



Power Platform

COMMUNITY CONFERENCE

SEPTEMBER 18–20, 2024 • Workshops: Sept 16, 17 & 21

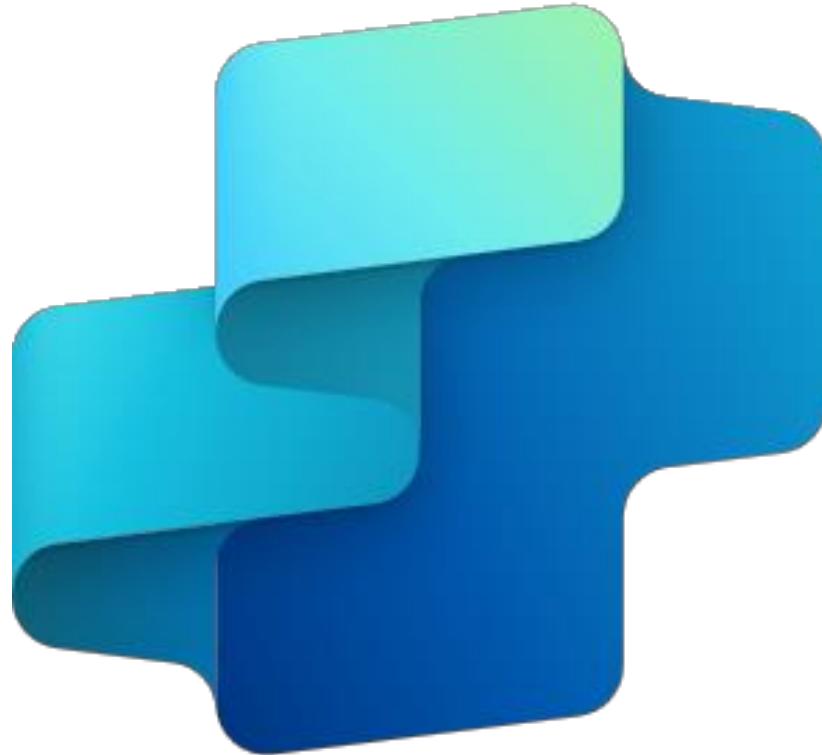
MGM GRAND • Las Vegas, NV



Power Platform
COMMUNITY CONFERENCE

Copilot Studio

10 Lessons in an Hour



Lisa Crosbie

Daniel Christian

Whova

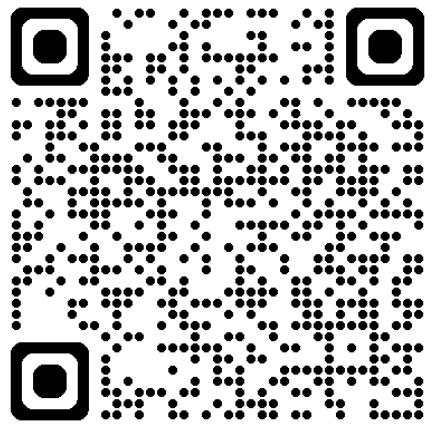


The official event app for the **Power Platform Community Conference**

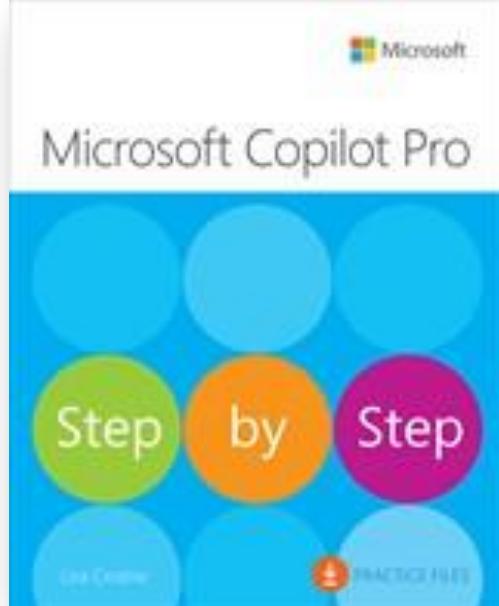
Join the event app to access:

- ➔ Event announcements
- ➔ Personalized agenda, session details
- ➔ Speaker & attendee profiles
- ➔ Networking, meet-ups, messages
- ➔ Event documents

Event Invitation
Code: **PPCCConf2024**



30% off Preorders
COPILOTSBS



LISA CROSBIE

TUTORIALS & FEATURE UPDATES

POWER PLATFORM • DYNAMICS 365

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Lisa Crosbie

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Learn how to get started and get the most out of your business applications with practical ...more

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HOW TO BUILD MODEL-DRIVEN POWER APPS COMPLETE COURSE 3:23:34

DYNAMICS 365 EXPLAINED IN 10 MINUTES 9:54

Power Apps Model Driven Apps FULL COURSE for... What is Dynamics 365? 285K views • 1 year ago

How to Turn Your Excel Spreadsheets into Power... How to present PowerPoint in Microsoft Teams: See notes... Microsoft Dynamics 365 Sales (CRM): Tutorial for... What is Microsoft Copilot? (Microsoft Copilot vs Copilo... 32:45 4:48 47:19 12:40



Lisa Crosbie

Business Applications & Microsoft 365 Copilot

Microsoft MVP & MCT



dan.christian.33



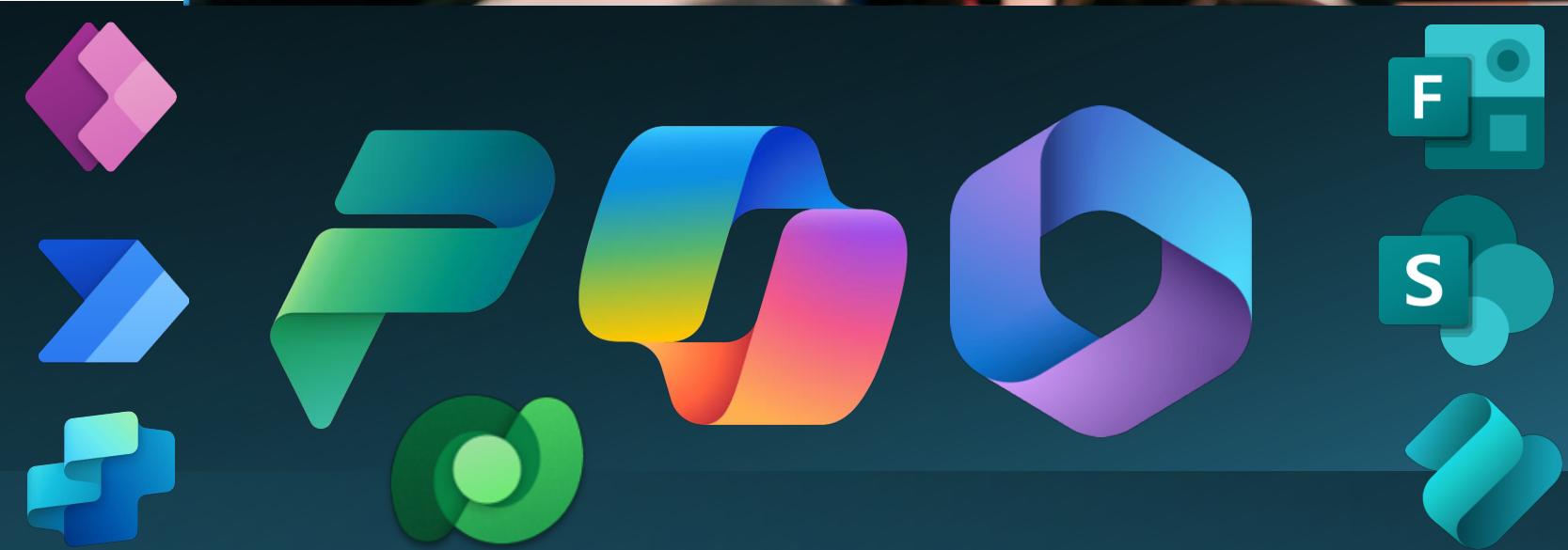
@dchristian19



danchristian19

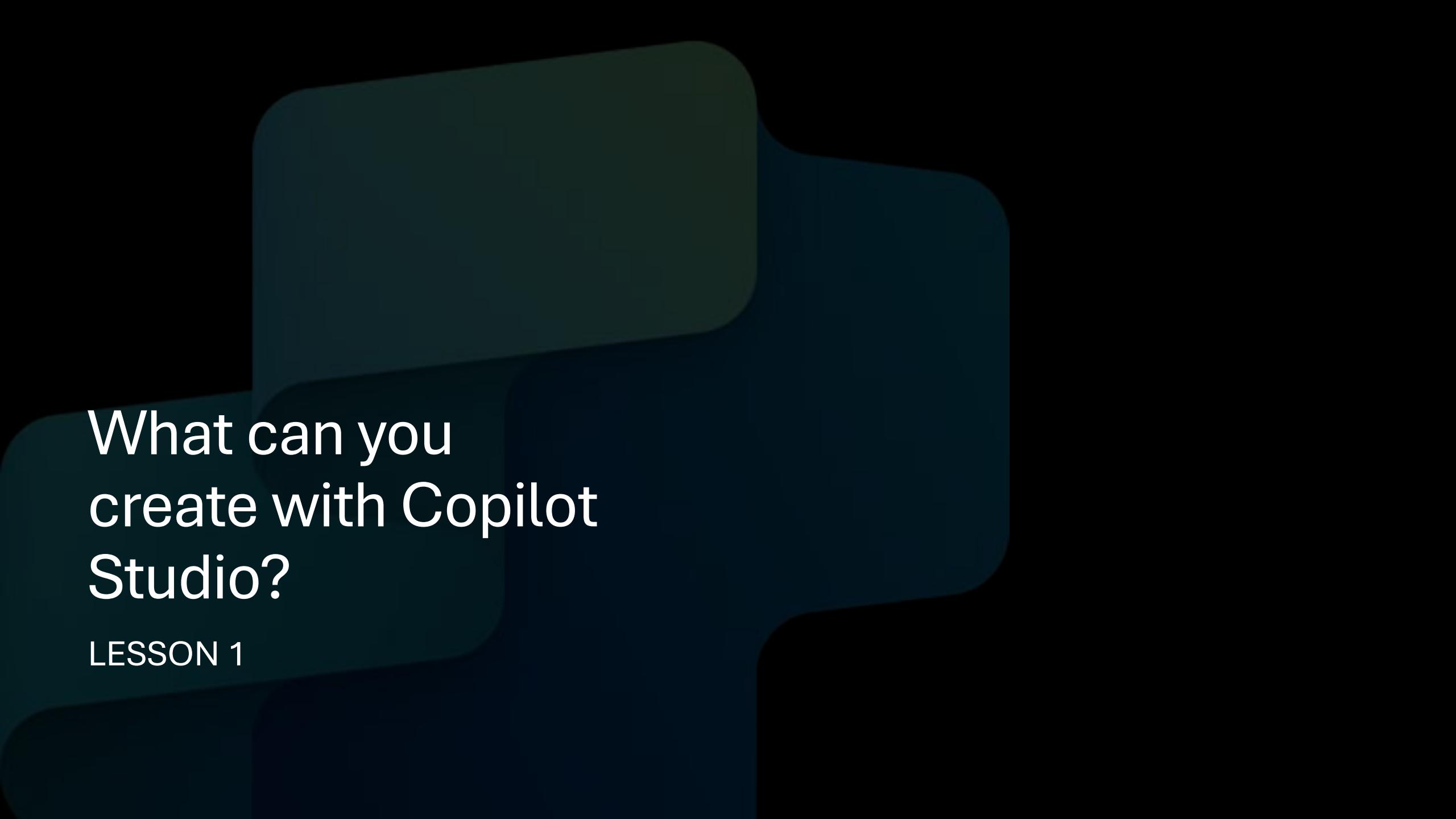


www.youtube.com/@DanielChristian19



Copilot Studio: 10 Lessons in an Hour





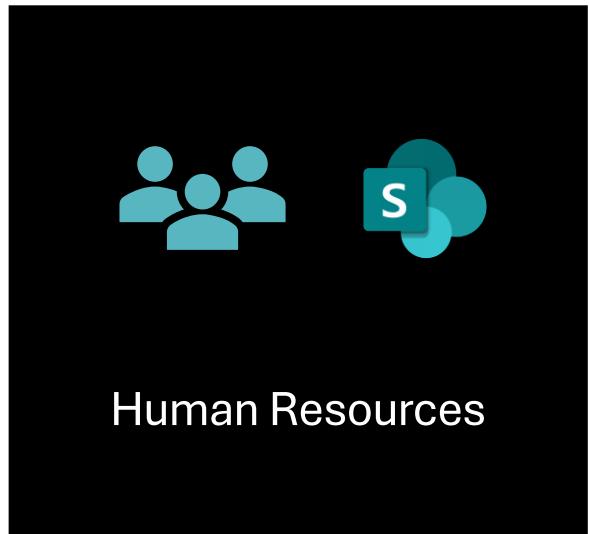
What can you
create with Copilot
Studio?

LESSON 1

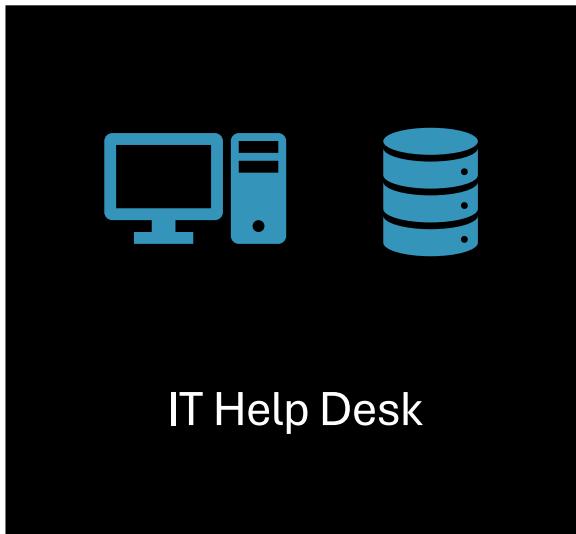
What can you create with Copilot Studio?



Typical starting point



Human Resources



IT Help Desk



Extend Copilots

The real value



Convert leads to
customers



Schedule an
appointment



Process claims or
applications



Reimagine your
call center



Find the right
service location



Upsell or suggest
new products

Use Copilot to Build a Copilot

LESSON 2



Describe your copilot to create it

[Helpdesk](#)[Expense tracking](#)[HR and benefits](#)

Use everyday words to describe what your copilot should do

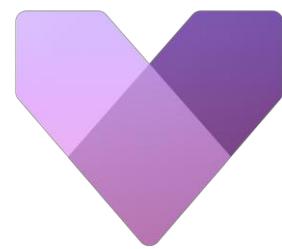
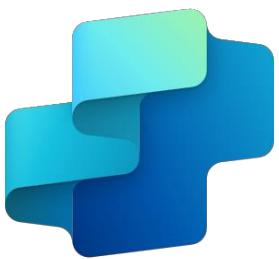
This AI-powered feature above is currently in preview. [See terms](#) and [supplemental terms](#)

Recent

Name	Type	Last modified	Link
Copilot for Table	Copilot	Daniel Christian 3 days ago	Not yet used
Copilot 1	Copilot	Daniel Christian 3 days ago	Not yet used
Copilot	Copilot	Daniel Christian 21 days ago	Not yet used
Copilot for Microsoft 365	Microsoft		Not yet used
Adaptive Cards Deno	Copilot	Daniel Christian 17 days ago	Not yet used

Start with Templates

LESSON 3



1



Safe Travels

Provides answers to common travel questions and related health and safety guidelines

2



Team Navigator

Assists employees in finding colleagues and their hierarchy within the organization using Microsoft Teams

3



Website Q&A

Instantly answer user questions using the content of your web site or other knowledge.

4



Sustainability Insights

Enables users to easily get insights and data about a company's sustainability goals and progress

5



Weather

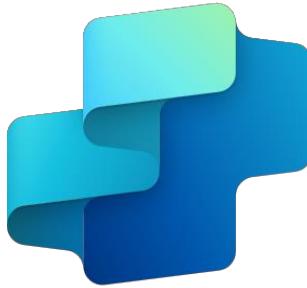
Your go-to assistant for getting weather forecast

6



Store Operations

Improve the efficiency of retail frontline workers by enabling easy access to store procedures and policies



Coming Soon To A Tenant Near You!



Job Craft

Coming soon

Revolutionize your HR approach with AI-constructed job descriptions and refined interview questions



CV Match

Coming soon

Employees use the power of AI to analyze CV and get recommended CVs



Wellness Check

Coming soon

Conduct automated wellness checks to gauge employee morale and provide insights for a healthier workplace



Status Tracker

Coming soon

Promote communication with less meetings by streamlining your team's status updates with automated surveys



Approval Manager

Coming soon

Streamline your approval process across multiple systems with summarized requests in a consolidated view



Kudos

Coming soon

Transform your company culture by crafting and promoting well-deserved positive peer-to-peer recognition

Knowledge is Power

LESSON 4

Knowledge Sources

Public websites
 Add public websites for real-time answers

Files
 Upload documents from your local computer

SharePoint and OneDrive
 Securely integrate and manage internal data

Dataverse (preview)
 Customize and deploy structured data tables

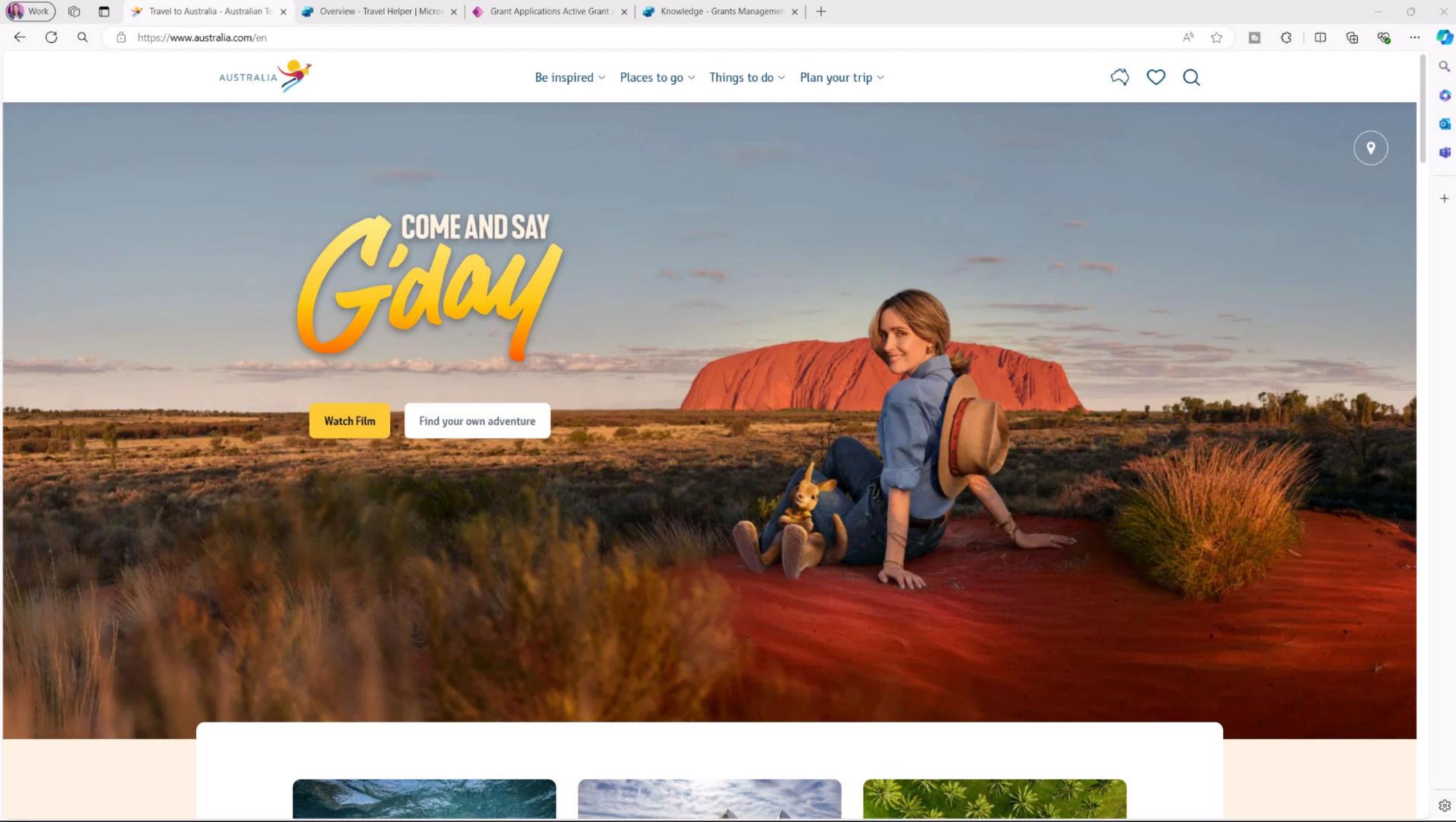
Connect to your enterprise data (preview)

 Enterprise websites	 Azure SQL	 ADLS Gen2	 MediaWiki
 Salesforce	 ServiceNow Knowledge	 File share	 SharePoint Server
 SAP	 Ado Git	 CSV	 Jira
 Azure DevOps Wiki	 Oracle SQL database	 Microsoft SQL server(New)	 ServiceNow Catalog
 Confluence	 ServiceNow Tickets	 Custom Connector	 Power Platform connector actions

Knowledge
Add data, files, and other resources to inform and improve AI-generated responses.

Allow the AI to use its own general knowledge (preview). [Learn more](#)

Disabled

[Be inspired](#) [Places to go](#) [Things to do](#) [Plan your trip](#)

Connecting to SharePoint

LESSON 5

The screenshot shows the Copilot Studio interface for the "Lego Copilot" copilot. The left sidebar has sections for Home, Create, Copilots, and Library. The Copilots section is expanded, showing "Custom copilots" with "Lego Copilot" selected, "Microsoft" with "Copilot for Microsoft 365", and "Coming soon". The main content area is titled "Knowledge" and lists three items: "Rebrickable" (Public website, last modified 14 days ago, Ready), "Lego" (Public website, last modified 14 days ago, Ready), and "projects" (SharePoint and OneDrive, last modified 18 minutes ago, Ready). A search bar at the top right says "Published 8/15/2024" and "Search knowledge". A "Test your copilot" button is also present. At the bottom, there's a chat window with the AI saying "Hello, I'm Lego Copilot, a virtual assistant." and a placeholder "Ask a question or describe what you need". A note at the bottom right says "Make sure AI-generated content is accurate and appropriate before using. See terms".

Lego Copilot

Name	Type	Last modified	Status
Rebrickable	Public website	Daniel Christian 14 days ago	Ready
Lego	Public website	Daniel Christian 14 days ago	Ready
projects	SharePoint and OneDrive	Daniel Christian 18 minutes ago	Ready

Hello, I'm Lego Copilot, a virtual assistant.

3 minutes ago

Ask a question or describe what you need

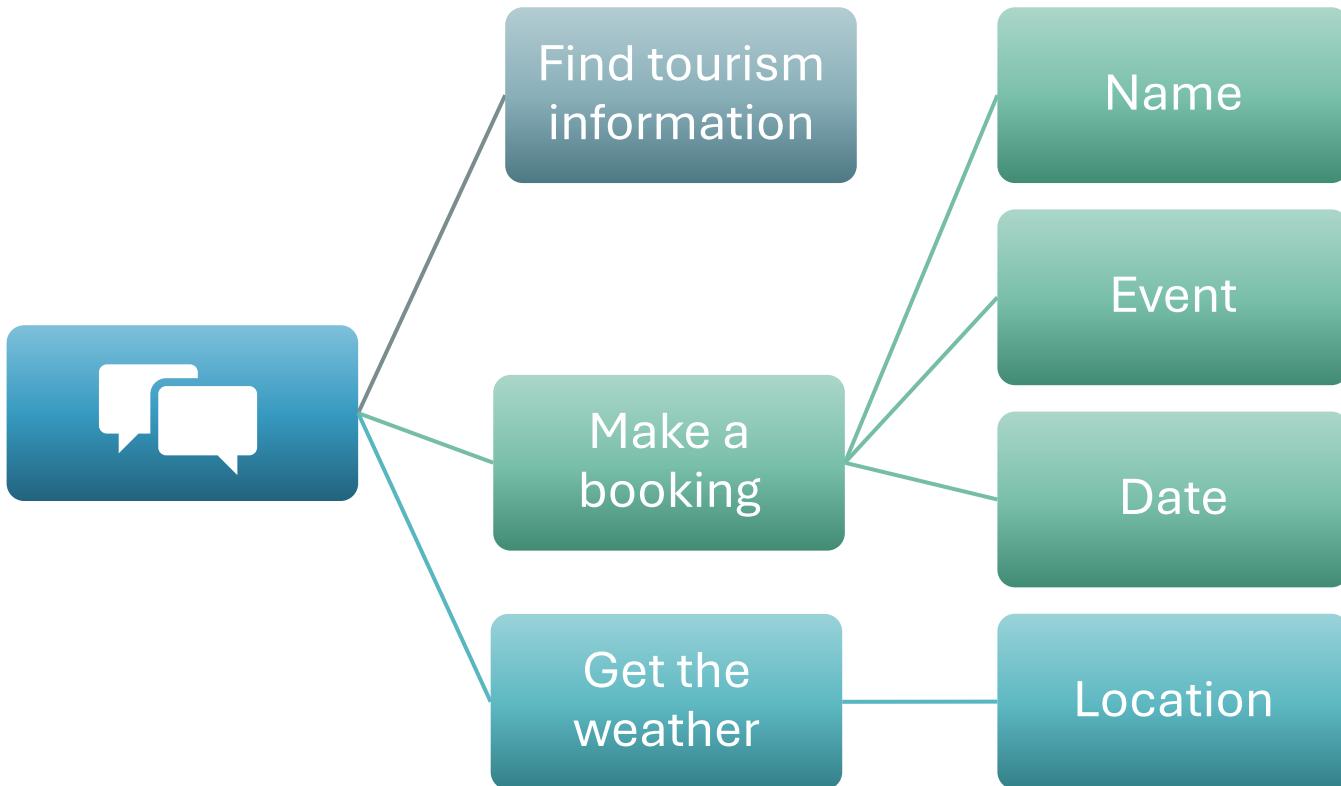
0/2000

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

Orchestrate the Conversation

LESSON 6

Conversational Orchestration





Be inspired ▾ Places to go ▾ Things to do ▾ Plan your trip ▾



COME AND SAY *G'day*

[Watch Film](#)

Find your own adventure



Use the Adaptive Card Node

LESSON 7

Provide Rich Conversation Capability



Platform Agnostic

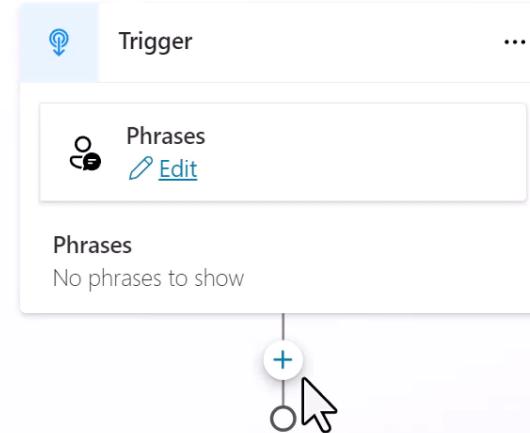


Interactive card to submit response

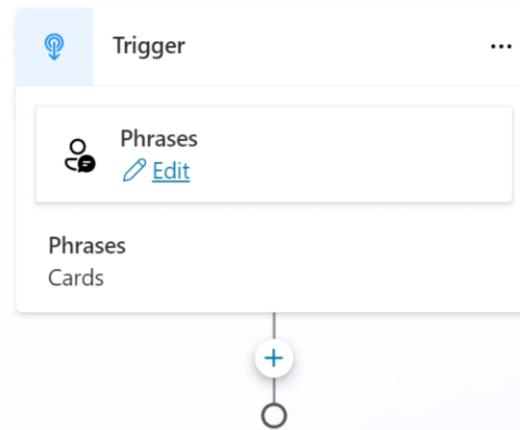


Use Microsoft Adaptive Cards

Version 1.5



It uses J...SON...Not Jason



Select an item to view properties

Hello, I'm Lego Copilot, a virtual assistant.

Just now

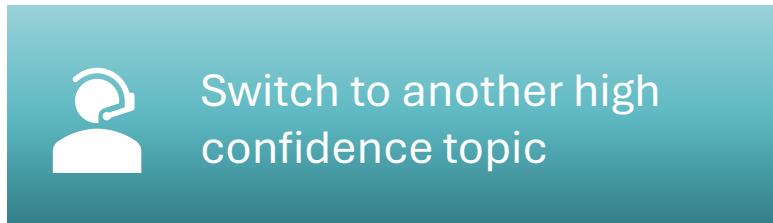
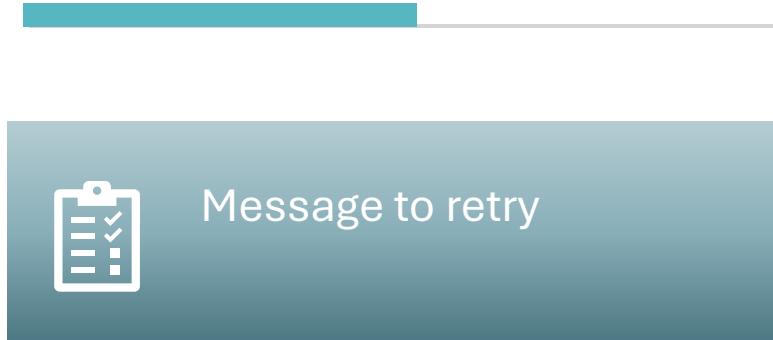
Ask a question or describe what you need

0/2000



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

Adaptive Card Properties



Adaptive Card Properties

Application Login

Username *

Password *

Login

Outputs (4) ▾

- {x} actionSubmitId string =
- {x} id string =
- {x} PassVal string =
- {x} UserVal string =

Wrap true
Style heading

Type Input.Text
Id UserVal
Label Username
IsRequired true
ErrorMessage Username

Type Input.Text

Edit schema

Allow switching to another topic

Only selected topics Redirected by Copilot

Retry prompt Customize

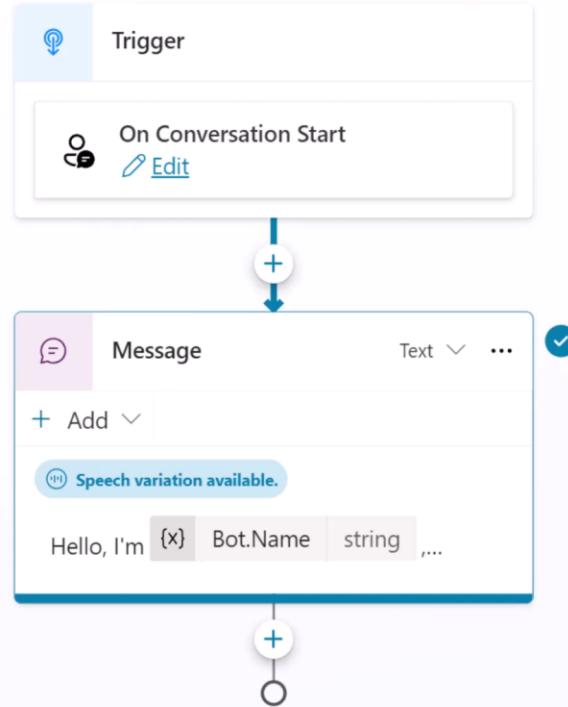
Message variation Text

Add

Please fill the form.

How many reprompts Manual input

Repeat once



Hello, I'm Lego Copilot, a virtual assistant.

Just now

Ask a question or describe what you need

0/2000



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

Put Your Copilot into Action

LESSON 8

Type of Actions Currently Available



Connector

Provide access to external data sources.



Prompt

Describe a custom action to create it.



Flow

Enable automated task completion.



Conversational

Create focused topics and responses.

Type of Actions - Connector



Connector

Provide access to external data sources.



Copilot for Microsoft 365
License is required.



Home



Create



Copilots



Library

...



Describe your copilot to create it

Helpdesk

Expense tracking

HR and benefits

Use everyday words to describe what your copilot should do

This AI-powered feature above is currently in preview. [See terms](#) and [supplemental terms](#)

Recent

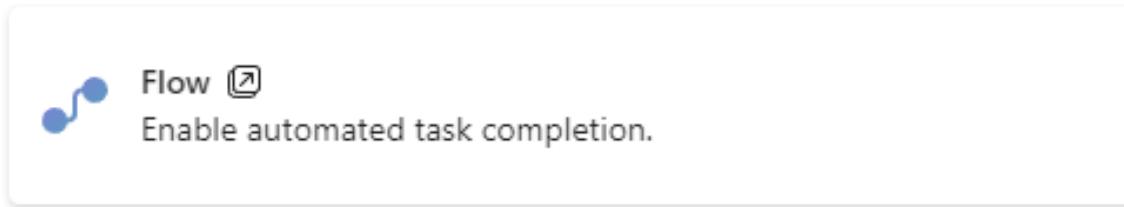
[See more](#)

Name	Type	Last modified	Last published	Owner
Copilot for Microsoft 365	Microsoft		Never	
Test (classic)	Chatbot (classic)	Daniel Christian 1 year ago	Never	Daniel Christian
SharePoint Bot	Copilot	# Microsoft Copilot Studio 13 days ago	Never	Daniel Christian
Store Operations	Copilot	# Microsoft Copilot Studio 2 months ago	Never	Daniel Christian
Team Navigator Copilot	Copilot	# Microsoft Copilot Studio 2 months ago	Never	Daniel Christian

Start with a template

[See more](#)Templates are currently a preview feature. See [supplemental terms](#)

Type of Actions - Flow



Copilot for Microsoft 365
License is required.



Home



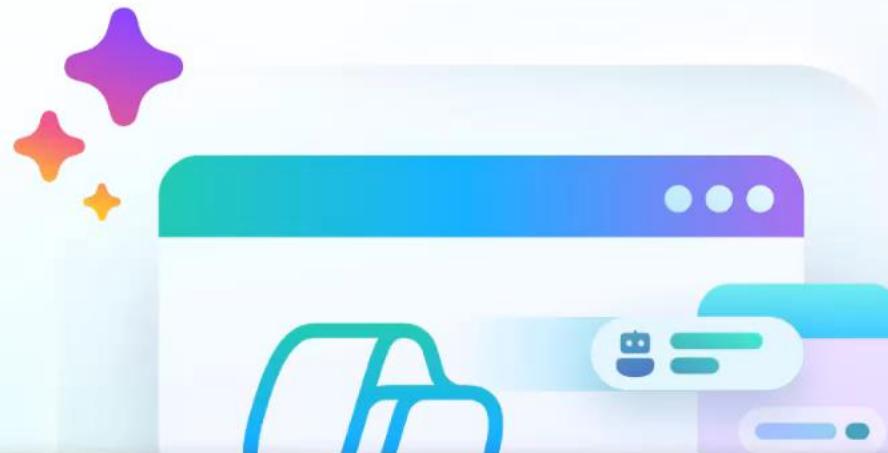
Create



Copilots



Library



Describe your copilot to create

Helpdesk

Expense tracking

HR and benefits

Use everyday words to describe what your copilot should do

This AI-powered feature above is currently in preview. [See terms](#) and [supplemental terms](#).

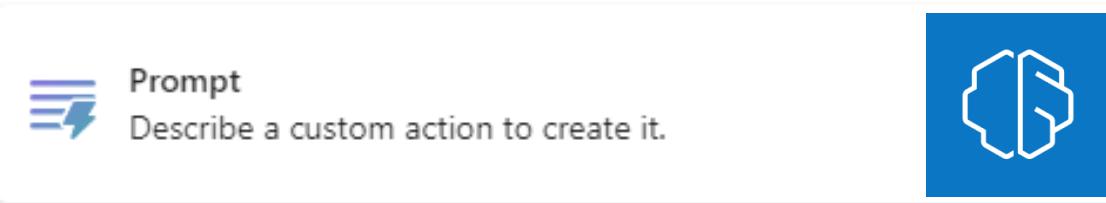
Recent

Name	Type	Last modified
 Copilot for Microsoft 365	Microsoft	
 Lego Copilot	Copilot	Daniel Christian 6 days ago



Start with a template

Type of Actions- Prompt



AI Hub



Demo

Demo



Prompt

Describe a custom action to create it.



Conversational Actions

LESSON 9

Conversational Actions



Copilot Studio

Home Create Copilots Library ...

Copilots

- ▶ Custom copilots
- ▼ Microsoft
 - Copilot for Microsoft 365
- ▶ Coming soon

Library > **Aussie Tourism** Overview Topics

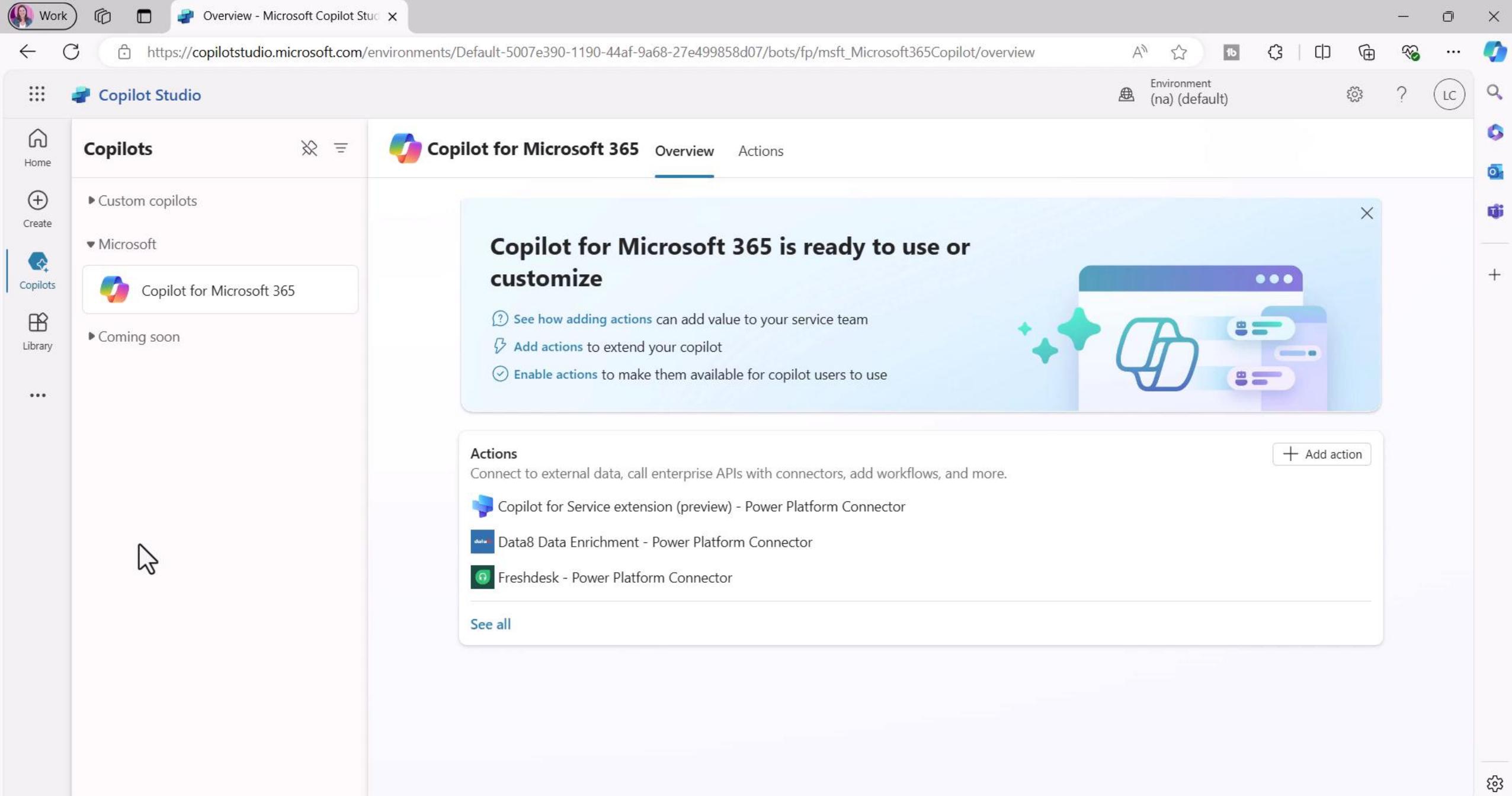
Aussie Tourism

[Edit details](#)

Next steps: Improve your actions

[Refine](#) Your action is configured as a conversational topic. [Edit the topics](#)

[Publish](#) Publish your action to Microsoft Copilot to share with others in your organization. [Go to publish](#)



Copilot Studio vs Azure AI

LESSON 10

Copilot Studio vs Azure AI Studio



Copilot Studio vs Azure AI Studio



Out of the box LLM
Conversational orchestration



Implement your own LLM
Generative AI

Work | Home - Microsoft Copilot Studio | Chat playground | Azure OpenAI | Microsoft Copilot Studio | Icdemosearch - Microsoft Azure | +

https://portal.azure.com/#@lisacrosbie.com/resource/subscriptions/adfb03e7-4807-4558-95d8-d497cdf46293/resourceGroups/AzureOpenAI_Demo/providers/Microsoft.Search/searchServices/Icdemosearch/overview

Microsoft Azure

Search resources, services, and docs (G+)

Copilot

lisa@lisacrosbie.com LISA CROSBIE (LISACROSBIE.COM)

Home > Icdemosearch

Search service

Search

Add index Import data Import and vectorize data Search explorer Refresh Delete Move

Larger vector index size and higher storage quota are available at no additional cost to new search services created after April 3, 2024. [Learn more](#)

Overview

Activity log

Access control (IAM)

Tags

Diagnose and solve problems

Search management

- Indexes
- Indexers

Data sources

Aliases

Skillsets

Debug sessions

Settings

- Semantic ranker
- Knowledge Center
- Keys
- Scale
- Search traffic analytics
- Identity
- Networking
- Properties
- Locks

Monitoring

Automation

Help

Essentials

Resource group (move)	: AzureOpenAI_Demo	Url	: https://Icdemosearch.search.windows.net
Location (move)	: Australia East	Pricing tier	: Basic
Subscription (move)	: Visual Studio Enterprise Subscription	Replicas	: 1 (No SLA)
Subscription ID	: adfb03e7-4807-4558-95d8-d497cdf46293	Partitions	: 1
Status	: Running	Search units	: 1
Tags (edit)	: ProjectType : aoai-your-data-service		

Get started Properties Usage Monitoring

Revolutionary retrieval with Azure AI Search

Don't know where to start? Here are some options from directly within the portal

Connect your data

Start here to import your data. Learn how to quickly connect to your data to build your first search index. [Learn more](#)

Import

Explore your data

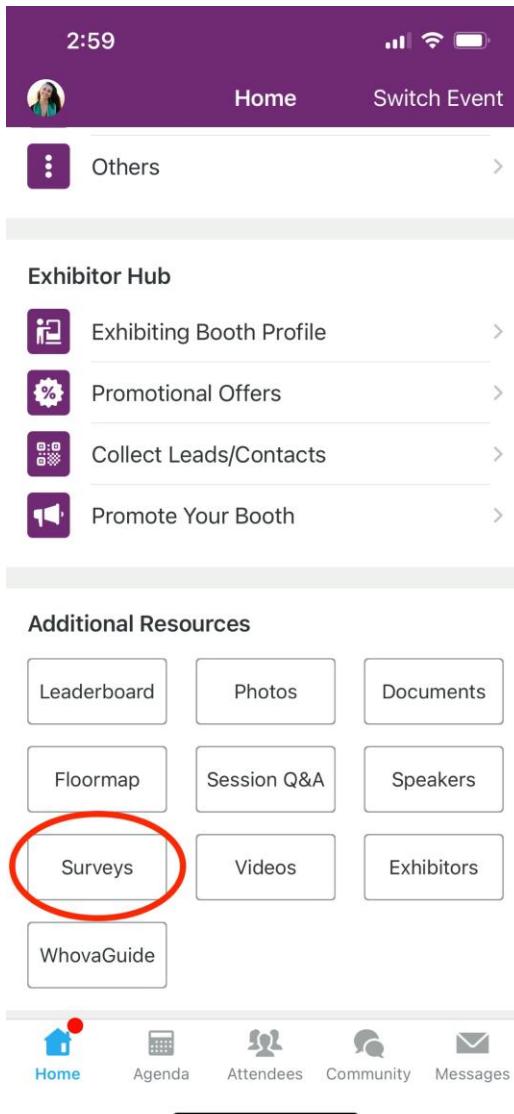
Connect to apps, optimize search results. Leverage features like faceting, filtering, scoring profiles and more. [Learn more](#)

View

Monitor and scale

Tools that allow you to monitor your system and scale for optimal performance. Adjust replicas and partitions as needed. [Learn more](#)

View



Session Feedback Surveys

We really want to hear from YOU!

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

Here's How -

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

It's just that easy!

thank you

Gracias	ευχαριστώ	Danke	Grazie	благодаря
Hvala	Obrigado	Kiitos	شُكْرًا	Tak
Ahsante	Teşekkürler	مُتَشَكِّرٌ م	Salamat Po	감사합니다
Cám ơn	شُكْرِيَّه	Terima Kasih	Dank u Wel	Děkuji
நன்றி	Köszönöm	ありがとう ございます	ឃុំបញ្ជូនទេរីប	Dziękuje
谢谢	Tack	Mulțumesc	спасибо	Merci
הודות	多謝晒	дякую	Ďakujem	Ευχαριστώ