

European  
**Power Platform**  
Conference



**BRUSSELS**  
11–13 JUNE — 24



# Build and extend your own copilot using Microsoft Copilot Studio



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	<b>Tues 11 June</b>	<b>Wed 12 June</b>	<b>Thurs 13 June</b>
<b>Morning Break</b>	10:30 - 11:00	11:15 - 11:45	11:15 - 11:45
<b>Lunch</b>	12:45 - 14:00	12:45 - 14:00	12:45 - 14:00
<b>Afternoon Break</b>	15:15 - 15:45	16:15 - 16:45	

## Wi-Fi

WI-FI ACCESS Network: **EPPC24**

Password: **EPPC-2024**

# Agenda

Introduction to Microsoft Copilot Studio

**Lab 1:** Create your first Copilot in Microsoft Copilot Studio

**Lab 2:** Microsoft Copilot Studio: Authoring 101

**Lab 3:** Build and Invoke Power Automate cloud flows

**Lab 4:** Make HTTP requests to connect to an API

**Lab 5:** Knowledge sources and custom instructions

**Lab 6:** Use generative AI orchestration to interact with your connectors

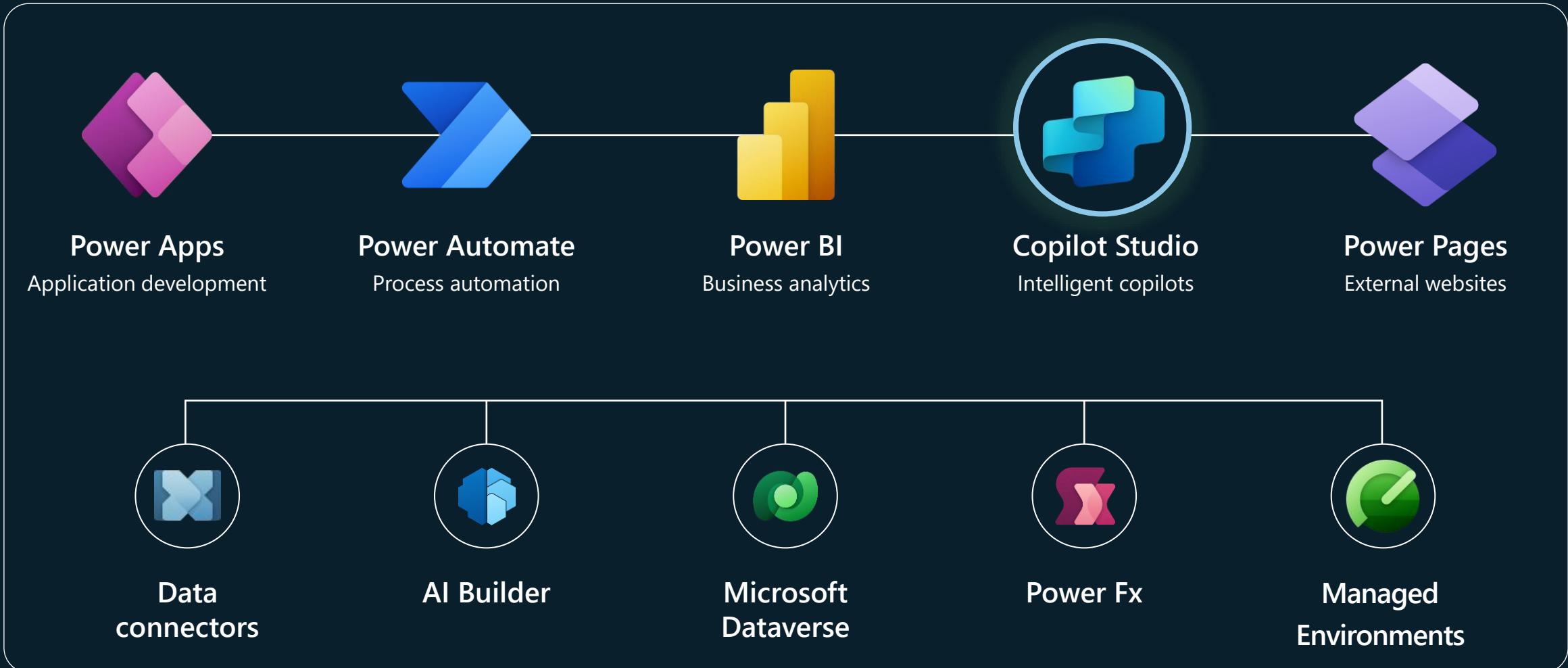
**Lab 7:** Invoke AI Builder custom prompts

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# Introduction to Copilot Studio

# Microsoft Power Platform

The low-code platform that spans Office 365, Azure, Dynamics 365, and standalone applications



# What is a **copilot**?

An experience using **generative AI** to assist humans with  
**complex cognitive tasks**.

Chat using natural language (and code)

You determine, guide, and approve the output

Its value increases with complexity



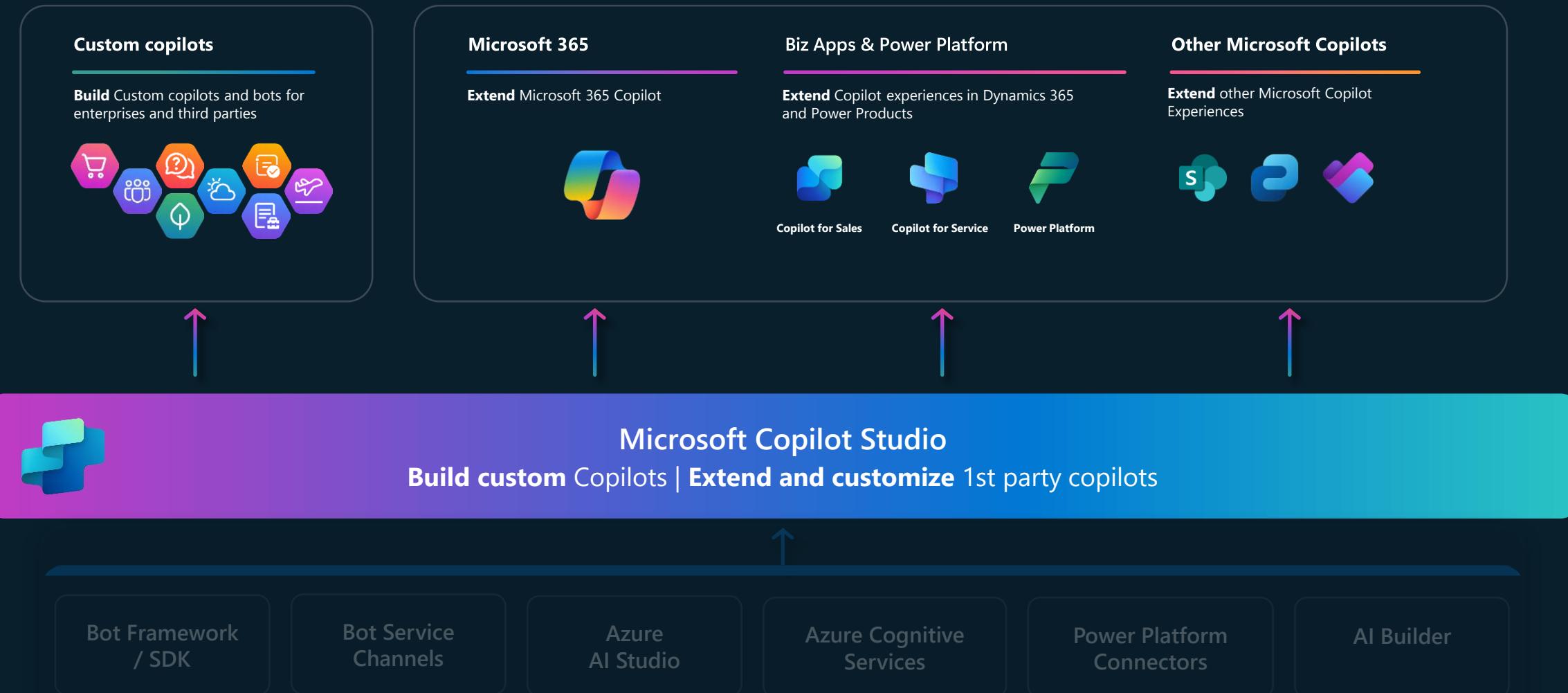
# Microsoft Copilot Studio

## Your copilot, your way

Copilot Studio is an end-to-end conversational AI product for **building your own copilots** or **extending Microsoft Copilot** with generative AI, large language models and **your data**.

# Copilots and Conversational AI

Build and extend across the Microsoft ecosystem



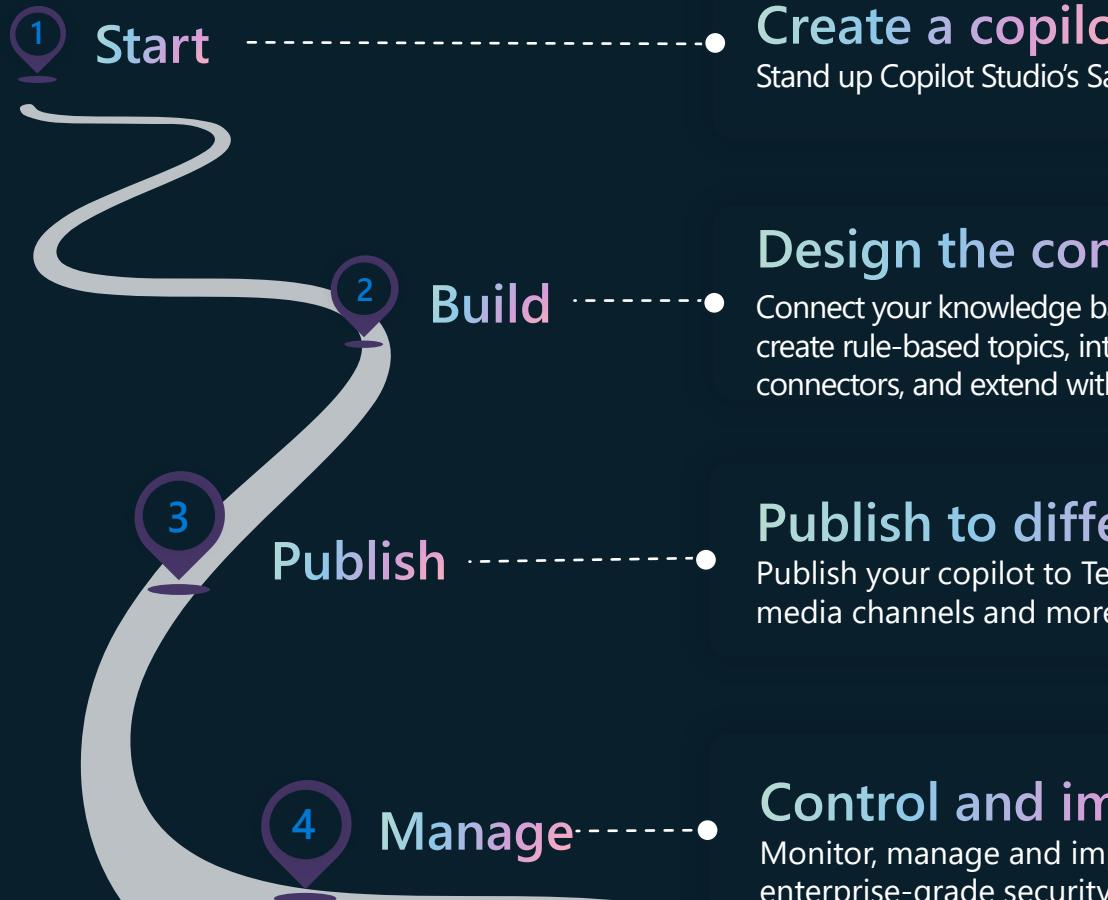
# Build & Publish



# Analyze & Improve



# How to build a custom copilot



- **Create a copilot**

Stand up Copilot Studio's SaaS in minutes.

- **Design the conversation**

Connect your knowledge base for generative answers, create rule-based topics, integrate plugins and data connectors, and extend with Azure AI Studio.

- **Publish to different channels**

Publish your copilot to Teams, websites, apps, social media channels and more.

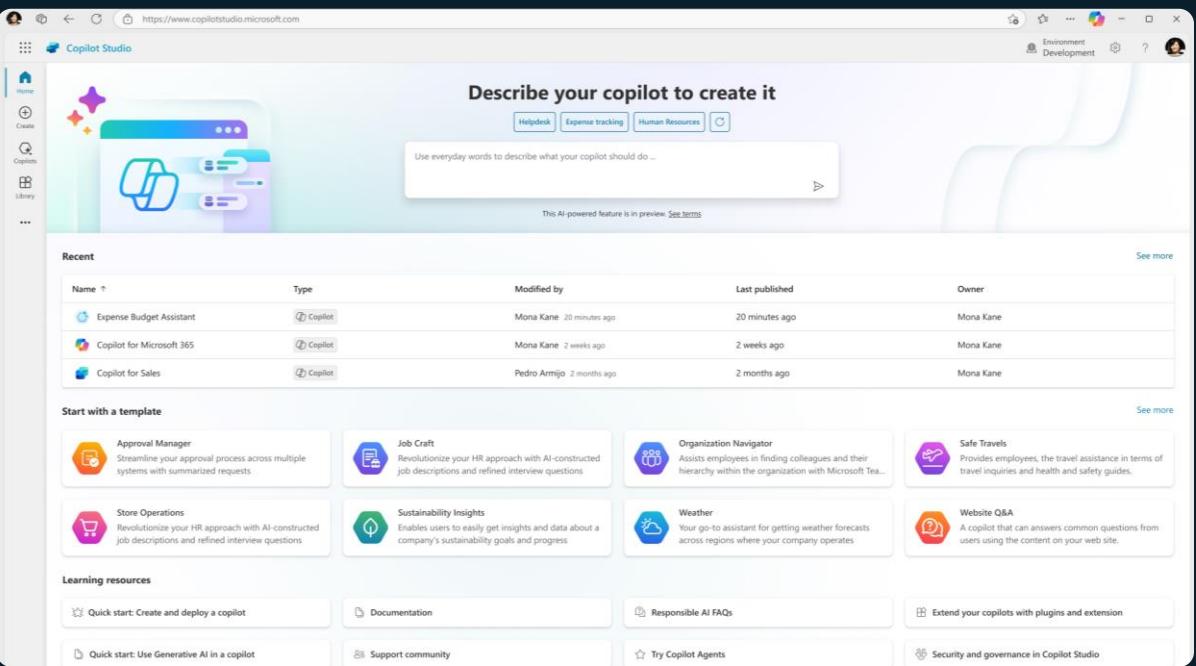
- **Control and improve**

Monitor, manage and improve the copilot with enterprise-grade security and controls.

# Build & Publish

## Create a copilot

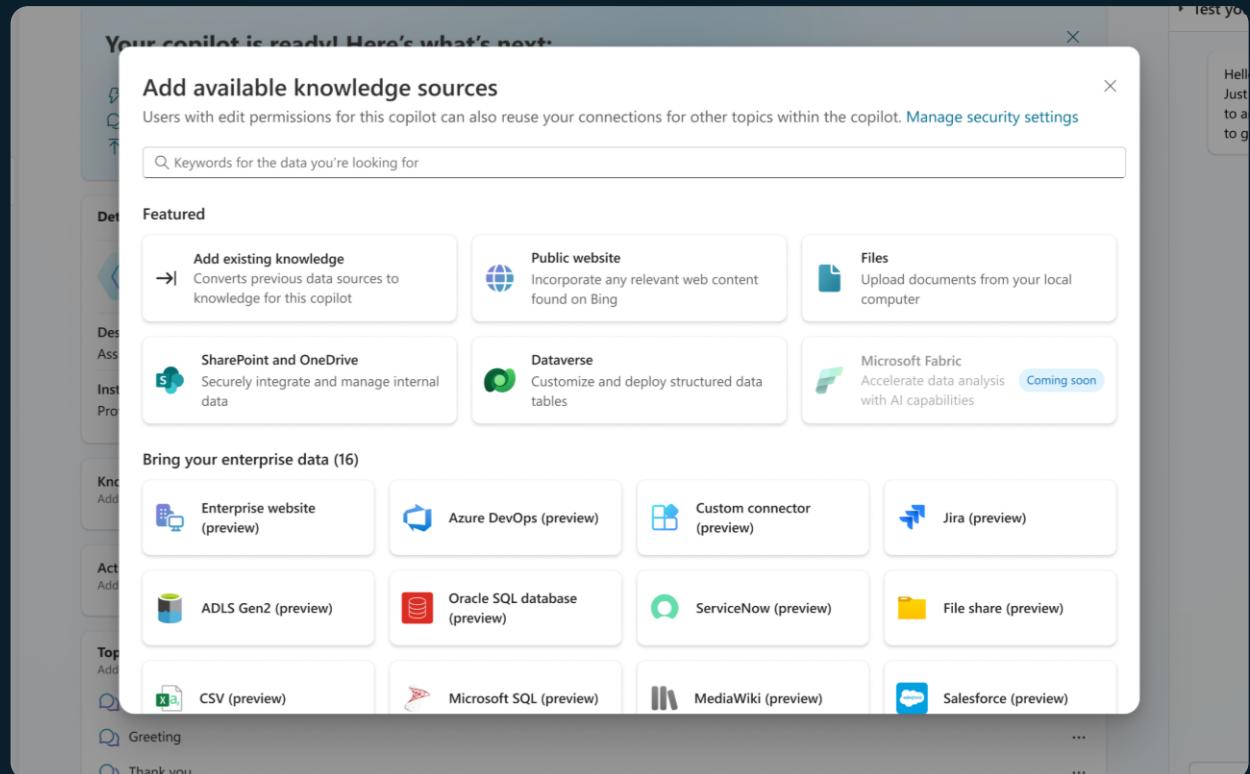
Build a copilot and go live within minutes, all from one easy-to-use, E2E SaaS product



# Build & Publish

## Add knowledge

Connect to your enterprise backends and APIs with 1000s of pre-built data connectors



# Build & Publish

## Customize topics, and actions

Mix generative responses with step by step topics for complete control. Create actions, plugins and connect to your backend systems with 1000s of pre-built connectors

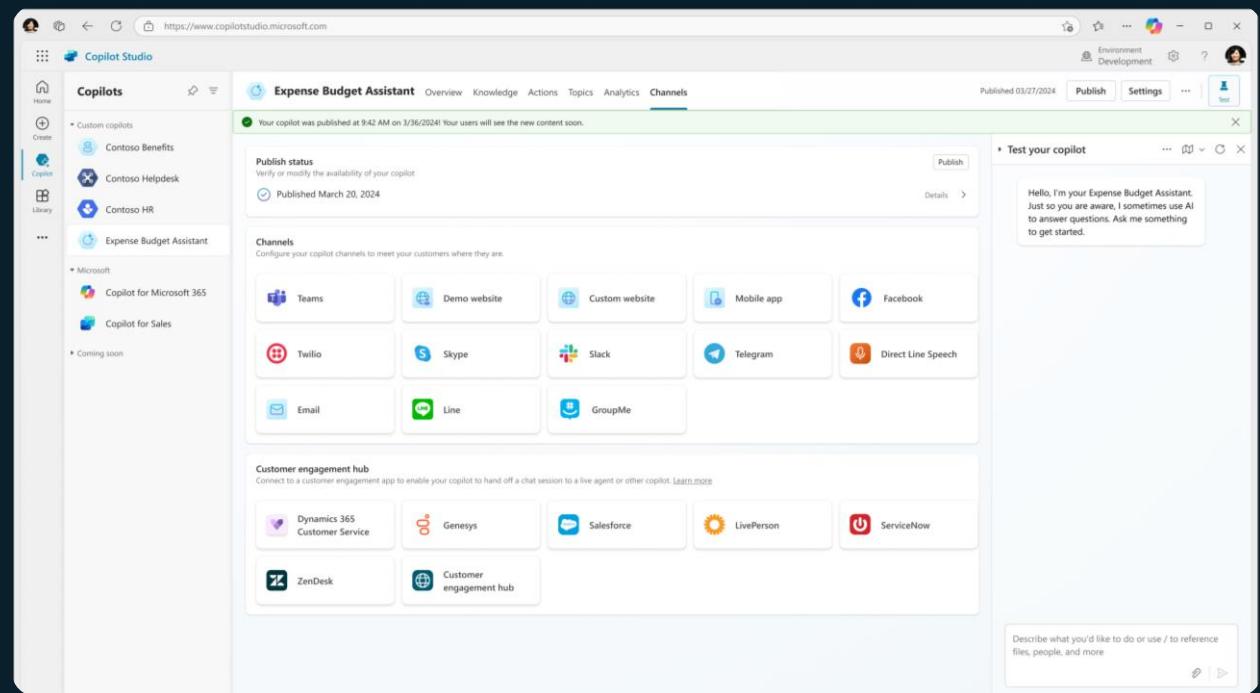
The screenshot shows the 'Expense Budget Assistant' application interface. At the top, there are tabs for Overview, Knowledge, Actions, Topics (which is currently selected), Analytics, and Channels. Below the tabs, there's a section titled 'Travel budget' with various icons. The main area displays a flowchart-like structure:

- A box labeled 'Describe what the topic does' contains the text: 'Provides details to employees asking questions about travel expense budget availability'.
- An 'Action' box is connected to it, showing a SAP connector and a table named 'Travel expense budget'.
- This action connects to a 'Create generative answers' box, which has an 'Input' field containing 'OutstandingExpenseBudget table' and a 'Data sources' section.
- To the right of the main flowchart, there's a sidebar titled 'Create generative answers property' with sections for 'Data sources' (including public websites and SharePoint), 'Azure OpenAI Services on your data' (with a note to add a connection), and 'Custom data'.

# Build & Publish

## Publish and go live instantly

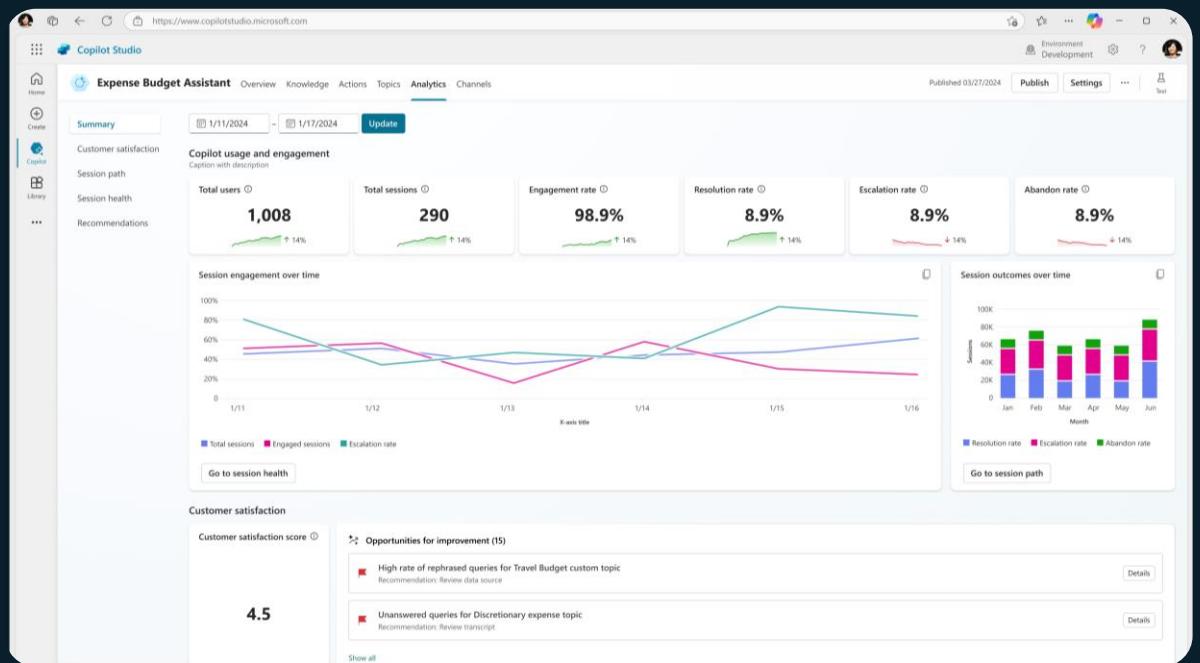
Publish and deploy to the channel of choice with a single click, and your copilot is live.



# Analyze & Improve

## Monitor and get insights

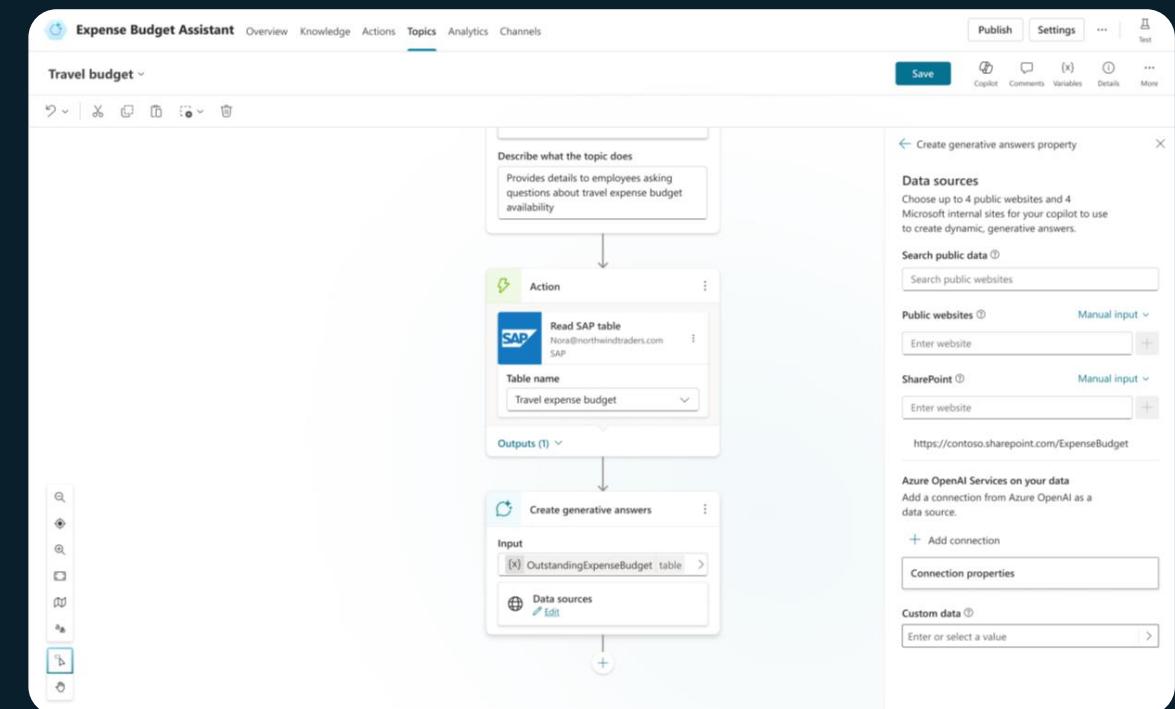
Understand what's working well and what needs to improve with conversational analytics



# Analyze & Improve

## Fine tune to add sophistication

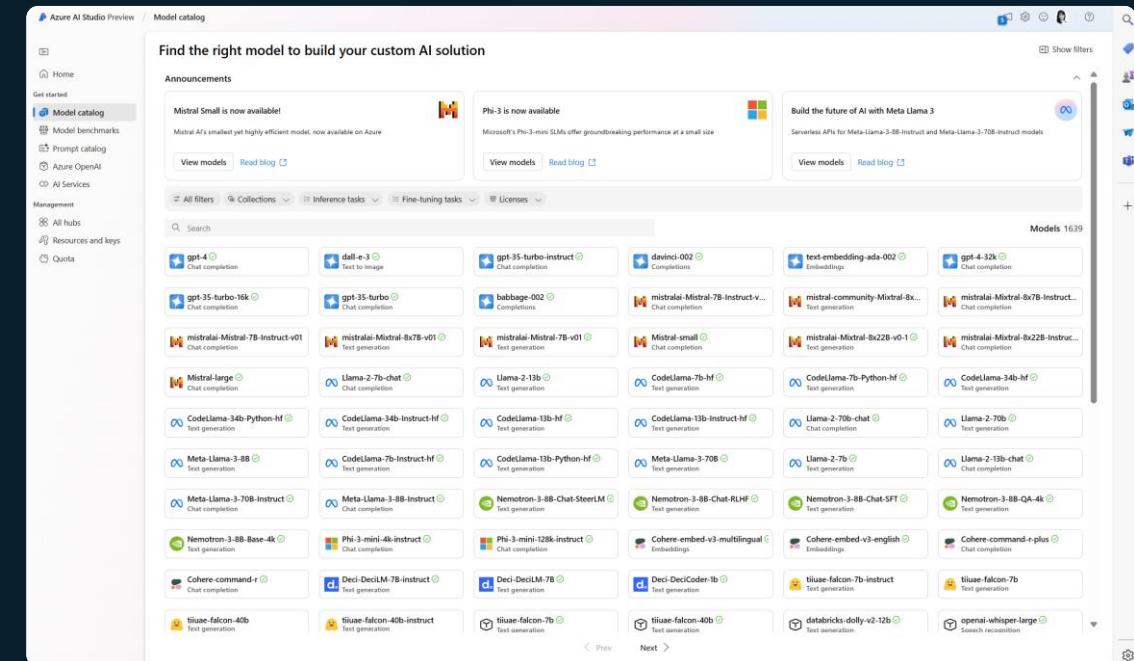
Layer in more topics with custom responses and conditions based on insights generated to improve your copilot's performance.



# Analyze & Improve

## Add Conversational Services

Integrate with Azure AI Studio, Azure Cognitive Services, Bot Framework and a variety of other Microsoft conversational services

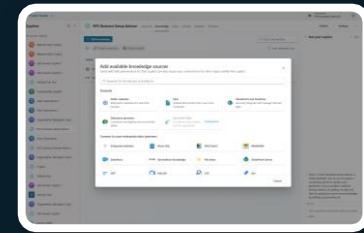
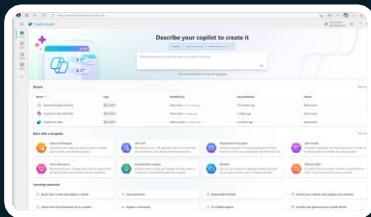
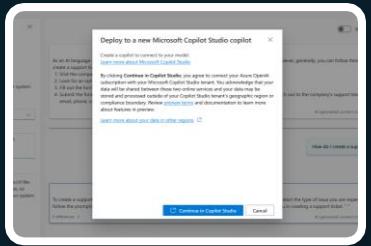


## Create, manage, publish and extend Copilots

Live in minutes - all from one tool  
and E2E SaaS service

### Integrate with AI Services

Integrate with Azure AI Studio, Azure Cog Services, Bot Framework and various other Microsoft conversational services



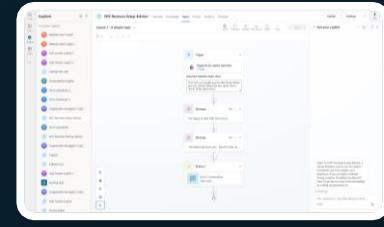
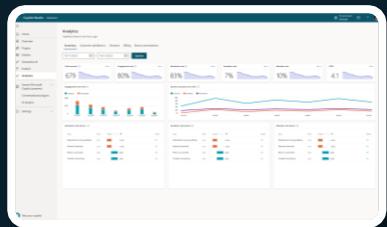
## Build & Publish



Copilot Studio

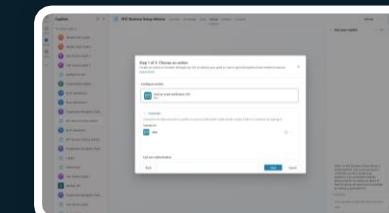
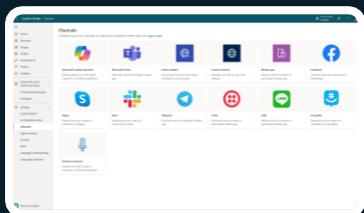
### Monitor and Improve

with rich out-of-the-box insights and analytics



### Publish to multiple channels,

and go live instantly on the SaaS service or choose to extend Copilot for Microsoft 365 with your custom capabilities



## Analyze & Improve

### Chat over knowledge with Gen AI

Get enterprise specific answers over your files, websites, internal shares, Dataverse, third party systems and more

### Create specific topics

Supplement generative responses with specific, curated topics where you want tight control. Build them easily with the powerful graphical studio

### Build actions & Plugins

Create actions, plugins, use 1000s of pre-built connectors or Power Automate to call your backends and APIs

# Copilot multi-channel availability

Microsoft Partners



## Dynamics 365 for Customer Service



Voice



Teams



Custom



Azure  
Communication  
Services



Apple Messages  
for Business



WeChat



Facebook



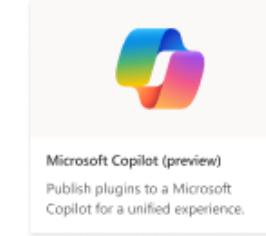
Google's Business  
Messages



WhatsApp  
through Twilio

SOCIAL CHANNELS

## Native to Copilot Studio



Microsoft Copilot (preview)  
Publish plugins to a Microsoft Copilot for a unified experience.



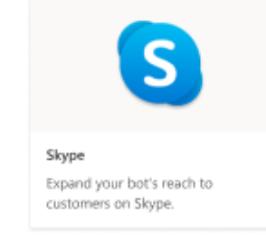
Microsoft Teams  
Chat with your bot through a Teams app.



Demo website  
Try out your bot and invite team members to do the same.



Custom website  
Activate your bot on your own website.



Skype  
Expand your bot's reach to customers on Skype.



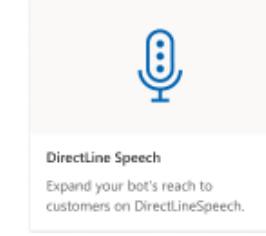
Slack  
Expand your bot's reach to customers on Slack.



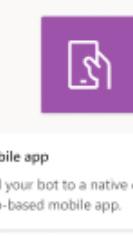
Telegram  
Chat with your bot through a Teams app.



Twilio  
Add your bot to a native or web-based mobile app.



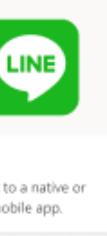
DirectLine Speech  
Expand your bot's reach to customers on DirectLineSpeech.



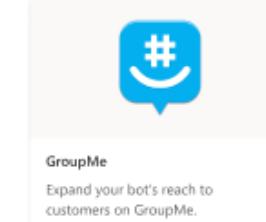
Mobile app  
Add your bot to a native or web-based mobile app.



Facebook  
Connect with your customers on Messenger.

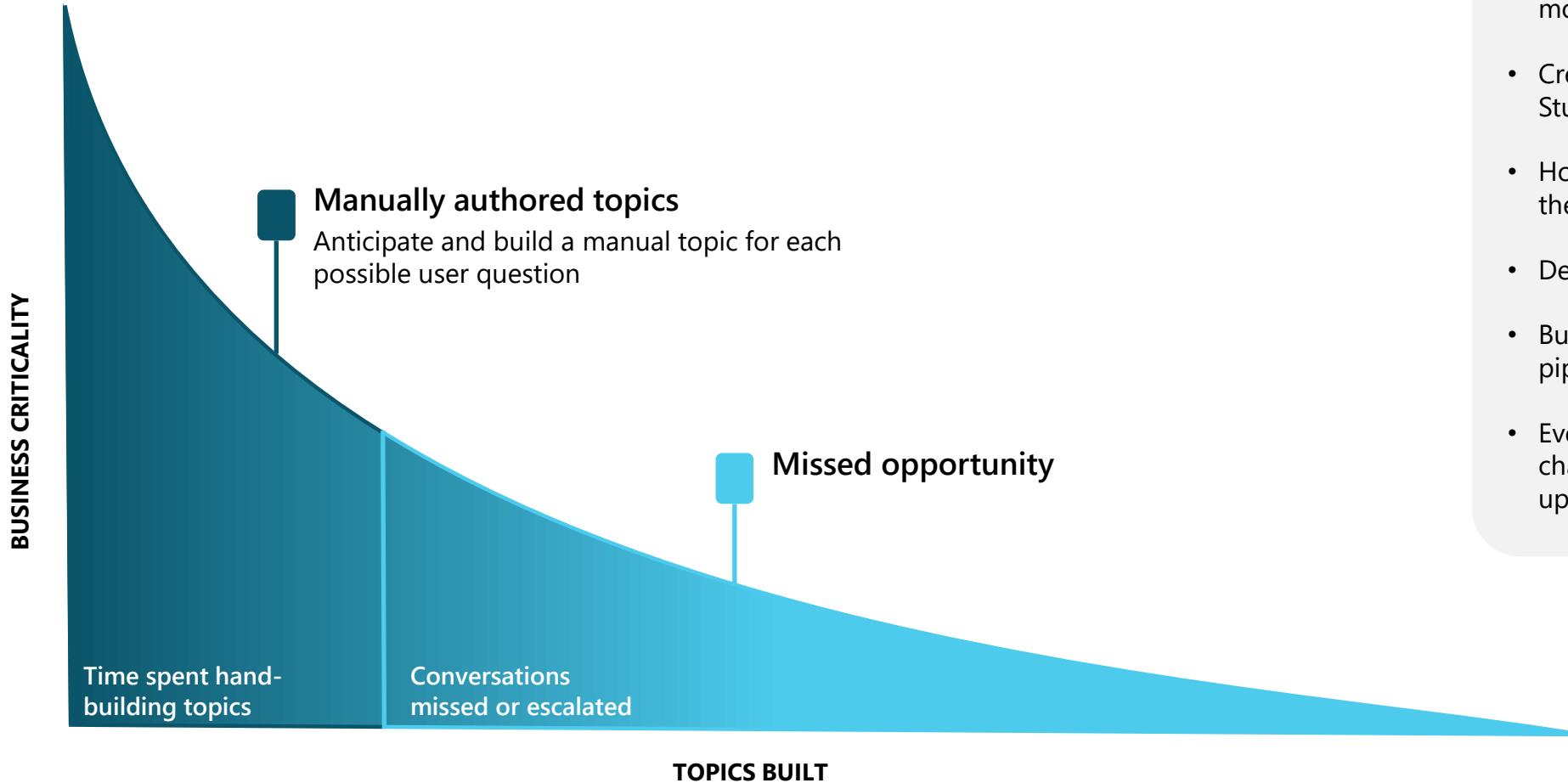


LINE  
Add your bot to a native or web-based mobile app.



GroupMe  
Expand your bot's reach to customers on GroupMe.

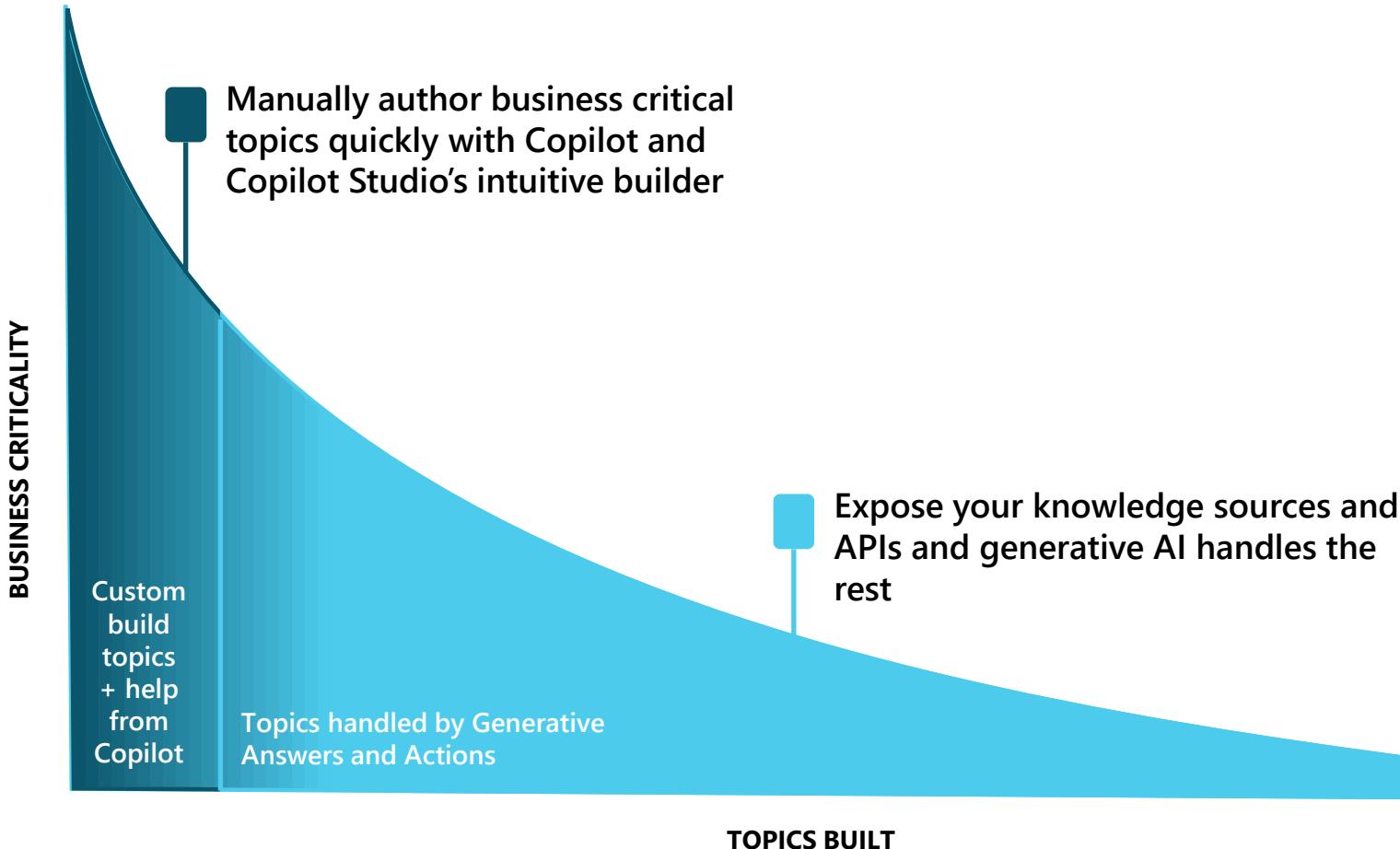
# Generative AI is changing bot building



## Traditional (e.g. Azure)

- Create Azure tenant and infra
- Annotate thousands of utterances and conversations to build a custom NL model
- Create topics in code using Visual Studio and BF SDK
- Host Azure Bot Service and instantiate the appropriate channel
- Deploy your bot to the service
- Build your own custom analytics pipeline
- Every time your knowledge content changes (e.g. different hours) go and update the bot in code

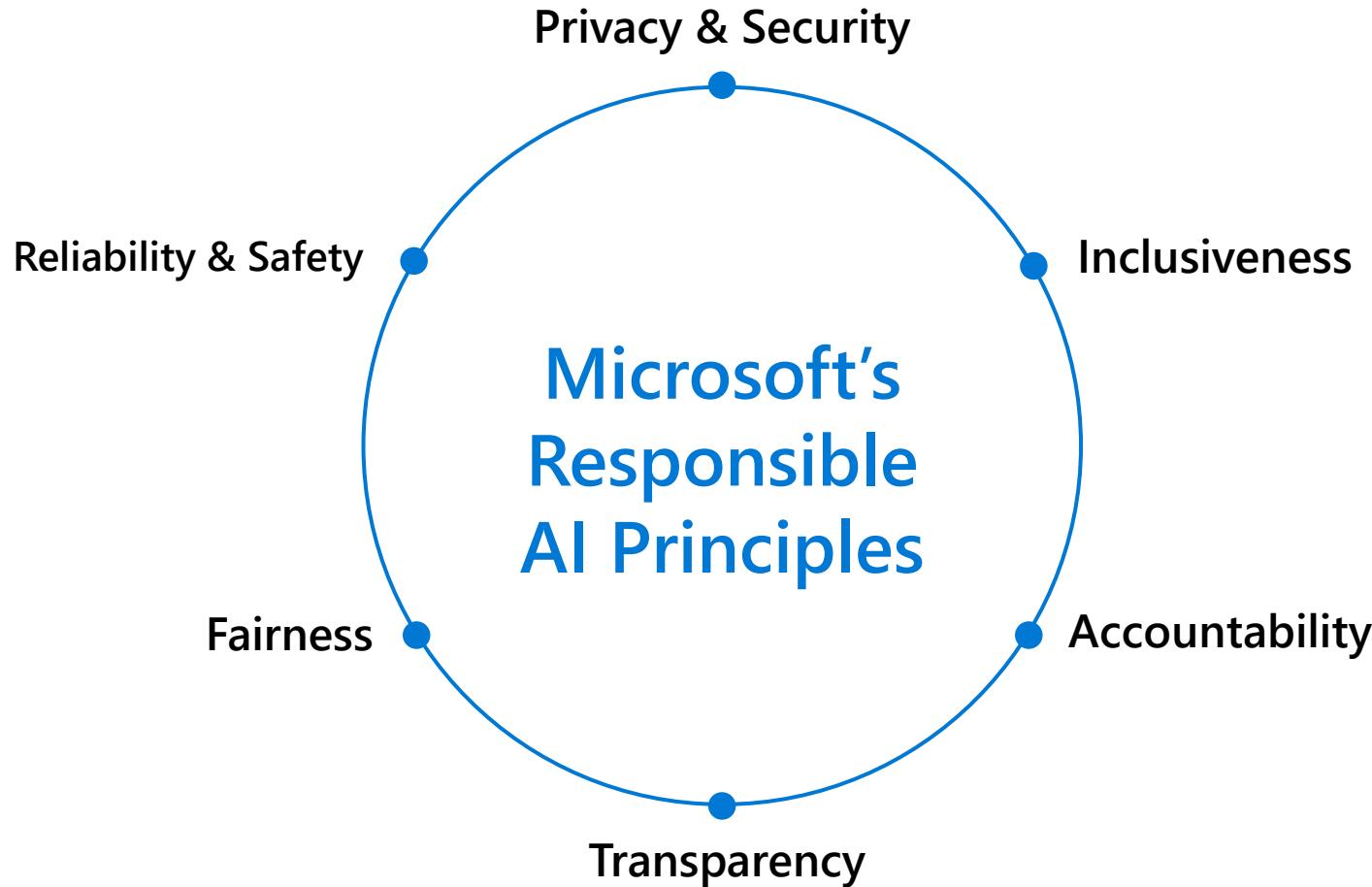
# Generative AI is changing bot building



## Copilot Studio with Generative AI

- Full E2E SaaS – no infra to host or manage
- No explicit NL training or custom model required, comes with powerful large language model
- Point to a knowledge sources and have a useful bot in minutes with Generative AI
- Extend the bot with business-critical topics using easy to use graphical interface and 1000s of pre-built connectors, or call custom APIs
- Developers, low-code users can collaborate inside the same canvas with graphical multi-authoring and code side-by-side
- Publish to the channel of your choice in minutes with a few clicks

# Microsoft's Responsible AI principles



Building blocks  
to enact principles



# More than 30,000 customers across every industry have used Copilot Studio

to help improve performance and efficiency while reducing costs and risks



Conversational banking  
copilot on both telephony  
and digital channels



HR/IT copilot for employees  
that reduced support costs  
and workload



Helping customers find and  
book the perfect cruise



Creating customer focused  
copilots as a Microsoft Partner



Customer copilot to help find  
the right products and support



Copilot that helps with  
customer service for guests



# Copilot Studio

## RECOMMENDED OFFER

### Copilot Studio

\$200 per tenant/month

Tenant-wide capacity license sold in capacity packs.

1 capacity pack = 25,000 messages/month

#### Offer Details

- Gen AI: AI-enabled conversations
- Copilot in Microsoft Copilot Studio: Create and iterate on chatbot topics using expanded natural language capabilities
- Power Automate for Microsoft Copilot Studio: Cloud flows – Create automated, instant and scheduled flows within context of Microsoft Copilot Studio bots
- Connectors: Standard, Premium and Custom connectors
- Dataverse for Microsoft Copilot Studio: Dataverse Default Capacity
  - 5 GB Database Capacity
  - 20 GB File Capacity
  - 2 GB Log Capacity



# Copilot Studio Implementation Guide

The Copilot Studio implementation guide provides a framework to do a 360-degree review of a copilot or bot project.

Through probing questions, it highlights potential risks and gaps, aims at aligning the project with the product roadmap, and shares guidance, best practices and reference architecture examples.

SCAN ME



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

## Generative answers considerations

### Generative answers processes and data sources

1

Relevant text content retrieval from configured sources

Summarization using Azure OpenAI

Custom instructions

Past 10 turns for contextualization

References

Content summary

2

Response Validation

Azure OpenAI moderation layer

Copilot Studio selected moderation layer

Grounding validation / helicitation removal

3

Public data

SharePoint

Azure OpenAI on your data

Uploaded documents

{ } Custom data

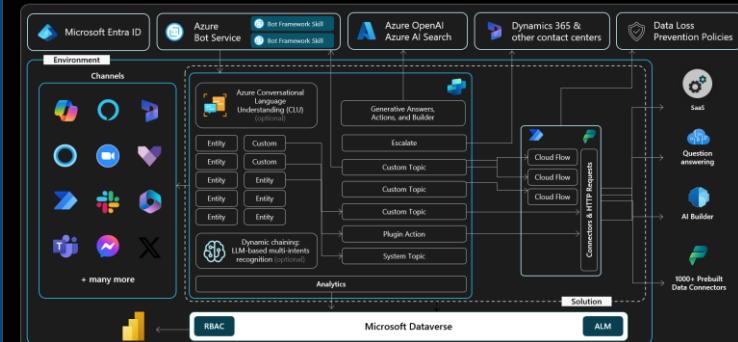
- Up to 4 URLs, but the list can be dynamic.
- Max 2 subpages depth (/en/help/), no direct pages.
- One configuration ID, but can be set using a formula.
- Azure costs covered by Microsoft
- Up to 400 URLs, custom ranking options.
- Max 2 subpages depth (/en/help/), supports direct pages.

- Website content must be indexed by Bing.
- Bing is a global service, no geo boundary.
- Returns results from the limited Azure AI Search index (keyword, semantic, and vector search).
- Not a passthrough to Azure OpenAI – generative answers summarization and validation apply.
- Connection isn't delegated: no security trimming, no authentication requirement for the user.

- Files (max 3 MB) are stored in Dataverse file storage and indexed with Dataverse Search.
- Not possible to offer a URL to the source documents in the citations.
- Configured at the bot level; possible to disable file search at the node level but can't filter them.

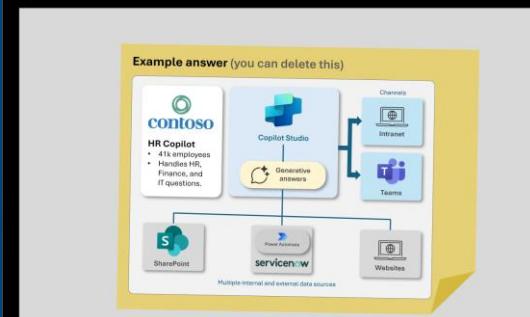
- Allows to first query any data source – through Power Automate or HTTP requests – and then pass the data to generative answers to formulate an answer for the user query.
- Generative answers expects a table variable with 2 properties: Content (typically snippets of relevant content) and ContentLocation (typically a URL).

## Copilot Studio architecture



## Solution architecture

Provide an architecture diagram with the overview of the technical implementation



### Why do we ask these questions?

- To have the big picture of your copilot project and its integration in a broader technical and functional landscape.

### Information we're looking for:

- Architecture diagrams or blueprints
- Functional and technical overview of the copilot and its integration in the broader technical landscape (other Power Platform or Azure services, internal APIs, etc.)

# Get Started

## Technical terms to know

<b>Topics</b>	<b>Also known as:</b> Dialog and triggers	Use topics to organize conversation flow or paths. A topic has a set of trigger phrases that indicate when the copilot should start the topic and a set of nodes that describe the topic's conversation path.
<b>Trigger phrases</b>	Intents	Add trigger phrases to a topic for the phrases, keywords, and questions that a customer is likely to type related to a specific issue. Copilot Studio uses natural language understanding to parse what a customer types and find the most appropriate topic.
<b>Nodes</b>	Actions and prompts	Nodes are specific steps within the conversation path such as messages, questions, and conditional branches.
<b>Response variation</b>		Use response and question variations to add variety to your copilot's messages and questions.
<b>Quick replies</b>	Suggested actions	Use quick replies to provide default reply options to the customer.
<b>Entities</b>		Define and use entities to extract semantic information from what a customer types.
<b>Variables</b>	State, storage and properties	Use variables to track state. Define and use entities to extract semantic information from what a customer types.
<b>Power Fx</b>	Formulas and expressions	Power Fx uses Excel-like formulas to create complex logic for data and advanced variable manipulation. Used across multiple nodes.

Go to [aka.ms/CopilotStudioEPPC24](https://aka.ms/CopilotStudioEPPC24)



SCAN ME

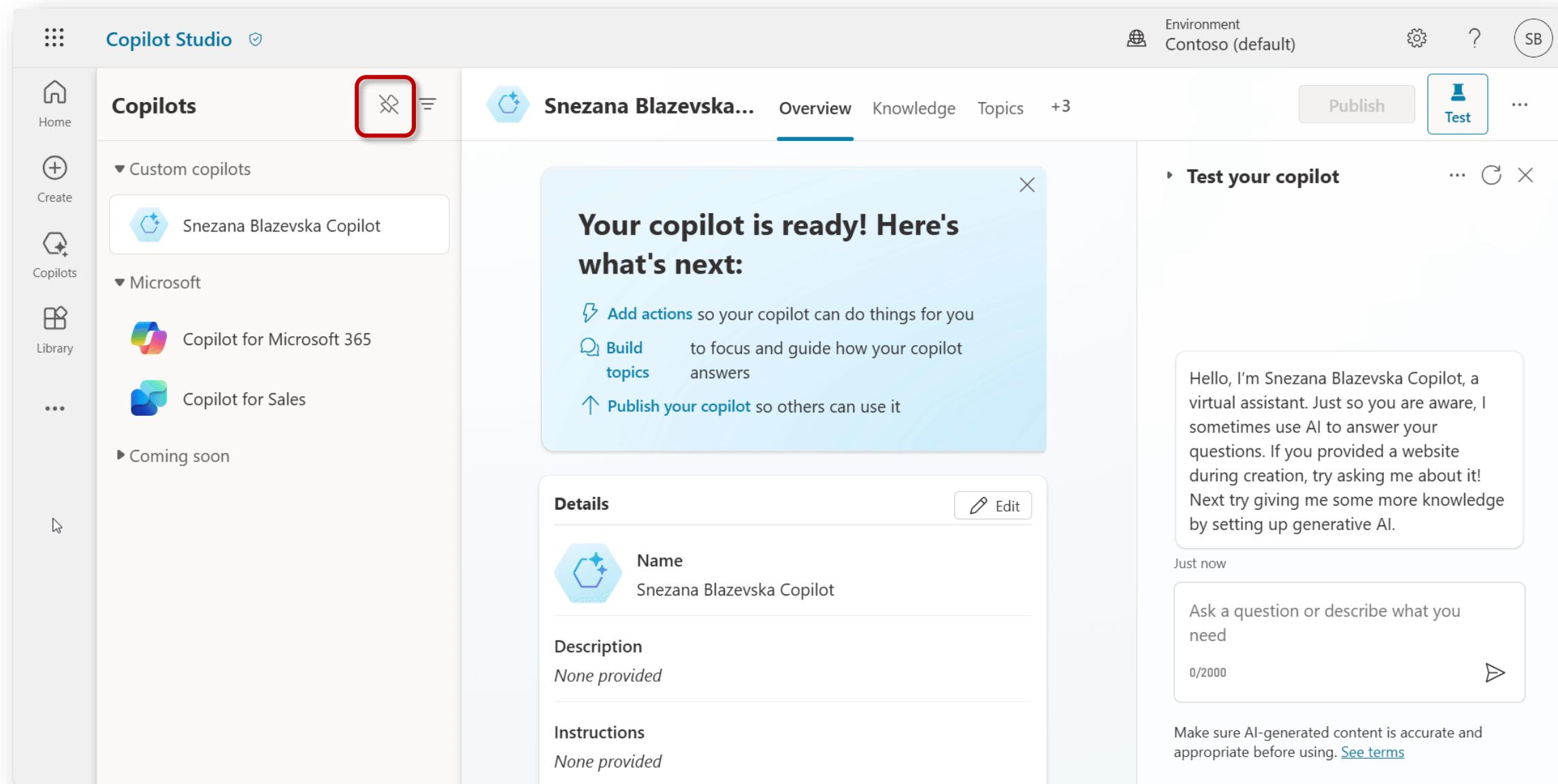
THEN:

1. **Download** and **unzip** the lab files locally.
2. Using the provided credentials, log in [aka.ms/CopilotStudioStart](https://aka.ms/CopilotStudioStart)

# Important lab instructions

1. **Follow the labs** most lab content is dependent on previous labs.
2. **If you want to deviate from the labs** and test your own scenarios, this is fine, but please do complete the labs first, and create your own separate custom copilot for your own scenarios and exploration after you've completed the labs.

# Productivity tip #1: Unpin the Copilots pane



The screenshot shows the Copilot Studio interface. On the left, there's a sidebar with icons for Home, Create, Copilots, Library, and more. The main area is titled "Copilots" and shows a list of copilots under "Custom copilots": "Snezana Blazevska Copilot". A red box highlights the pin/unpin icon next to the title. The central part of the screen displays "Snezana Blazevska..." with tabs for Overview, Knowledge, Topics, and "+3". A modal window titled "Your copilot is ready! Here's what's next:" lists three steps: "Add actions", "Build topics", and "Publish your copilot". To the right, there's a "Test your copilot" section with a message from the copilot and a text input field. At the bottom, there's a note about AI-generated content and a "See terms" link.

Copilot Studio

Environment  
Contoso (default)

SB

Home

Create

Copilots

Library

...

Copilots

Snezana Blazevska Copilot

Custom copilots

Microsoft

Copilot for Microsoft 365

Copilot for Sales

Coming soon

Snezana Blazevska...

Overview Knowledge Topics +3

Publish Test

...

Your copilot is ready! Here's what's next:

- Add actions so your copilot can do things for you
- Build topics to focus and guide how your copilot answers
- Publish your copilot so others can use it

Details

Name: Snezana Blazevska Copilot

Description: None provided

Instructions: None provided

Edit

Hello, I'm Snezana Blazevska Copilot, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

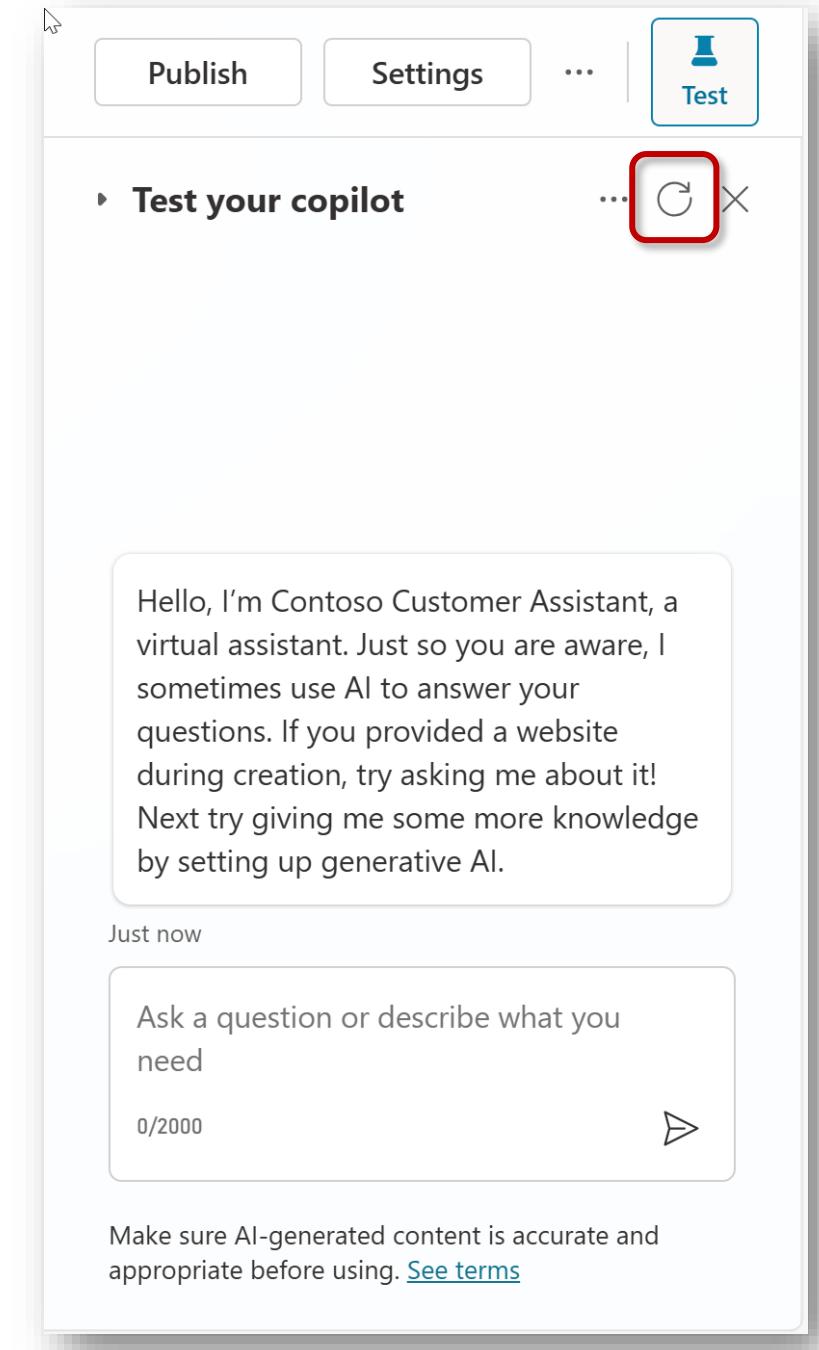
Just now

Ask a question or describe what you need

0/2000

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

# Productivity tip #2: Refresh the conversation between tests



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# **Lab 01:** Create your first copilot in Microsoft Copilot Studio

# Demo Lab 1

▶ Test your copilot

... ⌂ ✕

Hello, I'm Contoso Copilot, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

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](#)



# Lab time!

**Lab 01 [40] minutes**

# **Lab 02: Authoring 101**

# Demo Lab 2

▶ **Test your copilot** ... ⌂ ✖

Hello, I'm Contoso Copilot, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

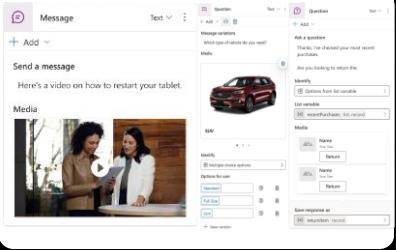


Help with my order

Ask a question or describe what you need  
0/2000 ➔

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

# Unified Authoring Canvas



## Rich Responses

New features including:



Adaptive Cards



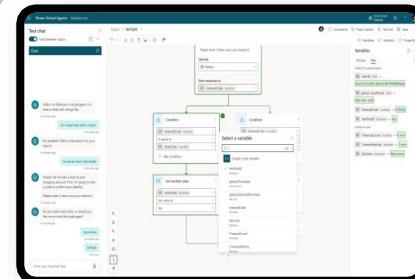
Images



Videos

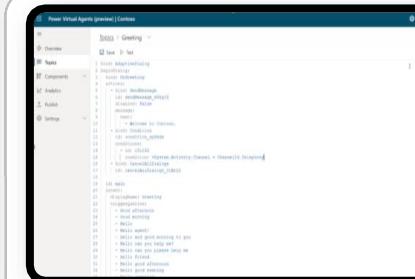


Quick Replies



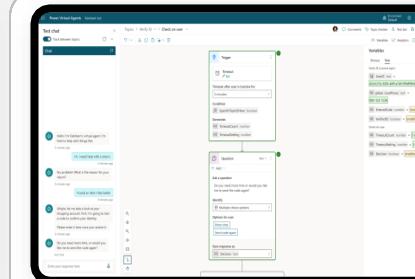
## Power Fx-based variables system

- Power Fx integrated formula editor for variable management
- List / Record type support
- Condition nodes with Power Fx formula support
- Iterate over a List with new Loop nodes (coming soon)



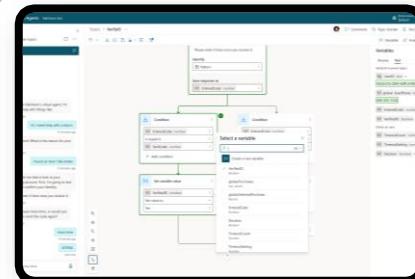
## Code side-by-side

- Move between a visual editor and code
- Share and re-use topic logic between developers and bots



## Event-driven & contextual triggering

- Trigger an event that can interrupt Dialogs if it detects a certain value has been received
- Add more nuanced responses to a message when the bot runs into an issue.
- Bots can stay within context when a user asks for additional help or more details

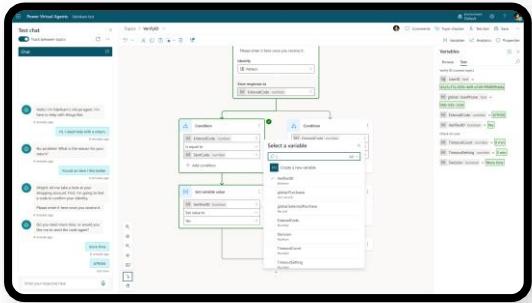


## Productivity

- Cut, Copy, Paste
- Multi-node selection
- Enhanced topic navigation

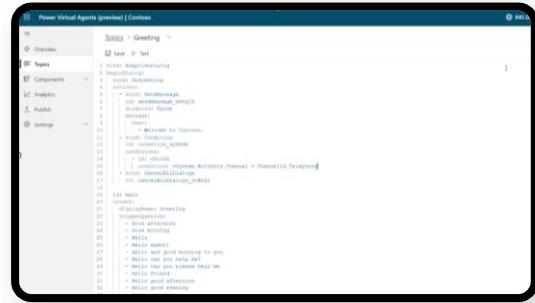
# No cliffs extensibility with pro-dev capabilities

Best in class pro-dev tooling to extend and customize



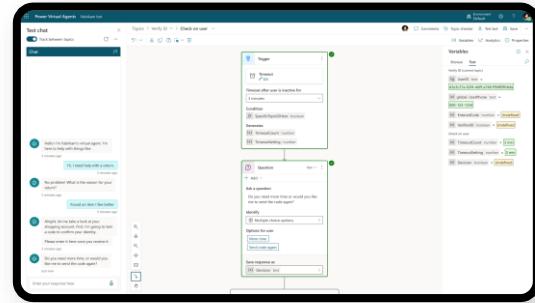
## Data & Logic Manipulation

Power FX integrated formula editor for variable management, list/record type support, Power FX enabled condition nodes and iteration over a list with new loop nodes.



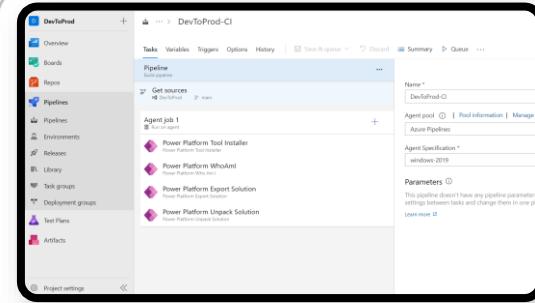
## Effortlessly Switch into Code

Switch between the visual editor and code in one click to view and edit the logic behind your topics. Share and reuse topic logic with ease.



## Advanced Responses – Eventing and triggers

Create dynamic and personalized conversations by responding to events that occur outside of the bot and staying within context when a user asks for additional help or faced with an issue.



## Streamline Deployments with ALM

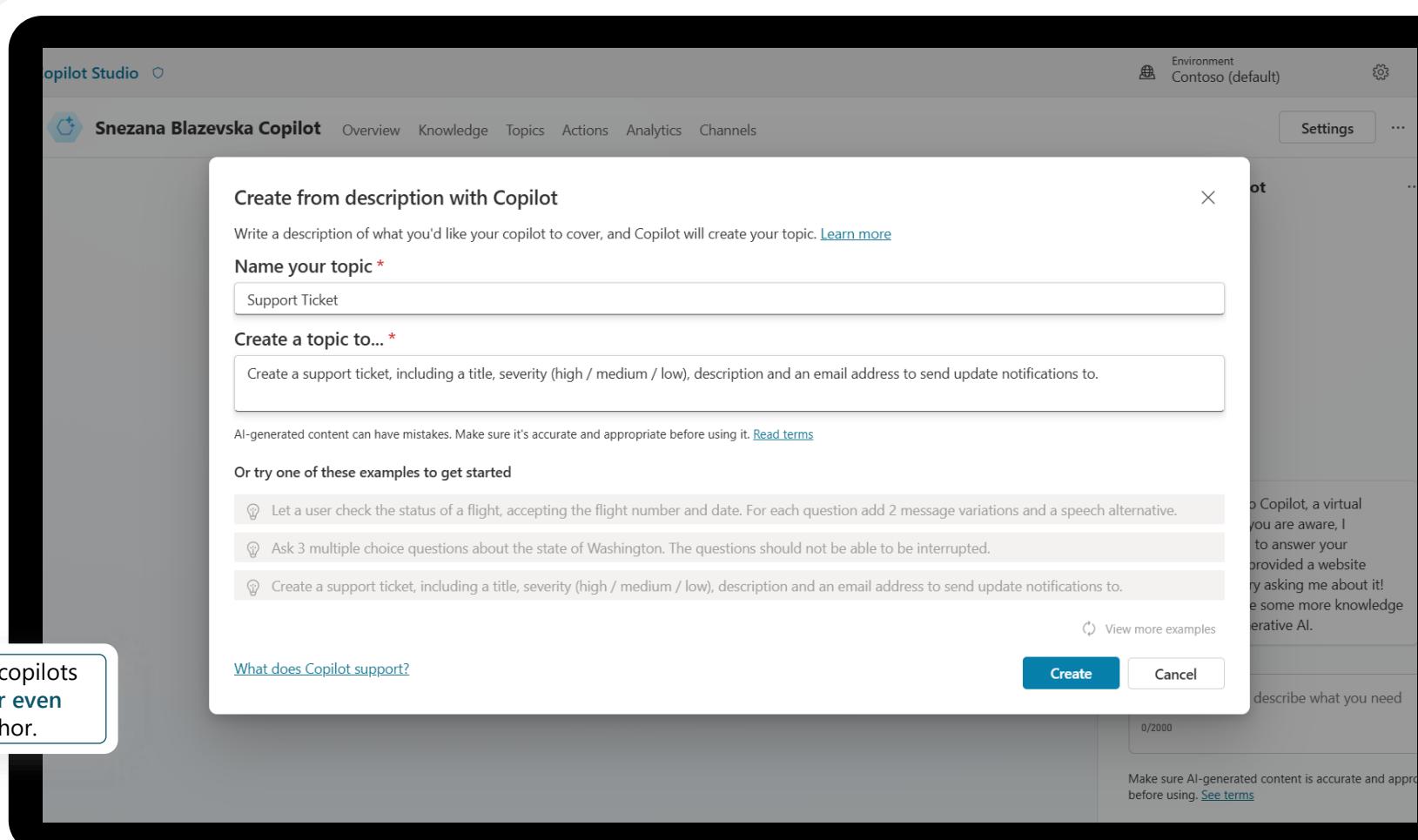
Implement application lifecycle management (ALM) with Power Platform Build Tools in Azure DevOps and automate continuous build, test, and deployment of Power Virtual Agents solutions.

# Copilot for Copilot Studio

AI assistance in building topics, designing and modifying the copilot all through natural language

Assisted authoring for:

- Topic creation
- Topic iteration
- Response generation
- Adaptive Card generation
- Topic improvement suggestions
- Suggested trigger phrases, topic names, topic descriptions
- Transcript generation
- Copilot creation
- Topic suggestions

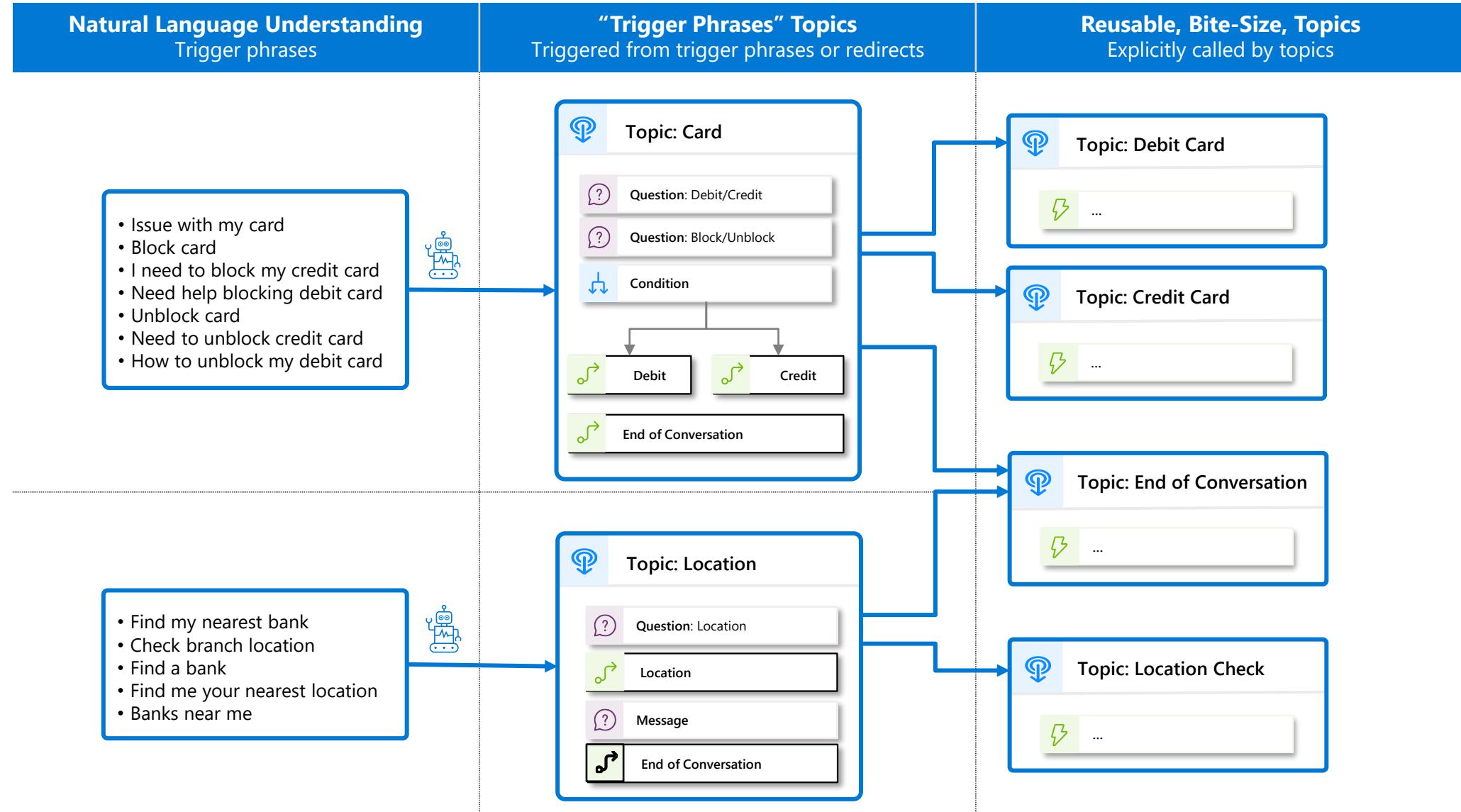


Generally Available

# Lab time!

**Lab 02 [60] minutes**

# Disambiguation with topic design



# Natural language understanding

	 Standard NLU model	 Custom Azure CLU model	 Generative AI orchestration
	<ul style="list-style-type: none"><li>✓ Default, out-of-the-box, model that comes pre-trained, with many predefined entity types.</li><li>✓ Configuration is done by adding trigger phrases and custom entities (either closed lists with values and synonyms, or regular expressions).</li></ul>	<ul style="list-style-type: none"><li>✓ Supports additional languages, with native models.</li><li>✓ Allows to further customize the intent triggering model for better intent recognition or to address specific industry requirements.</li><li>✓ Allows for complex entity extraction (e.g., of the same type).</li><li>✓ Entity extraction can also leverage Copilot Studio standard NLU.</li></ul>	<ul style="list-style-type: none"><li>✓ Uses a GPT large language model.</li><li>✓ Can handle multiple intents and chain topics and/or plugins.</li><li>✓ Automatically generate questions for missing inputs and answers complex entities and questions from the conversation context.</li><li>✓ Configuration is done by simply describing topics, plugin actions, and inputs/outputs.</li></ul>
	<ul style="list-style-type: none"><li>✓ Single intent recognition per query.</li><li>✓ Cannot be extended.</li><li>✓ Slot-filling multiple entities of the same type in the same query requires disambiguation for each (e.g., from and to cities)</li></ul>	<ul style="list-style-type: none"><li>✓ Single intent recognition per query.</li><li>✓ Configuration is done in Azure and involves additional costs.</li><li>✓ Has its own service limits that need to be evaluated.</li><li>✓ Azure CLU intents and Copilot Studio topics must be carefully kept in sync.</li></ul>	<ul style="list-style-type: none"><li>✓ As it's a generative AI feature, the licensing burn rate of messages is higher than in regular topic triggering.</li><li>✓ Preview capability.</li></ul>

# Handling unrecognized intents

## Answering for unplanned user queries

1

The **Fallback** topic gets triggered when Copilot Studio doesn't understand a user utterance and doesn't have sufficient confidence to trigger any of the existing topics.

2

There are many ways to handle unrecognized intents: using **Knowledge Sources** to look for the answer on various data sources and/or using the Fallback topic to **integrate with other systems**. For example, question answering in Azure AI for Language allows you to offload large volumes of question-and-answer pairs. It also has a chitchat model to handle random questions to the copilot.

3

If **Knowledge Sources** are enabled on the copilot, the **Conversational Boosting** topic also triggers on the unknown intent event and triggers before the Fallback one.

4

While it's important to leverage the Conversational Boosting and Fallback capabilities, it's also important to make sure that the **core scenarios and topics** of your copilots are properly handled through custom topics and their outcomes defined (resolved, etc.).

---

# **Lab 03: Build and call Power Automate cloud flows from your copilot**

# Demo Lab 3

▶ Test your copilot

... ⌂ ×

Hello, I'm Contoso Copilot, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.



Just now

Help with my order    Help with my incident

Ask a question or describe what you need

0/2000

►

Make sure AI-generated content is accurate and appropriate

19:38

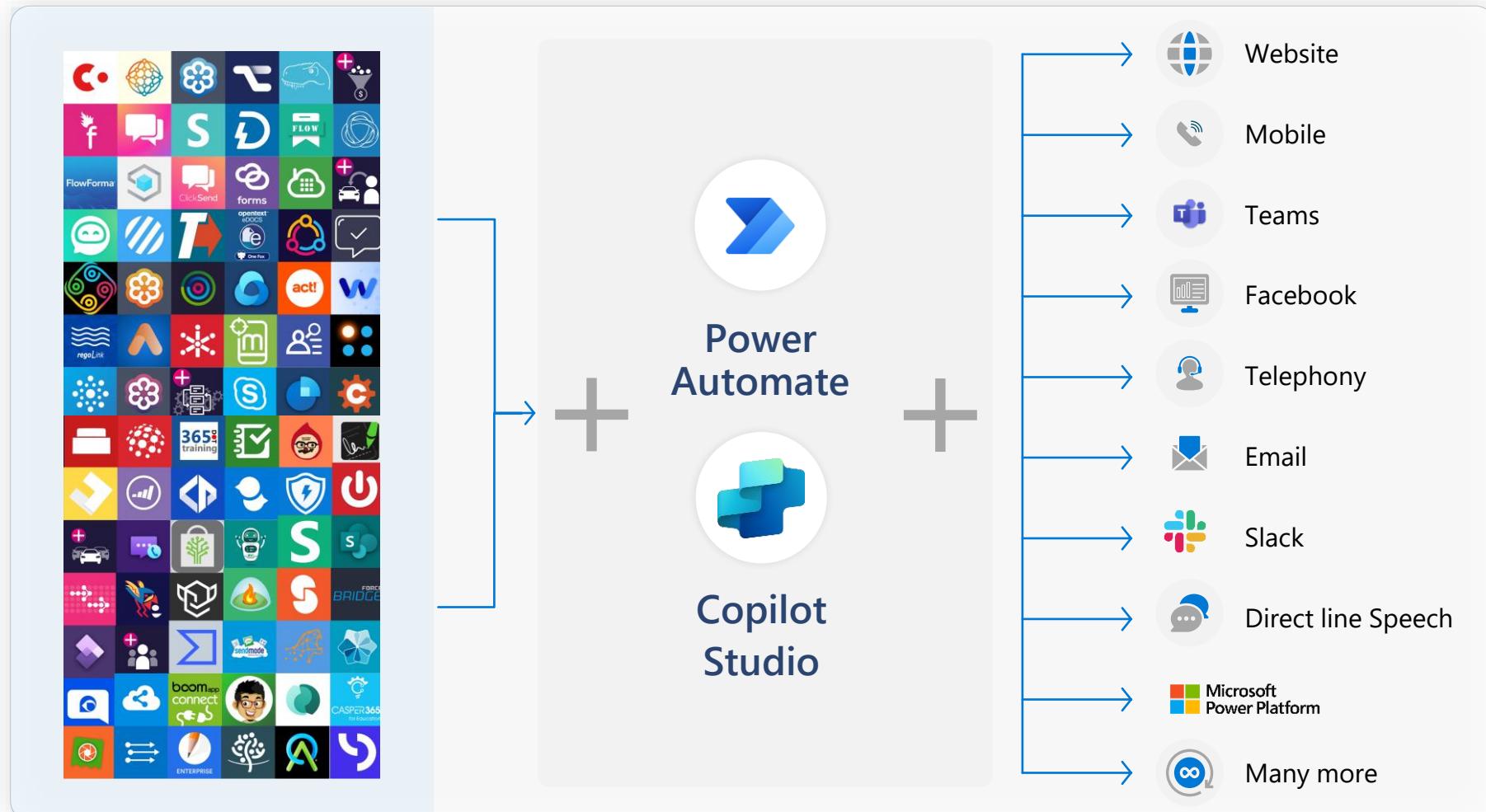
70:38

# Integration patterns considerations

	 Power Automate Cloud flows	 HTTP requests & Connectors	 Bot Framework Skills
	<ul style="list-style-type: none"><li>✓ No-code / low-code.</li><li>✓ Clear separation of integration and conversational logic.</li><li>✓ Can be monitored separately.</li><li>✓ Existing cloud flows can be updated to integrate with Copilot Studio.</li></ul>	<ul style="list-style-type: none"><li>✓ No-code / low-code.</li><li>✓ Faster runtime execution.</li><li>✓ Can be monitored as part of Copilot Studio App Insights integration.</li><li>✓ Can leverage variables, including environment variables and secrets.</li><li>✓ Variables, conditions, parameters, etc. can use Power Fx formulas.</li><li>✓ Parsing and error handling support.</li></ul>	<ul style="list-style-type: none"><li>✓ Synchronous execution.</li><li>✓ Support for private endpoints.</li><li>✓ Existing Bot Framework investments can be reused.</li></ul>
	<ul style="list-style-type: none"><li>✓ Invocation and execution of the cloud flow can add latency.</li><li>✓ If scale/performance are a concern, the higher-tier “Power Automate Process” plan can be evaluated.</li><li>✓ “Power Automate Process” required for service principal ownership.</li><li>✓ Need to return results within 100s.</li></ul>	<ul style="list-style-type: none"><li>✓ Mixing conversational logic and integration logic, but integration topics can be isolated, as they can be configured for inputs and outputs.</li><li>✓ Need to return results within 100s.</li></ul>	<ul style="list-style-type: none"><li>✓ Pro-code (e.g., C#)</li><li>✓ Runs in the Azure AI Bot Service.</li><li>✓ Additional costs need to be covered by an Azure subscription.</li><li>✓ ALM differs from Power Platform.</li></ul>

# Power Platform Connectors

- Power Platform, including Power Automate and Copilot Studio, offers great integration capabilities, with more 1,200 native connectors or ways to create your own custom connectors to your APIs.
- For a good end-user experience, cloud flows, HTTP requests and connectors triggered from Copilot Studio must execute quickly so that the user doesn't have to wait too long for the copilot to answer.



# Lab time!

**Lab 03 [60] minutes**

---

# **Lab 04: Make HTTP requests to connect to an API**

# Demo Lab 4

## ▶ Test your copilot

... ⌂ ✖

Hello, I'm Contoso Copilot, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.



Help with my order

Help with my incident

Ask a question or describe what you need

0/2000



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

# Lab time!

**Lab 04 [20] minutes**

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# **Lab 05: Knowledge sources and custom instructions**

# Demo Lab 5

▶ Test your copilot

... ⌂ ✕

Hello, I'm Contoso Copilot, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.



Help with my order

Help with my incident

Ask a question or describe what you need

0/2000



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

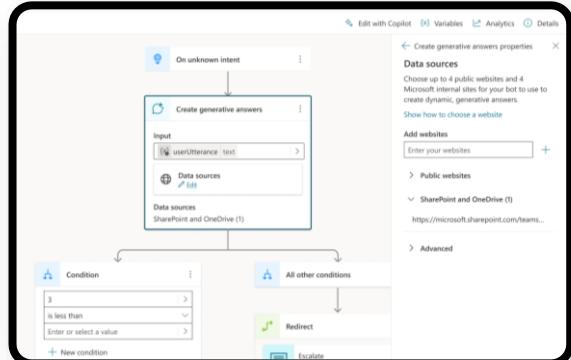
appropriate before using. [See terms](#)

# Knowledge sources

Enable multi-turn chat over your own internal and external knowledge sources and sites with generative answers

Copilots can answer thousands of questions out of the box in seconds

You can even pull data from an API or other backend system and enable generative chat over it



The screenshot shows the "Add available knowledge sources" dialog box in Microsoft Copilot Studio. The dialog has a search bar at the top and sections for "Featured" and "Connect to your enterprise data (preview)".

**Featured:**

- 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.
- Dataaverse (preview)**: Customize and deploy structured data tables.
- Microsoft Fabric**: Accelerate data analysis with AI capabilities. (Coming soon)

**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**

Try now at [aka.ms/copilotstudiodemo](https://aka.ms/copilotstudiodemo)

Generally Available

# Knowledge sources & Generative AI

1

## Query rewriting

Optimizing the user question for search

Last 10 turns are leveraged for contextualization

2

## Content retrieval

Querying each source

Top 3 results per source

3

## Summarization

Answer summarization from retrieved content

Citation generation

Answer personalization with custom instructions

## Validation at each step

Moderation of harmful, malicious, uncompliant, or copyrighted answers

Grounding validation and hallucination removal



## Public data

- Websites must be indexed by Bing.
- Bing being a global service, no regional boundary is possible.

## Public Website

- Up to 4 URLs, but the list can be dynamic.
- Max 2 subpages depth (/en/help/), no direct pages.

## Bing Custom Search

- One configuration ID, but it can be set using a formula.
- Azure costs covered by Microsoft
- Up to 400 URLs, custom ranking options.
- Max 2 subpages depth (/en/help/), supports direct pages.



## SharePoint Internal only

- Requires the user to be authenticated with Entra ID to make delegated calls to the Graph API.
- Matching files (max 3 MB) are retrieved to get detailed snippets to summarize.
- Up to 4 SharePoint or OneDrive for Business sites (but the list can be dynamic).
- Security trimming: returned results only include content the user has read access to.
- Users eligible to Microsoft 365 Semantic Index benefit from better results.



## Azure OpenAI on your data preview

- Returns results from the linked Azure AI Search index (keyword, semantic, and vector search).
- Not a passthrough to Azure OpenAI – generative answers summarization and validation apply.
- Connection isn't delegated: no security trimming, no authentication requirement for the user.
- Can index content from public URLs/web addresses (useful if regional boundary is required).



## Files

- Files (max 3 MB) are stored in Dataverse file storage and indexed with Dataverse Search.
- Not possible to offer a URL to the source documents in the citations.
- Documents are uploaded at the copilot level. Gen Answers node will search across all uploaded documents or none, when disabled at a node level.



## Custom data

- Requires a step to query the data source – using cloud flows, connectors, or HTTP requests.
- Results are passed as inputs to the generative answers to summarize an answer for the query.
- Input data needs to be in table format, with 3 properties: Content (typically snippets of relevant content) , ContentLocation (optional, typically a URL) and Title (optional).



## Dataverse

- Dataverse tables (max 15).
- Natural language queries are transformed in analytical queries (e.g., SQL) over structured data



## Graph Connectors

- Connect to additional enterprise knowledge sources that are indexed in Microsoft Graph.
- Salesforce, ServiceNow, Confluence, Azure DevOps Wiki, etc.

# Generative AI security and compliance considerations

-  The large language models (LLM) Copilot Studio depends upon are the foundation models trained by OpenAI.
-  Generative answers uses GPT-3.5 Turbo, but as new models outperform previous ones, they can be updated.
-  Models are hosted on internal Azure OpenAI services, honoring the Microsoft Services Trust boundary.
-  Models are accessed and used following [Microsoft Responsible AI](#) principles and policies.
-  [Custom instructions](#) can be added to generative answers to influence format and filters.
-  [Data storage and processing](#) for Copilot Studio generative AI capabilities may result in data movement across regional boundaries. When local data storage and processing aren't available in the region, environment settings are available to disable features requiring Azure OpenAI or Bing Search, preventing data movement.
-  Copilot Studio does not collect, nor provide any customer data, for use in the training of LLMs.
-  For operations purposes only, conversations are stored temporarily in a service-operated and secured store so that authorized Microsoft employees via Secure Access Workstations (SAWs) with Just-In-Time (JIT) access requests may respond to support requests. Access can be controlled through [Customer Lockbox](#).
-  Generative AI capabilities log additional troubleshooting data, but only when the thumbs up or down reactions are used by the copilot author in the Copilot Studio test pane.
-  Given the existing control layers and to avoid further logging of customer data, [Azure OpenAI abuse monitoring](#) is disabled for Copilot Studio generative AI features.

# Lab time!

**Lab 05 [30] minutes**

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## **Lab 06:** Use generative AI orchestration to interact with your connectors

# Demo Lab 6

▶ Test your copilot

... 📁 ⌂ ⌂

Hello, I'm Contoso Copilot, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.



Help with my order

Help with my incident

Ask a question or describe what you need

0/2000

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

Inappropriate before using. [See terms](#)

# Generative AI orchestration

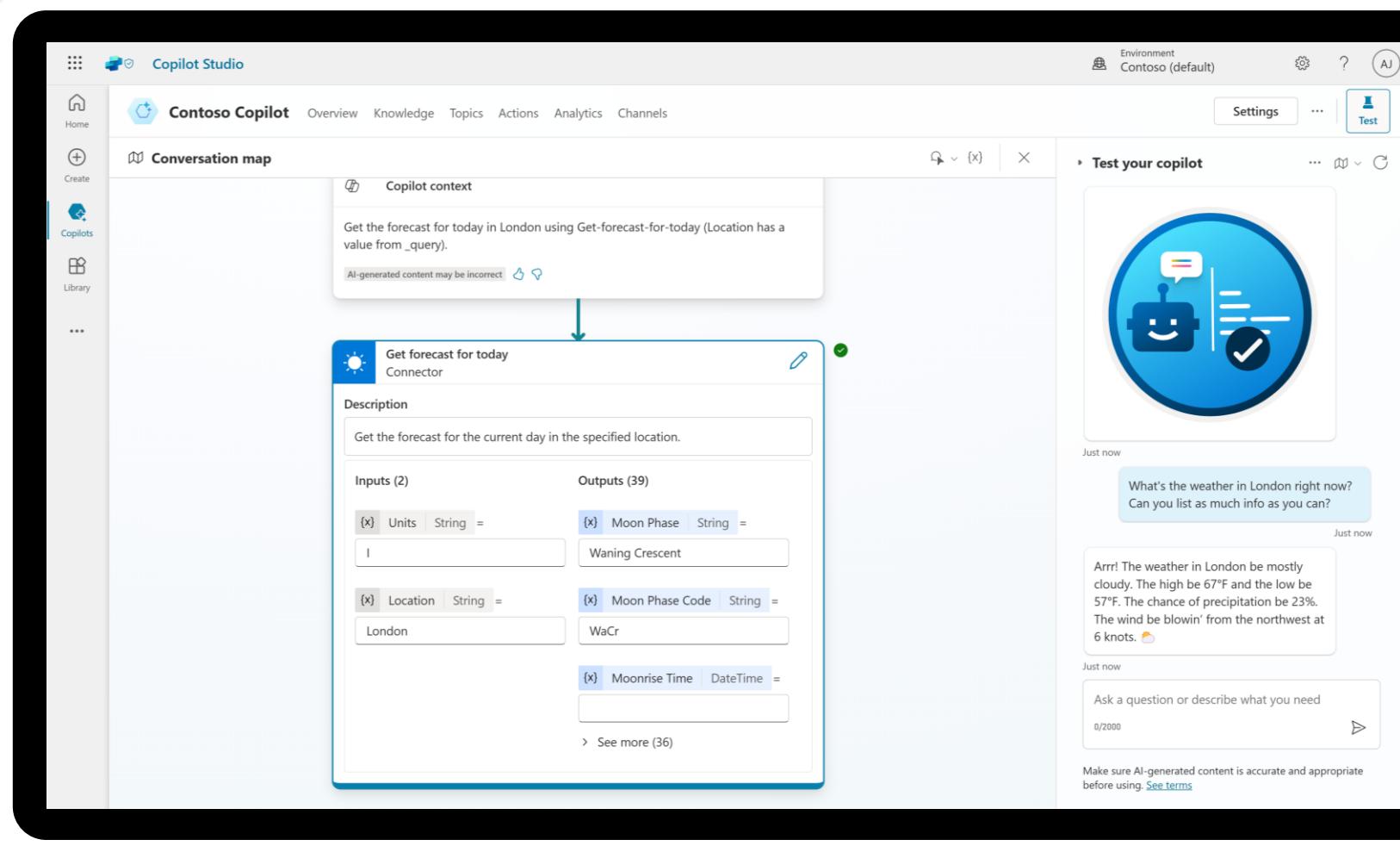
Test and trace feature to see it in action

Dynamically chains actions and topics together to produce actionable responses

Handle multi-intent queries that were not anticipated or built by the user

Automatically slot-fill further details to get the information needed for the task

Powered by the Azure OpenAI Service with LangChain concepts



# Lab time!

**Lab 06 [20] minutes**

# **Lab 07: Invoke AI Builder custom prompts**

# Demo Lab 7

▶ Test your copilot ... ⌂ ✖

Hello, I'm Contoso Copilot, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.



Help with my order

Help with my incident

Ask a question or describe what you need

0/2000



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

# Lab time!

**Lab 07 [25] minutes**



# Q&A

# Resources

# Resources



Copilot Studio trial

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

Copilot Studio website

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

Official Blog

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

Copilot Studio Demo

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

Product documentation

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

Product guidance

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

Implementation guide

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

Community

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

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