

Practical AI Skills for Business Applications

Workshop Guide

Power Platform Community Conference 2024

Lisa Crosbie

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Agenda

Time	Topic
9:00	Skill #1: Think differently
9:30	Skill #2: Understand what's available
10:15	Break
10:30	Skill #3: Write effective prompts
11:15	Skill #4: Use Copilot for low-code development
12:00	Lunch
1:00	Skill #5: Knowledge is power
1:30	Skill #6: Know when to build or extend
2:00	Skill #7: Build your own Copilot
2:30	Break
3:30	Skill #8: Keep an open mind
3:45	Open Q&A

Skill #3: Write Effective Prompts

Elements of effective prompting – Exercise

- Think of a basic prompt or instruction
- Go to copilot.microsoft.com and enter your prompt
- Work through the elements of effective prompts step by step to improve your prompt and compare the results.

Example:

Goal:

Write a blog post about the benefits of remote work

Context

Write a blog post about the benefits of remote work. This post is intended for small business owners who are considering allowing their employees to work remotely. The goal is to highlight the advantages and persuade them to adopt remote work policies

Source

Write a blog post about the benefits of remote work. This post is intended for small business owners who are considering allowing their employees to work remotely. The goal is to highlight the advantages and persuade them to adopt remote work policies. Include examples such as a tech startup that saw a 20% increase in productivity after transitioning to remote work, or a marketing agency that reduced overhead costs significantly by closing its physical office and moving to a fully remote setup

Expectations

Write a 1,000-word blog post about the benefits of remote work. This post is intended for small business owners who are considering allowing their employees to work remotely. The goal is to highlight the advantages and persuade them to adopt remote work policies. Include examples such as a tech startup that saw a 20% increase in productivity after transitioning to remote work, or a marketing agency that reduced overhead costs significantly by closing its physical office and moving to a fully remote setup. The post should have at least three subheadings (e.g., Increased Productivity, Cost Savings, and Employee Satisfaction) and a concluding paragraph that summarizes the key points. Maintain a professional yet friendly tone throughout

A different expectation:

Write a 150-word elevator pitch about the benefits of remote work. This is intended to help me explain to small business owners that they should consider allowing their employees to work remotely. Use a conversational, friendly, but persuasive tone.

Skill #4: Use Copilot for Low Code Development

Part 1: Using Copilot as a Maker

You will need a Power Apps license or a Power Apps developer plan to follow along with this section. You can sign up for a free Power Apps developer plan using your work account by following the instructions [here](#).

[Create a developer environment with the Power Apps Developer Plan - Power Platform | Microsoft Learn](#)

Build apps through conversation

- make.powerapps.com
- Switch on the toggle for the new data experience
- Create an app by describing it (single table): Create an app to manage event registrations

Results:

- Multiple tables created with relationships
- Zoom in/out/move around the canvas
- View data - click on each table

Use Copilot to help you understand the ERD

- Screenshot the ERD
- Copilot (web) – Help me understand this ERD
- Copilot (windows) – snippet of the screen

Use Copilot to add/edit tables

TIP: This is a bit limited. Look to the suggested prompts for the kinds of things you can do

- **Create a new table for the venues**
 - Creates a new disconnected table
- To create the relationship, draft from the right node of Event to the left node of Venue
 - Note you can't create many to many relationships here
 - Create: Many to One, Display name for lookup: Venue
- Asking Copilot to create a table and relationship together doesn't work so well
 - **Create a table to manage speakers. An event can have many speakers**
 - (other versions of this don't do any better, you end up with a new Event table)
 - Instead use the technique just shown or do it manually (+New table, add columns and data, now the create relationships option is available). Using this new UI to manually create a table (aside – not Copilot)
- Ask Copilot to modify existing tables by adding columns
 - Clear instructions work well: Add a column to the venue table to store the cost of venue hire.

- Vague instructions get inconsistent results: I want to be able to track whether people attended or not
 - Sometimes adds to the attendee table, sometimes the event table
 - Undo
- Good example: Add a column to the registration table to show attendance status. It should have 3 options - Registered, Attended, No Show
- TIP: Remember this Copilot's job is to speak "database"

Create the app

- While that's working, let's check back on your suggestions (activity)
- Compare this prompt with the first one: Create an app to manage events, including venues and speakers. It should be able to track registrations, including whether the attendee attended the event or not. It should have a table for attendees, who may register for many different events.

Copilot for Canvas Apps Makers

You can continue to refine your app design with Copilot here.

Sidecar experience

- This is mostly good for providing help
- Even the suggested prompts mostly just tell you how to do something rather than doing it

Copilot Ideas

- Click on an element to get suggestions
- Events page of the app- try this on the gallery, header, form etc

Copilot Explain the Formula

- Click on the gallery for the events
- Items formula – Copilot – explain this formula

Copilot Create a formula

- On the Items formula in the event screen:

//filter events where the date is 2023

// filter events where the start time is after 8am (blank, can't do it)

// filter events where the location contains New York

// if location is New York show in yellow, otherwise black

- Creates a formula with an error!
- This doesn't go in the items property! (you still need to "speak" Power Apps)
- Go to the Template Fill property

//Set the color to pale yellow if the location is new york

Part 2: Power Apps Copilots for Users

Add a Copilot to a Canvas App

TIP: To make this work with Dataverse tables you need to make sure Dataverse search is on and the table(s) are indexed. (For user Copilot in both canvas and model driven apps).

Dataverse search setup:

- Power Platform Admin Center
 - Environment – Settings – Product - Features
 - Search – Dataverse Search: On
 - Save
- Maker experience – Solution
 - Table must have settings enabled:
 - Track changes
 - Appear in search results
- Go into the Venues table
 - Views – Quick Find View
 - Edit find table columns
 - Add: Capacity, Cost, Description, Is Indoor, Location
 - Also add these columns to the Quick find view
 - Save and publish
- Give it some time for the index to run (depends on size of the data tables)

Add a Copilot for the Users (Canvas App)

- Insert – Copilot
- Select the Dataverse table - Venues
- Save
- Play
- Ask a question: What is the venue with the biggest capacity
- Ask a question: What is the rating of the Catalyst Conference Center

Customise the Copilot

- Click on the copilot and go to properties
- Customize copilot - Edit - Create new copilot
- Edit in copilot studio
- Add knowledge - website for the MGM Grand <https://mgmgrand.mgmresorts.com>
- Go back to your Copilot – now it can answer questions about the MGM Grand
 - Tell me about the pool complex at the MGM grand

Add a Copilot Answer Control

- Insert – Search “Copilot”
- Copilot Answer
- Select a data source (Events)
- Properties- Title: Next Event
- Question for Copilot (prompt) -What is the next event after today?
- Show answer - immediately or after sending
- You can use this to build a dashboard of tiles

Add a Copilot to Model Driven Apps

- Power Platform Admin Center
 - Environment – Settings – Product - Features
 - Copilot settings– Allow users ... change from Default to On)
 - Default is only on for D365, you need to switch to on for MDA
- Now the Copilot appears in your MDA
 - Uses the tables added to the index earlier
 - Ask: Tell me about the pool complex at the MGM grand
 - No answer – this is not the same as the Canvas apps Copilot!

Copilot in Power Automate

Describe the automation you want to build

First scenario:

Attempt #1: Vague instruction that doesn't work:

I want to automate a process to help manage service tickets

Attempt #2: Basic request without connector detail that does work:

When a service request is filled out send me an email

No connector was specified here so it assumed Microsoft Forms

Go to forms.microsoft.com

- New Form: Draft with Copilot (only available if you have a paid Microsoft 365 Copilot license)
- Create a form for customers to submit service requests
- Review the created form

Go back and create the flow, add this form in.

Second scenario:

You would need to have a SharePoint list set up if you want the final automation to work but even without that you can do the steps below to understand what's possible.

Attempt #1: Basic request naming the connector:

When a new item is created in the SharePoint list IT Help Desk, send me an email

Attempt #2: Let's get ambitious (screenshot of this working if needed!)

When a new item is created in the SharePoint list IT Help Desk, use the office 365 connector to get the manager, and start an approval process. Send the approval to that manager. Update the approval status in the SharePoint list and send an email to the person who created the item

- Next
- Check your connections
- Create flow
 - Change the flow name (it picks up the whole prompt)
 - It doesn't find your SharePoint URL – add that
 - It doesn't get the approval type right – fix that

Edit to change the flow

In the create an approval step, the approval name is IT Ticket Approval, and it should be sent to the person from the get manager step

Change the send an email steps to send a teams message

Looking good 😊

Ask Copilot to Explain the Flow

This mostly gives you “meta” help on how to build flows rather than actually explaining it.

What does the get current weather action do

Skill #5 Knowledge is Power

Ground a custom Copilot in Knowledge

copilotstudio.microsoft.com

- **Create a new Copilot**
- **Add Knowledge**
- **Upload the epub provided in the GitHub repo ([Computers.epub](#))**

“Computers—the Machines We Think With” by D. S. Halacy explores the history, development, and impact of computers on various aspects of society, highlighting their capabilities and future potential.

Test your Copilot by asking questions and comparing the results with asking the same questions at copilot.microsoft.com

Suggested questions:



What are the practical uses of computers today?



How advanced are computers compared to the human brain?



How is automation using computers changing industries?



What are the challenges computers face, and how are people reacting?



What were the most exciting recent developments in computing technology in the early 1960s?



What are computers capable of that were once thought impossible?

Skill #6: Build your Own Copilot

Create a new Copilot

- Describe how the Copilot will assist the users: Help attendees at the Power Platform Conference with session and venue information
- Instructions and tone: Act as a very enthusiastic community member who knows all about the conference and wants to help other participants. You have a very friendly and helpful tone. Use emojis in your responses. Wherever possible use a pun based on the word "Power".
- Add knowledge - public website:
 - <https://powerplatformconf.com>
- What should it not talk about
 - It should not answer any questions about Salesforce
- I'm done
- Create
- Show where everything ended up

Test the Copilot

- Tell me about Lisa Crosbie's workshop (AI generated response!)
- Switch off the general knowledge
- Same question – can't answer it
- Go to the Workshop page on powerplatformconf.com – view page source – look at all the javascript!

Add a Knowledge Source

- Download the conference schedule pdf from the website or the GitHub repo
- Document – upload the workshop schedule

Test again

- What is the name of Lisa Crosbie's workshop?
- Is she doing any other sessions
- Which room is her workshop in
- What day is it on

New scenario: Create a new Copilot to help with travel questions

Generative Answers

- Create your Copilot: (European travel scenario)
- Add knowledge: Public website <https://visiteurope.com/en/>
- Multiple data sources
 - Add another website - <https://www.slovenia.info/en>
 - Test

Topics

- Edit the greeting
- Build a topic using Copilot to describe it
 - Description: Let a user check whether they need a visa to travel from outside the European Union
 - Create a basic card:
 - <https://www.consilium.europa.eu/en/infographics/eu-visa-agreements-with-non-eu-countries/>
 - Image: European Flag
https://upload.wikimedia.org/wikipedia/commons/thumb/b/b7/Flag_of_Europe.svg/383px-Flag_of_Europe.svg.png
- Build a topic using entities, conditions and variables
 - Build from blank
 - Trigger phrases: find a music festival, interested in musical concerts, what are some musical locations, music scene
 - Poland: <https://visiteurope.com/en/experience/musical-journey-across-poland/>
 - Ireland: <https://visiteurope.com/en/experience/play-us-a-tune-ireland/>
 - Other: <https://visiteurope.com/en/guides/european-music-destinations/>

Actions and Plugins

- Generative actions and dynamic chaining
- Create an action using an API (Weather connector)

Publish and Test

- Create an icon using Copilot or use the one provided in the GitHub repo
- Security and authentication – set to no authentication
- Publish
- Test on the demo website