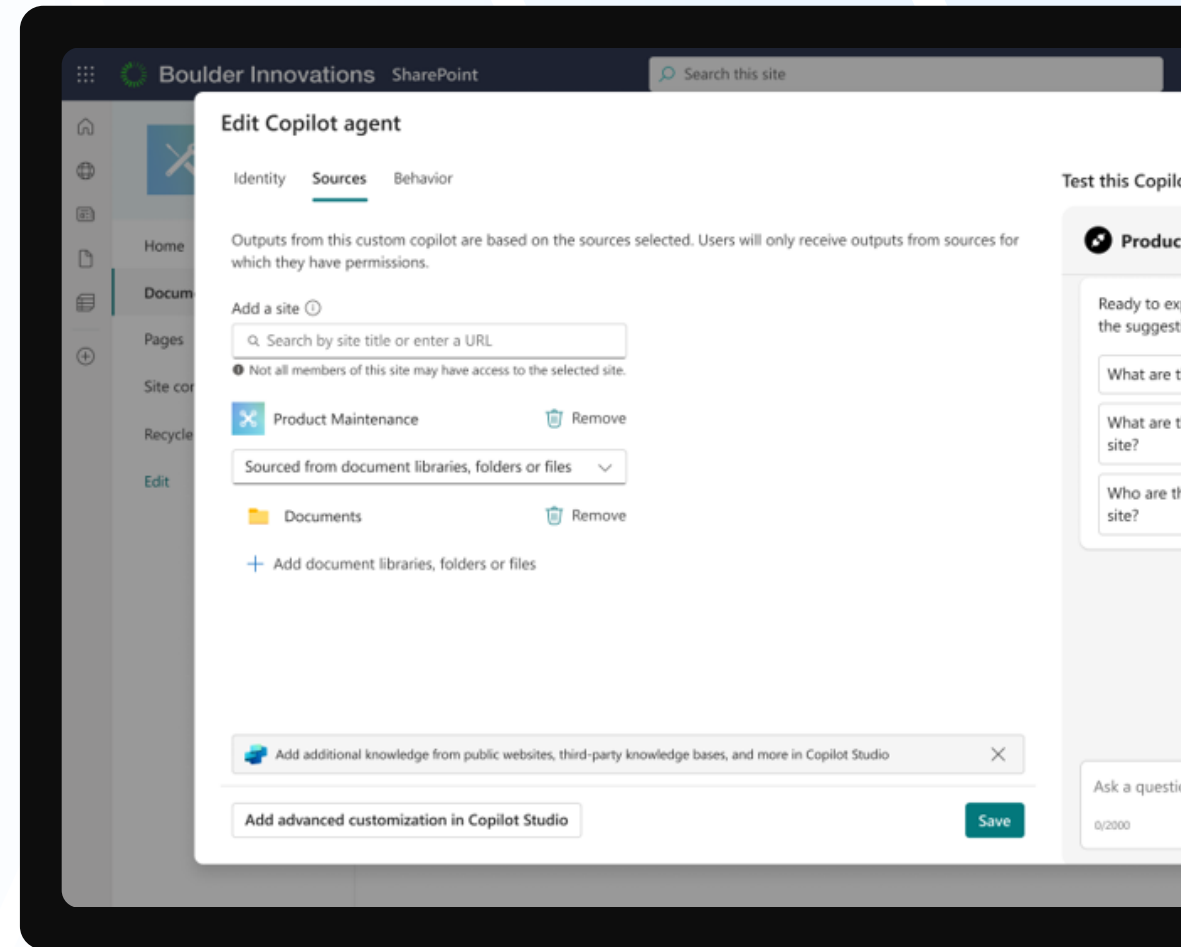
Launch Copilot Studio directly from SharePoint to further customize and add actions to automate workflows



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



Demo

Create agents as an end-user



Create

Copilot Agents



Getting started guide

Requirement

What you should do

How to do it

01

AI for personal productivity and business processes: Microsoft 365 Copilot grounded in your

- Microsoft 365 productivity data
- Security, Identity, data governance and compliance policies
- Microsoft 365 skills e.g., Outlook, SharePoint, Teams

Ground in your data

Index and rank your data alongside native data in Microsoft Graph using Graph connectors

Connect to your tasks

Customize behavior and connect to your apps and workflows, including 3P apps with Copilot agents

Consider: AI optimized for your roles

Streamlined role-specific workflows and out-of-box integrations to leading 3P solutions

Pick from existing, or build a new [Graph connector](#)¹ and configure in admin center

For internal users, choose from store or build a [Copilot agent](#) with [Copilot Studio](#)¹

For external users: See option 2

Buy and deploy

- [Copilot for Sales](#)
- [Copilot for Finance](#)
- [Copilot for Service](#)

02

AI in your apps: Gen-AI in your internal and external facing line of business apps

Build your Copilot agents in your apps/websites

Grounded in your data and connected to your app skills and workflows

Build your own Copilot agent with [Copilot Studio](#)¹ and [Azure AI](#) and publish to your app or website

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 out-of-the-box solutions that work with my existing data estate for my employees

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.



Dynamics 365

Build Copilot agents that integrate and improve business processes.



Your applications

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



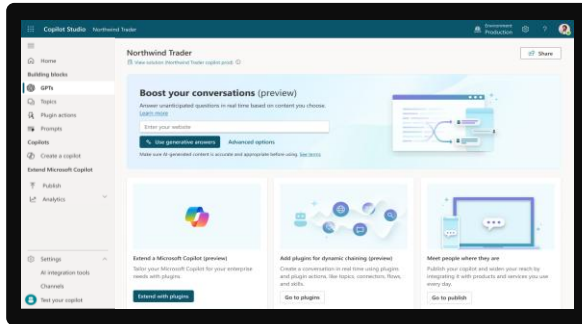
Power Platform

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



Build and customize
your agents using
Copilot Studio

What's in Copilot Studio?



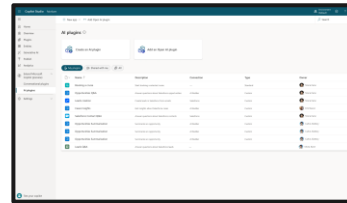
Copilot Building Studio

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

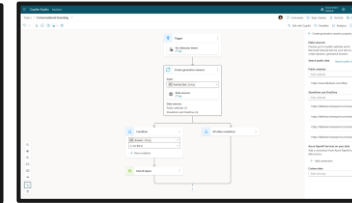
Including **advanced capabilities** of Azure Bot Framework natively in Copilot Studio.

Workspaces

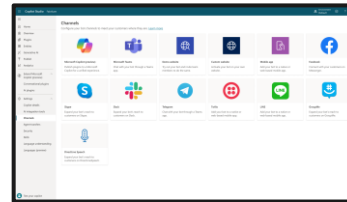
Build Your Own Copilot



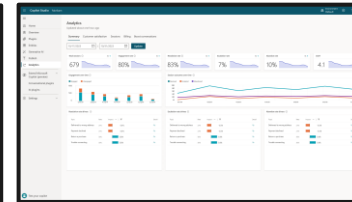
Topics, GPTs & Plugins



Generative AI

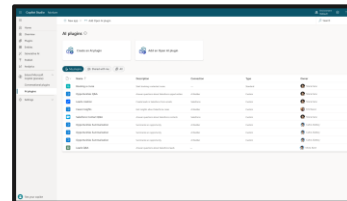


Channel Publishing

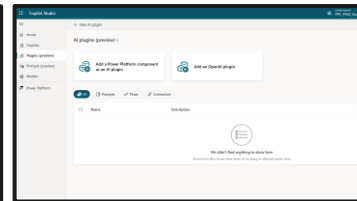


Analytics & Insights

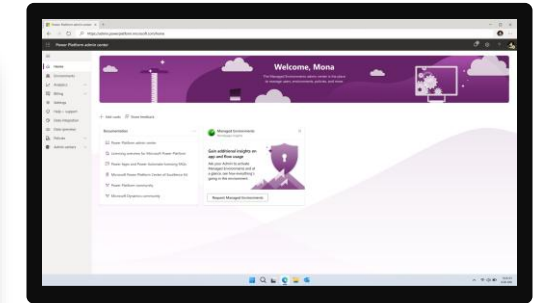
Extend Microsoft Copilot



Conversational Plugins



AI Plugins



Admin Studio

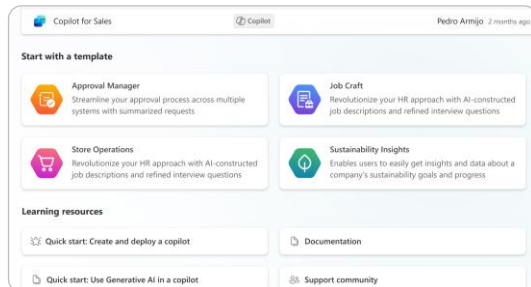
Deploy copilots securely using **central administration**, built-in security roles, and simple management across environments to maintain compliance and governance.

Build the way you want

Users of all skill levels can create and test together

Preview

Templates

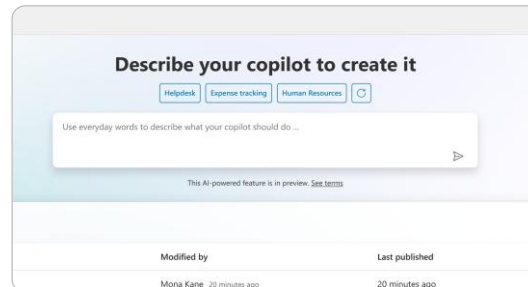


Get started quickly

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

Preview

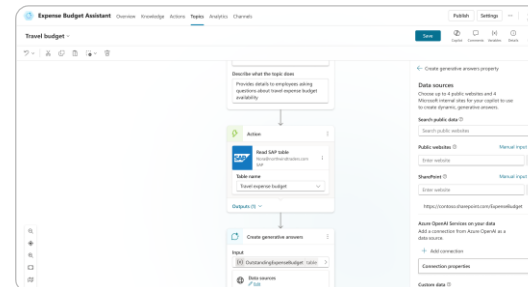
Natural language



Build conversationally

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

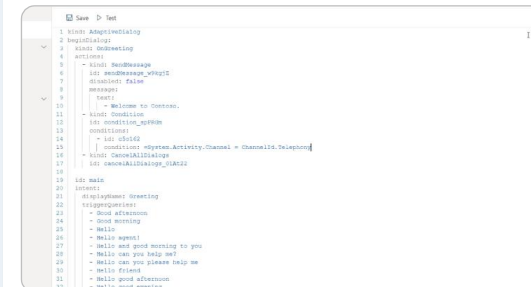
Visual canvas



Navigate a modern UX

Design your conversation by following the low code graphical interface.

Code



Switch to YAML

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




Demo

Copilot Studio Walkthrough






Copilot Studio licensing options

Copilot Studio became a pay-go service on December 1st, 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
Classic answers 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
Generative answers Dynamically generated responses based on knowledge sources & context that provide flexible and natural interactions	0	2 messages
Tenant Graph grounding for messages 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
Autonomous actions 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

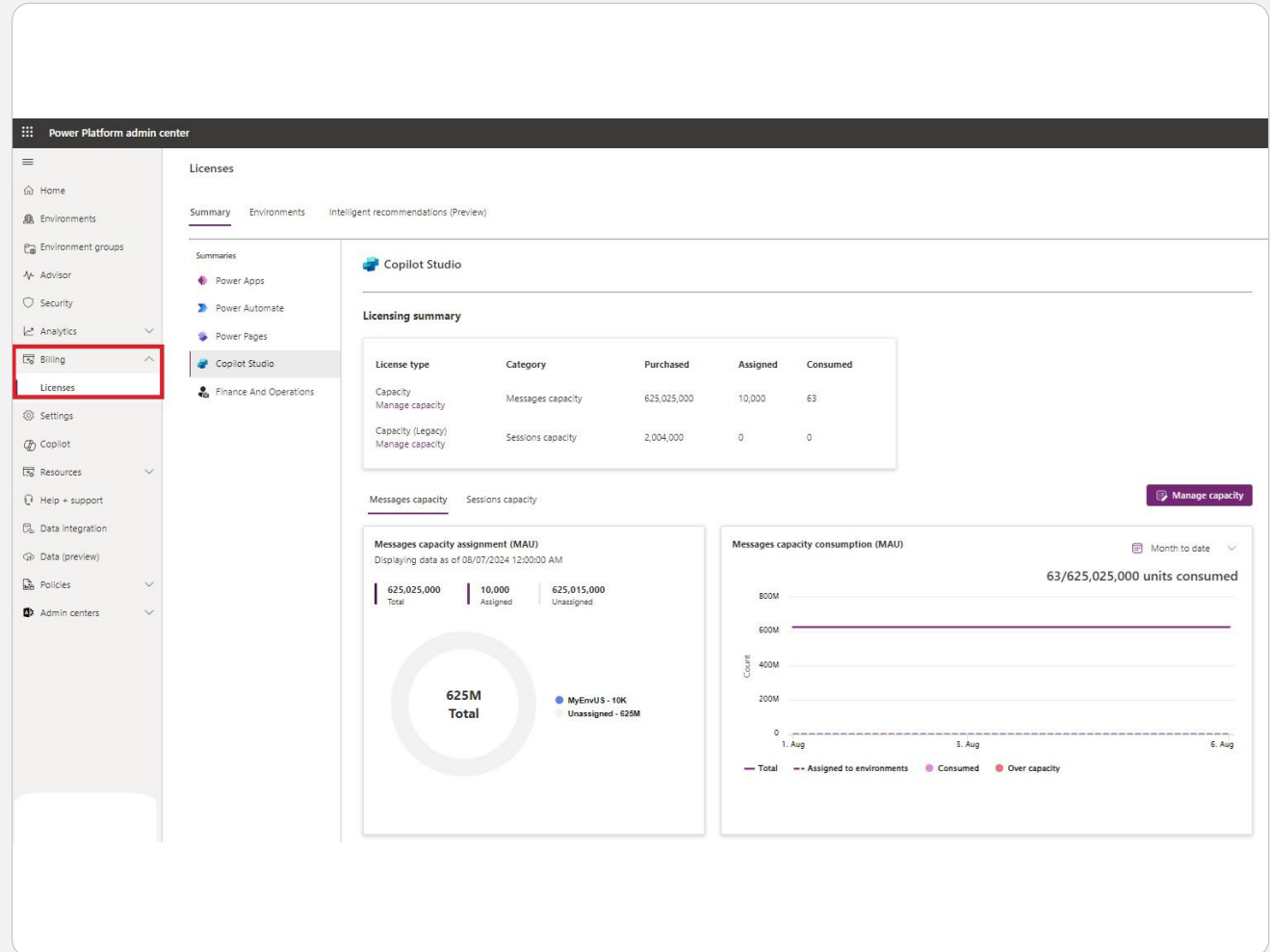
- Understand what you have purchased in terms of capacity for the project
- Determine the potential impact of design on capacity and licensing (e.g., keeping conversation transcripts will grow database storage)
- Additional services such as Azure OpenAI and AI Search (if used as the Azure OpenAI 'on 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




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:

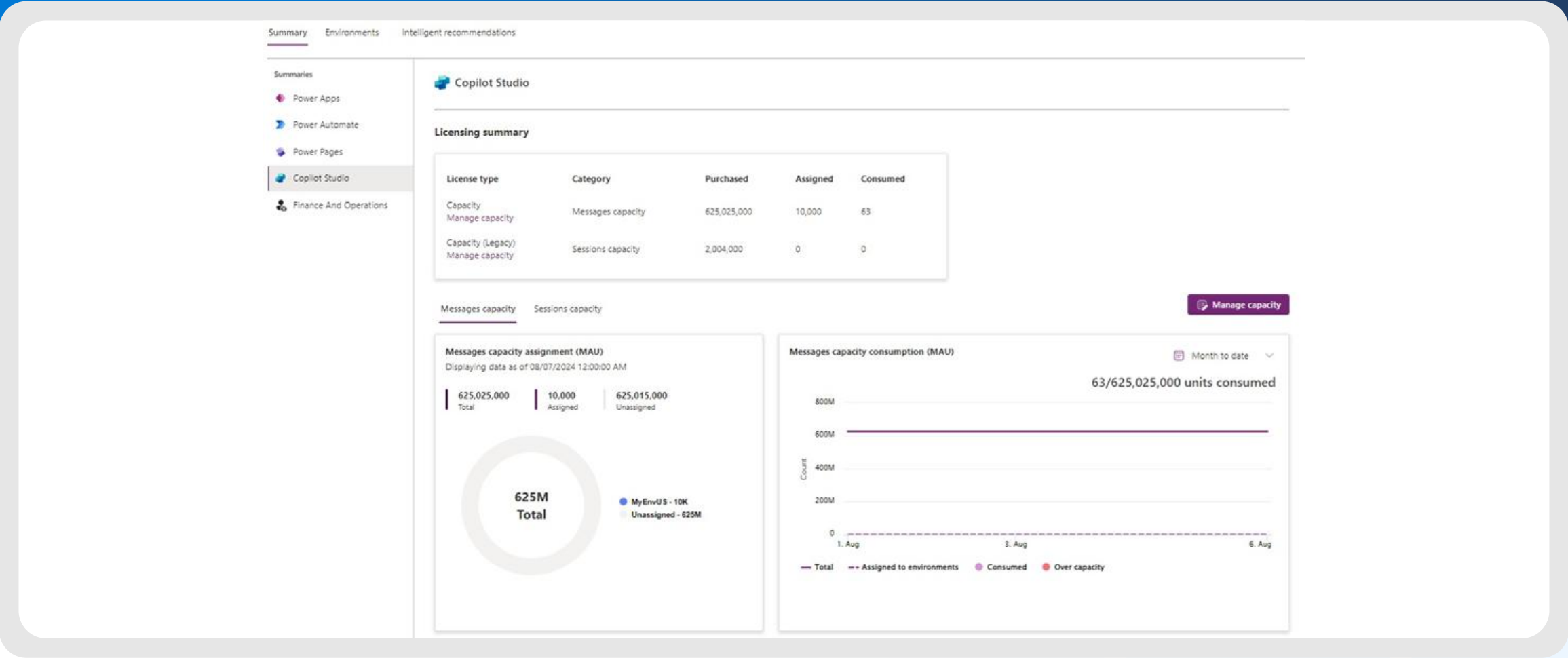
- Reallocate existing capacity from the org (tenant) or environment level
- Purchase more capacity and make it available to your environment
- **Now available:** Set up a consumptive meter (“Pay-as-you-go” meter) to handle any overage

Licensing summary

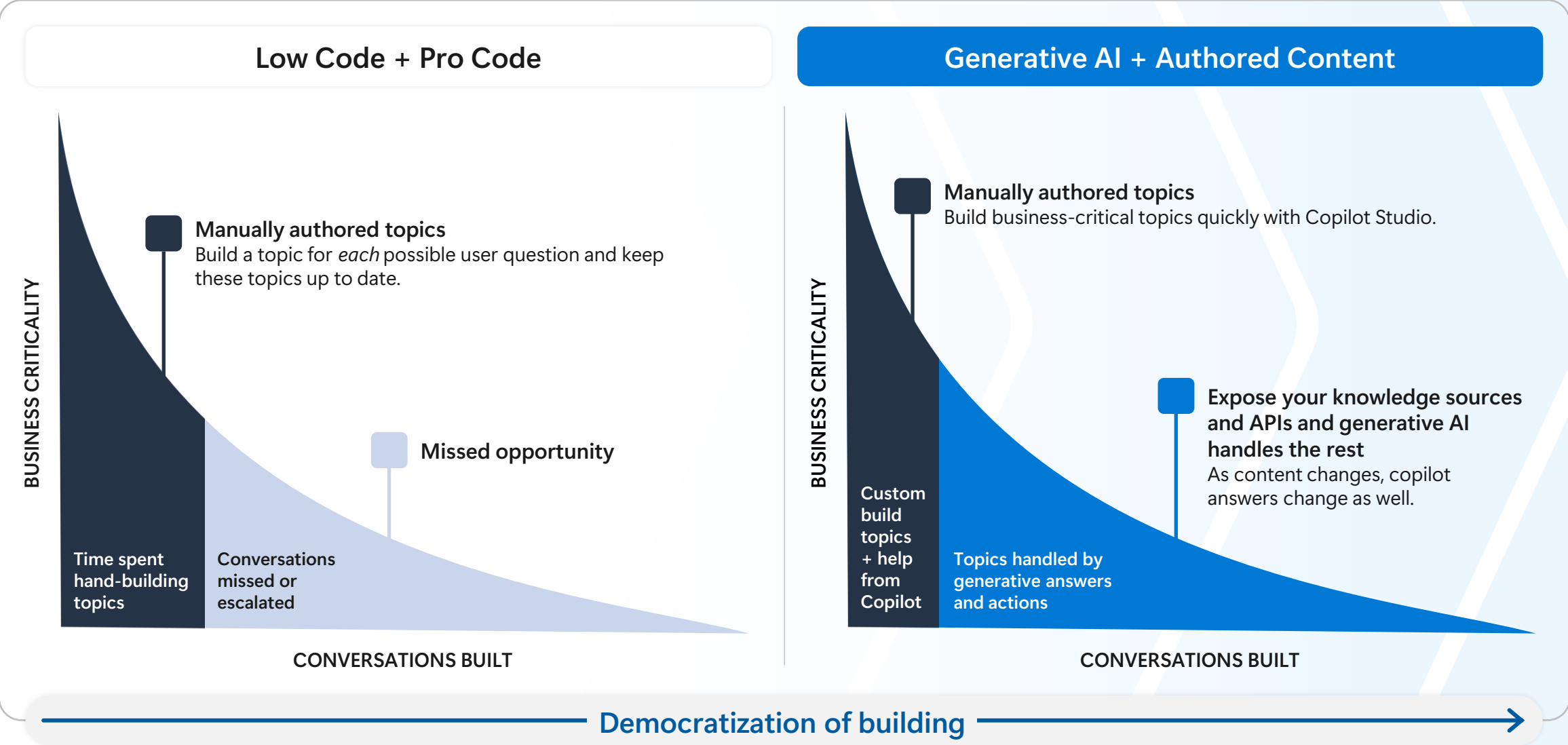
License type	Category	Purchased	Assigned	Consumed
Capacity Manage capacity	Messages capacity	0	0	 121
Capacity (Legacy) Manage capacity	Sessions capacity	29,000	500	0

Monitor message consumption as an admin

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



Generative AI is changing conversational AI



Generative AI in Copilot Studio | Powered by Azure OpenAI Service

CONNECT AND EXTEND



M365 Copilot



Azure Open AI Foundry



Power Apps



Power Pages



Teams

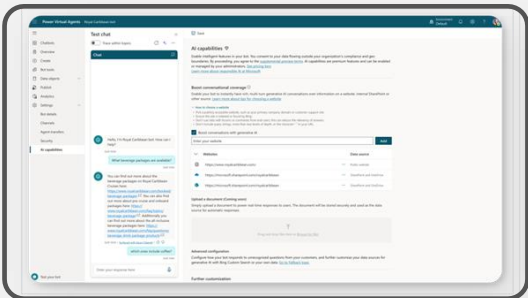


Dynamics 365



Generative Conversations

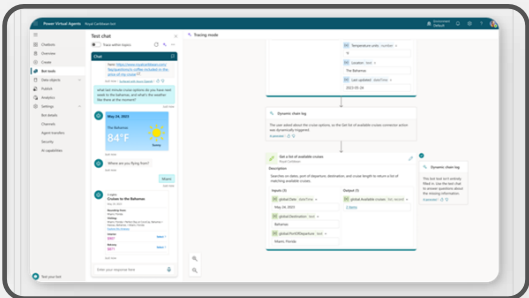
To Answer



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

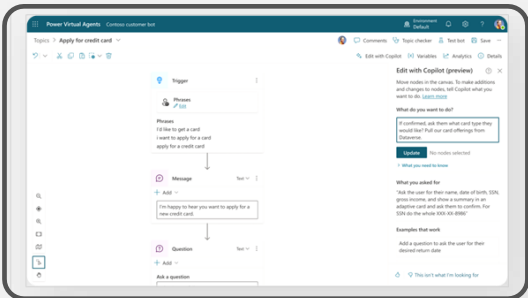


Generative Actions

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

Next steps

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



Get started today



aka.ms/trycopilotstudio

Learn more

Website

aka.ms/copilotstudio

Blog

aka.ms/copilotstudio-blog

Product documentation

aka.ms/copilotstudiodocs

Learning resources

aka.ms/copilotstudiolearn

Community page

aka.ms/copilotstudiocommunity

Implementation guide

aka.ms/copilotstudioimplement

D365 agents FAQ

aka.ms/Dynamics365agentsFAQ

D365 blog

aka.ms/D365blog

Sessions at Microsoft Ignite 2024

1

What's new with Copilot Studio

Omar Aftab | Tuesday 19th at 2:45–3:30 PM CST

2

Better together: Copilot Studio and Azure AI

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

3

Extending Microsoft 365 Copilot with Copilot agents: Best practices

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

4

Reinventing business processes with autonomous agents

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

5

Developers guide to building your own agents

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

6

The spectrum of agents with Copilot Studio

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

Find more Copilot Studio sessions here: 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: Product discovery	Execute a site inspection
Custom Copilot: Customer return	Onboard new employees
Plug-in: Enhance Copilot for M365	Service desk (coming soon!)
	Track inventory

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: Product discovery	Execute a site inspection
Custom Copilot: Customer return	Onboard new hires
Plug-in: Enhance Copilot for M365	Service desk
	Track inventory

Get hands on with Copilot Studio in a day

The Copilot Studio in a Day (Copilot StudioIAD) 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 StudioIADevent](https://aka.ms/CopilotStudioIADevent)



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



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

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)

<https://aka.ms/CopilotStudioImplementationGuide>

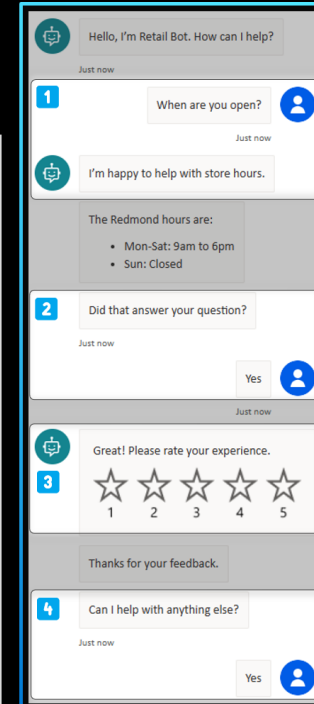


Engagement and outcomes

✓ How do you track engagement rates & session outcomes?

Example answer (you can delete this)

- 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).



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](#)



Resources

Copilot Studio trial

aka.ms/TryCopilotStudio

Blog

aka.ms/CopilotStudioBlog

Demo

aka.ms/CopilotStudioDemo

Product documentation

aka.ms/CopilotStudioDocs

Ignite on-demand session

aka.ms/CopilotStudioAtIgnite

Community page

aka.ms/CopilotStudioCommunity

Feature Requests

aka.ms/CopilotStudioFeatureRequest

How To Videos

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