



Microsoft 365 Community Conference



Microsoft Copilot Studio

Embrace generative AI to revolutionize
chatbot development with Microsoft
Copilot Studio



Henry Jammes

Principal PM, Power CAT



Gary Pretty

Principal PM, Copilot Studio



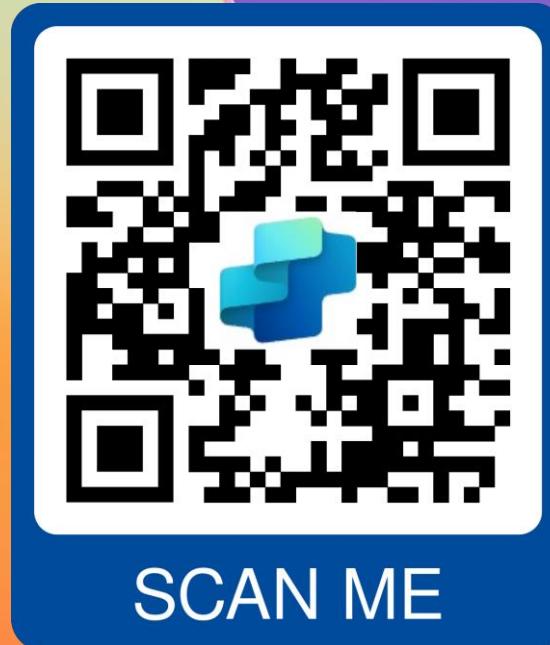
Dewain Robinson

Principal PM, Copilot Studio



Matt Jimison

Microsoft MVP, Business Apps



Whova



Scan this code for the link to download
Whova from the App Store and Google Play.



Whova

Microsoft 365 Community Conference

Join the event app to access:

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

Share your event feedback!

...

1. How likely are you to recommend this event to a friend or colleague?

0	1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	---	----

Not at all likely

Extremely likely

2. What was your favorite part of the event?

Enter your answer

3. What could we have done better to improve the event?

Enter your answer

Visit
aka.ms/M365ConfSurvey

Agenda



SCAN ME

Introduction to Copilot Studio

Walkthrough of the 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: Using the HTTP Node to connect to an API

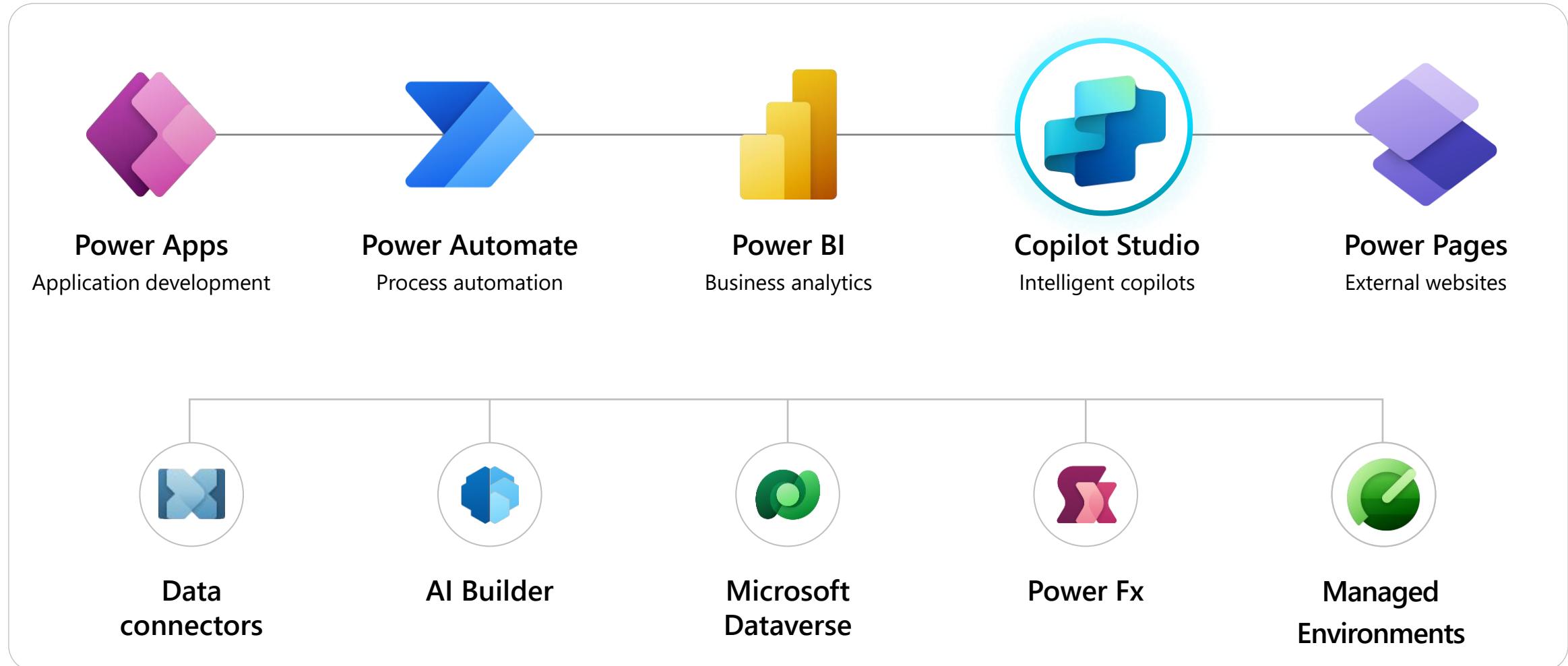
Lab 5: Generative answers and custom instructions

Lab 6: Use dynamic chaining to interact with your APIs

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



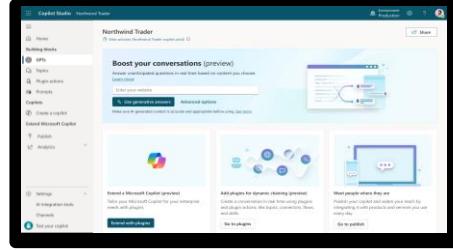
Copilot Studio

Copilot Studio is an end-to-end low code conversational AI platform for **extending Microsoft Copilot** or **building your own copilot** with generative AI and large language models.

- ◆ SaaS / no infrastructure management
- ◆ Conversational orchestration

The screenshot shows the Copilot Studio interface for the 'Northwind Trader' solution. The main header reads 'Copilot Studio Northwind Trader'. On the left, a sidebar lists 'Home', 'Building blocks' (with sub-options like GPTs, Topics, Plugin actions, Prompts, and Copilots), 'Create a copilot', 'Extend Microsoft Copilot' (with options for Publish and Analytics), and 'Settings', 'AI integration tools', 'Channels', and 'Test your copilot'. The main content area features a section titled 'Boost your conversations (preview)' with a sub-section 'Answer unanticipated questions in real time based on content you choose.' It includes a 'Learn more' link, a search bar 'Enter your website', and buttons for 'Use generative answers' and 'Advanced options'. Below this are three cards: 'Extend a Microsoft Copilot (preview)' (described as tailoring a Microsoft Copilot for enterprise needs with plugins), 'Add plugins for dynamic chaining (preview)' (described as creating conversations in real time using plugins and plugin actions like topics, connectors, flows, and skills), and 'Meet people where they are' (described as publishing a copilot to widen reach by integrating it with products and services). Each card has a 'Go to [feature]' button at the bottom.

What's in Copilot Studio?



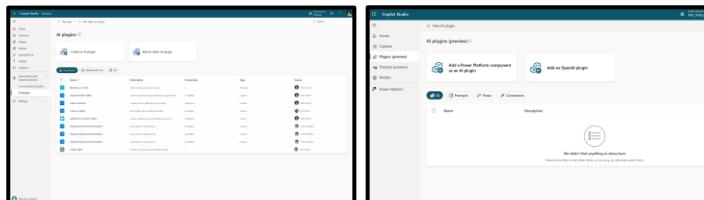
Copilot Building Studio

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

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

Extend Microsoft Copilot

Build Your Own Copilot



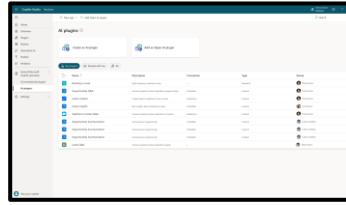
Conversational Plugins



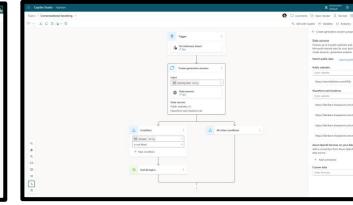
AI Plugins

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

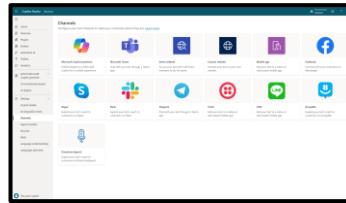
Workspaces



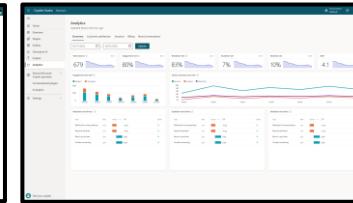
Topics, GPTs & Plugins



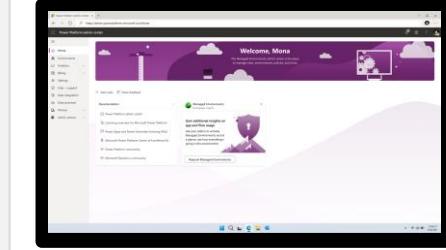
Generative AI



Channel Publishing



Analytics & Insights



Admin Studio

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



Multi-Channel Platform

Dynamics for Customer Service



Voice



Teams



Custom

SMS

Azure
Communication
Services

TeleSign



Twilio

SOCIAL CHANNELS

Apple Messages
for Business

Facebook

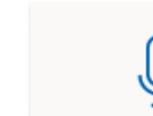
Google's Business
MessagesWhatsApp
through Twilio

Line

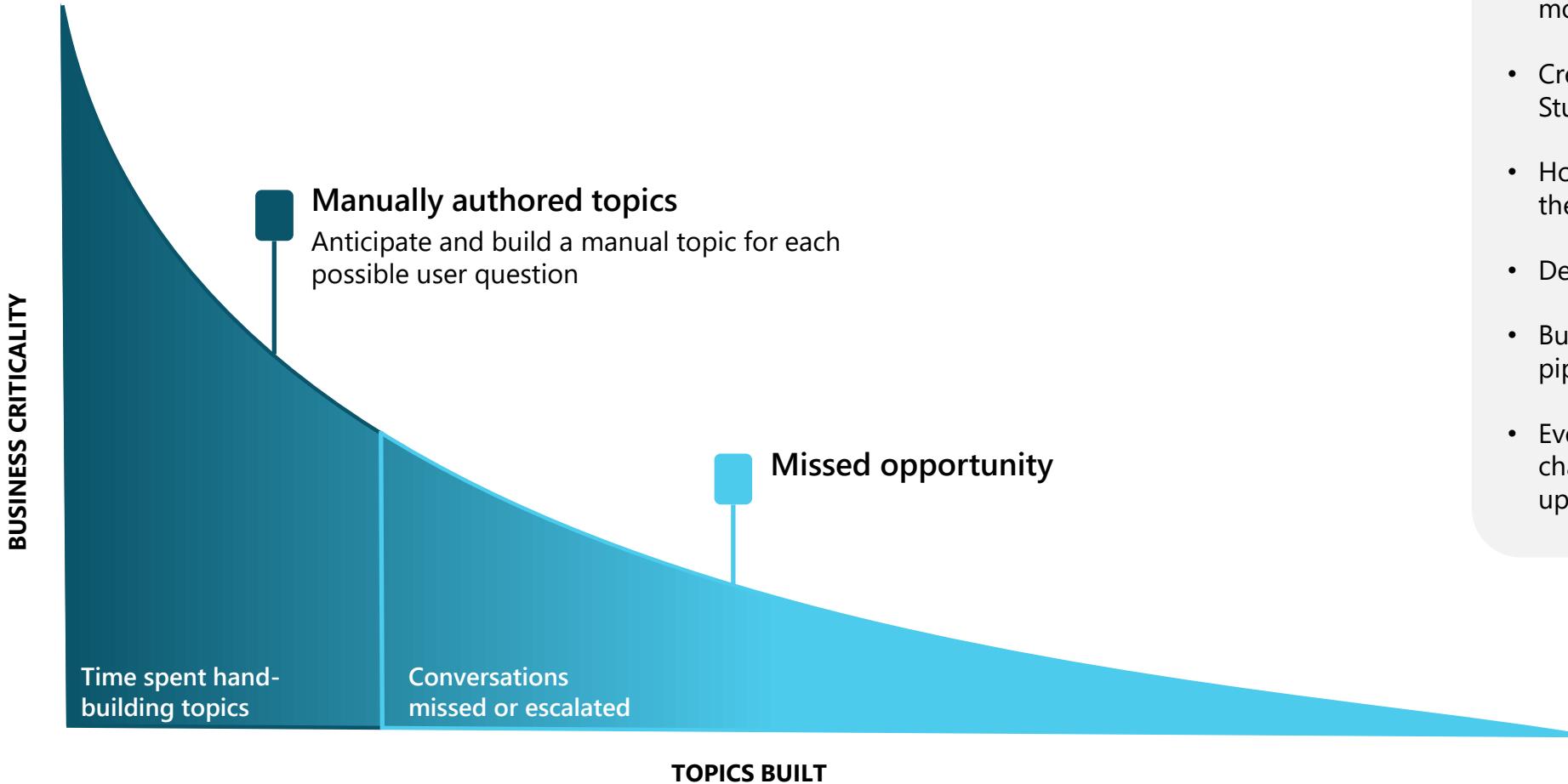


WeChat

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.

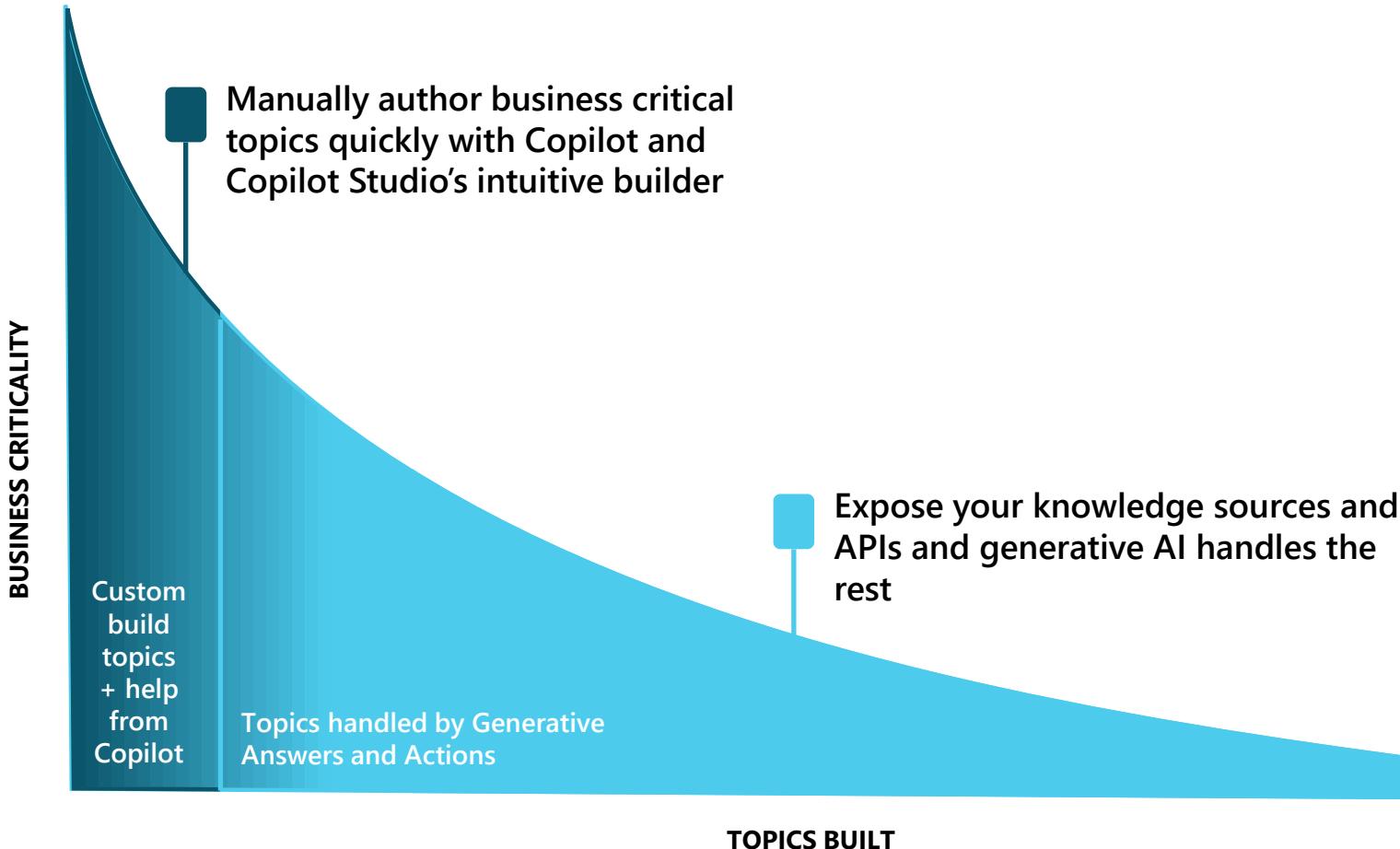
Generative AI is changing bot building



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

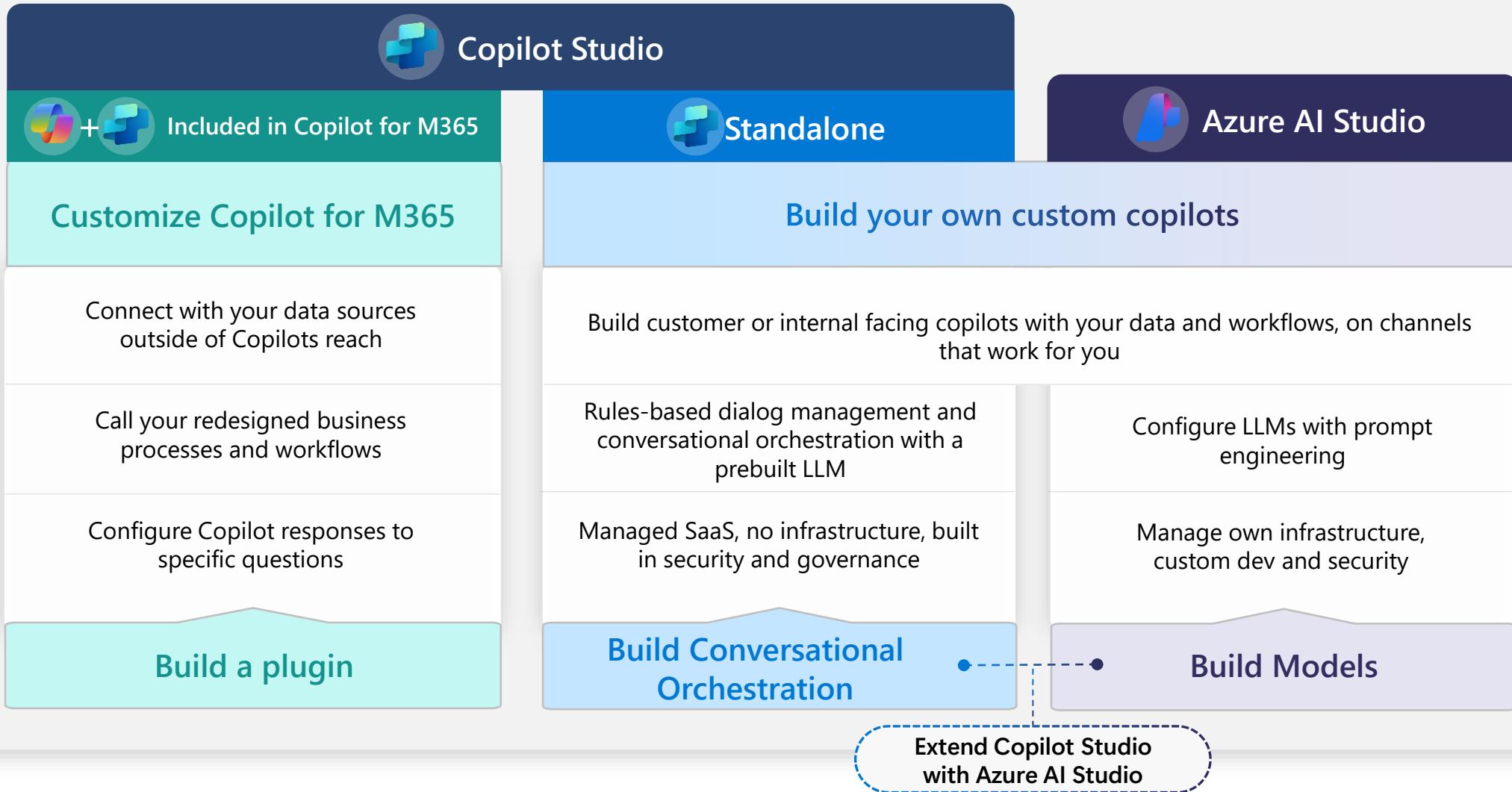
Generative AI is changing bot building



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

Different building journeys for different needs



The end-to-end copilot conversation

1. Authored Topics

Organizations control their critical topics by designing their own specific processes and workflows.

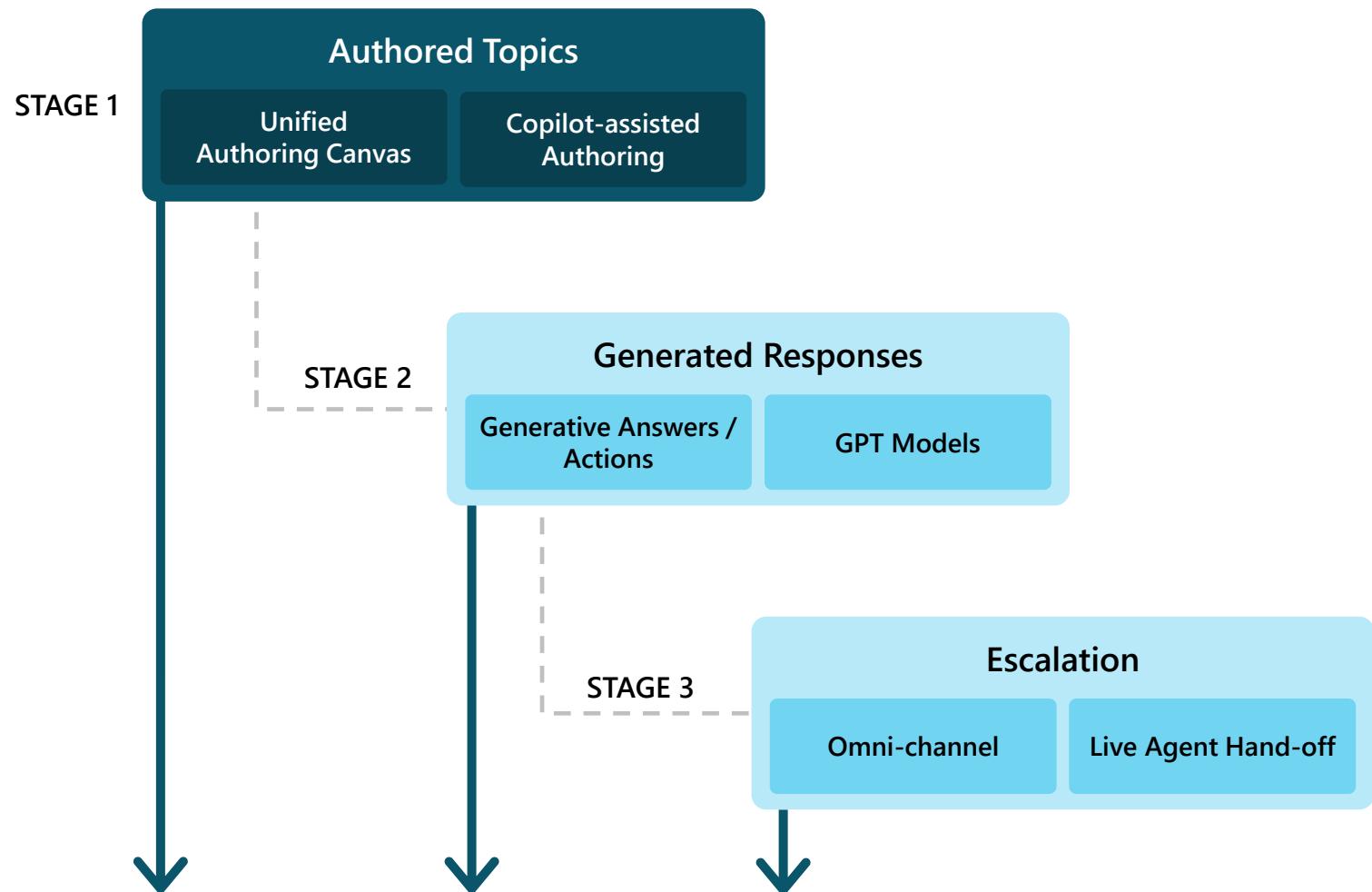
2. Generated Responses

Generative AI answers queries at scale that may be duplicative or less complex.

3. Escalation

If the copilot can't handle the conversation, it will escalate the conversation to a human assistant.

Copilot Studio Dialog Management

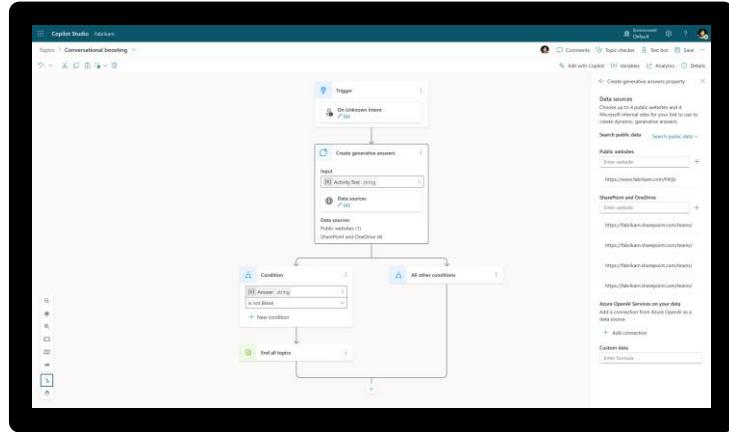


* Will only move to next stage(s) if necessary

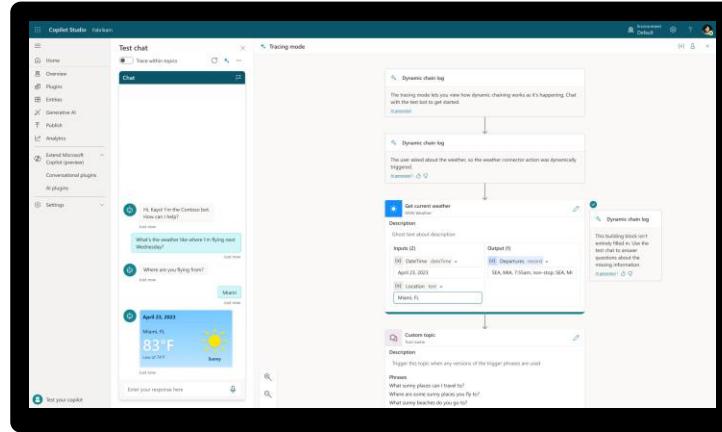
Generative AI in Copilot Studio

Powered by Azure OpenAI Service

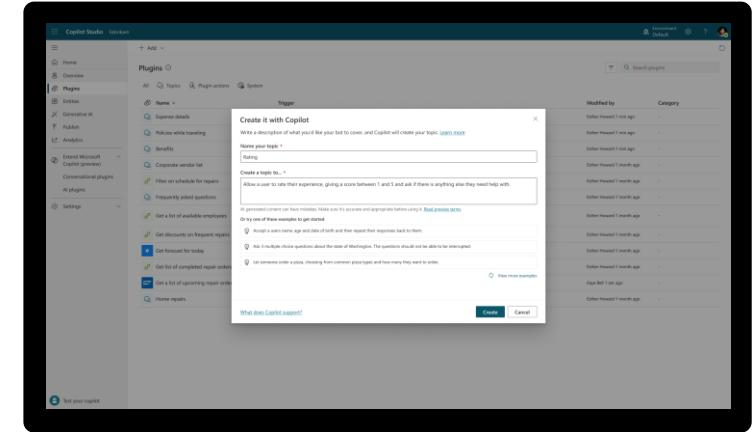
TO ANSWER



TO ACT



TO BUILD



Generative Answers

Dynamically generate multi-turn answers based off an organization's content in real-time.

Generally Available

Generative Actions

Generate dialog and take action through dynamically chaining existing building blocks and plugins.

Public Preview

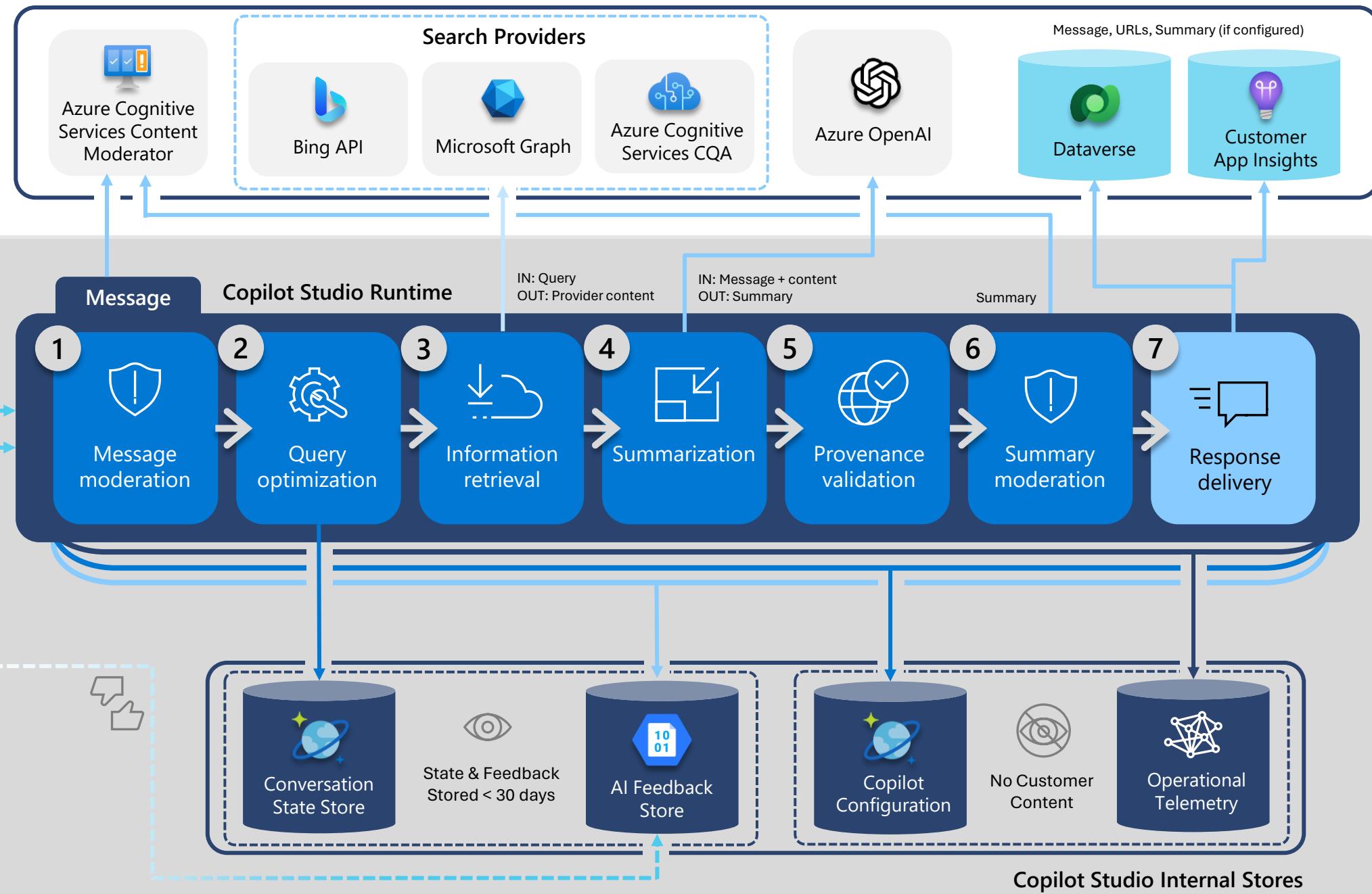
Generative Building

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

Generally Available



Generative Answers Architecture





Copilot Studio Implementation Guide

SCAN ME



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.

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
↓

Response Validation
Azure OpenAI moderation layer
Copilot Studio selected moderation layer
Grounding validation / helicization removal
↓

3

Uploaded documents
{} Custom data

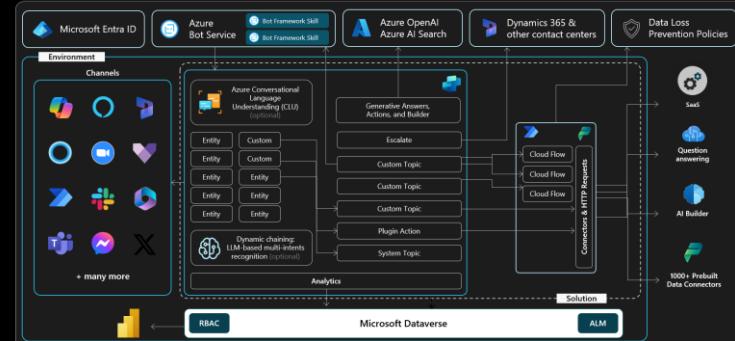
- Website content must be indexed by Bing.
- Bing is a global service, no geo boundary.
- Up to 4 URLs, but the list can be dynamic.
- Max 2 subpages depth (/en/help), no direct pages.
- One configuration ID, but can be set using a formula.
- Azure costs covered by Microsoft.
- Up to 400 URLs, custom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

- Up to a 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.

- Returns results from the limited Azure AI Search index (keyword, semantic, and vector search).
- Not possible to refer 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.

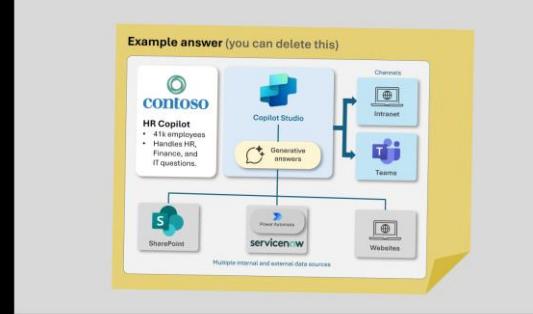
- Allows to first query any data source – through Power Automate or HTTP requests – and then pass the data to generative answers to formulate an answer for the user query.
- Generative answers expects a table variable with 2 properties: Content (typically snippets of relevant content) and ContentLocation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

Walkthrough of Copilot Studio

Try out increased conversational coverage with real-time responses using Azure OpenAI services. [Learn more about Azure OpenAI](#)

X

+ New copilot Import copilot

Copilots

Edit and manage copilots from Copilot Studio.

Search copilots

	Name	Type	Modified by ↓	Last published	Owner
	Microsoft Store	...	Copilot	Jayamali Silva a few seconds ago	Never

List of your copilots

- Copilots
- Overview
- Topics
- Actions (preview)
- Entities
- Analytics
- Publish
- Extend Microsoft Copilot (preview)
- Settings

Test copilot

Tracking: off ...

Chat

Hello, I'm Microsoft Store, 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

Type your message

Microsoft Store

Edit copilot details

JS Share

In this copilot

6 Topics

1 Action (preview)

Add building blocks

Custom topics

Build custom topics and workflows for greater control with predictable scenarios.

Create a topic

Actions (preview)

Connect to external data, call enterprise APIs with connectors, add flows, and more.

Go to Generative AI

Status

Not yet published

Navigation + Test pane

⚡ Enable dynamic chaining with generative actions (preview) to create conversations in real time using your existing plugin actions.

[Go to Generative AI](#)[+ Create](#)

Topics ⓘ

Determine the logic of a dialogue for greater control with predictable scenarios.

 Search custom topics[All](#) [Topics \(6\)](#) [System \(9\)](#)

Name



Computer order



Conversation Start



Conversational boosting



End of Conversation



Escalate



Fallback



Goodbye



Greeting



Multiple Topics Matched



On Error

Trigger



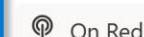
Phrases



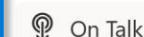
On Conversation Start



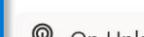
On Unknown Intent



On Redirect



On Talk to Agent



On Unknown Intent



Phrases



Phrases



On Error

Modified by



Jayamali Silva 33 minutes ago



Jayamali Silva 4 hours ago



Jayamali Silva 3 hours ago



Jayamali Silva 4 hours ago



Jayamali Silva 4 hours ago



Jayamali Silva 4 hours ago



Jayamali Silva 4 hours ago



Jayamali Silva 4 hours ago

Topics (custom & system) and their triggers



Test your copilot

⚡ Enable dynamic chaining with generative actions (preview) to create conversations in real time using your existing plugin actions.

[Go to Generative AI](#)[+ Create](#)

Actions (preview)

 Search actions

Dynamically chain actions together to create automatic responses (generative dialogue). Create actions with existing Power Platform components or make new ones. [Learn more](#)

Name	Trigger	Description	Errors	Editing	Modified by
Get current weather	Dynamic chaining (preview)				Jayamali Silva 12 minutes ago

(Plugin) actions

- Copilots
- Overview
- Topics
- Actions (preview) preview
- Entities
- Analytics
- Publish
- Extend Microsoft Copilot (preview) ▼
- Settings ▼



Test your copilot

+ New entity

Entities

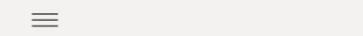
Search entities

Name	Description	Method	Errors	Modified ↓
Order ID	Purchase Order ID	Regex		a few seconds ago
Operation Types	Block, Unblock, Extend	ClosedList		a few seconds ago
Age	Age of a person, place, or thing, extracted as a number	Prebuilt		
Boolean	Positive or negative responses, extracted as a Boolean	Prebuilt		
City	City names, extracted as a string	Prebuilt		
Color	Primary colors and hues on the color spectrum, extracted as a string	Prebuilt		
Continent	Continent names, extracted as a string	Prebuilt		
Country or region	Country and region names, extracted as a string	Prebuilt		
Date	Dates, days of the week, and months relative to a point in time	Prebuilt		
Date and time	Dates, times, days of the week, and months relative to a point in time	Prebuilt		
Date and time without timezone	Dates, times, days of the week, and months relative to a point in time			
Duration	Lengths of time, extracted as a string			
Email	Email addresses, extracted as a string	Prebuilt		

Entities and their types



Test your copilot



Analytics

Updated about one hour ago

Summary

Customer satisfaction

Billing

Boost conversations

3/13/2024

- 3/19/2024

Update

Total sessions

100%

23

Engagement rate

100%

87%

Resolution rate

0%

0%

Escalation rate

100%

5%

Abandon rate

100%

95%

CSAT

0%

0.0

Engagement over time

Engaged Unengaged

0 10

3/13/24 3/14/24 3/15/24 3/16/24 3/17/24 3/18/24 3/19/24

Session outcomes over time

Resolved Escalated Abandoned

100%
50%
0%

3/13/24 3/14/24 3/15/24 3/16/24 3/17/24 3/18/24 3/19/24

Resolution rate drivers

Topic

Rate

Impact

Detail

Schedule appointment for supp...

0%

0%



Escalation rate drivers

Topic

Rate

Impact

Detail

Schedule appointment for support

0%

-0%



Abandon rate drivers

Topic

Rate

Impact

Detail

Schedule appointment for support

100%

2%



Copilot analytics



Test your copilot

- Copilots
- Overview
- Topics
- Actions (preview)
- Entities
- Analytics
- Publish**
- Extend Microsoft Copilot (preview)
- Settings
- Test your copilot

Publish

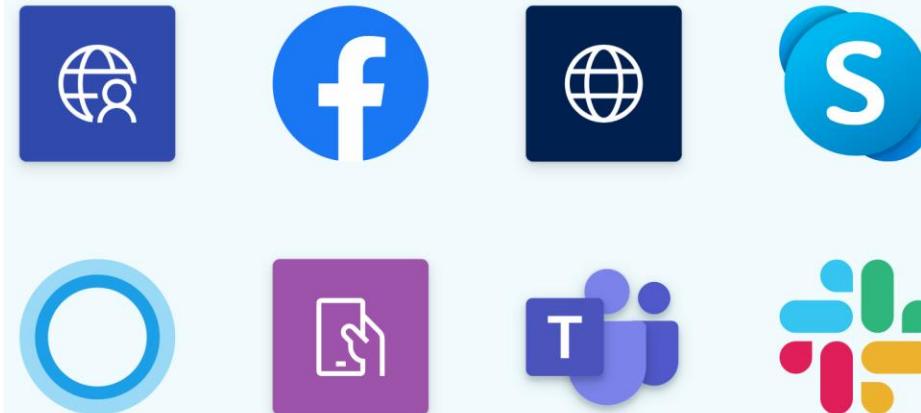
Excited to go live with your copilot and Microsoft Copilot plugins? Publish both in one go. Then, try out your copilot on a website and configure channels to meet your users where they are. [Learn more](#)

Publish

Published copilot details

Your copilot has not been published yet.

Optimize your copilot



Publish

Configure channels

Set up channels for your copilot. Check this page frequently to see updates on your progress.

See how your copilot is doing

Your activated copilot collects data to help you make it better. Check the health

❖ Enable dynamic chaining with generative actions (preview) to create conversations in real time using your existing plugin actions.

[Go to Generative AI](#)[+ Add conversational plugin](#)

Conversational plugins (preview)

Extend your Microsoft Copilot with these topics. Microsoft Copilot conversational plugins don't support rich text formatting, multi-turn interactions, or analytics. [Learn more](#)

 Search custom topics

No conversational plugins here.

[Add a conversational plugin](#)

M365 Copilot Conversational Plugins

[Copilots](#)[Overview](#)[Topics](#)[Actions \(preview\)](#)[Entities](#)[Analytics](#)[Publish](#)[Extend Microsoft Copilot \(preview\)](#)[Conversational plugins](#)[AI plugins](#)[Settings](#)[Test your copilot](#)

[+ New AI plugin](#)

Search

There may be some delay in newly created plugins before they appear on this page.

[Learn more](#)

AI plugins (preview)

Extend your Microsoft Copilot with these Prompt plugins. Microsoft Copilot plugins can take time to show up inside of Microsoft Copilot. [Learn more](#)



Add a Power Platform component
as an AI plugin

	Name	Description	Type
<p> No plugins yet</p> <p>This is where your plugins will live. Create an AI plugin to get started.</p> <p>Learn more</p> <p>+ New AI plugin</p>			

AI Plugins (AI Builder)

Your copilot is not yet published. In order to use your copilot successfully go to the publish page and click publish.

[Go to the publish page](#)

Save Reset Export Delete

Copilot details

[General](#) [Advanced](#)

Your copilot's name and appearance will be applied to your web chat controls and all configured channels. To customize the copilot's look for specific integrations, go to [Channels](#). [Learn more](#)

My copilot's name *

Microsoft Store

[View Solution \(Chatbot Summit\)](#) ⓘ

Icon *

Your copilot's name and icon appear on chat controls across all configured channels. Go to [Channels](#) to customize each individually.



[Change icon](#)

Used to represent the copilot inside the chat canvas. Icon should be in PNG format and less than 100x100 pixels in size.

Copilot details



[Test your copilot](#)

ⓘ Your copilot is not yet published. In order to use your copilot successfully go to the publish page and click publish.

Go to the publish page

Save Reset Export Delete

Copilot details

General Advanced

Application Insights

Automatically send telemetry for your copilot into an Application Insights resource. You can also log custom telemetry events from within your topics. [Learn more](#)

Connection string

Provide the connection string for your Application Insights resource.

Enter your connection string

[Where can I find my connection string?](#)

Advanced options

Log activities ⓘ

Log sensitive Activity properties ⓘ

Log node actions ⓘ

Channels

Customer engagement hub

Test your copilot

Metadata

Metadata holds all the information to uniquely identify your copilot and its endpoint used for calling your copilot or using your copilot in external scenarios. [Learn more](#)

Advanced settings

Environment ID



AI Integration tools

Take advantage of the power of the Microsoft Conversational AI stack including integrations with Azure AI Studio and Azure Services to build powerful experiences.



Azure Cognitive Service for Language

Want to reuse an existing conversational language understanding (CLU) model in your copilot? Use CLU instead of Copilot Studio's native language understanding.

[Learn more](#)

AI models from Azure Open AI

Using Azure Open AI on your data, you can ground your AI model in your content, then use it as a data source within Generative Answers to answer user's questions.

[Learn more](#)

Copilot SDK

With the Copilot SDK you can extend your copilot with pro-code capabilities and simplify your migration to Microsoft Copilot Studio through Skills.

[Learn more](#)

Copilots

Overview

Topics

Actions (preview)

Entities

Analytics

Publish

Extend Microsoft Copilot (preview)

Settings

Copilot details

AI integration tools

Generative AI

Channels

Customer engagement hub

Test your copilot

Additional AI extensibility services

- Copilots
- Overview
- Topics
- Actions (preview)
- Entities
- Analytics
- Publish
- Extend Microsoft Copilot (preview) ▾
- Settings ▾
- Copilot details
- AI integration tools
- Generative AI**
- Channels
- Customer engagement hub
- Test your copilot

Save

Generative AI

Generative AI is premium feature and can be enabled or managed by your administrators. [See pricing tiers](#)

Public websites & Sharepoint sources

Enter your website Add

Websites	Data source
https://www.microsoft.com/en-us/	... Public website

Upload a document

Upload a document to power real-time responses to users. The document will be stored securely and used as the data source for automatic responses. Recommend using text-based files. Please note that image, audio, video, and executable files are not supported. [Learn more](#)

File contents available to all users. Uploaded file content is available to anyone chatting with the copilot, regardless of file permissions or access controls.

↑ Drag and drop files here or [click to browse](#)
Up to 3 MB per file

Name	Size
Azure - Compliance Offerings (January...)	1.21 MB

Ready

Generative AI settings

Because you chose Teams Authentication, only Teams channel is available. To use other channels, change your authentication settings. [Go to authentication settings.](#)

Channels

Configure your copilot channels to meet your customers where they are. [Learn more about channels](#)



Microsoft Copilot (preview)

Publish plugins to a Microsoft Copilot for a unified experience.



Microsoft Teams

Chat with your copilot through a Teams app.



Demo website

Try out your copilot and invite team members to do the same.



Custom website

Activate your copilot on your own website.



Mobile app

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



Facebook

Connect with your customers on Messenger.



Skype

Expand your copilot's reach to customers on Skype.



Slack

Expand your copilot's reach to customers on Slack.



Telegram

Expand your copilot's reach to customers on Telegram.



Twilio

Expand your copilot's reach to customers on Twilio.



Line

Expand your copilot's reach to customers on Line.



GroupMe

Expand your copilot's reach to customers on GroupMe.



Direct Line Speech

Expand your copilot's reach to customers on Direct Line Speech.



Email

Expand your copilot's reach to customers on Email.

Channels

Copilots

Overview

Topics

Actions (preview)

Entities

Analytics

Publish

Extend Microsoft Copilot (preview)

Settings

Copilot details

AI integration tools

Generative AI

Channels

Customer engagement hub

Test your copilot

- Copilots
- Overview
- Topics
- Actions (preview)
- Entities
- Analytics
- Publish
- Extend Microsoft Copilot (preview) ▾
- Settings ▾

Copilot details

AI integration tools

Generative AI

Channels

Customer engagement hub

Test your copilot

Customer engagement hub

Connect to a customer engagement app to enable your copilot to hand off a chat session to a live agent or other copilot. [Learn more](#)

**Omnichannel****Genesys****LivePerson****Salesforce****ServiceNow****ZenDesk****Custom engagement hub**

Live agent handoff integrations

Actions (preview)

Entities

Analytics

Publish

Extend Microsoft Copilot (preview) ▾

Settings ^

Copilot details

AI integration tools

Generative AI

Channels

Customer engagement hub

Security

Skills

Language understanding

Languages



Test your copilot

Security

Set up additional security measures for the copilot and your users.



Sharing

Invite people to collaborate on your copilot.



Authentication

Verify a user's identity during a chat.



Web channel security

Review other enhanced security options.



Allowlist

Let other copilots call your copilot as a skill.

Security & authentication settings

Actions (preview)

Save Refresh

Entities

Analytics

Publish

Extend Microsoft Copilot (preview)

Settings

Copilot details

AI integration tools

Generative AI

Channels

Customer engagement hub

Security

Skills

Language understanding

Languages



Test your copilot

Language

Customize your copilot's language settings. Review [supplemental terms and conditions](#) to learn more about features in preview.

Natural language understanding



Azure Cognitive Service for Language

Want to reuse an existing Conversational language understanding (CLU) model? You can use CLU in place of the native Microsoft Copilot Studio NLU.

Learn more

[Manage connections in Power Apps](#)

Custom NLU capabilities

Actions (preview)

Entities

Analytics

Publish

Extend Microsoft Copilot (preview) ▾

Settings ▾

Copilot details

AI integration tools

Generative AI

Channels

Customer engagement hub

Security

Skills

Language understanding

Languages



Test your copilot

Languages

Add languages and customize your copilot's voice per language.

Primary language

English (United States) (en-US)

Add languages

Add more languages for localization

+ Add Languages

No additional languages

Add Languages

Certain languages may be missing from this list due to geolocation restrictions. [Learn more](#)

Search

- Chinese (Simplified) (zh-CN)
- Chinese (Traditional) (zh-TW)
- Czech (Czech Republic) (cs-CZ)
- Danish (Denmark) (da-DK)
- Dutch (Netherlands) (nl-NL)
- Finnish (Finland) (fi-FI)
- French (France) (fr-FR)
- German (Germany) (de-DE)
- Greek (Greece) (el-GR)
- Hindi (India) (hi-IN)
- Indonesian (Indonesia) (id-ID)
- Italian (Italy) (it-IT)
- Japanese (Japan) (ja-JP)
- Korean (Korea) (ko-KR)
- Norwegian Bokmål (Norway) (nb-NO)

Multi-language capabilities

Add Languages

Cancel

Get Started

Go to: aka.ms/MCSM365Conf



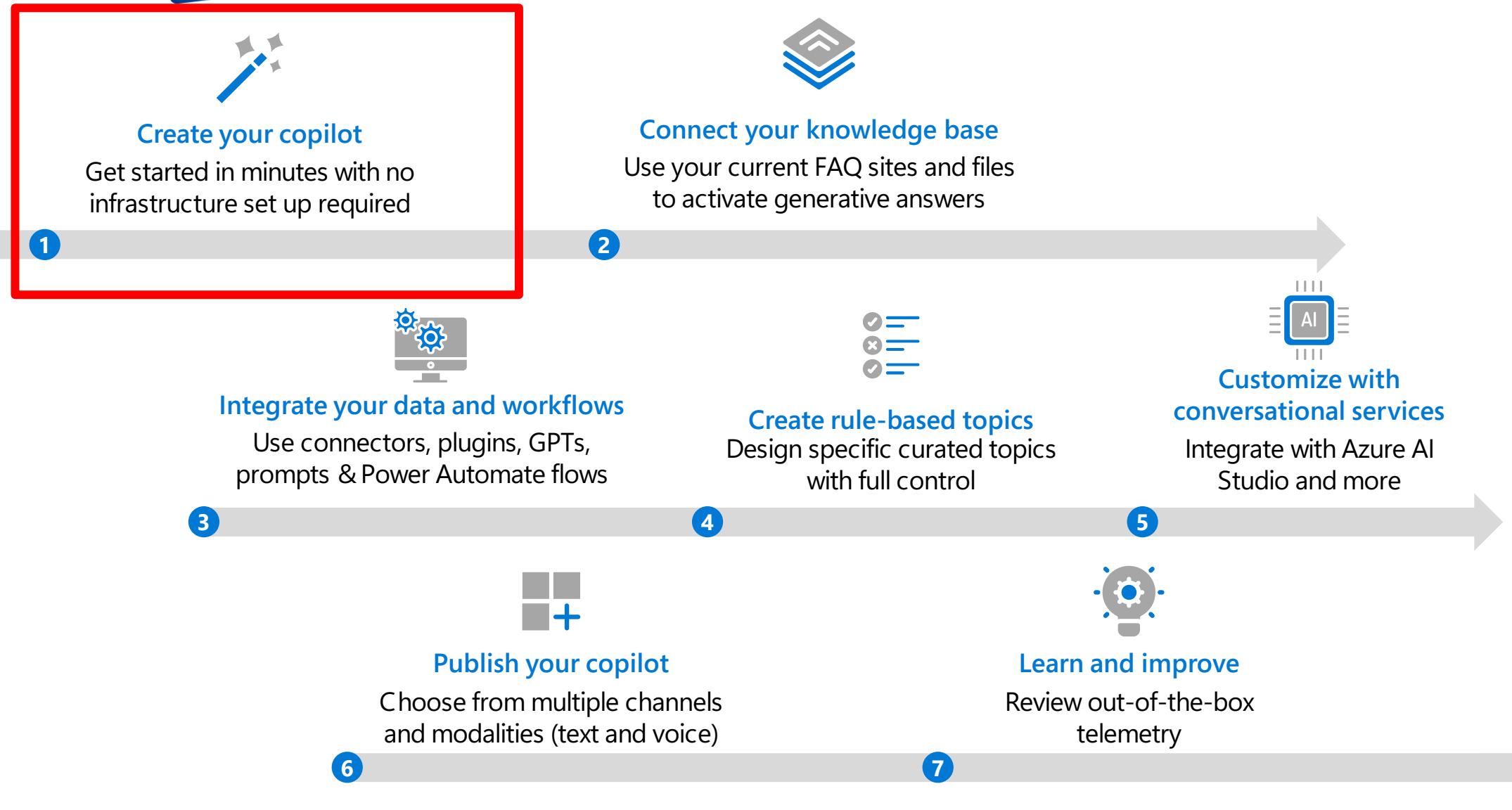
THEN:

1. Download and unzip the lab files locally.
2. Using the provided credentials, log in aka.ms/CopilotStudioStart

Lab 01: Create your first copilot in Microsoft Copilot Studio



Build automated conversations with ease



Lab time!

Lab 02: Authoring 101 writing in unified authoring



Build automated conversations with ease



Create your copilot

Get started in minutes with no infrastructure set up required



Connect your knowledge base

Use your current FAQ sites and files to activate generative answers

1

2



Integrate your data and workflows

Use connectors, plugins, GPTs, prompts & Power Automate flows

3



Publish your copilot

Choose from multiple channels and modalities (text and voice)



Create rule-based topics

Design specific curated topics with full control

4



Customize with conversational services

Integrate with Azure AI Studio and more

5



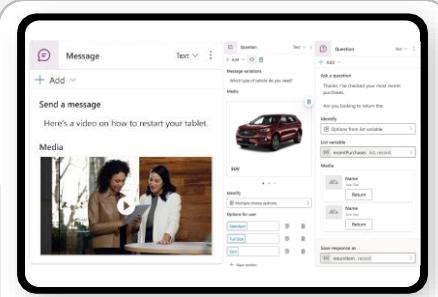
Learn and improve

Review out-of-the-box telemetry

7



Unified Authoring Canvas



Rich Responses

New features including:



Adaptive Cards



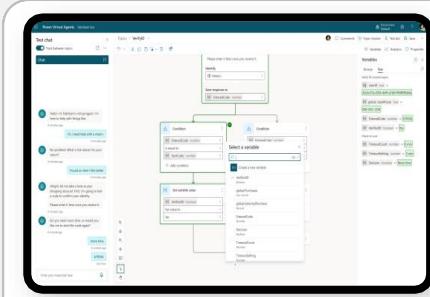
Images



Videos

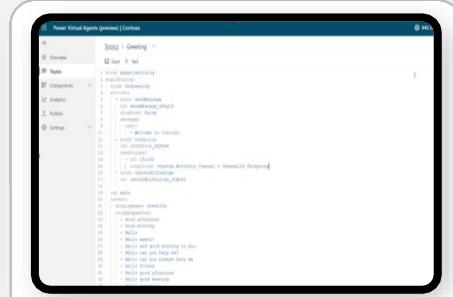


Quick Replies



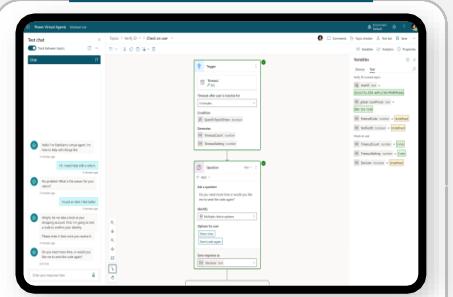
Power FX-based variables system

- 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)



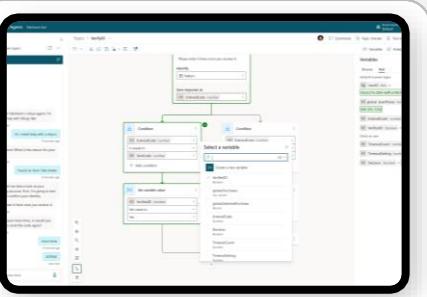
Code side-by-side

- 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

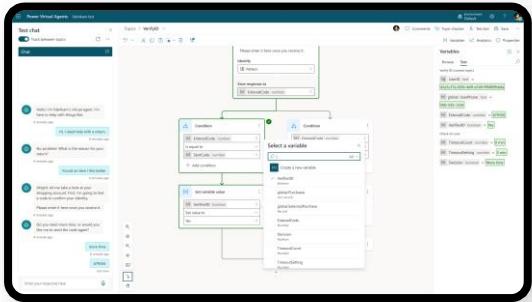


Productivity

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

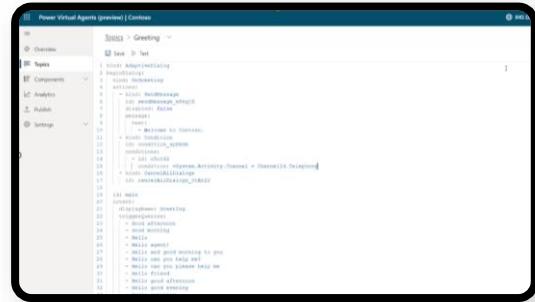
No cliffs extensibility with pro-dev capabilities

Best in class pro-dev tooling to extend and customize



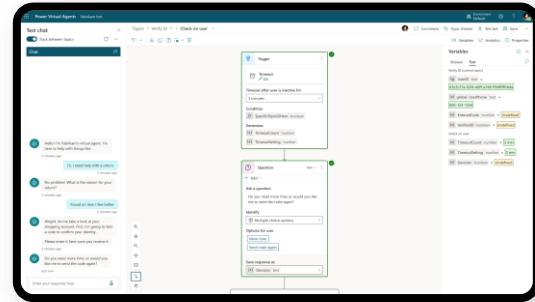
Data & Logic Manipulation

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.



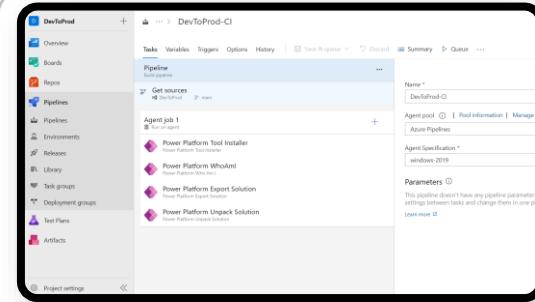
Effortlessly Switch into Code

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

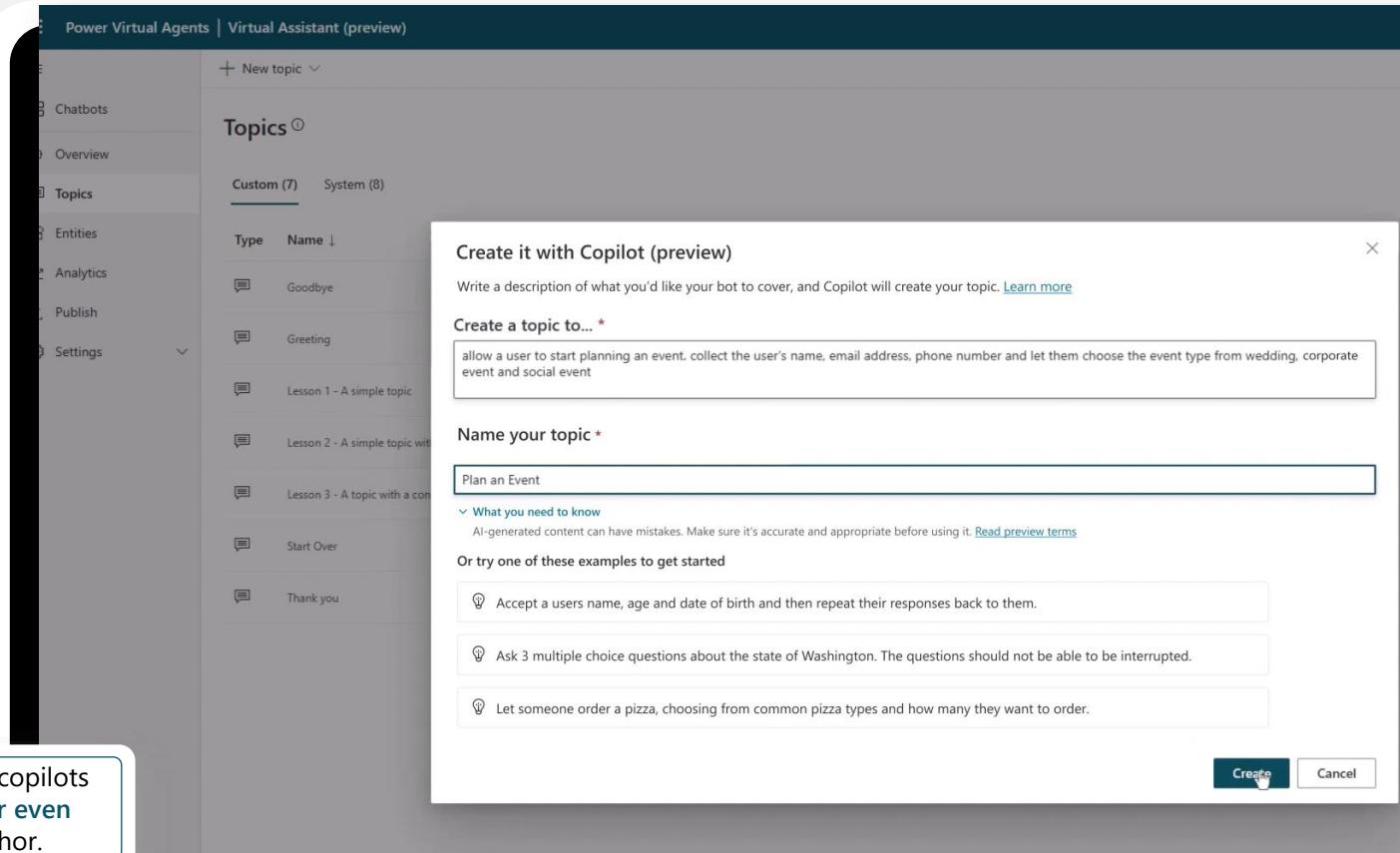
Implement application lifecycle management (ALM) with Power Platform Build Tools in Azure DevOps and automate continuous build, test, and deployment of Power Virtual Agents solutions.

Copilot for Copilot Studio

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

Assisted authoring for:

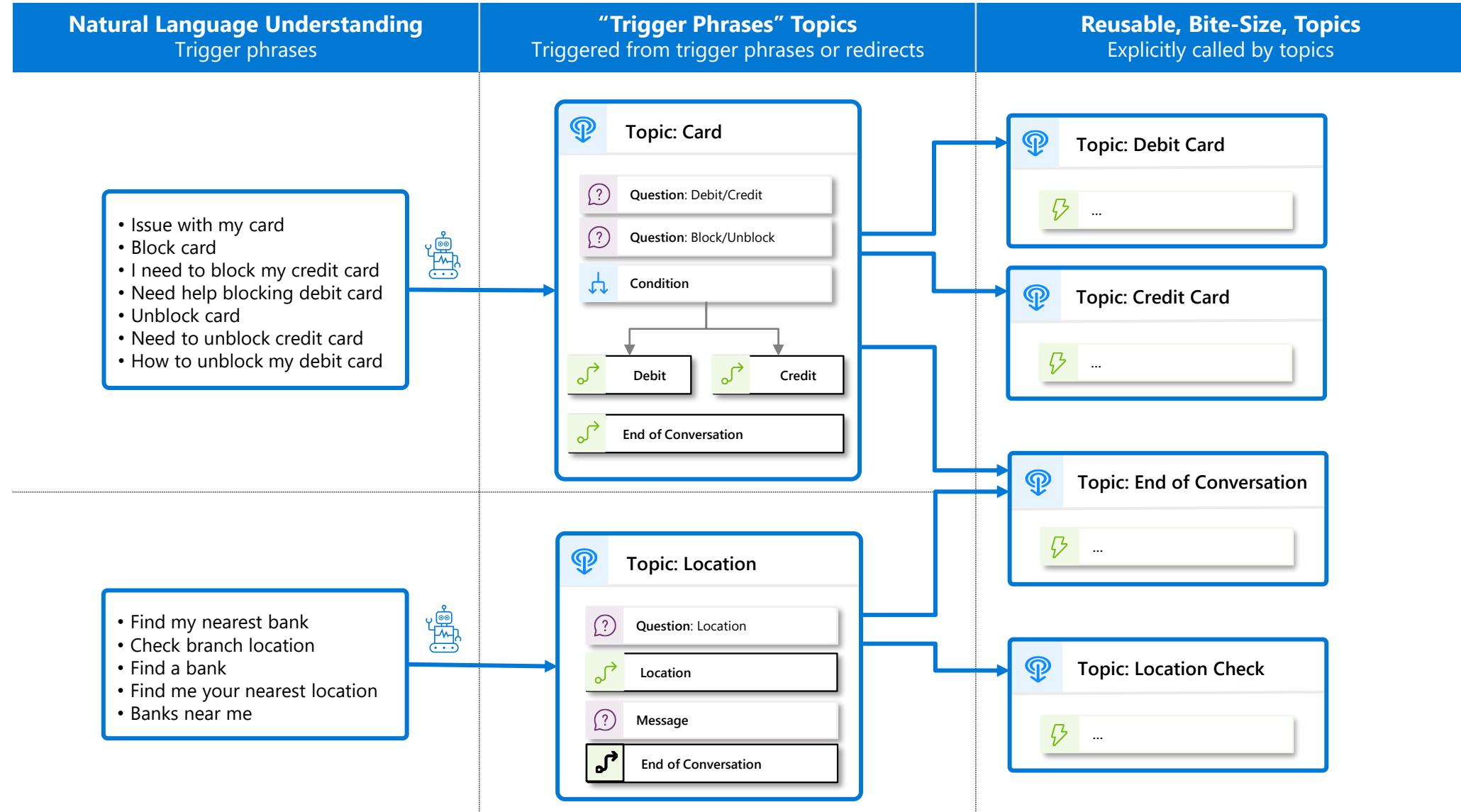
- Topic creation
 - Topic iteration
 - Response generation
 - Adaptive Card generation
 - Topic improvement suggestions
 - Suggested trigger phrases, topic names, topic descriptions
 - Transcript generation
 - Copilot creation
 - Topic suggestions
- Azure bots take **months** to author → Copilots took **days** to author → Prompt-authored copilots will take **hours or even minutes** to author.



Generally Available (USA)

Lab time!

Disambiguation with topic design



Natural language understanding

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

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 **Generative Answers** 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 Cognitive Service 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 Generative Answers 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 Power Automate flows and HTTP calls for your copilot



Build automated conversations with ease



Create your copilot

Get started in minutes with no infrastructure set up required



Connect your knowledge base

Use your current FAQ sites and files to activate generative answers

1

2



Integrate your data and workflows

Use connectors, plugins, GPTs, prompts & Power Automate flows

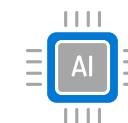
3



Create rule-based topics

Design specific curated topics with full control

4



Customize with conversational services

Integrate with Azure AI Studio and more

5



Publish your copilot

Choose from multiple channels and modalities (text and voice)

6



Learn and improve

Review out-of-the-box telemetry

7

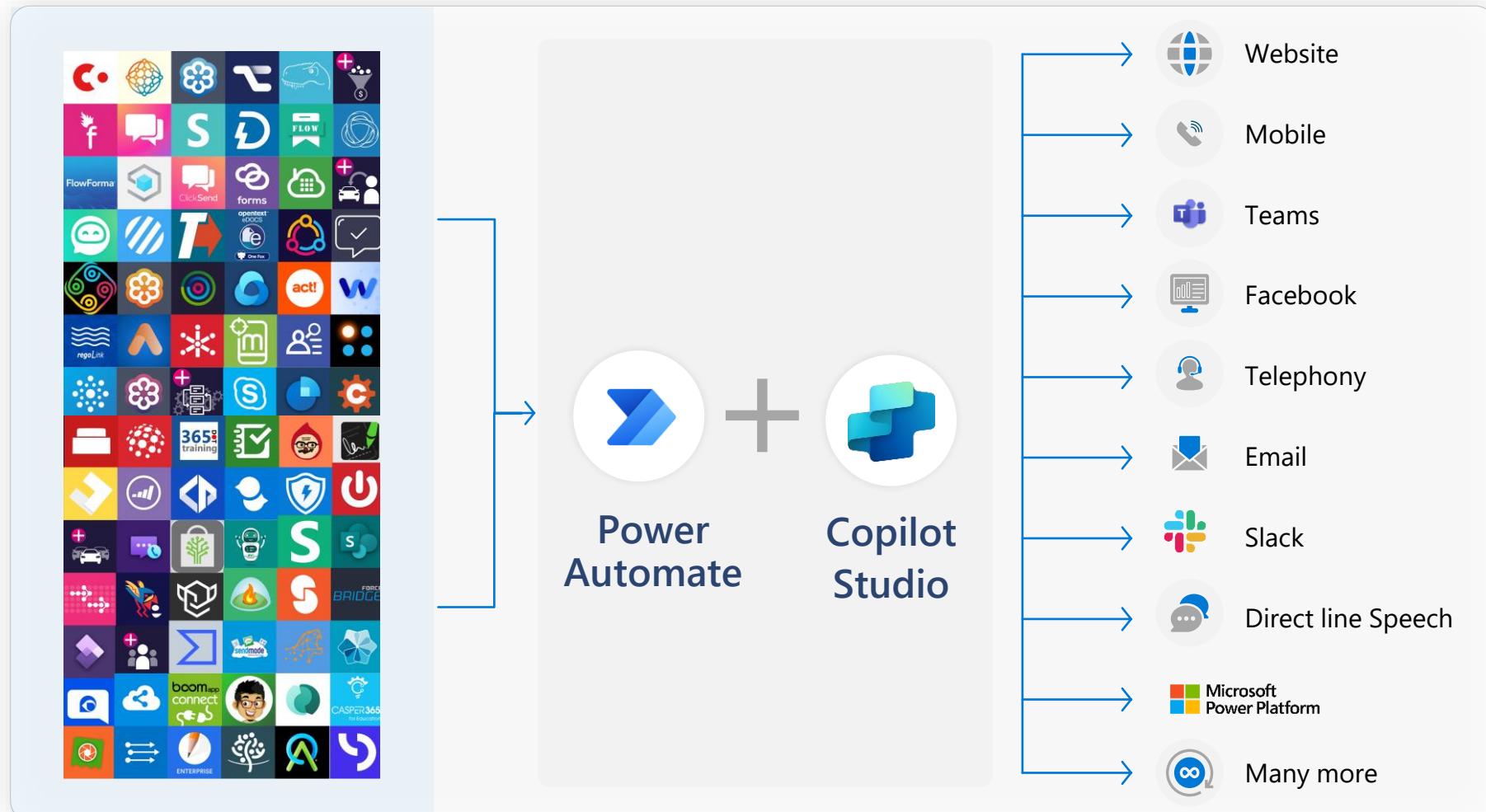


Integration patterns considerations

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

Power Automate and Connectors

- Power Automate including in 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 triggered from Copilot Studio must execute quickly so that the user doesn't have to wait too long for the copilot to answer.
- Cloud flows triggered from Copilot Studio have a maximum of 100 seconds to return to Copilot Studio before they time out.
- You can make HTTP requests directly from Copilot Studio, to avoid invoking cloud flows and trim a few milliseconds.



1200+ prebuilt data connectors

Lab time!

Lab 04: Using the HTTP Node to connect to an API

Lab time!

Lab 05: Generative Answers and Custom Instructions



Build automated conversations with ease



Create your copilot

Get started in minutes with no infrastructure set up required

1



Integrate your data and workflows

Use connectors, plugins, GPTs, prompts & Power Automate flows

3

2



Connect your knowledge base

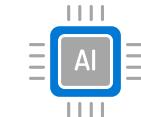
Use your current FAQ sites and files to activate generative answers



Create rule-based topics

Design specific curated topics with full control

4



Customize with conversational services

Integrate with Azure AI Studio and more

5



Publish your copilot

Choose from multiple channels and modalities (text and voice)

6



Learn and improve

Review out-of-the-box telemetry

7

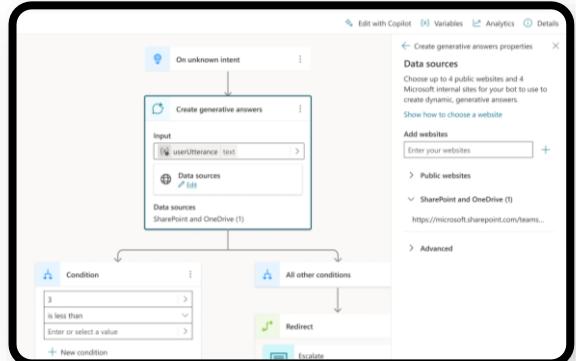


Generative Answers

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



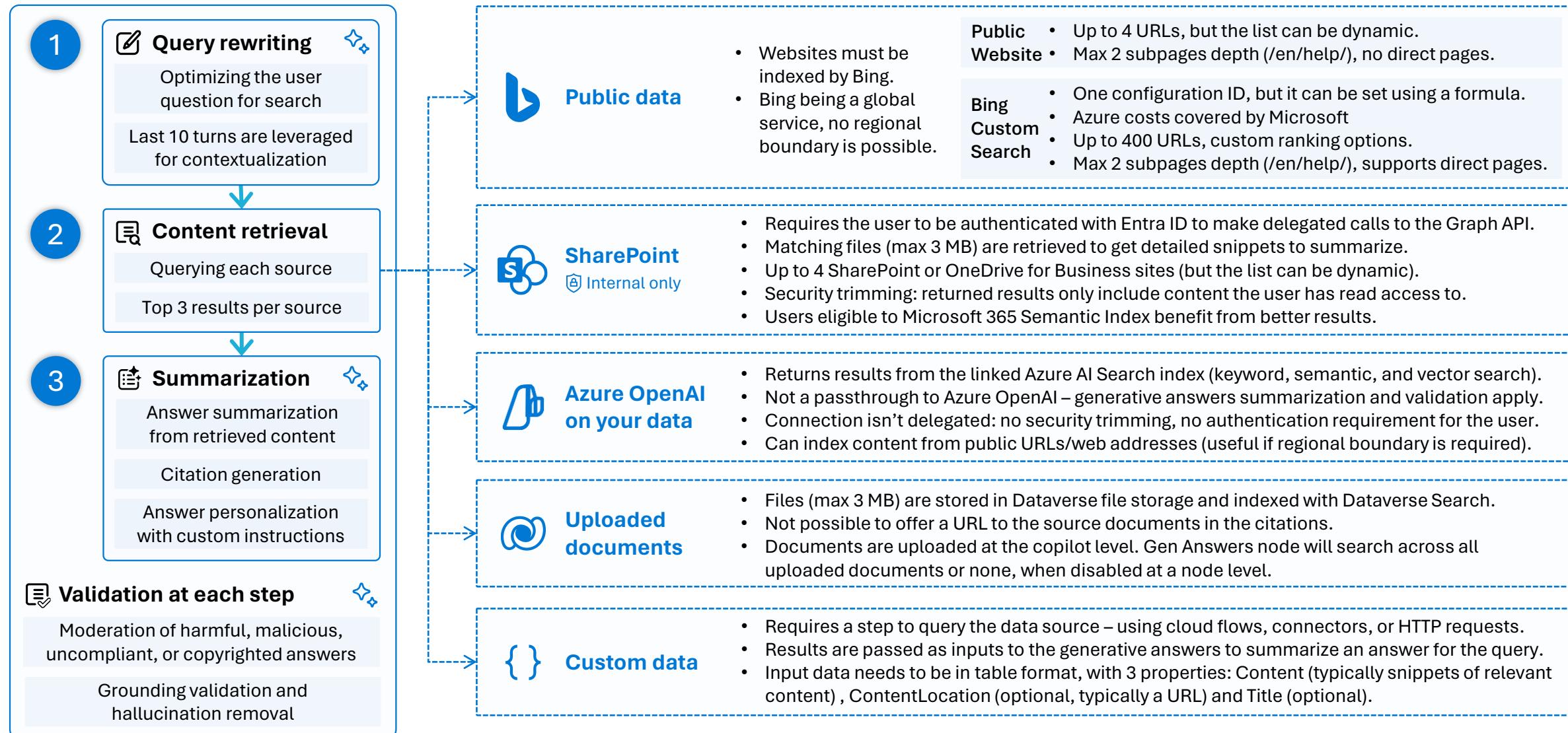
The screenshot shows the 'Power Virtual Agents' interface with the 'Royal Caribbean bot' selected. On the left, a sidebar lists 'Chatbots', 'Overview', 'Create', 'Bot tools', 'Data objects', 'Publish', 'Analytics', 'Settings', 'Bot details', 'Channels', 'Agent transfers', 'Security', and 'AI capabilities'. The 'AI capabilities' section is currently active.

In the main area, a 'Test chat' window is open, showing a conversation between a user and the bot. The user asks 'What beverage packages are available?' and the bot responds with a link to the Royal Caribbean website: <https://www.royalcaribbean.com/booked/beverage-packages>. The bot also mentions finding more about pre-cruise and onboard packages at <https://www.royalcaribbean.com/faqs/topics/beverage-package>.

To the right, the 'AI capabilities' configuration pane is visible. It includes sections for 'Save', 'AI capabilities', 'Boost conversational coverage', 'How to choose a website', 'Websites' (listing three public websites), 'Upload a document (Coming soon)', 'Advanced configuration', and 'Further customization'. At the bottom right, a call-to-action button says 'Try now at aka.ms/pvademo'.

Public Preview

Generative answers processes and considerations



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 06: Using Generative AI to call APIs with Actions



Build automated conversations with ease



Create your copilot

Get started in minutes with no infrastructure set up required



Connect your knowledge base

Use your current FAQ sites and files to activate generative answers

1

2



Integrate your data and workflows

Use connectors, plugins, GPTs, prompts & Power Automate flows

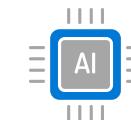
3



Create rule-based topics

Design specific curated topics with full control

4



Customize with conversational services

Integrate with Azure AI Studio and more

5



Publish your copilot

Choose from multiple channels and modalities (text and voice)

6



Learn and improve

Review out-of-the-box telemetry

7



Generative actions runtime

Test and trace feature to see it in action

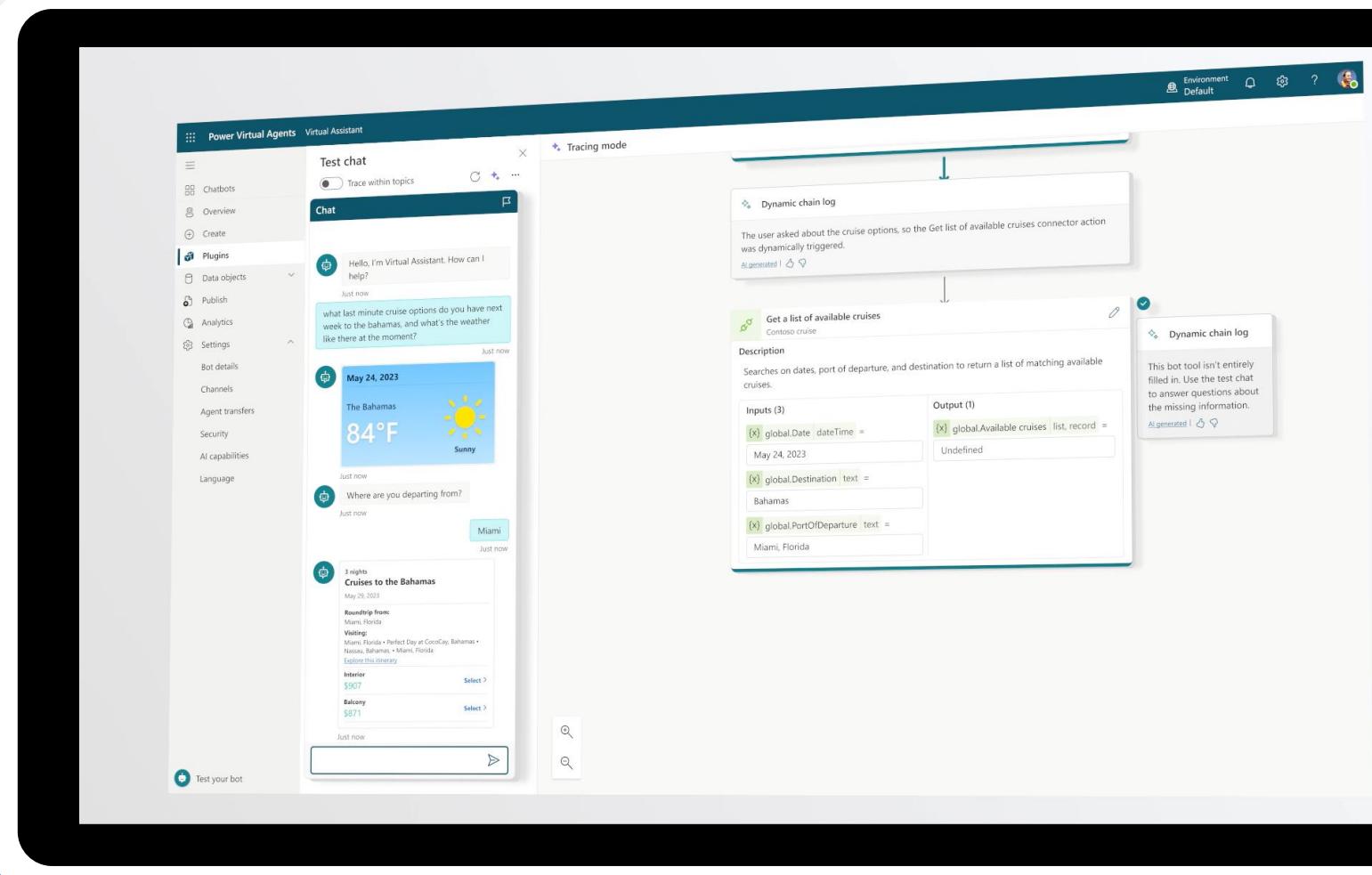
Dynamically chains plugins together to produce actionable customer responses

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

Example shows generative actions calling two APIs (Weather + Cruise APIs) based on request.



Public Preview

Lab time!

Lab 07: Bonus



Build automated conversations with ease



Create your copilot

Get started in minutes with no infrastructure set up required



Connect your knowledge base

Use your current FAQ sites and files to activate generative answers

1

2



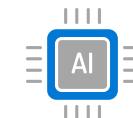
Integrate your data and workflows

Use connectors, plugins, GPTs, prompts & Power Automate flows



Create rule-based topics

Design specific curated topics with full control



Customize with conversational services

Integrate with Azure AI Studio and more

3

4

5



Publish your copilot

Choose from multiple channels and modalities (text and voice)



Learn and improve

Review out-of-the-box telemetry

6

7



Additional activities: publishing your bot

- Change the [Security](#) authentication setting to [No authentication](#)
- [Publish](#) your copilot
- Access the [Demo website](#)

Resources:

- [Configure user authentication](#)
- [Publish a chatbot to various channels](#)

Additional activities: create rich experiences

- Use **Adaptive Cards** to create rich experiences

Resources:

- [Adaptive Cards overview](#)
- <https://adaptivecards.io/designer>
- [Actionable Messages Designer](#)

Additional activities: add data sources

- For **SharePoint**, you can add crm72135.sharepoint.com/sites/HR/. Then, ask questions over documents in your library.
For example, "*What is the Northwind Standard plan?*"
- Upload **files** to your bot, like the Azure compliance offering document available at that location <https://servicetrust.microsoft.com/DocumentPage/7adf2d9e-d7b5-4e71-bad8-713e6a183cf3>.
Once indexed, ask: "*What are Microsoft distinct Azure cloud environments?*"

Resources:

- [Use content on SharePoint or OneDrive for Business for generative answers](#)
- [Use uploaded documents as a generative answers data source](#)

Resources



Copilot Studio Implementation Guide

SCAN ME



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.

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

Uploaded documents

{ } Custom data

Public data

SharePoint

Azure OpenAI on your data

Uploaded documents

{ } Custom data

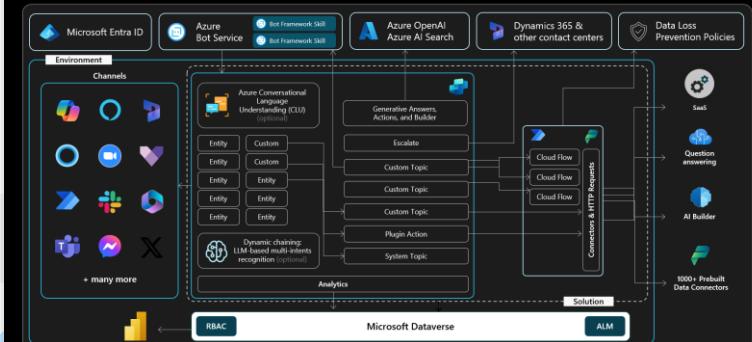
- Website content must be indexed by Bing. Bing is a global service, no geo boundary.
- Up to 4 URLs, but the list can be dynamic.
- Max 2 subpages depth (/en/help), no direct pages.
- One configuration ID, but can be set using a formula.
- Azure costs covered by Microsoft.
- Up to 400 URLs, custom ranking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

- 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.

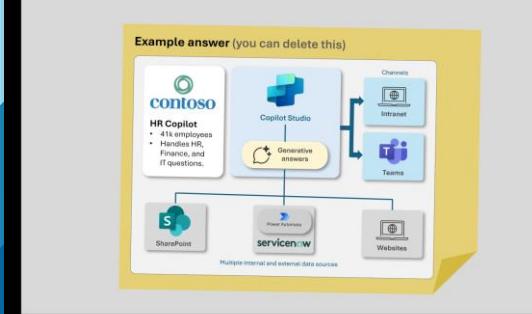
- Allows to first query any data source – through Power Automate or HTTP requests – and then pass the data to generative answers to formulate an answer for the user query.
- Generative answers expects a table variable with 2 properties: Content (typically snippets of relevant content) and ContentLocation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

Resources



Copilot Studio trial

aka.ms/TryCopilotStudio

Copilot Studio website

aka.ms/CopilotStudio

Official Blog

aka.ms/CopilotStudioBlog

Copilot Studio Demo

aka.ms/CopilotStudioDemo

Product documentation

aka.ms/CopilotStudioDocs

Product guidance

aka.ms/CopilotStudioGuidance

Implementation guide

aka.ms/CopilotStudioImplementationGuide

Community

aka.ms/CopilotStudioCommunity

Engage with the best
community in tech...
There's something
for everyone!



aka.ms/MicrosoftCommunity

Ask and answer questions in
the community forums by product and role



CommunityDays.org

Find or host a local event in your area
or to match your interests



Community Lounge Meet Ups

Check Whova for official meetups with user
group leaders, MVPs, Super Users and more!



Meet Speakers & the Product Group

Check Whova for the full schedule of speaker Q&A and
PG meet & greets in the Community Lounge and on
the show floor.

3RD ANNUAL

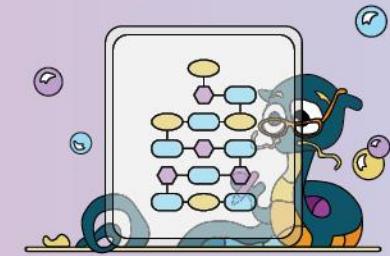


Microsoft Power Platform COMMUNITY CONFERENCE

POWER BI POWER AUTOMATE POWER APPS POWER VIRTUAL AGENTS POWER PAGES

SEPT 18-20, 2024 • MGM GRAND LAS VEGAS, NV

Workshops Sept 16, 17 & 21



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