Microsoft 365

CSP Level Up In-Person Technical Training

Introduction to

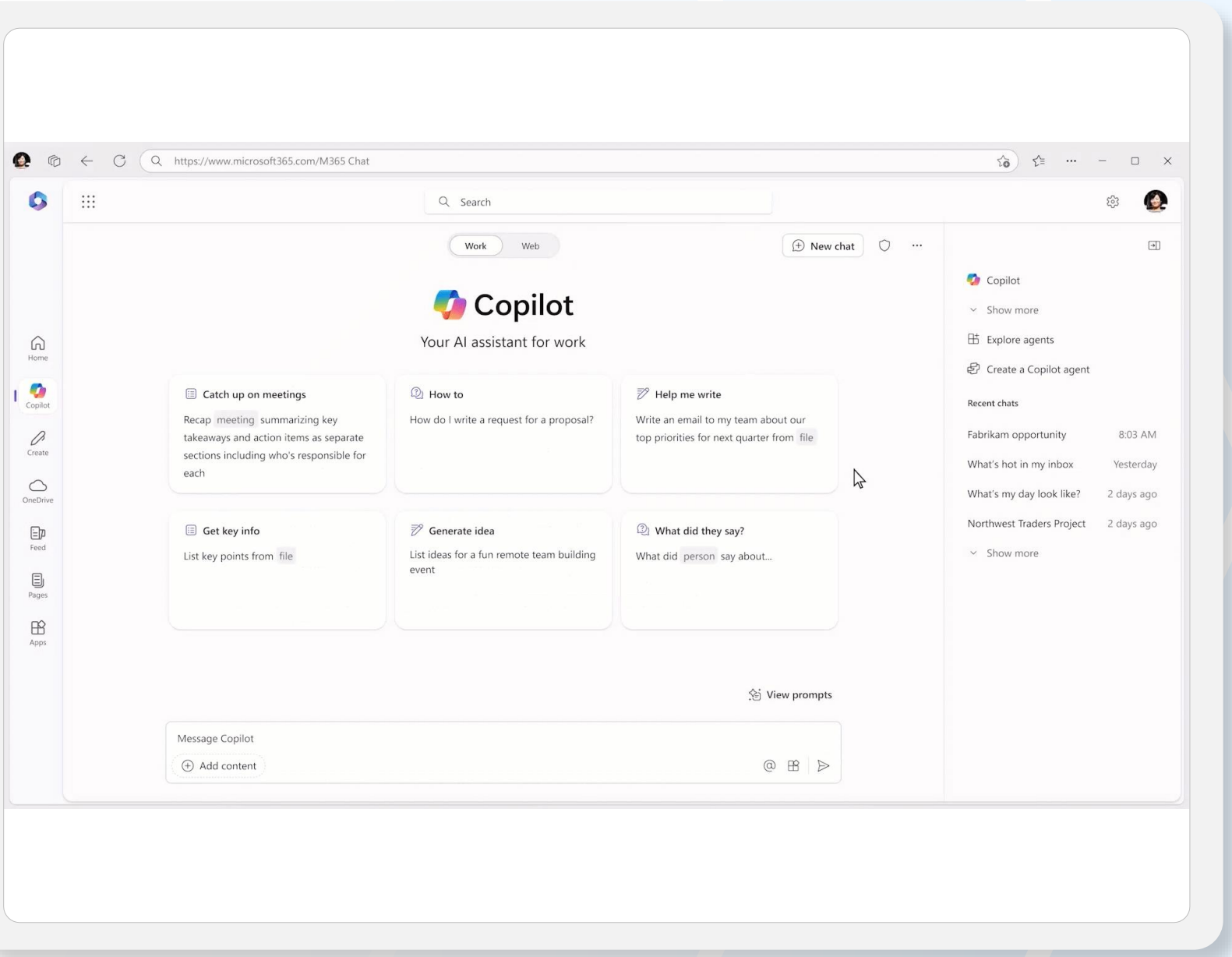
Copilot Agents

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

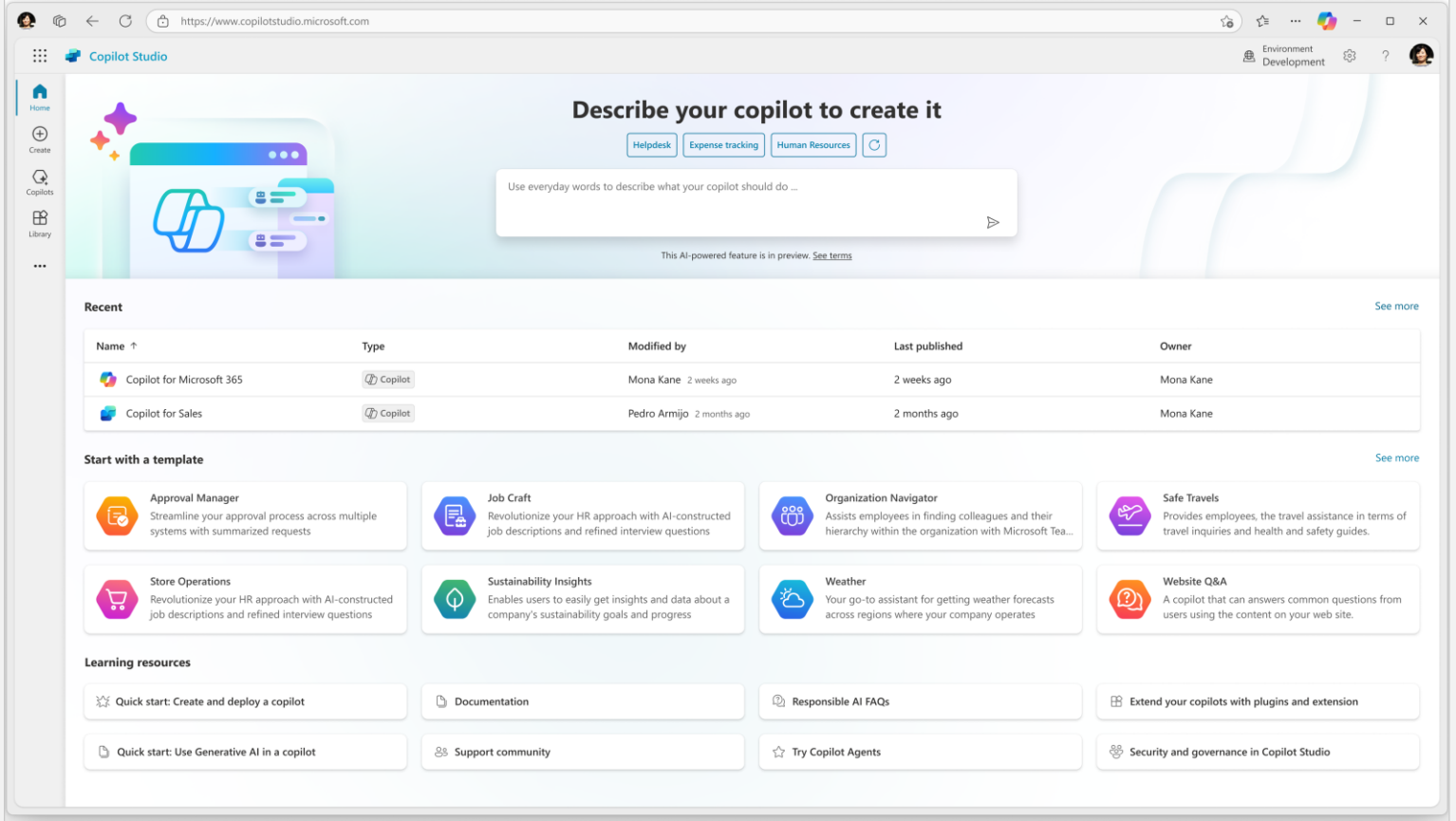
Copilot Studio embedded builder

- 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

Custom agents

Build Custom agents and bots for enterprises and third parties

Microsoft 365

Extend Microsoft 365 Copilot

Biz Apps & Power Platform

Extend Copilot experiences in Dynamics 365 and Power Products

Copilot for Sales

Copilot for Service

Power Platform

Other Microsoft Copilots

Extend other Microsoft Copilot Experiences

Microsoft Copilot Studio
Build custom agents | **Extend and customize** 1st party copilots

Agent SDK

Bot Service Channels

Azure AI Foundry Portal

Azure Cognitive Services

Power Platform Connectors

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

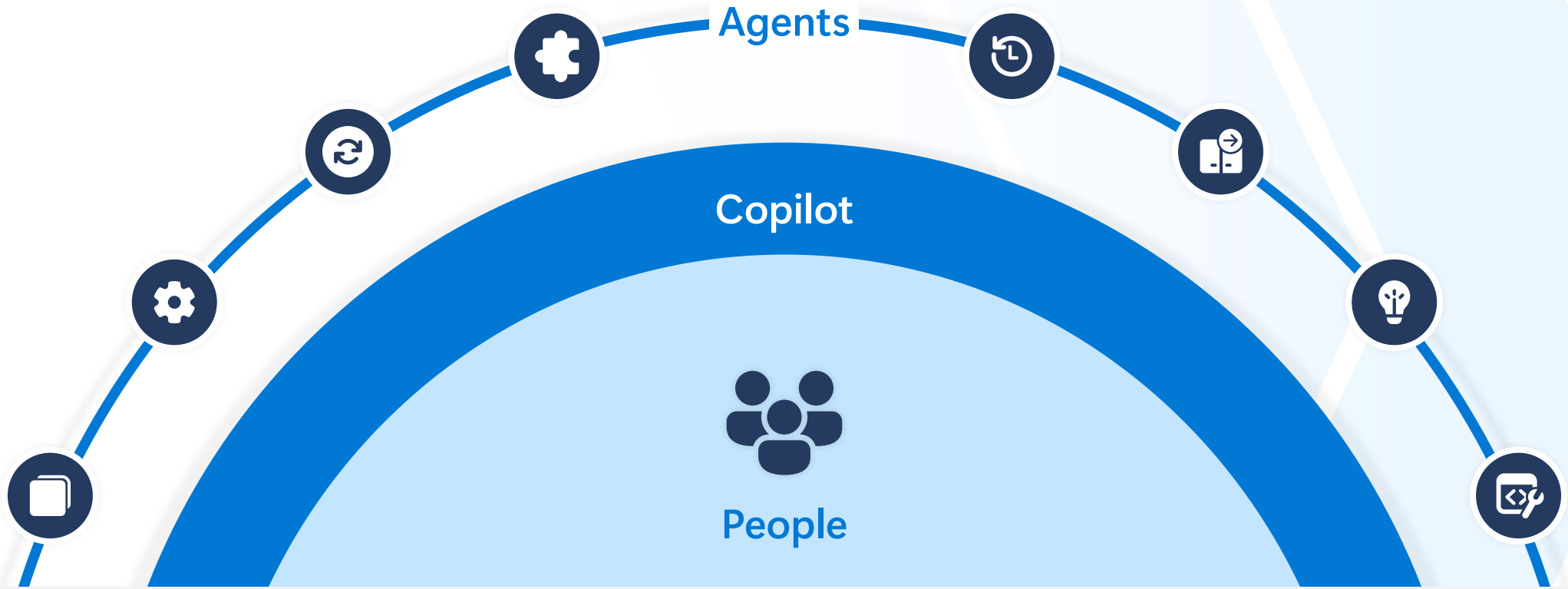
Autonomous

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



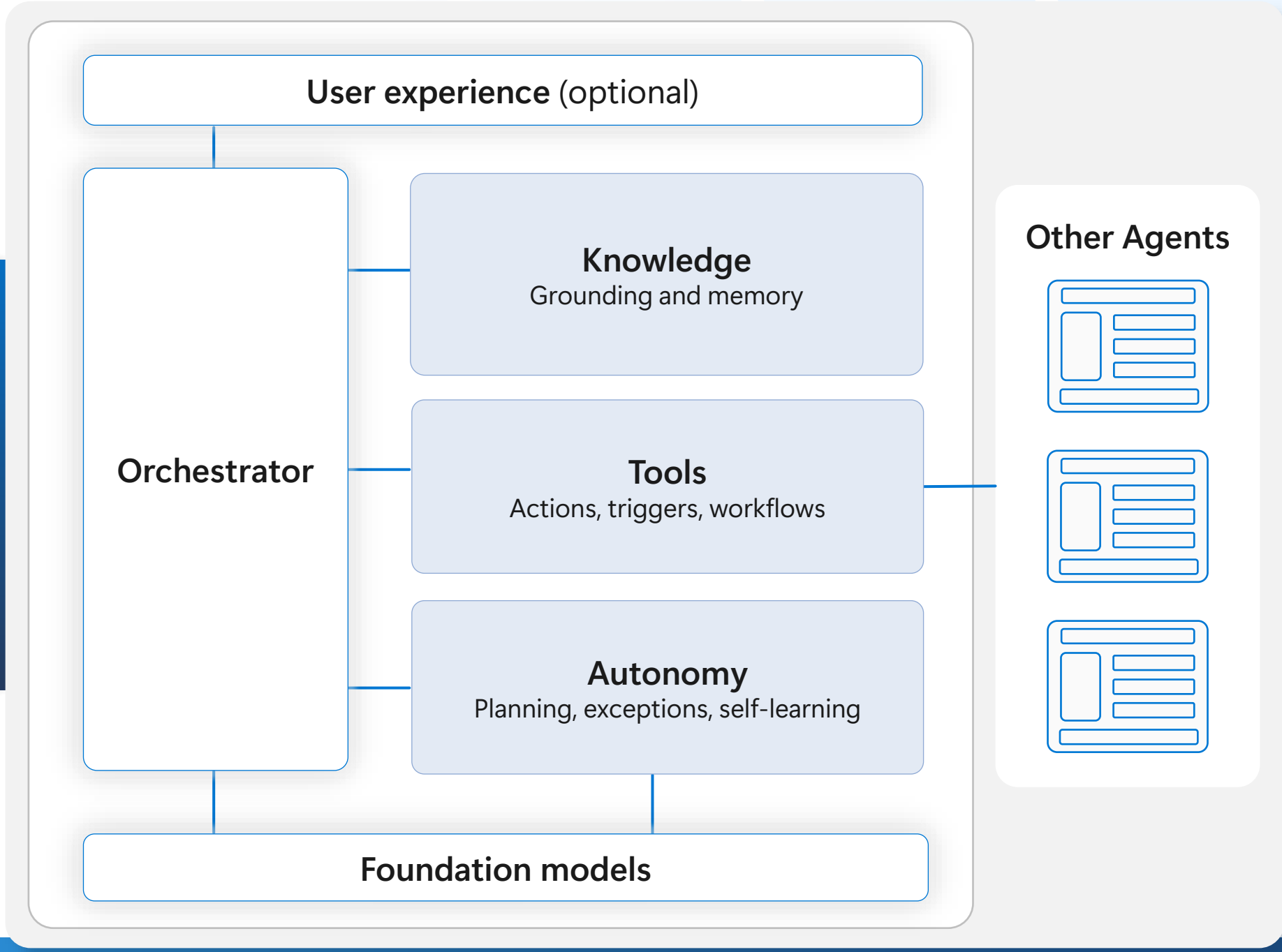
Copilot makes agents more personal to you

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

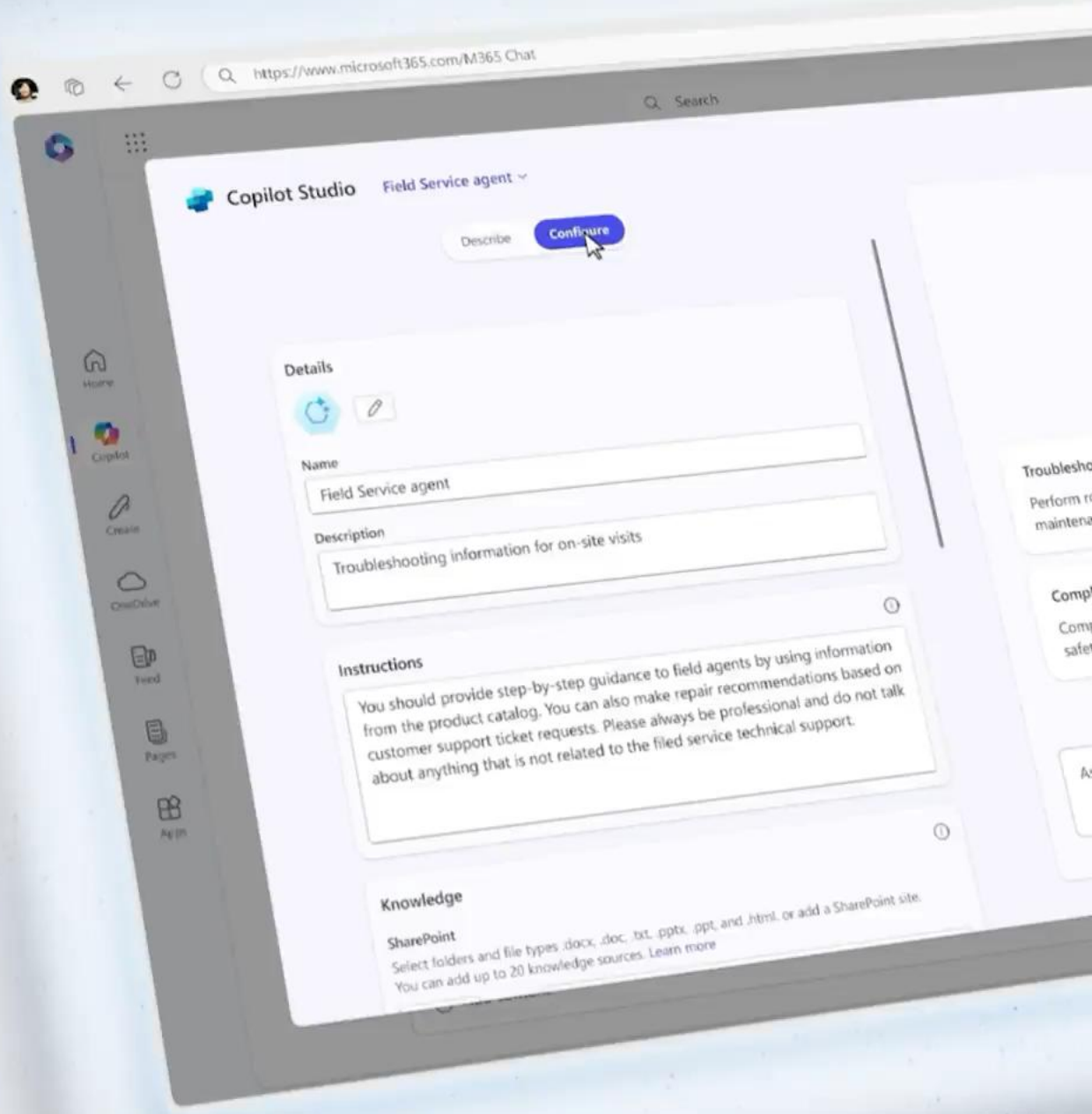
Native access to your Microsoft 365 data sources

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

Grounded solely in your selected content

Microsoft 365 Copilot

Copilot Studio
Agent builder



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

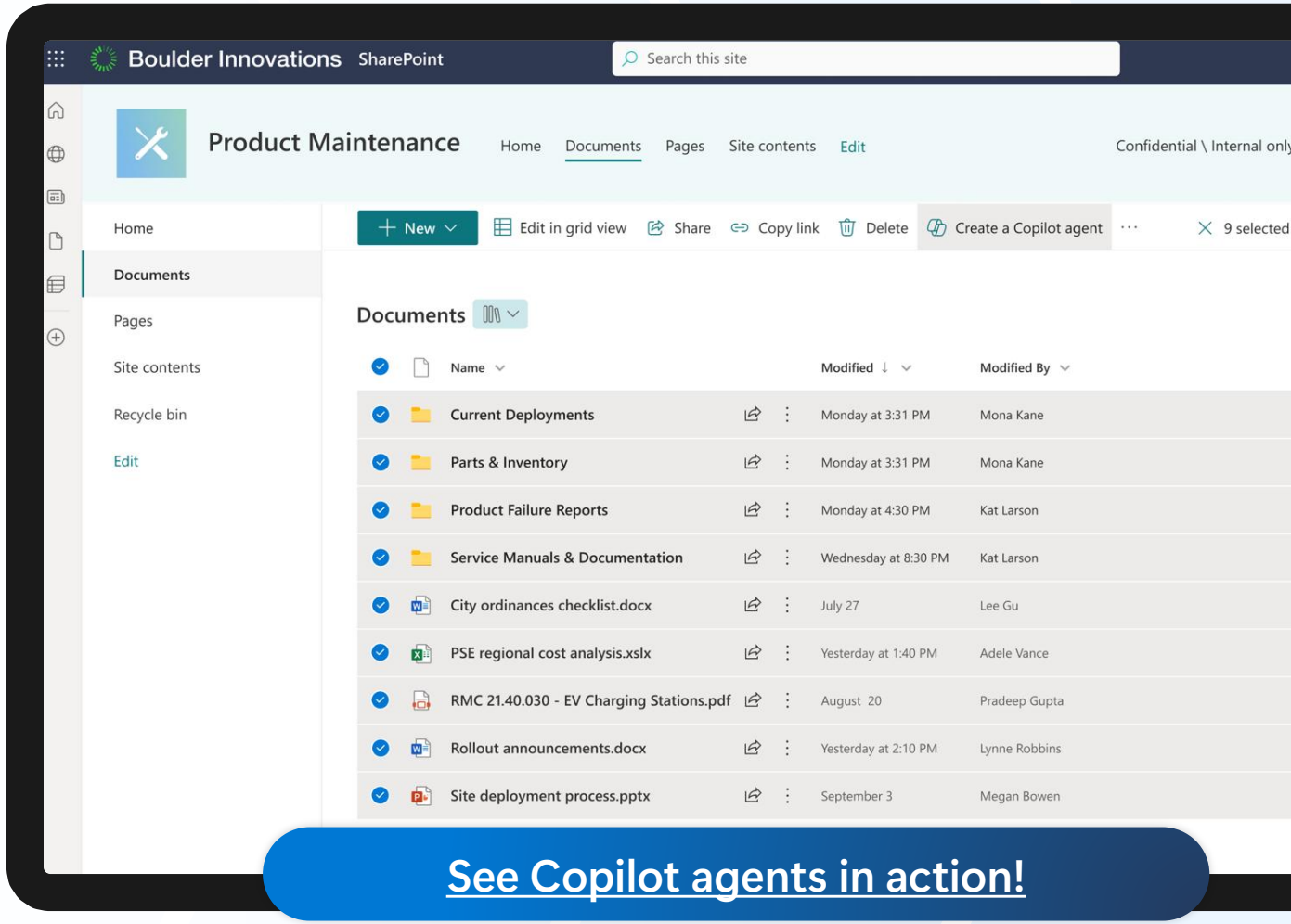
Add to a Microsoft Teams chat and @mention the agent for instant interaction

Extensibility

Launch Microsoft Copilot Studio directly from SharePoint for deeper customizations

Secure

Defaults to your existing SharePoint permissions and sensitivity settings



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

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

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

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

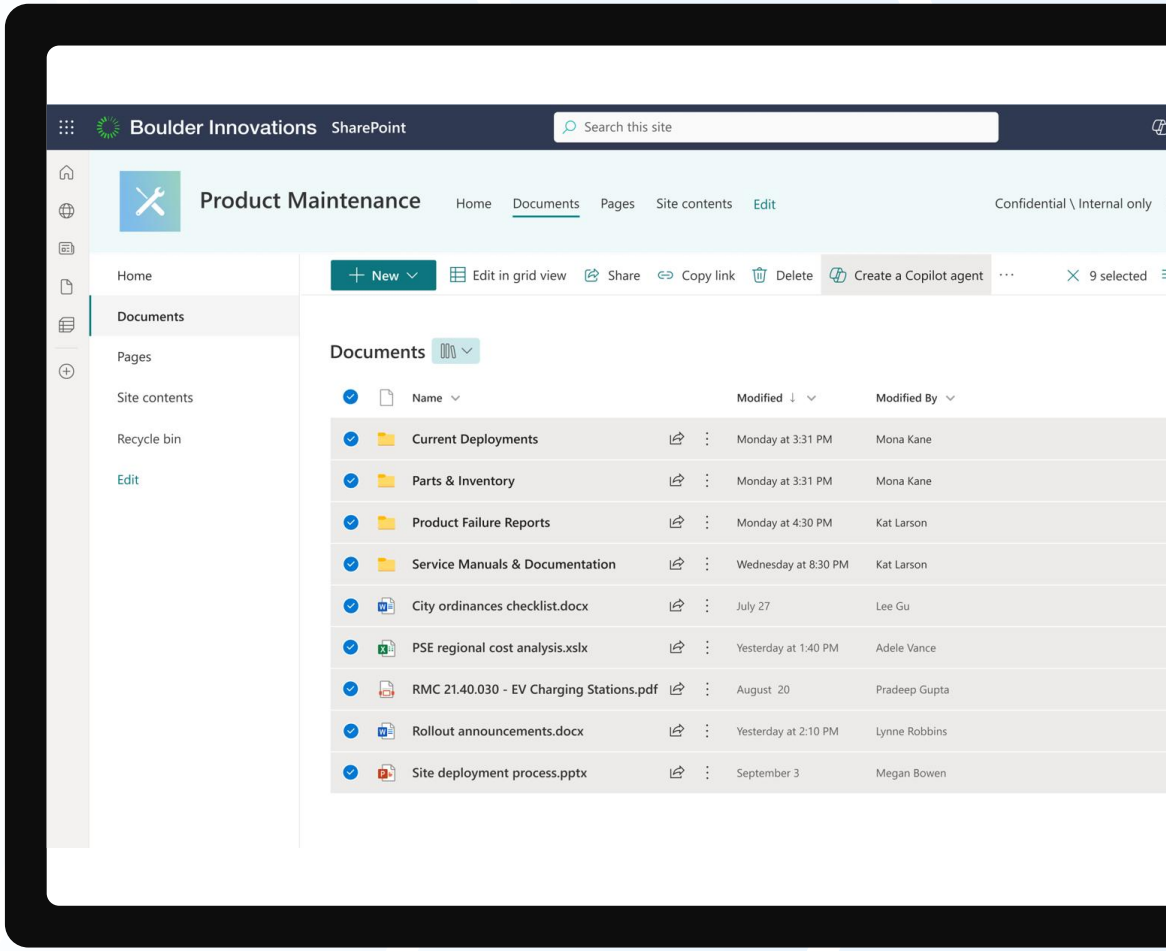
Share your Copilot agent via a link or add to a Teams chat

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



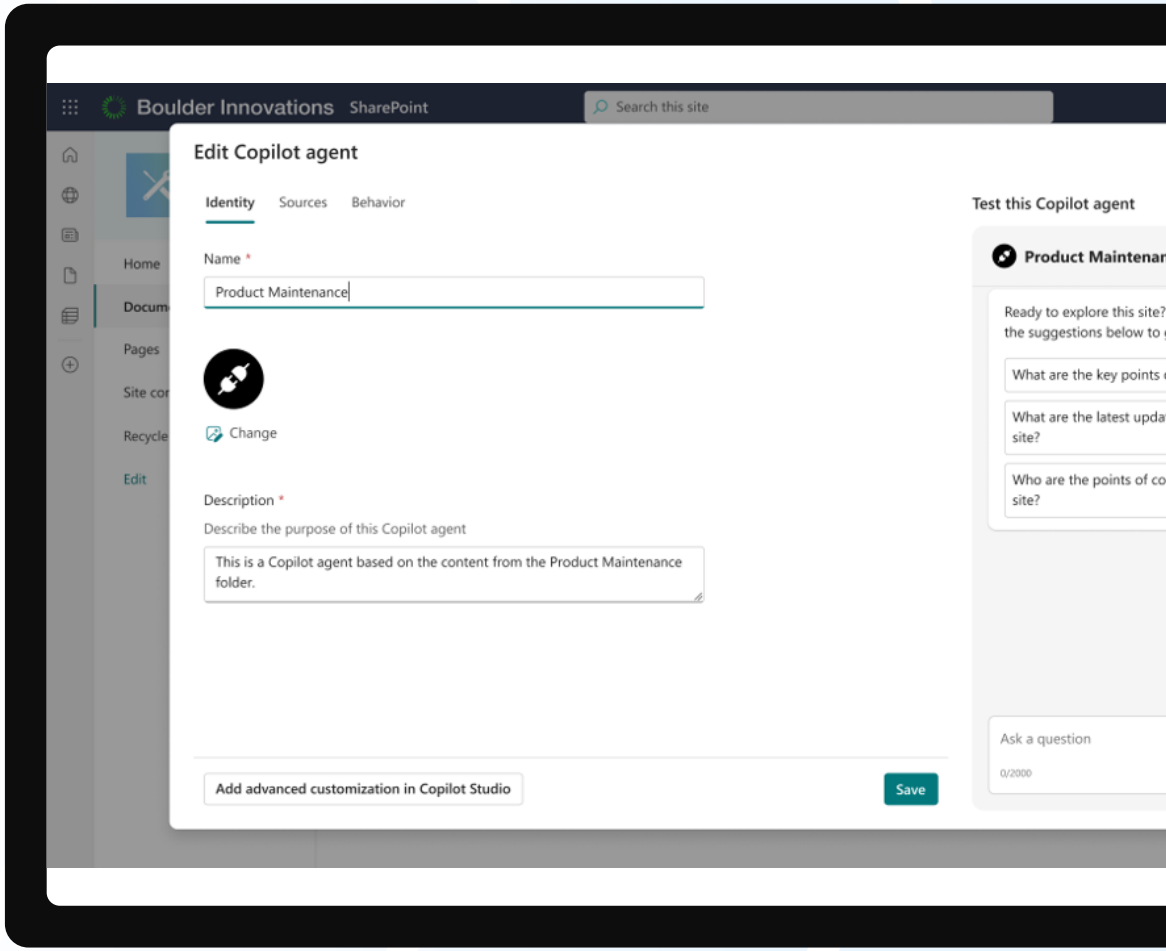
* Product images subject to change

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

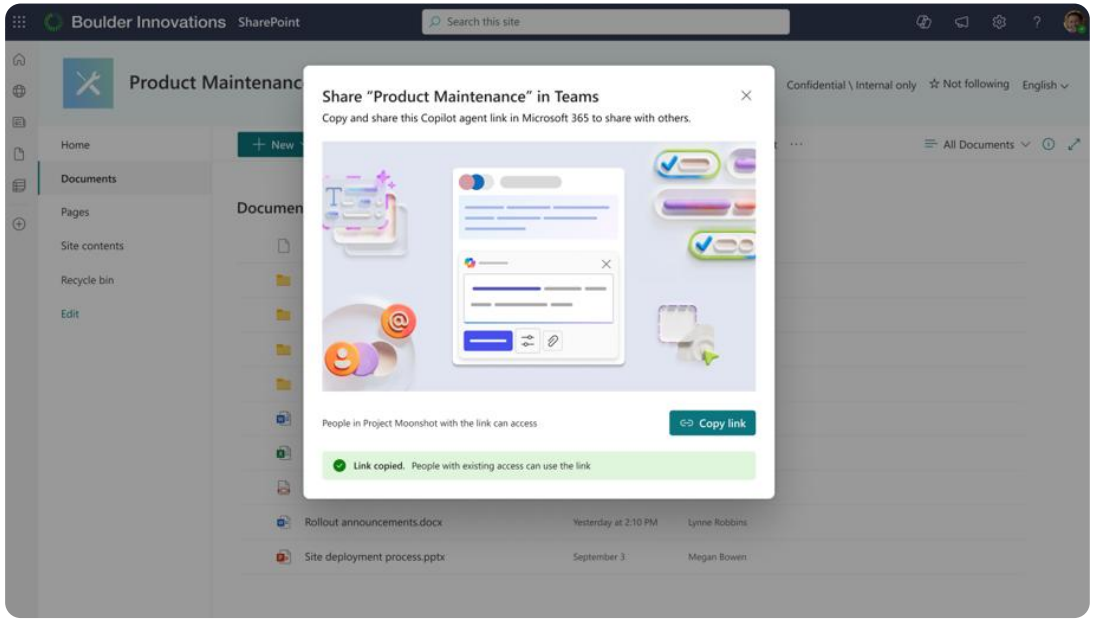
Provide additional guidance to users so they know how to maximize the value of the Copilot agent

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

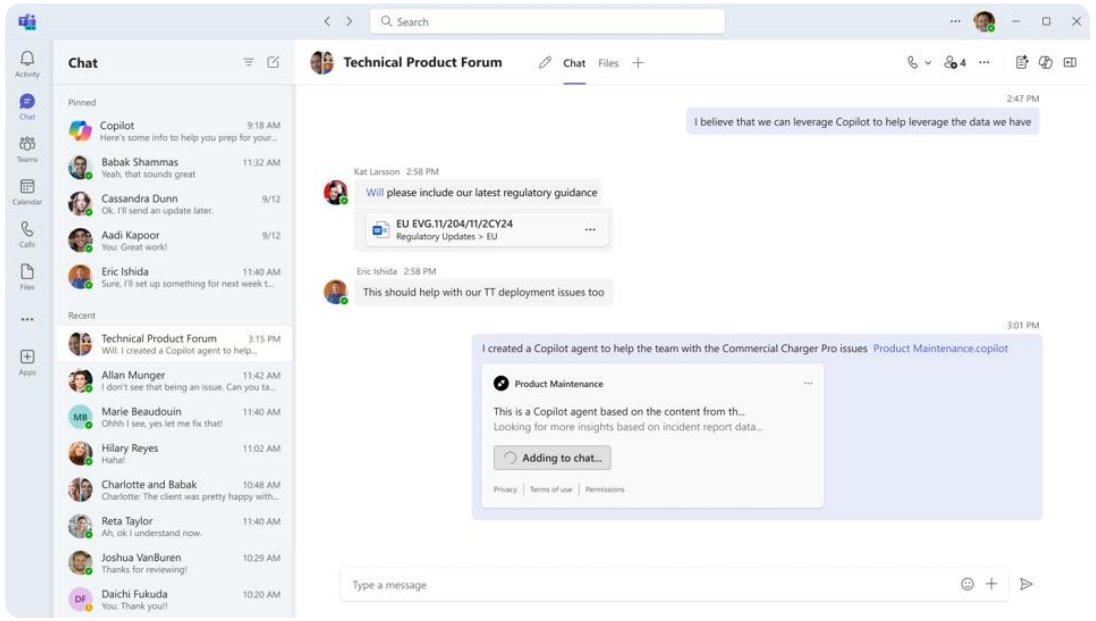


* Product images subject to change

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

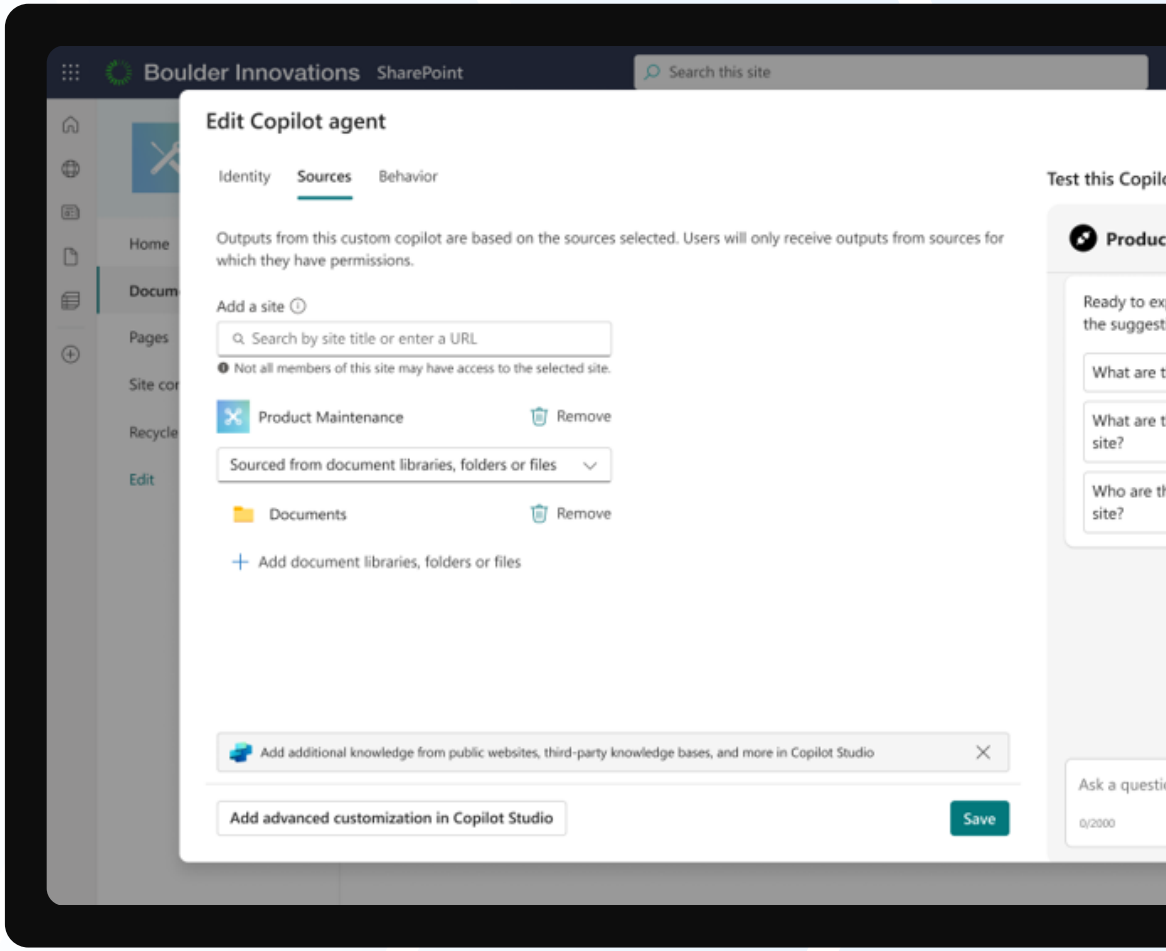
* Product images subject to change

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



* Product images subject to change

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	Pick from existing, or build a new Graph connector[1] and configure in admin center
	Connect to your tasks Customize behavior and connect to your apps and workflows, including 3P apps with Copilot agents	For internal users, choose from store or build a Copilot agent with Copilot Studio[1] For external users: See option 2
	Consider: AI optimized for your roles Streamlined role-specific workflows and out-of-box integrations to leading 3P solutions	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.

Build and customize your agents using Copilot Studio

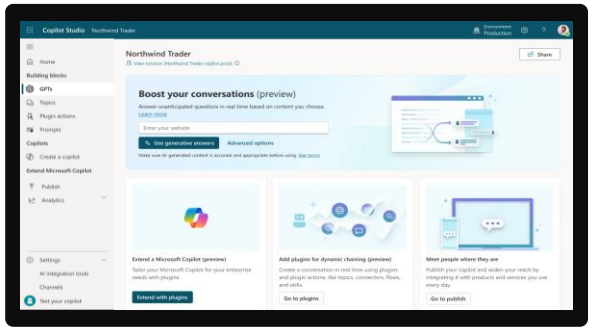
Your applications

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.

What's in Copilot Studio?



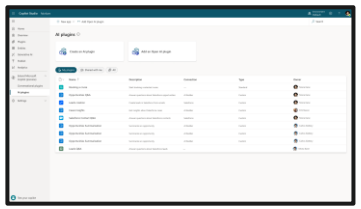
Copilot Building Studio

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

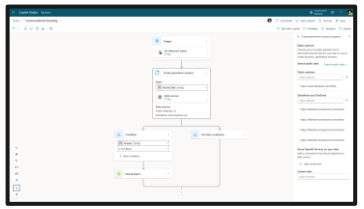
Including **advanced capabilities** of Azure Bot Framework natively in Copilot Studio.

Workspaces

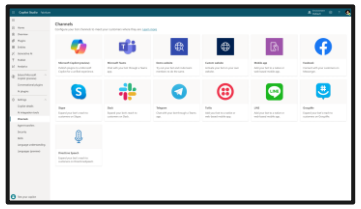
Build Your Own Copilot



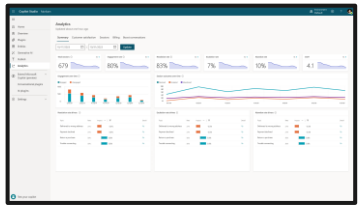
Topics, GPTs & Plugins



Generative AI

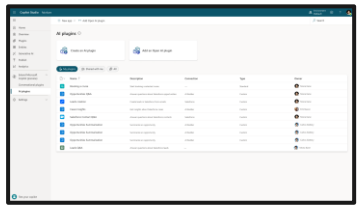


Channel Publishing

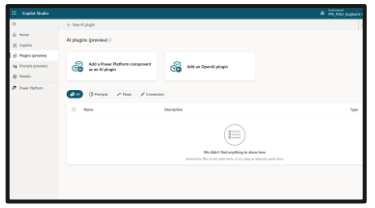


Analytics & Insights

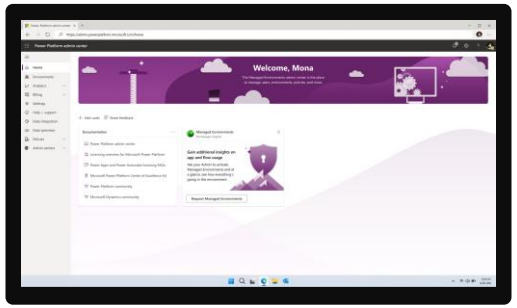
Extend Microsoft Copilot



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.

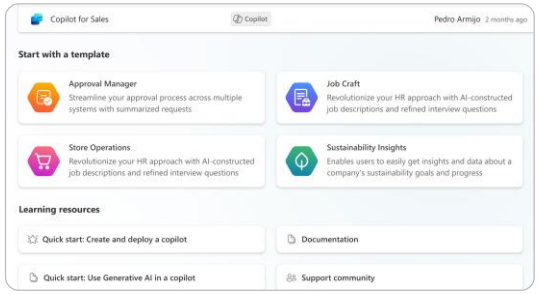
Settings: Security, Skills, Language Understanding, Languages, Customer Engagement Hub

Build the way you want

Users of all skill levels can create and test together

Preview

Templates

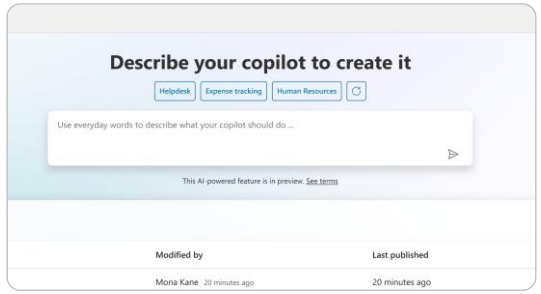


Get started quickly

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

Preview

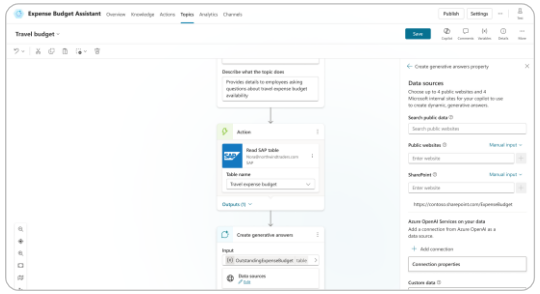
Natural language



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	Pay-as-you-go
Tenant-wide message packs	New PAYG meter in Azure
25,000 messages/month	$0.01/message
$200 per pack/month	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

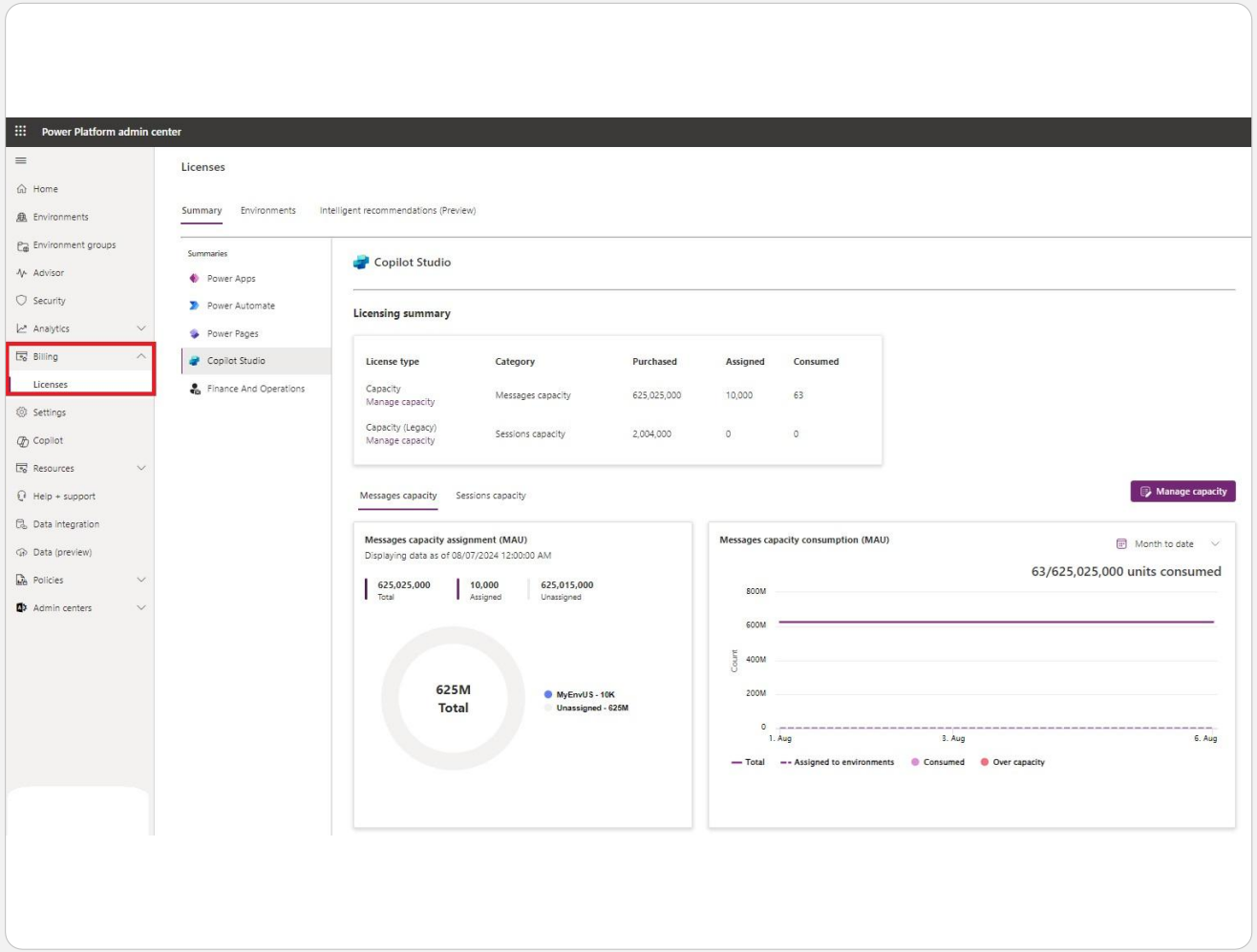
- Understand what you have purchased in terms of capacity for the project
- Determine the potential impact of design on capacity and licensing (e.g., keeping conversation transcripts will grow database storage)
- Additional services such as Azure OpenAI and AI Search (if used as the Azure OpenAI 'on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

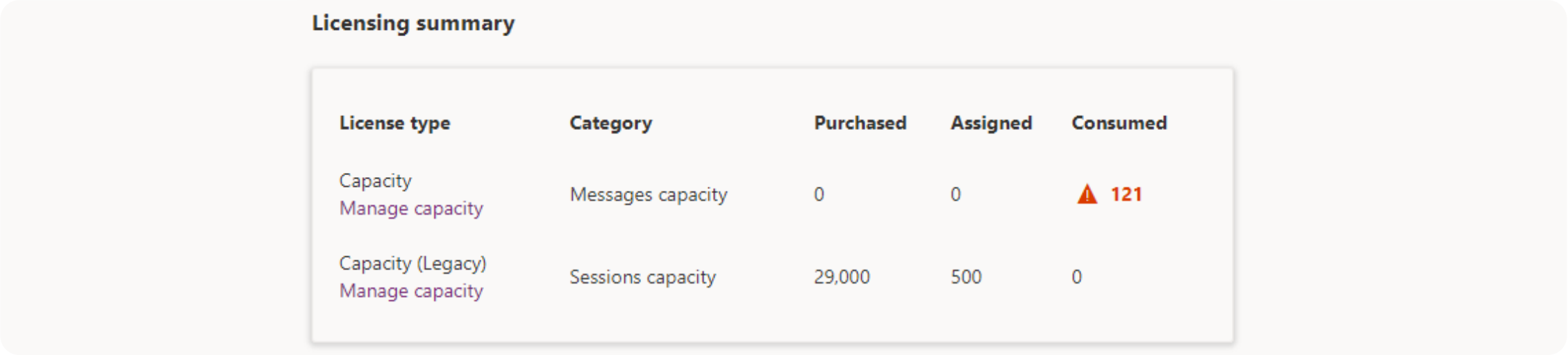


Manage message capacity – Overage

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.

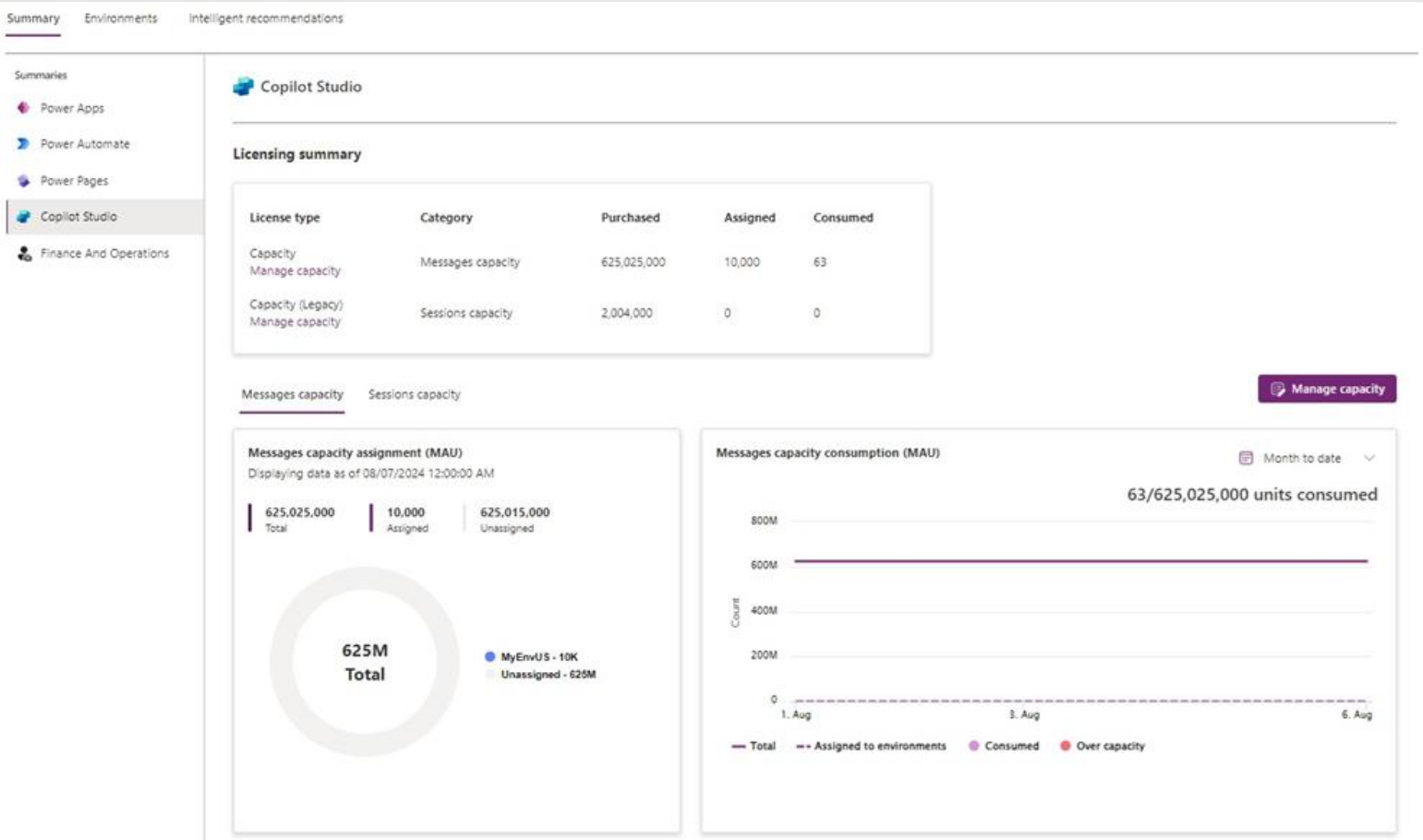
If your environment has no more capacity, you have the following options:

- 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

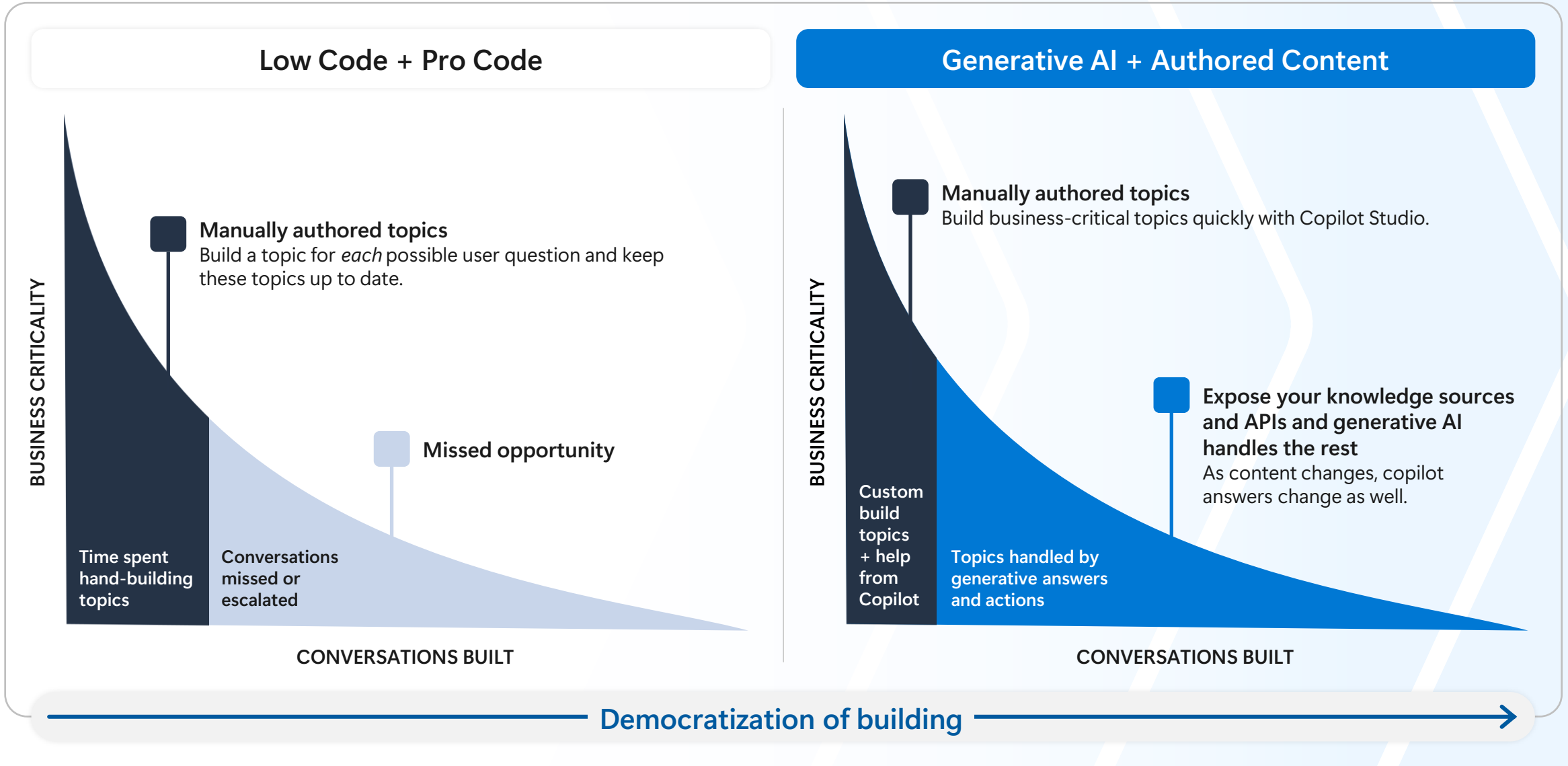


Monitor message consumption as an admin

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

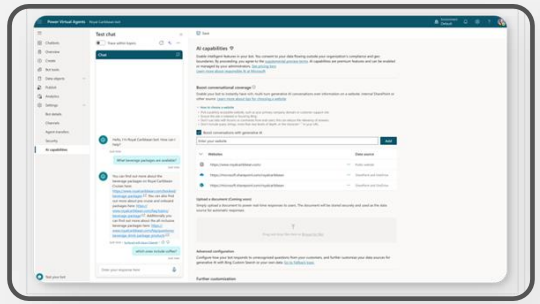
OpenAI Service

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.

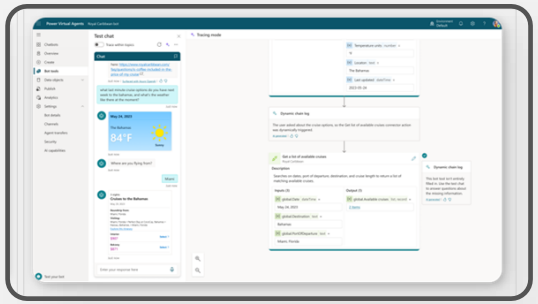
External

- 3P Search APIs
- External URL

Internal

- OneDrive URL
- Documents
- SharePoint URL

To Act



Generative Actions

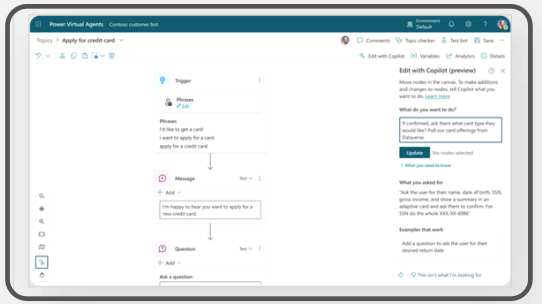
Copilot Studio generates dialog and takes action through dynamically chaining existing building blocks which can handle queries that were not anticipated or previously built.

Tools

- Power Platform Connectors
- Copilot Topics
- Skills
- Power Automate Flows

Generative Assistance

To Build



Generative Builder

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

Edit & Refine

- Topics
- Trigger Phrases
- Entities
- Variables
- Adaptive Cards
- Branching

Next steps

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

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

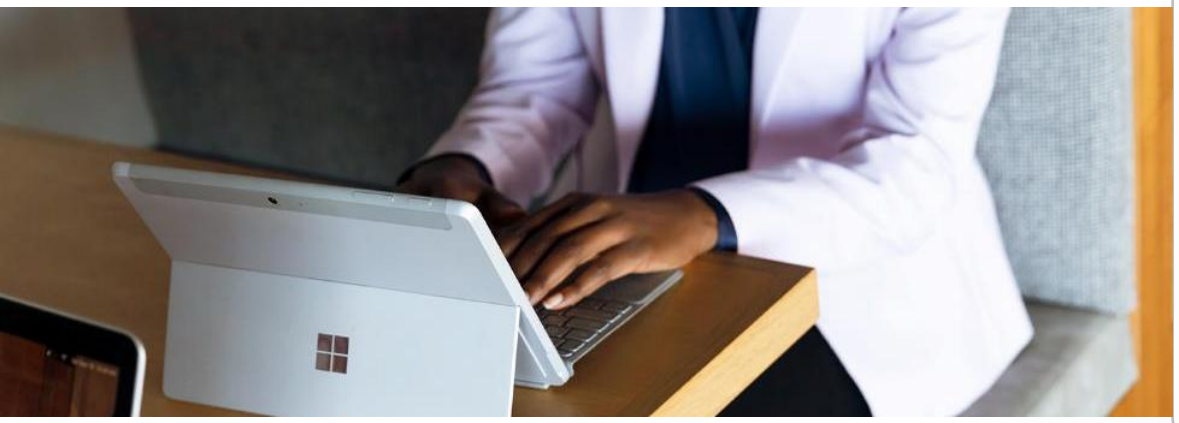
Get hands on with Copilot Studio in a day

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

Instructor: aka.ms/Copilot StudioinadayInstructor

Student: aka.ms/Copilot StudioinaDayPackage



Labs include:

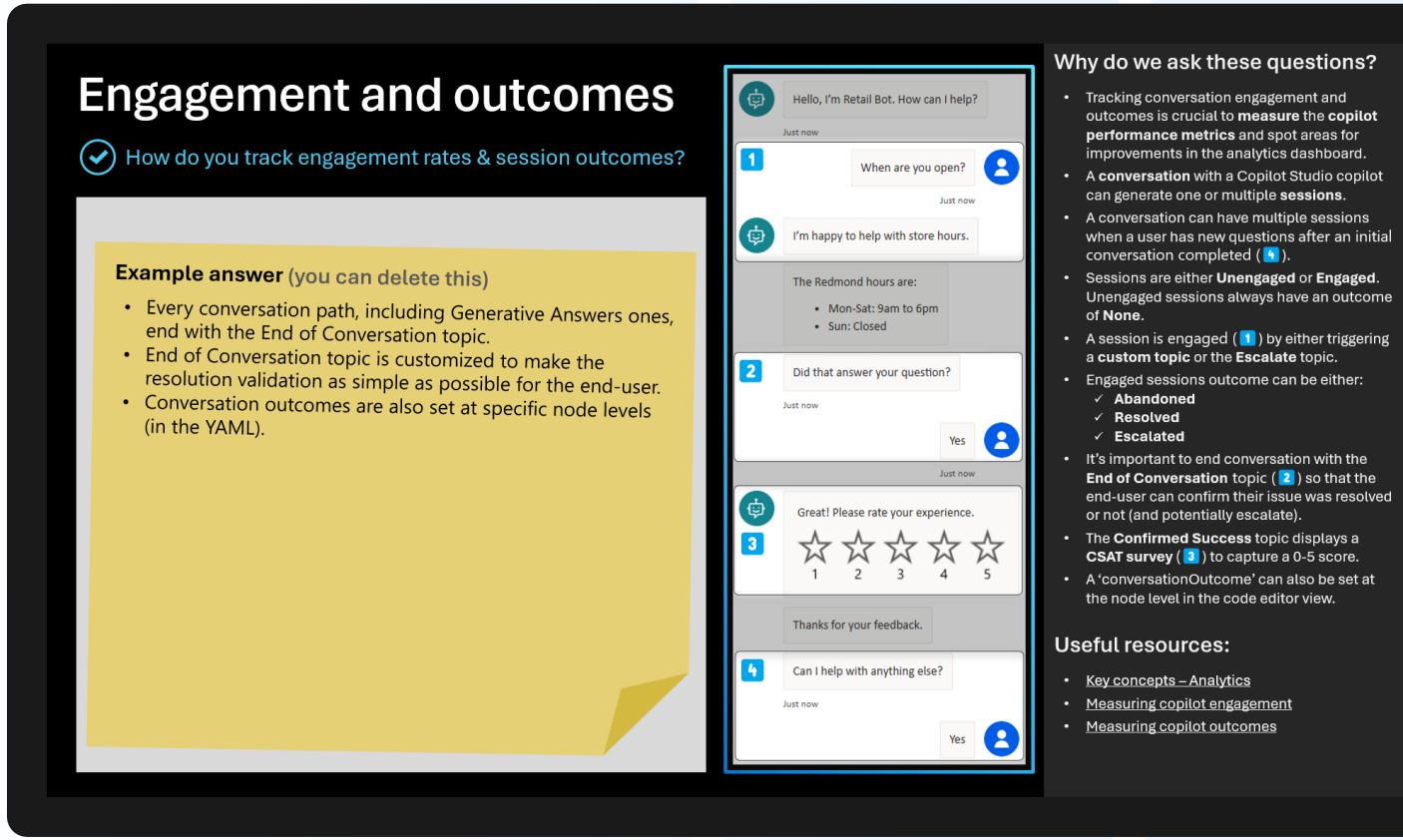
1. Build your first Copilot
2. Topic suggestions
3. Improve your Copilot with entities, variables and topic redirect
4. Integrate with prebuilt Power Automate flows
5. Build Power Automate flows for your Copilot
6. Authentication
7. Export and import bots using solutions
8. Create a Copilot in Microsoft 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)



https://aka.ms/CopilotStudioImplementationGuide

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	aka.ms/CopilotStudioVids

https://bit.ly/ciacopilottech