



# Building your own agile data with Microsoft Power BI

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# Agenda



- Copilot Studio overview (10 mins)
- Understanding language and AI capabilities (20 mins)
- Building custom copilots (60 mins)
  - Design (40 mins)
  - Enhance (10 mins)
  - Manage (10 mins)
- How to plan a custom copilot project (15 min)
- The future: copilots as an agents (15 min)
- Closing (5 mins)

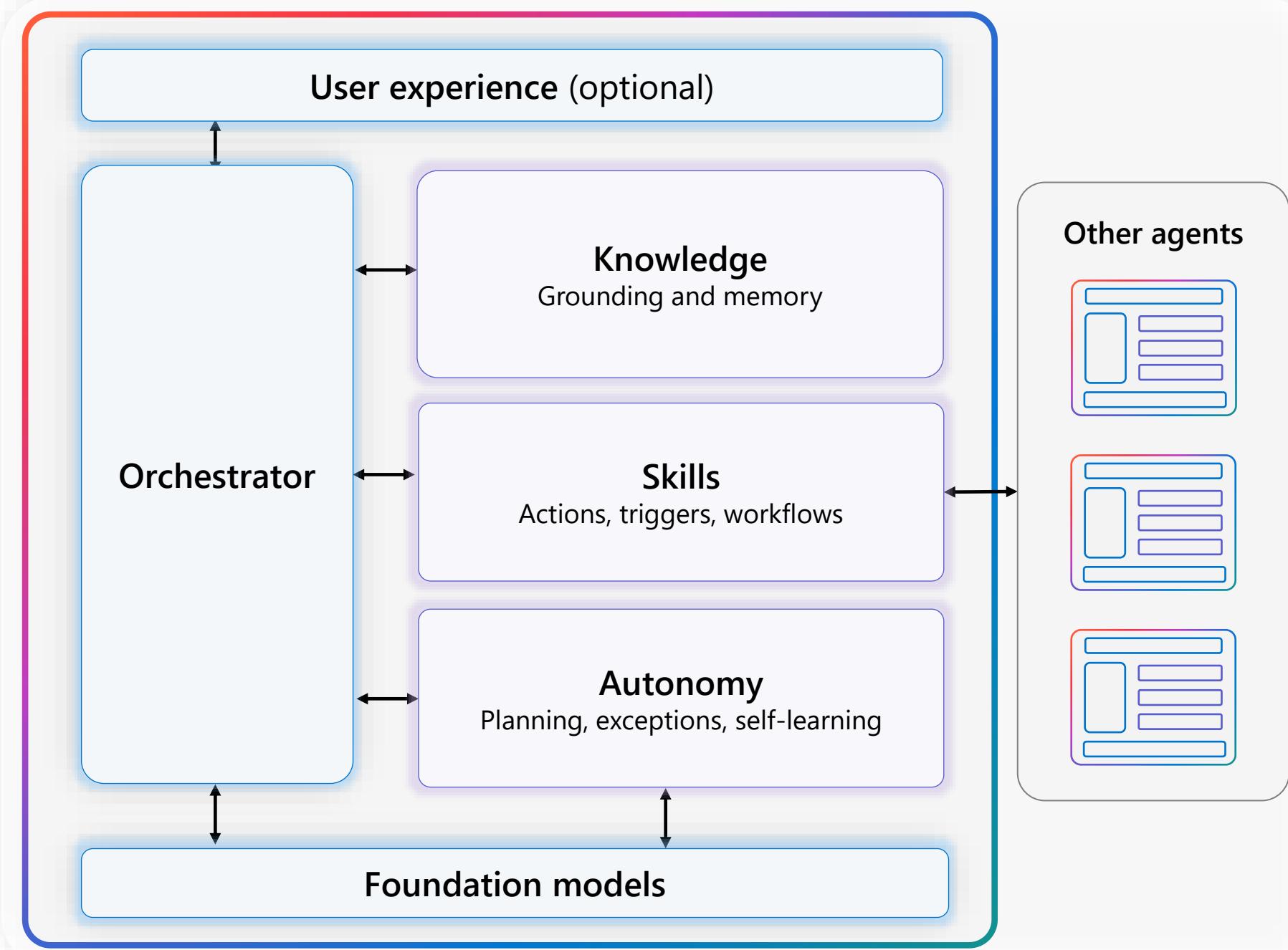




## Copilot Studio overview

# What are **Copilot agents**?

AI assistants designed to automate and execute business processes, working with or for a human.



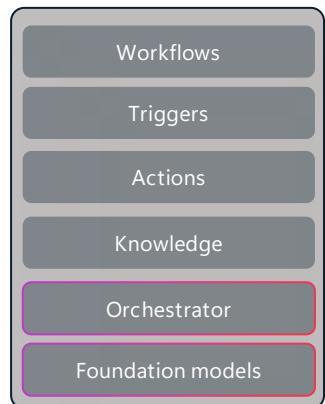
# Types of copilot agents in Copilot Studio

Private preview

## Declarative

Developer declares copilot workflows, actions, knowledge and triggers and Microsoft Copilot runs the orchestration and models

*E.g hosted on the MS Copilot LLM*

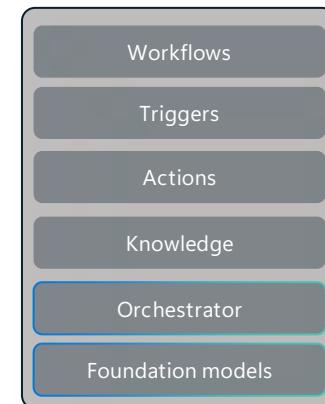


Generally available

## Custom engine

Copilot uses its own orchestration and foundation models

*E.g existing copilots from Copilot Studio*



# Spectrum of Copilot agents

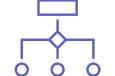
Simple



## Retrieval

Retrieve information from grounding data, reason, summarize, and answer user questions

Generally available



## Task

Take actions when asked, automate workflows, and replace repetitive tasks for users

Generally available



## Autonomous

Operate independently, dynamically plan, orchestrate other agents, learn and escalate

Preview

Advanced

←.....Copilot agents vary in levels of complexity and capabilities depending on your need.....→

# Explore a continuum of solutions

## IT Helpdesk agent

How do I connect to the corporate network?



## Device Refresh agent

Request a new laptop and send approvals via IT Service tool.



## Lead Gen agent

The agent has identified and researched 15 new leads for you to review.



Simple



Advanced

## Project Tracker agent

What is the status of phase 2 for project X and the remaining budget?



## Budget Management agent

Review outstanding open PO's and begin financial planning.



## Customer Support agent

The agent has identified new support issues and triaged to other agents.

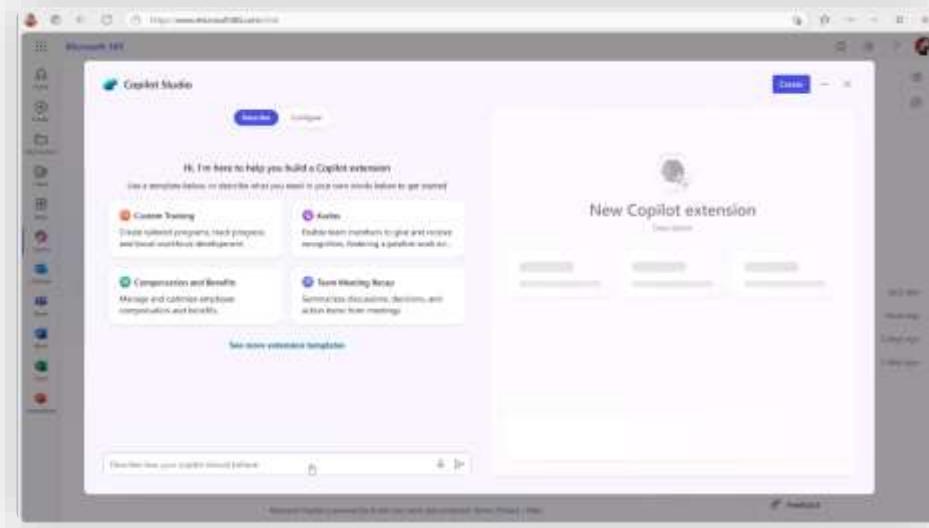




# Copilot Studio

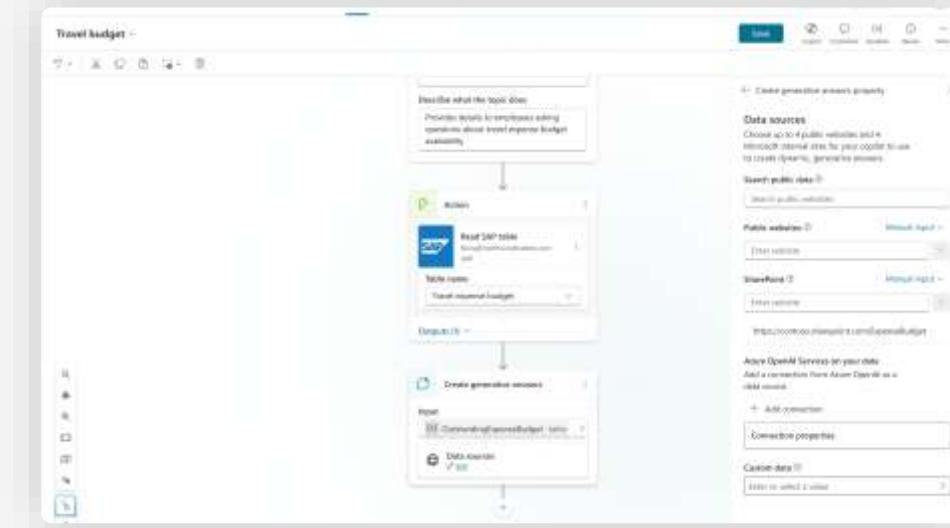
Copilot Studio is the platform to build Copilot agents that  
**extend Microsoft 365 Copilot or operate standalone**

## For End Users



**Copilot Studio agent builder**  
in Microsoft 365 Copilot Business Chat & SharePoint

## For Makers



**Copilot Studio platform**

# Copilot Studio is the platform for Copilot agents

## Deploy and use Copilot agents in any system



### Microsoft 365

Add Copilot agents that give Copilot focused knowledge and new skills.



**Build and customize**

your agents using  
Copilot Studio



### Your applications

Deploy Copilot agents to your website and other line of business applications.



### Dynamics 365

Build Copilot agents that integrate and improve business processes.



### Power Platform

Extend Power Platform with Copilot agents that transform your low code apps and pages.

# Copilot Studio boundaries

The screenshot shows the Copilot Studio interface with a central callout box containing three sections: Content creation, Solution development, and Language model development.

**Extend with Azure when you want...**

- Content creation**  
Creative writing or image generation  
*Ex: Write a poem based on this document.  
Design an image of people playing sports.*
- Solution development**  
Code generation, predictive analytics, research  
*Ex: Write me code to help build a website. What is the average delivery time based on this data.*
- Language model development**  
Create/train custom LLMs directly in Copilot Studio. Available through Azure AI Studio extensibility.

**Copilot Studio** Environment Personal Productivity SA

Home Create Copilots Library ...

Recent Name Copilot for Microsoft 365

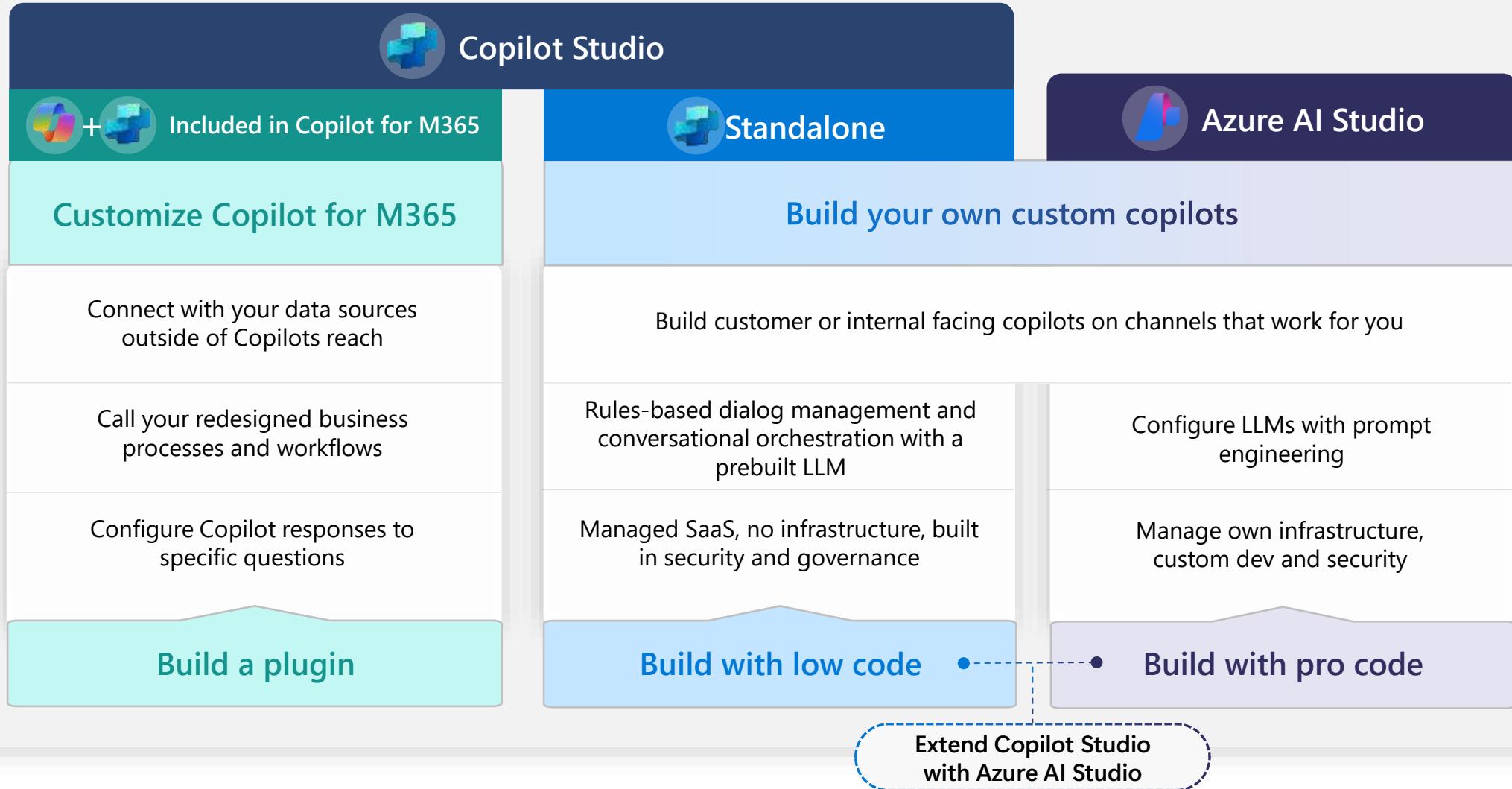
Start with a template Templates are currently a preview feature. See [supplemental terms](#)

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

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

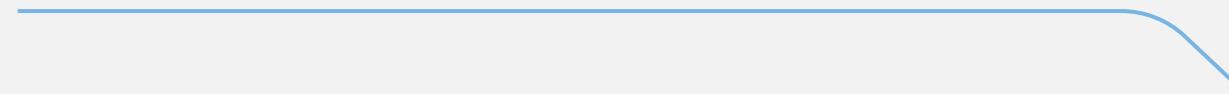
See more Owner See more See more

# Different building journeys for different needs



# Understanding Copilot Studio language and AI capabilities

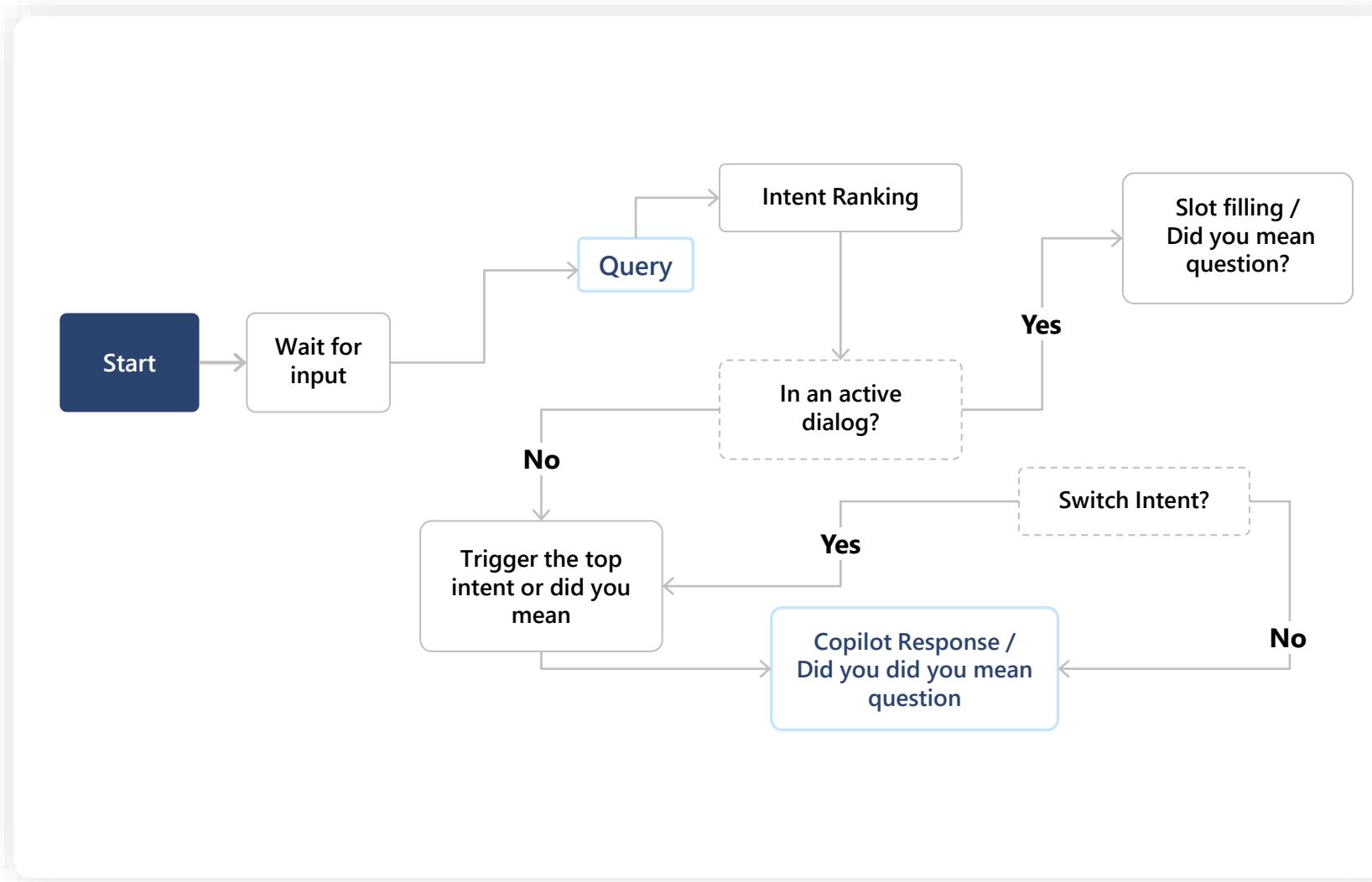
# Language



# Natural language understanding

|   |  Standard NLU model  |  Custom Azure CLU model   |  Dynamic chaining   |
|---|---|--|--|
|    | <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>   |

# Standard NLU model in Copilot Studio



## Fundamentals

- New transformer-based NL model – Dual Transfer Encoder (DTE)
- Enhanced intent triggering with entities
- Slots and entities

## Authoring

- Topic 'confusion' tool
- Multi-turn topic suggestions
- Regex entities

## Continuous Copilot improvements

- Intent triggering auto-improvement from live traffic
- Topic suggestion from live traffic such as URL, CSV, DOCX, PDF
- Proactive slot filling
- User context aware, personal and dynamic conversations

# Standard NLU model in Copilot Studio

## Intent recognition

Define a few trigger phrases that captures the way a customer might ask for help

## Slot-filling

Contextual understanding of what you type and can 'hop' to the appropriate part of the conversation and skip a repetitive question/comment

## Entity recognition

Prebuilt that represent the most used information such as age, colors, numbers, and names and the possibility to create custom entities

# Topic structure

## Creating and designing efficient topics



Topics are discrete conversation paths that, when used together, allow for users to have a conversation with a copilot that feels natural and flows appropriately.



While there's no one size fits all, given how topics can be triggered, it's a good practice to distinguish between:

- ✓ **Topics that will trigger based on user utterances.** These can almost be seen as your entry points topics.  
If you have trigger phrases that overlap multiple topics, consider having a catch-all topic and then redirect to other topics after clarifying questions. With entity extraction and slot filling, clarifying questions can be skipped if already answered.
- ✓ **Topics that will trigger when called from a redirect action, activity or event.**  
These can be called by multiple topics and can have input and output variables. They're ideally reusable, bite-size, topics.
- ✓ **A topic can also be both,** triggered through intent recognition or by an explicit redirect.
- ✓ **Conversational boosting and fallback:** topics that trigger when no matching topic is triggered based on a user query.

# 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.

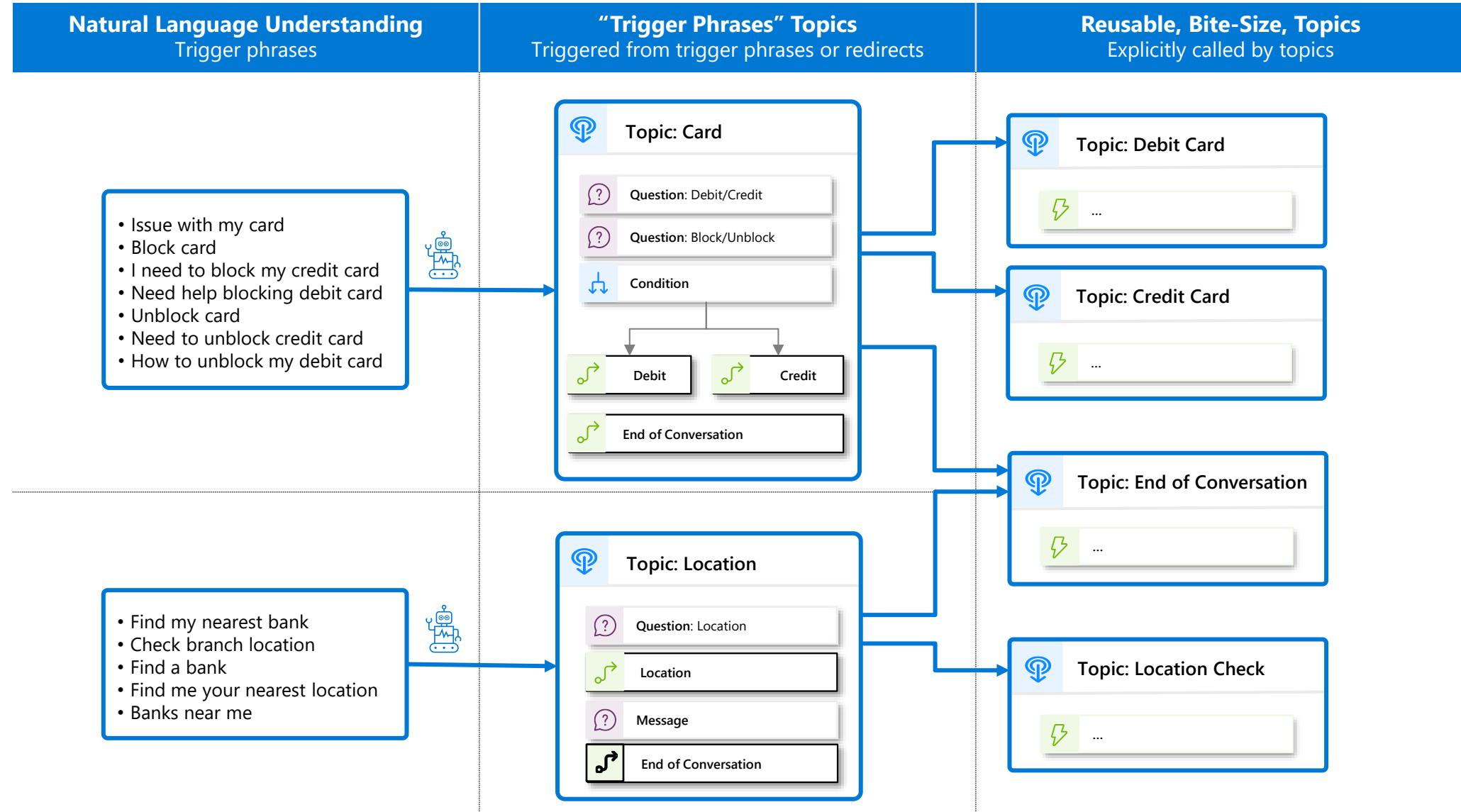
3

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.).

# Disambiguation with topic design



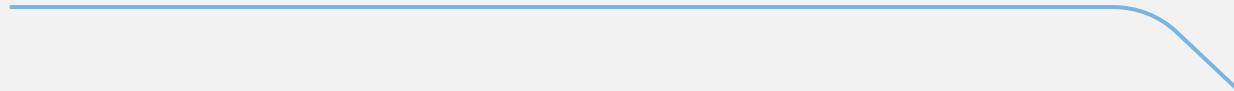
# Choosing your language

## The common approaches are:

1. One copilot per language.
2. One copilot for multiple languages, with translations provided as part of the copilot configuration.  
Translations need to be updated each time the copilot is updated or when new content is added.
3. One copilot for multiple languages, with translations provided real-time, at runtime, through a relay copilot sitting between the user and the copilot. This allows deploying more languages rapidly, but it also adds a dependency on a relay copilot and a real-time translation layer (e.g., Azure Service Copilot and Azure Cognitive Services Translator).

| Language              | Authoring canvas/End-User | Generative answers | Generative actions |
|-----------------------|---------------------------|--------------------|--------------------|
| Chinese (Simplified)  | ✓                         | ✓                  | Preview            |
| Chinese (Traditional) | ✓                         |                    | Preview            |
| Czech                 | ✓                         | ✓                  | Preview            |
| Danish                | ✓                         | ✓                  | Preview            |
| Dutch                 | ✓                         | ✓                  | Preview            |
| English               | ✓                         | ✓                  | Preview            |
| Finnish               | ✓                         | ✓                  | Preview            |
| French                | ✓                         | ✓                  | Preview            |
| German                | ✓                         | ✓                  | Preview            |
| Greek                 | ✓                         | ✓                  | Preview            |
| Hindi                 | ✓                         | ✓                  | Preview            |
| Indonesian            | ✓                         | ✓                  | Preview            |
| Italian               | ✓                         | ✓                  | Preview            |
| Japanese              | ✓                         | ✓                  | Preview            |
| Korean                | ✓                         | ✓                  | Preview            |
| Norwegian             | ✓                         | ✓                  | Preview            |
| Polish                | ✓                         | ✓                  | Preview            |
| Portuguese (Brazil)   | ✓                         | ✓                  | Preview            |
| Russian               | ✓                         | ✓                  | Preview            |
| Spanish               | ✓                         | ✓                  | Preview            |
| Swedish               | ✓                         | ✓                  | Preview            |
| Thai                  | ✓                         | ✓                  | Preview            |
| Turkish               | ✓                         | ✓                  | Preview            |

# AI



# Generative AI in Copilot Studio | Powered by Azure OpenAI Service

**CONNECT AND EXTEND**

M365 Copilot   Azure OpenAI Studio   Power Apps   Power Pages   Teams   Dynamics 365

The diagram illustrates the integration of various Microsoft services through a central hub. At the top, a blue rounded rectangle contains icons for M365 Copilot, Azure OpenAI Studio, Power Apps, Power Pages, Teams, and Dynamics 365. Below this, a large white box features a central circular icon with a refresh symbol. The box is divided into sections: 'Generative Conversations' (dark blue header), 'Generative Assistance' (light blue header), 'TO ANSWER' (light blue header), 'TO ACT' (light blue header), 'TO BUILD' (light blue header), 'Generative Answers' (with a screenshot of a multi-turn conversation interface), 'Generative Actions' (with a screenshot of a mobile app interface), and 'Generative Builder' (with a screenshot of a complex flowchart). The bottom section is organized into four columns: 'External' (3P Search APIs, External URL), 'Internal' (OneDrive URL, Documents, SharePoint URL), 'Tools' (Power Platform Connectors, Copilot Topics, Skills, Power Automate Flows), and 'Edit & Refine' (Topics, Trigger Phrases, Entities, Variables, Adaptive Cards, Branching).

**Generative Conversations**

**Generative Assistance**

**TO ANSWER**

**TO ACT**

**TO BUILD**

**Generative Answers**

Copilot Studio boosts conversational coverage by dynamically generating multi-turn answers based off an organization's content in real-time in response to unanticipated questions.

**Generative Actions**

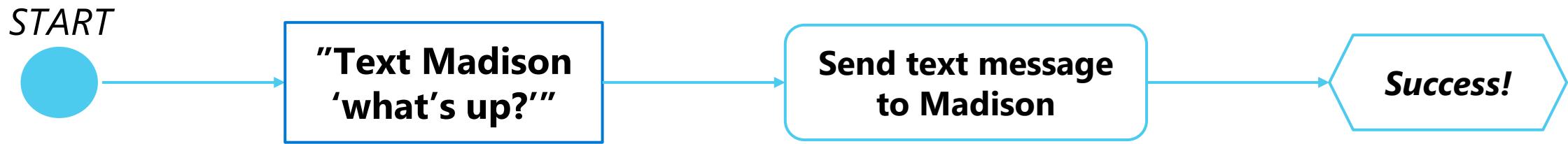
Copilot Studio generates dialog and takes action through dynamically chaining existing building blocks which can handle queries that were not anticipated or previously built.

**Generative Builder**

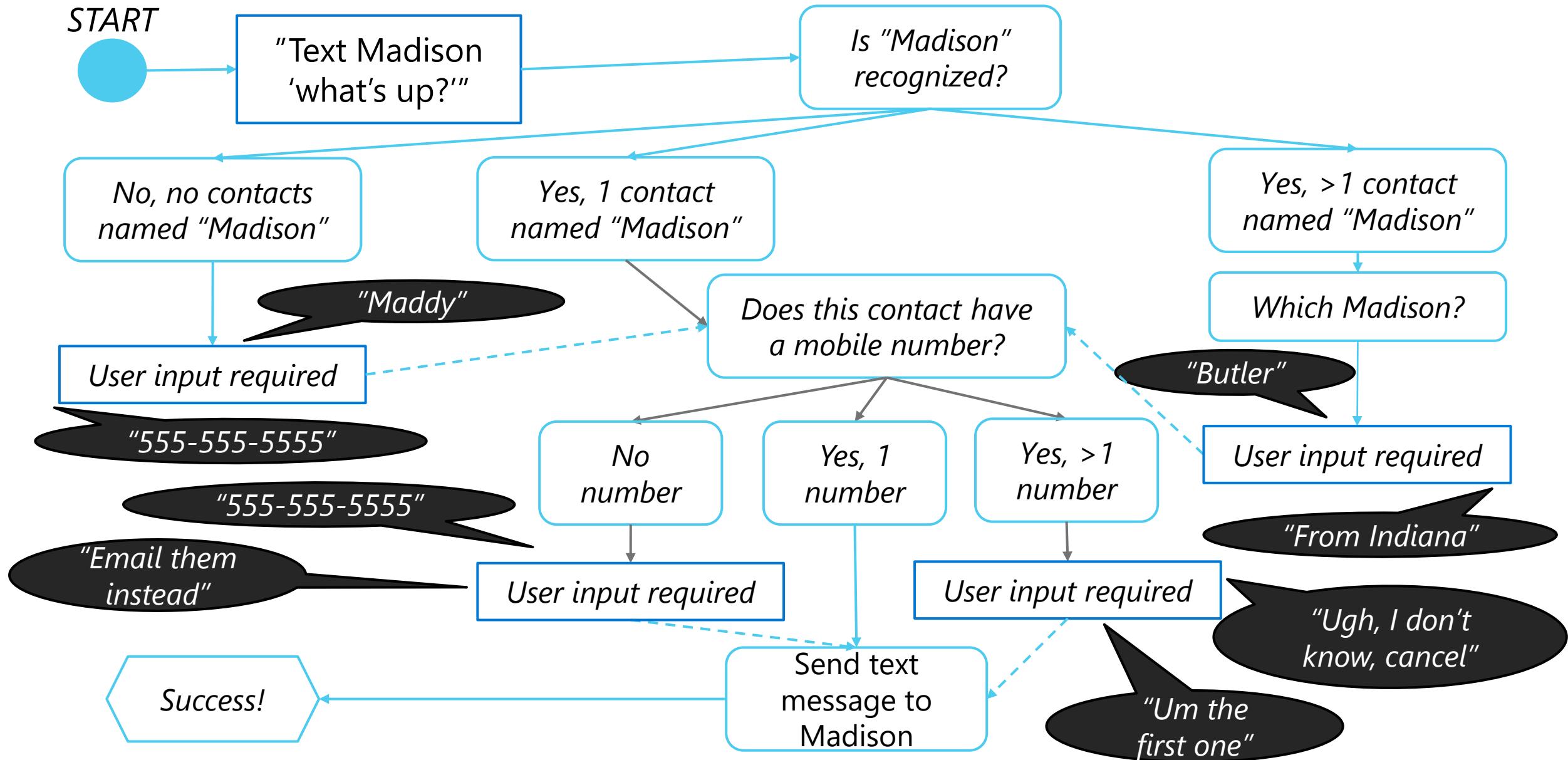
Copilot Studio Copilot assistant helps build, design and modify Copilot topics through natural language.

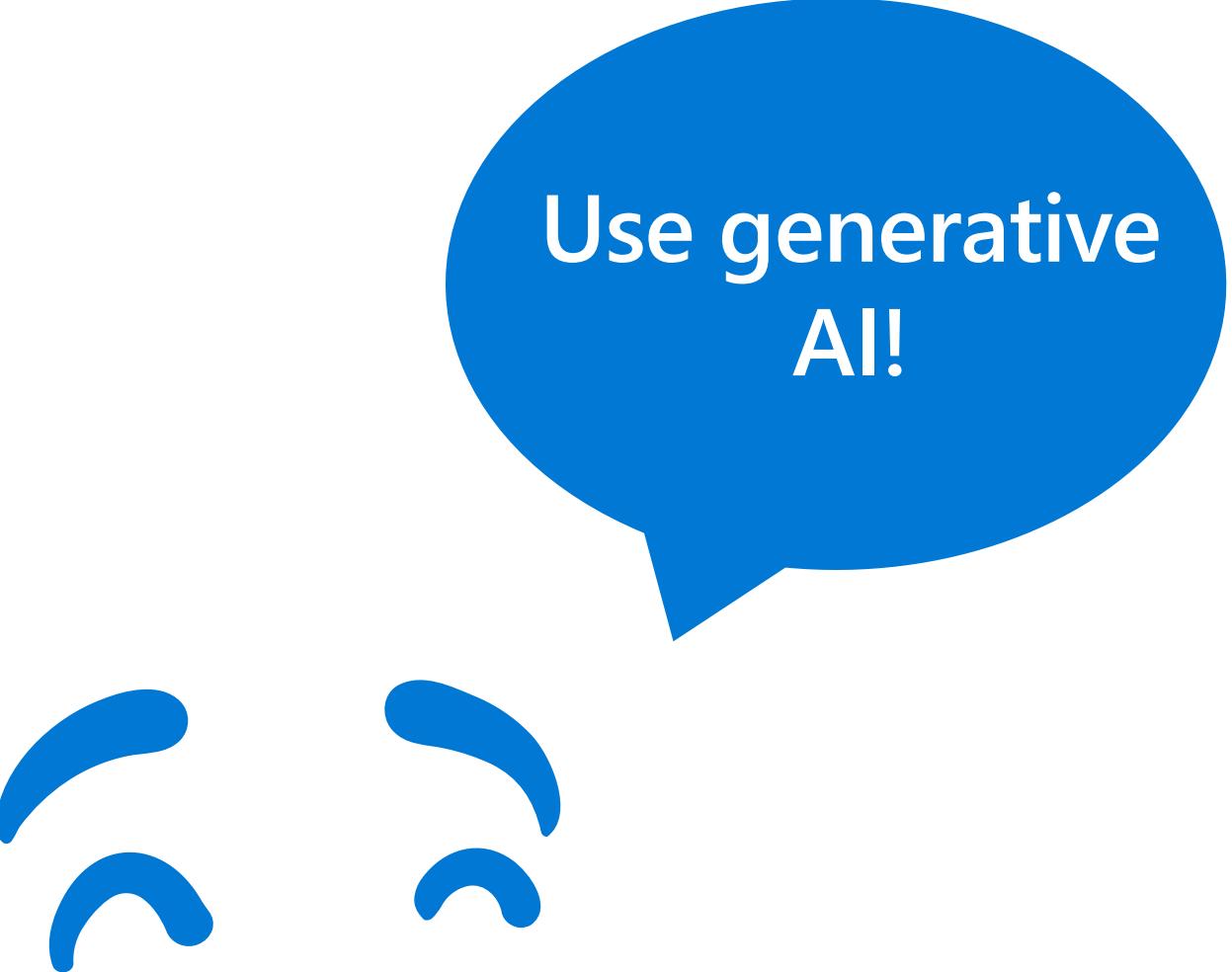
| External                       | Internal                                    | Tools   | Edit & Refine   |
|--------------------------------|---|---|---|
| 3P Search APIs<br>External URL | OneDrive URL<br>Documents<br>SharePoint URL | Power Platform Connectors<br>Copilot Topics<br>Skills<br>Power Automate Flows | Topics<br>Trigger Phrases<br>Entities<br>Variables<br>Adaptive Cards<br>Branching |

# It's easy to know where a conversation begins and ends...



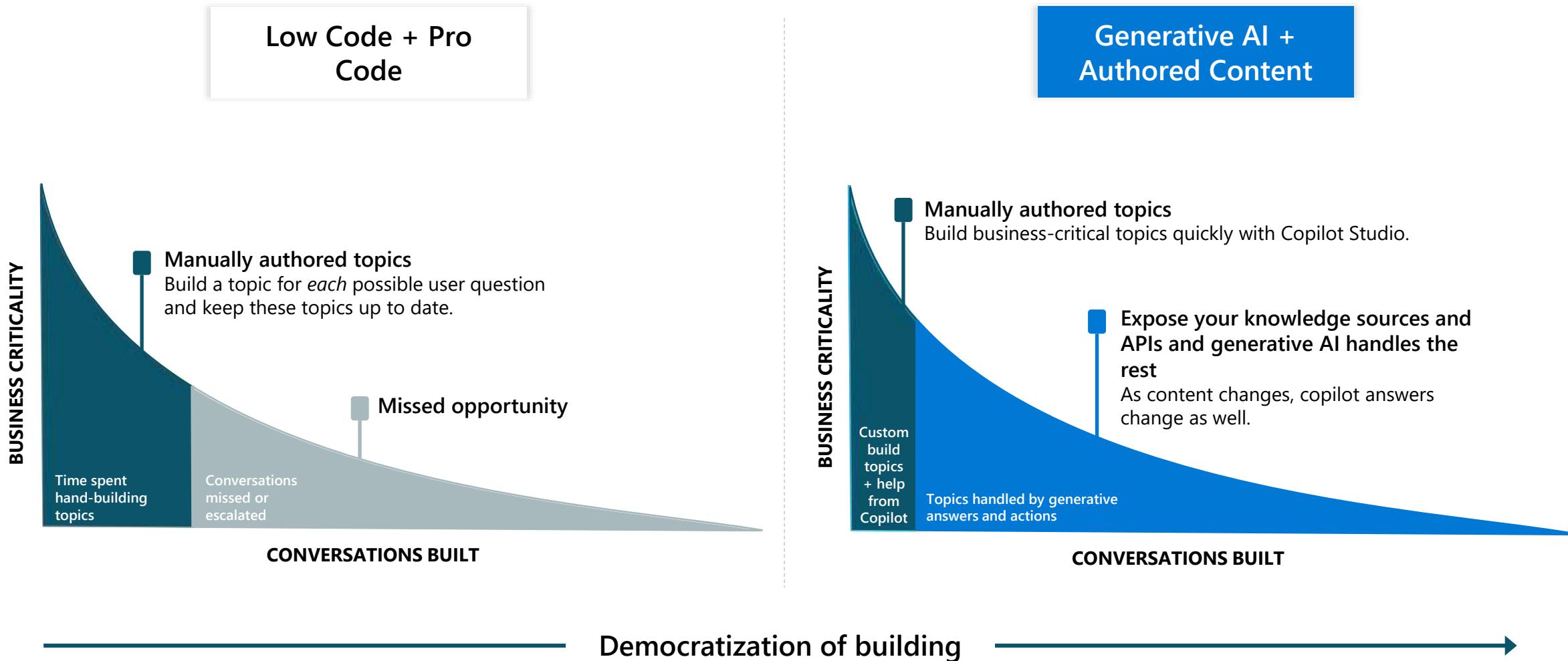
# The middle is the hard part...





Use generative  
AI!

# Generative AI is changing conversational AI

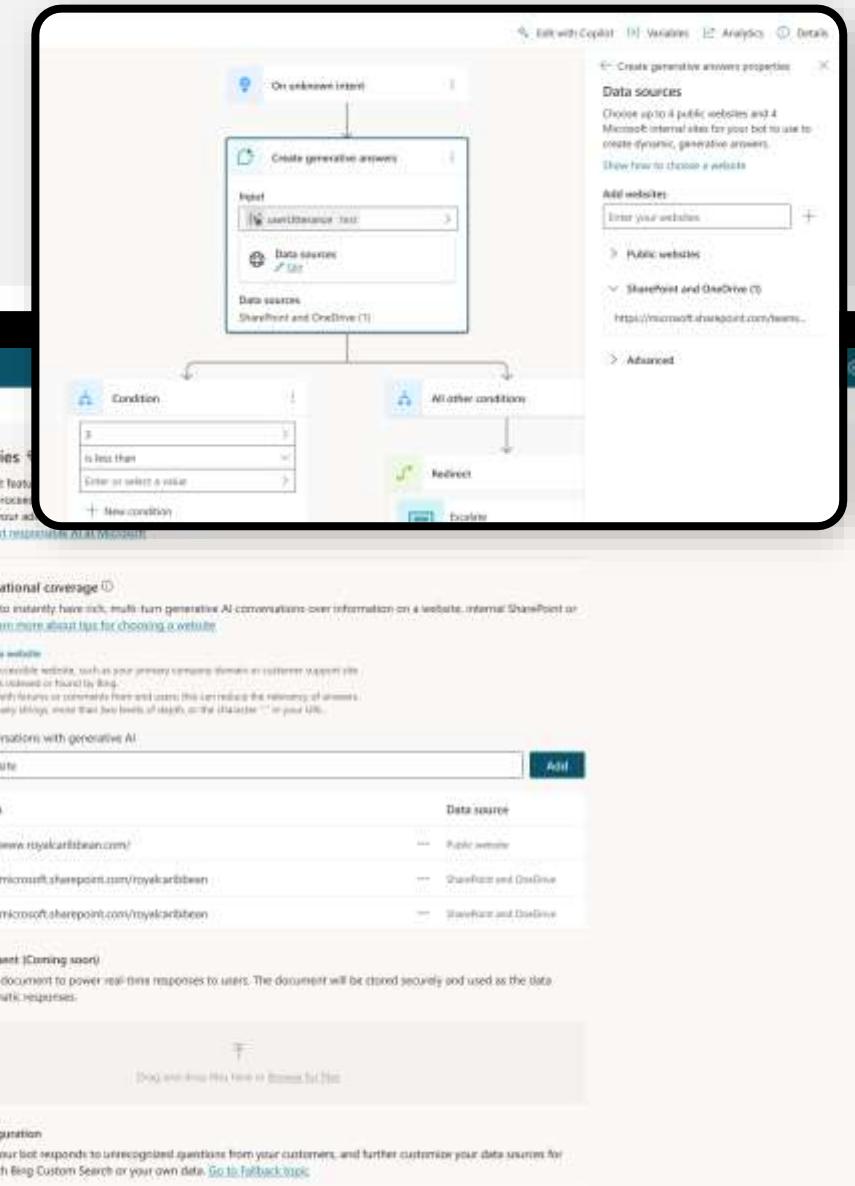
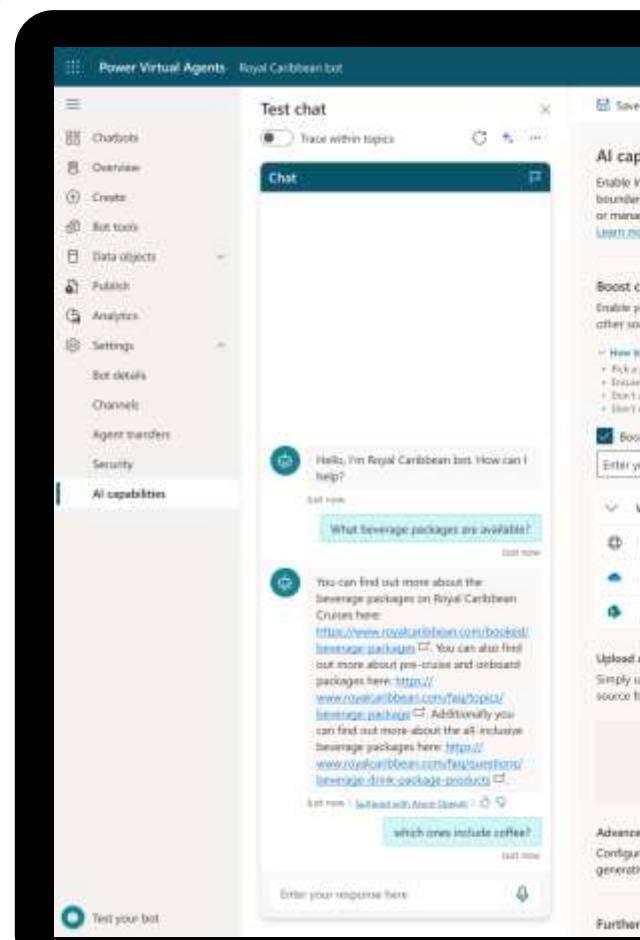


# Generative answers

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

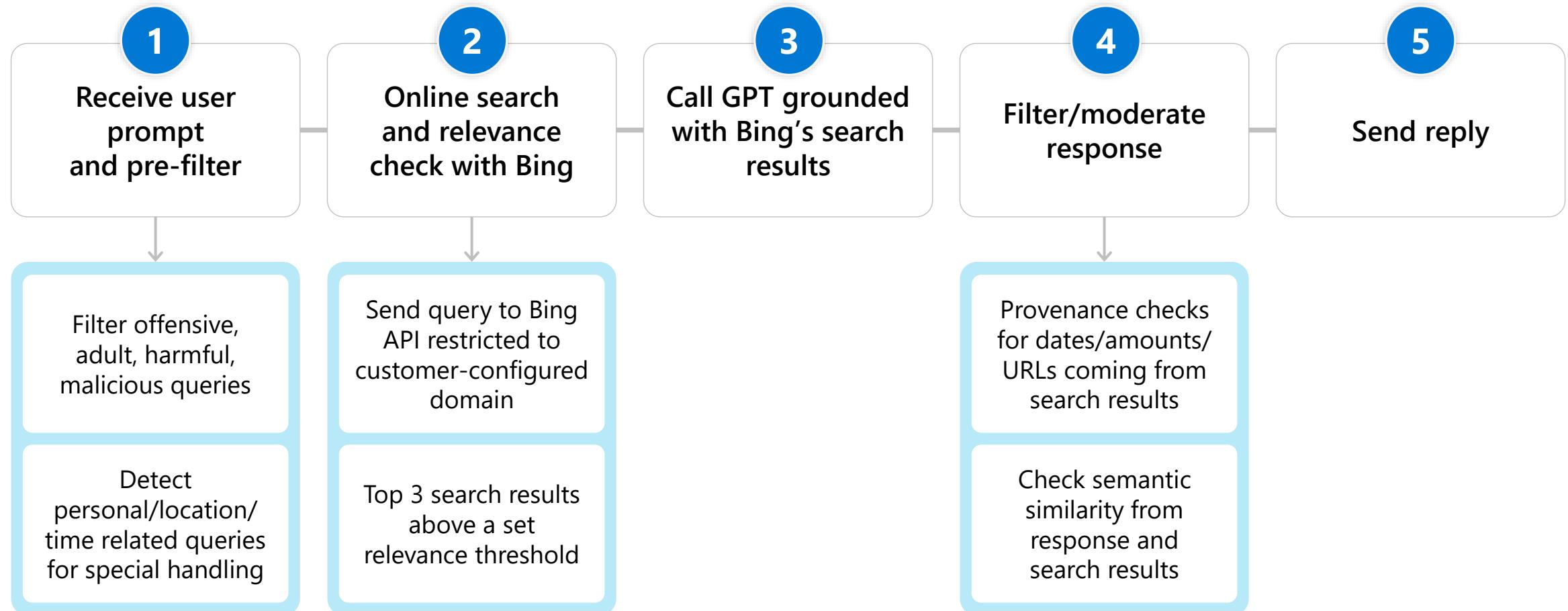
Bots can answer thousands of questions out of the box in seconds

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



Public Preview

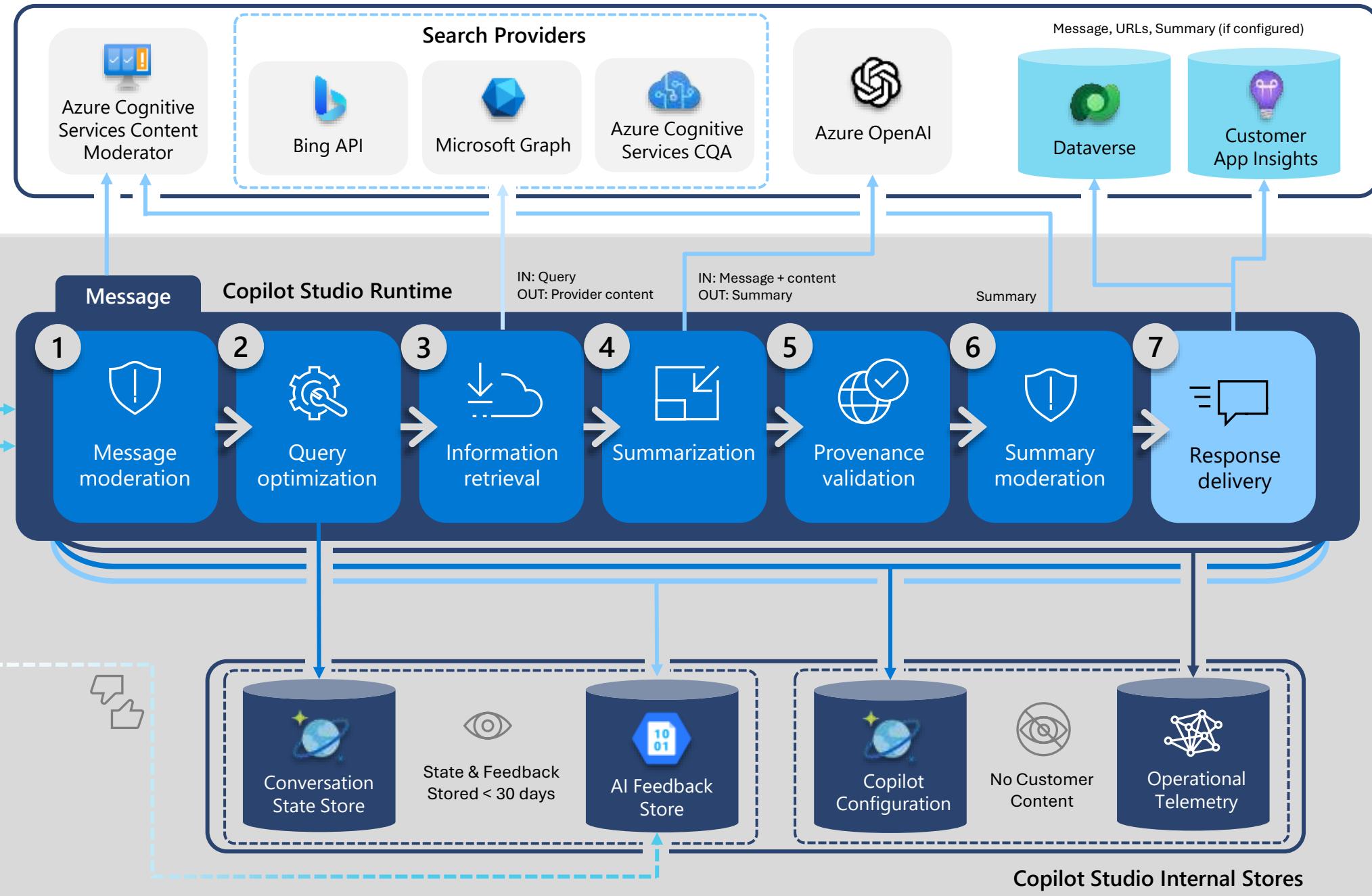
# Generative Answers: How does it work?





Microsoft Copilot Studio

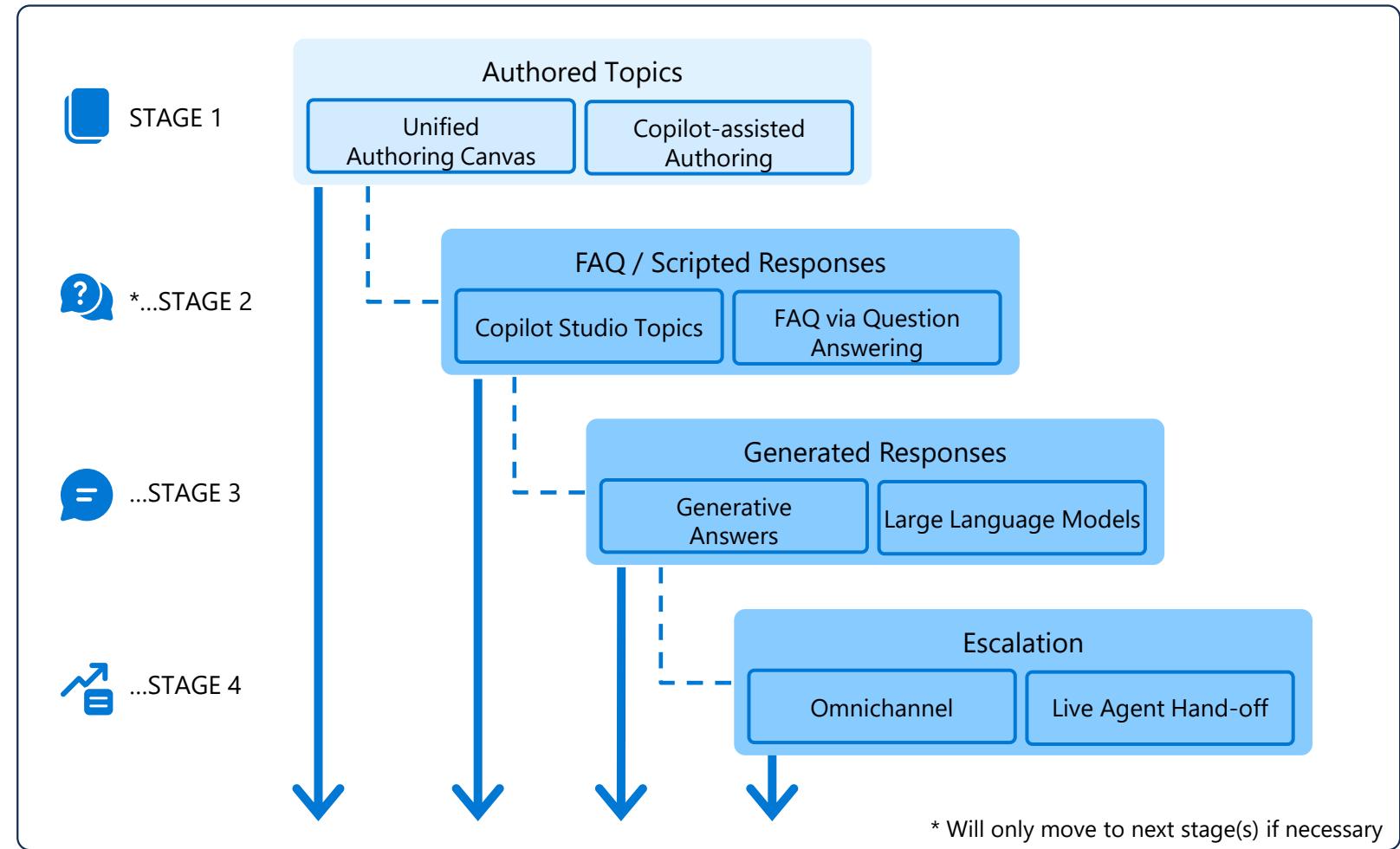
# Generative Answers Architecture



# New design patterns with generative AI

## New paradigm in topic responses

- This shows how generated responses are plugged into a dialog manager (Copilot Studio) to ensure that you remain in control of the user experience while allowing for authored experiences that are key functions of your copilot, scripted responses that are key for managing the answers you want scripted (such as marketing-controlled responses) work in conjunction with generated responses allowing the enterprise to remain in full control of the experience.
- This allows for an end-to-end enterprise conversational platform to build effective and managed experiences that delight customers, while reducing the overhead and cost of maintaining fully scripted experiences of the past.



# Additional recommended content

## Appendix section on this deck

Learn about alternative scenarios about how to infuse generative AI into topics.

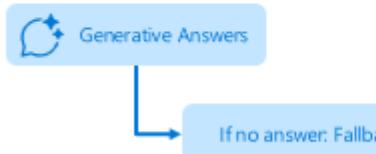
## Infusing generative AI into topics example

### Finding the right place for generative AI in your new or existing copilots

- Generative answers unlock new use cases for copilots where dialog paths no longer need to be fully anticipated.
- By plugging generative answers into your internal and external data sources, the copilot can search and summarize answers for user queries.
- It's not an 'either' choice: you can configure generative answers wherever you choose in your topics, and the data sources can both be dynamic, hard coded, or enriched with context variables.
- It's still a good idea to have generative answers also configured in the Conversational boosting topic that triggers before Fallback, to try to catch and answer user queries with broader data sources before they get to Fallback.
- While planning for generative answers, it's important to plan for follow-up questions (should they remain in context of the previous answer or trigger a new topic?) and how you will measure, track, and validate that the generated answers are accurate and answer the user questions.

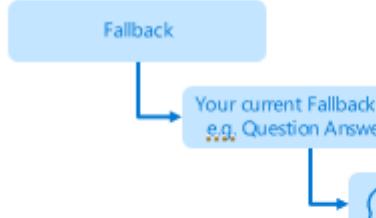
#### Pattern #1:

Placing Generative Answers as the first level of unknown intent logic before Fallback.



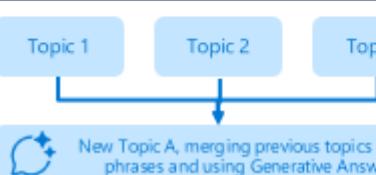
#### Pattern #2:

Enriching your existing Fallback



#### Pattern #3:

For simple, single-turn question & answer topics, group them into a single or multiple new topics with their past trigger phrases



# Building copilots agents

Building copilot agents pillars



# Microsoft Copilot Studio

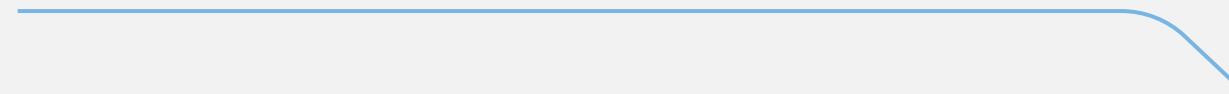
**Build** copilots agents, your way

Design

Enhance

Manage

# Design



# Design powerful, connected agents

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## Handle complex queries with ease

Design intelligent conversations with greater control over the LLM such as robust variable and dialog management, logic, and responses.

## Design personalized, responsive interactions

Engage employees or customers with rich, dynamic interactions that remember user content and context.

## Customize your copilot how you want

Build custom plugins, connectors, and prompts, and surface your business data where you need it.

## Connect to your organization's knowledge bases

Use generative AI to dynamically respond using your organization's real-time content.

## Create automated workflows

Use Power Automate to trigger automation across your business with UI, API, DPA, and RPA automation capabilities.

## Escalate to live agents when needed

Continue the conversation with full context with an end-to-end customer engagement platform.

# Build the way you want

Users of all skill levels can create and test together

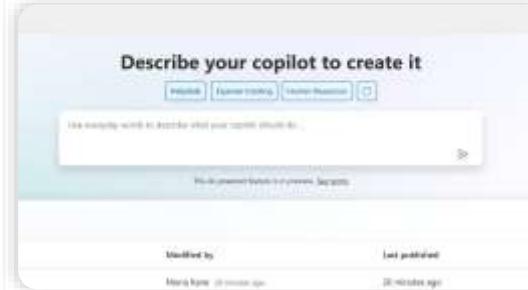
Preview

## Templates



Preview

## Natural language



## Visual canvas



## Code



### Get started quickly

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

### Build conversationally

Build copilots by engaging in a conversational, natural, human-like experience.

### Navigate a modern UX

Design your conversation by following the low code graphical interface.

### Switch to YAML

Share and re-use topic logic between developers and copilots in a side-by-side view.

# Customize your agent

Easily tailor your copilot's building blocks to meet your unique business needs in a comprehensive, end-to-end studio

## Building blocks



### Knowledge

Existing enterprise data in or outside of M365 that copilot can query



### Actions

Tasks and processes your copilot can perform across LOB services/apps



### Logic

Defined conversation paths for your copilot to follow when triggered



### Channels

Where and how your end users engage with your copilot

# Knowledge

Add your **public and enterprise data** sources using copilot connectors.

Your copilot will be able to **dynamically generate multi-turn answers** in real time using your enterprise data.

Allows you to create an **immediately useful** agent.

Supported data sources include:

Public websites

SharePoint / OneDrive

Dataverse

Microsoft Fabric (coming soon)

File uploads

Microsoft Graph

**Add available knowledge sources** (Powered by Copilot connectors)

Users with edit permissions for this copilot can also reuse your connections for other topics within the copilot. [Manage security settings](#)

Keywords for the data you're looking for

**Featured**

- Add existing knowledge**  
Converts previous data sources to knowledge for this copilot
- Public website**  
Incorporate any relevant web content found on Bing
- Files**  
Upload documents from your local computer

- SharePoint and OneDrive**  
Securely integrate and manage internal data
- Dataverse**  
Customize and deploy structured data tables
- Microsoft Fabric**  
Accelerate data analysis with AI capabilities

**Bring your enterprise data (16)**

- Enterprise website (preview)**
- Azure DevOps (preview)**
- Custom connector (preview)**
- Jira (preview)**

- ADLS Gen2 (preview)**
- Oracle SQL database (preview)**
- ServiceNow (preview)**
- File share (preview)**

- CSV (preview)**
- Microsoft SQL (preview)**
- MediaWiki (preview)**
- Salesforce (preview)**

- Confluence (preview)**
- Azure SQL (preview)**
- Zendesk (preview)**
- Power Platform connector**

# Actions

Easily connect to your key line of business systems.

Enable your agent to automate your business processes and complete tasks.

## Types of actions:

### Prebuilt connectors

Choose from 1400+ prebuilt Power Platform connectors to popular data sources and apps

### Custom connectors

Create a custom connector for any publicly available API

### Flows

Bring in automated workflows built using Power Automate

### Prompts

Provide custom instructions to the GPT model using AI Builder

### Skills

Add a bot built using Azure Bot Framework as a skill

Step 1 of 3: Choose an action  
Create an action or browse through our list of actions you want to use to get information from external sources. [Learn more](#) X

Discover an action  
Search for flows, skill actions, and commonly used connector actions

Search

11 actions found

Connectors Custom Connectors Flows Skills Dataverse

|   |   |
|---|---|
|  Untitled<br>Get information about industries, solutions, services and cont... |  Run a flow built with Power Automate for desktop<br>Desktop flows |
|  Delete a row<br>Excel Online (Business)                                       |  Run script<br>Excel Online (Business)                             |
|  Get a row<br>Excel Online (Business)   |  Run script from SharePoint library<br>Excel Online (Business)    |

Cancel

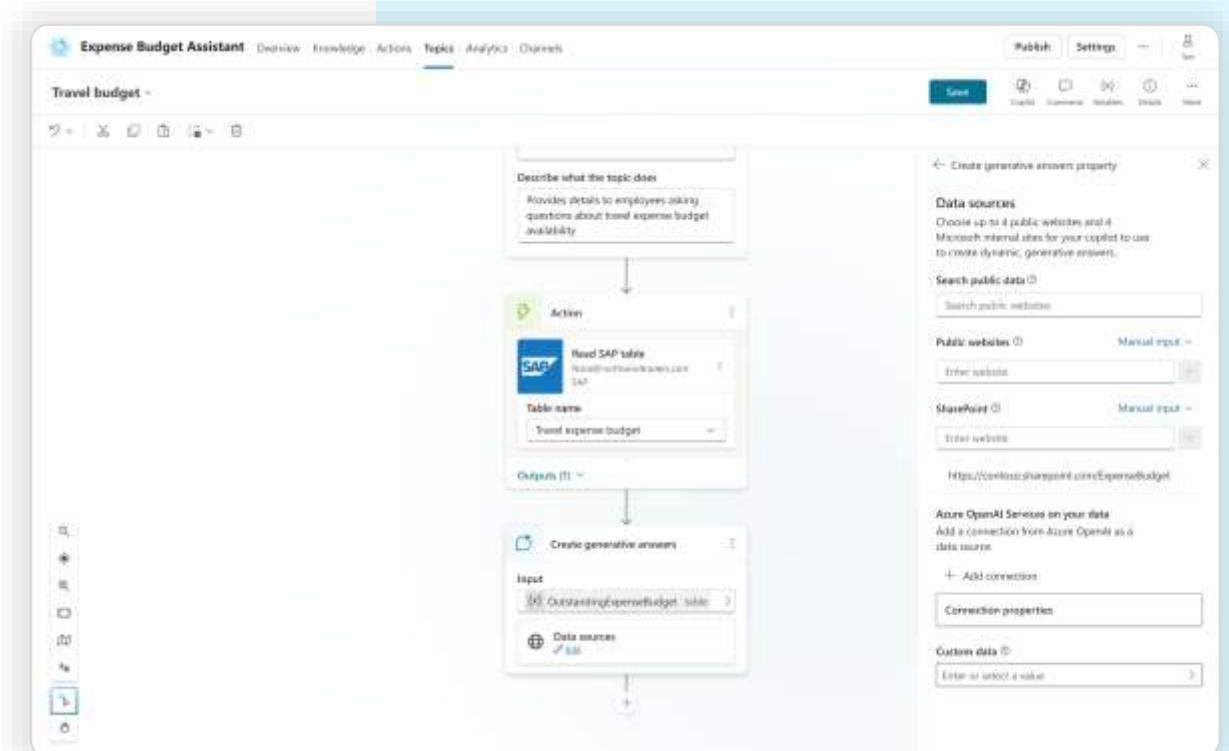
# Logic

Have **complete control over critical scenarios** by designing specific step-by step topics.

Enable your agent to **automatically select the most appropriate action or topic** to respond to a user using generative AI.

Easily mix and manage both **generative and custom dialog** in one system.

**Connect to your contact center** so your copilot can escalate and hand off the conversation with full context to a live human agent.



# Channels

Publish and deploy to your channels of choice with a single click.

Add your agent to a custom app built with Power Apps or a custom website built with Power Pages.

You can access even more channels through ISVs, including:



WeChat



WhatsApp  
through Twilio



Google's Business  
Messages



Apple Messages  
for Business



Azure  
Communication  
Services



TeleSign



Custom

Expense Budget Assistant Overview Knowledge Actions Topics Analytics Channels

Your copilot was published at 9:42 AM on 3/30/2024! Your users will see the new content soon.

**Publish status**  
Verify or modify the availability of your copilot

Published March 20, 2024

**Channels**  
Configure your copilot channels to meet your customers where they are.

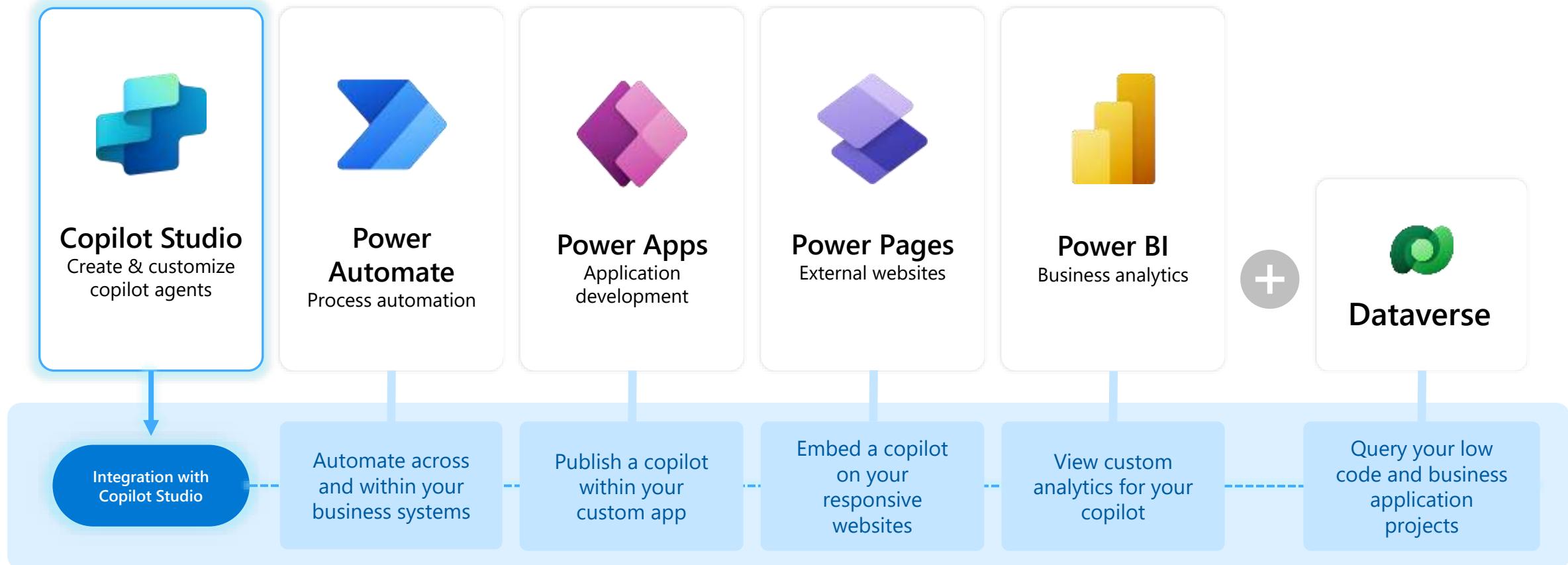
Teams Demo website Custom website Mobile app Facebook Twilio Skype Slack Telegram Direct Line Speech Email Line GroupMe

**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](#)

Dynamics 365 Customer Service Genesys Salesforce LivePerson ZenDesk Customer engagement hub

# Microsoft Power Platform

Accelerate app development, automate workflows, visualize data, and reduce repetitive tasks with AI-powered tools



# Demo

- New Creation Experience Overview for Copilot Studio (7 mins)
- Using Generative Actions to Orchestrate your Copilot (14 mins)

EDUCATION  
*Series*

COPilot STUDIO

# NEW CREATION EXPERIENCE OVERVIEW

COPilot STUDIO DUDE





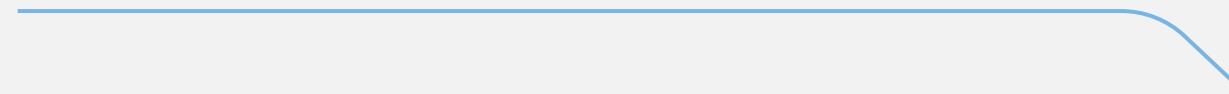
# Using Generative Actions to Orchestrate your Copilot



Dewain Robinson  
Principal Program Manager



# Enhance



# Enhance with advanced capabilities

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## Customize your agent with pro developer tools

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

## Analyze your agent's performance

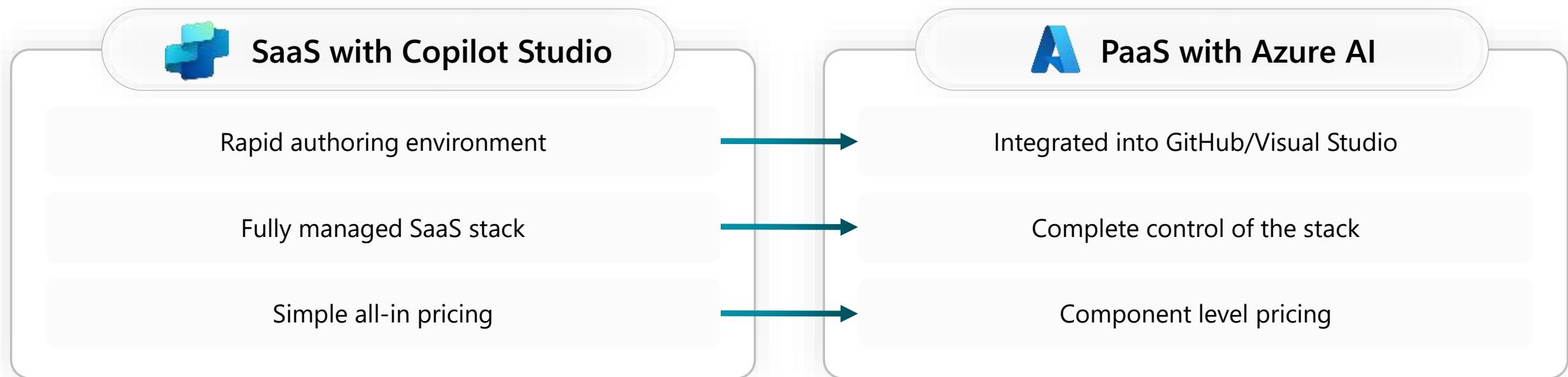
Access built-in conversational analytics that automatically track critical KPIs.

## Continuously improve the conversation

AI-driven features will help you to fine-tune your copilot over time by providing suggestions on how to optimize your conversations.

# One conversational AI ecosystem

Access more advanced customization tools by building across Microsoft Copilot stack



Start with Copilot Studio and seamlessly integrate with Azure AI



# Better together: Azure AI Studio Integrations with Microsoft Copilot Studio



## Language services:

Add Azure AI Language Services - Custom Language Understanding (CLU) support if you don't want to use the out of the box model.

## Knowledge base:

Azure AI Question and Answer integration if you don't want the out of the box.

## AI Search:

Azure OpenAI on your data enables Azure OpenAI's models (ChatGPT, GPT-4...) on YOUR DATA and can enable you to build powerful conversational experiences over it with Copilot Studio.

## Analytics:

Build custom analytics to move your data into extended data pipelines.

## API Calls:

Add Copilot Studio supports any API / HTTP calls to Azure services too.

## Telemetry:

Can use Azure app insights for custom telemetry.

## Bot Framework:

We rebuilt the capabilities of Bot Framework Composer into Copilot Studio natively (Code like views, Adaptive cards, eventing, variable management) and added support for customers that still used Bot Framework bots to call as skills to Copilot Studio.

## Application lifecycle management:

Works with Azure DevOps for full ALM and solution management.

# CQA Integration with Copilot Studio

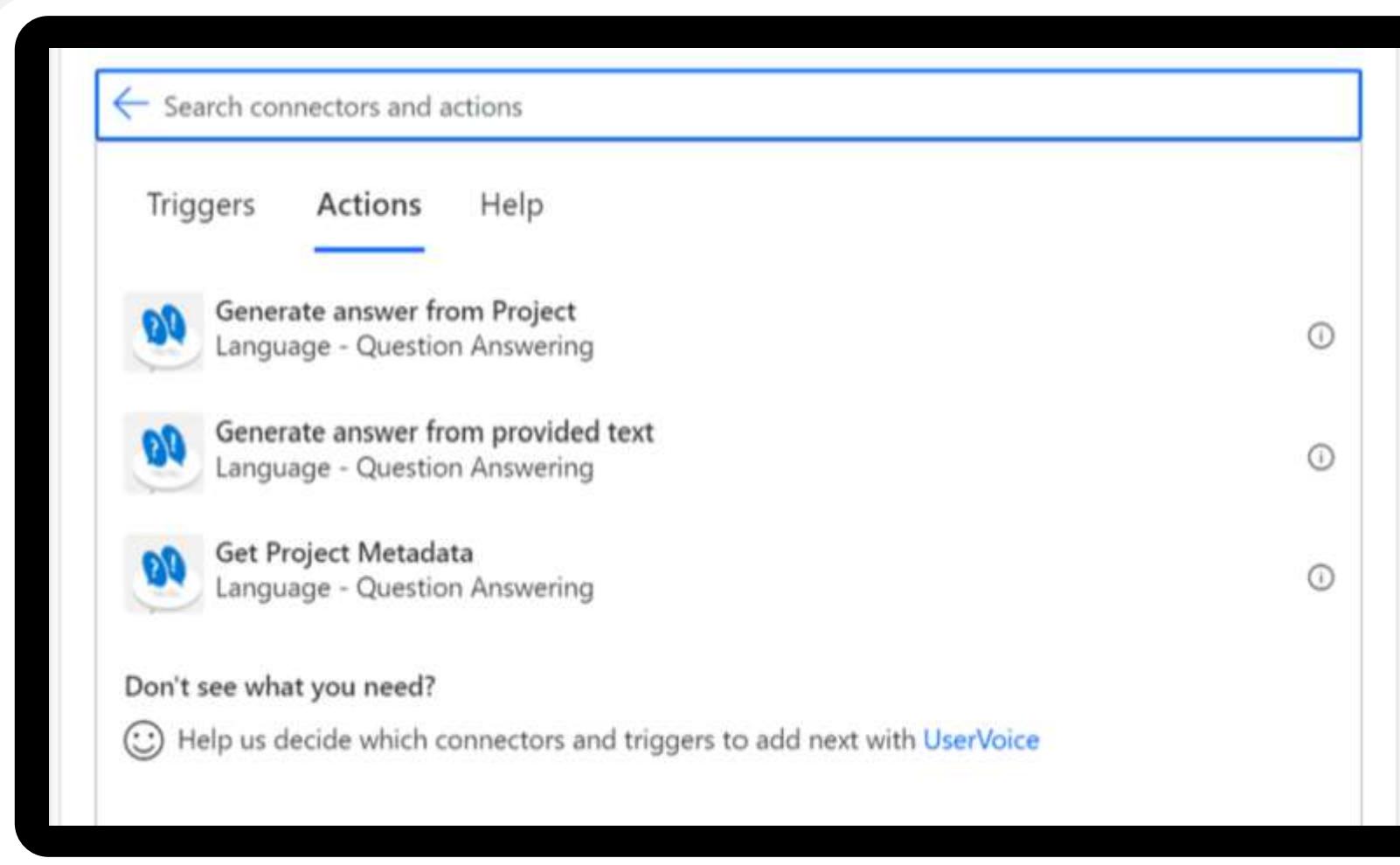
Customize your agent to provide answers from your specific knowledge base

Tailor responses based on specific languages in CQA

- Multilingual base model available in over 70 languages, including 12+ Indic languages

Combine the accuracy of CQA with the simplicity of Copilot Studio to create a copilot:

- Leverage Fallback Topics for Logical Flows
- Enhanced Natural Language Processing (NLP)
- Seamless Integration and Easy Configuration
- Rapid Iteration and Continuous Improvement



General Availability

# Azure Custom language understanding integration

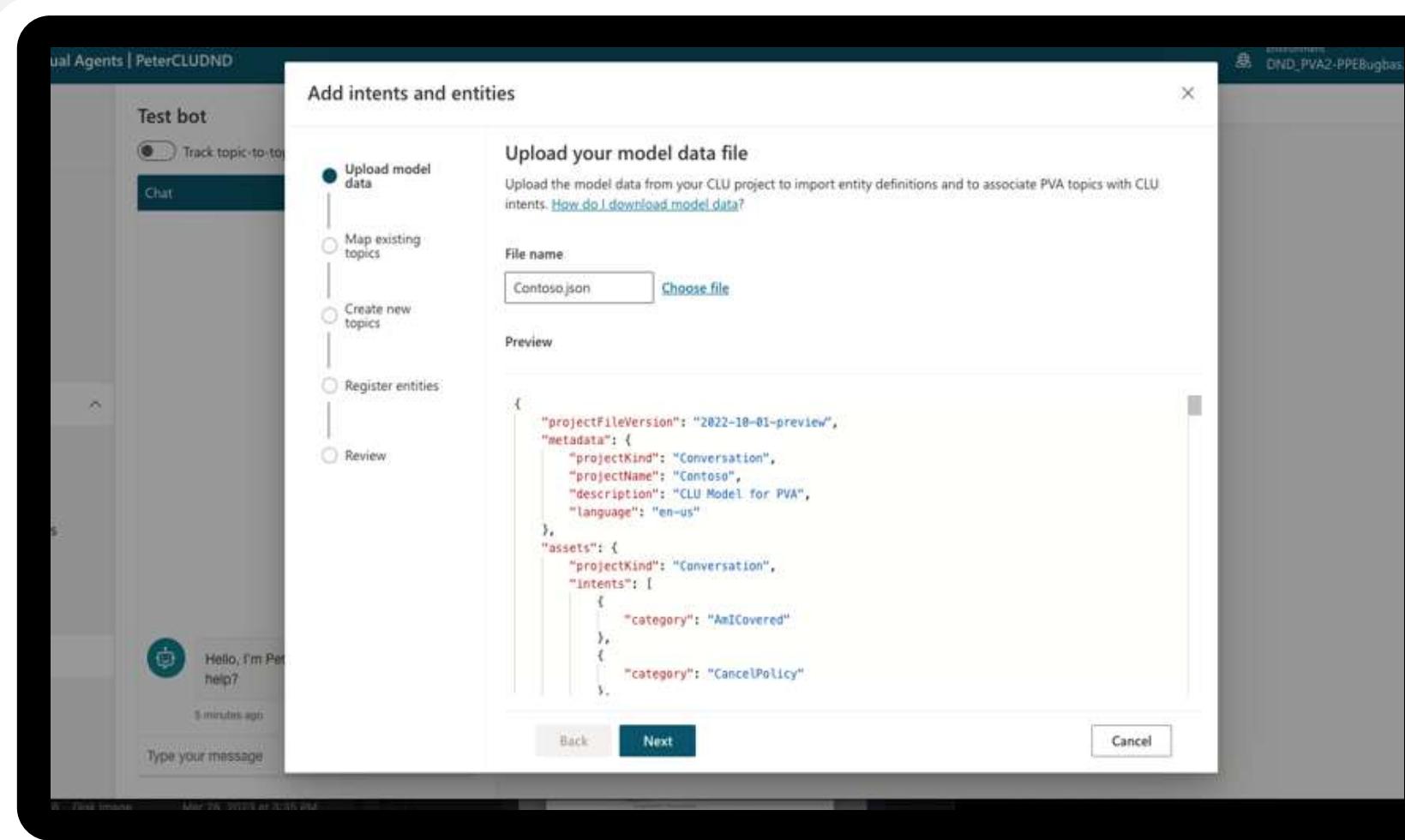
Customize your conversational language models to your specific use case

Tailor responses based on specific languages in CLU

- Multilingual base model available in over 70 languages, including 12+ Indic languages

Blend the power of CLU with the simplicity of Copilot Studio to do more with your chat bot:

- Enhanced Natural Language Processing (NLP)
- Improved Intent Recognition and Entity Extraction
- Seamless Integration and Easy Configuration
- Rapid Iteration and Continuous Improvement



# Bot Framework as skills

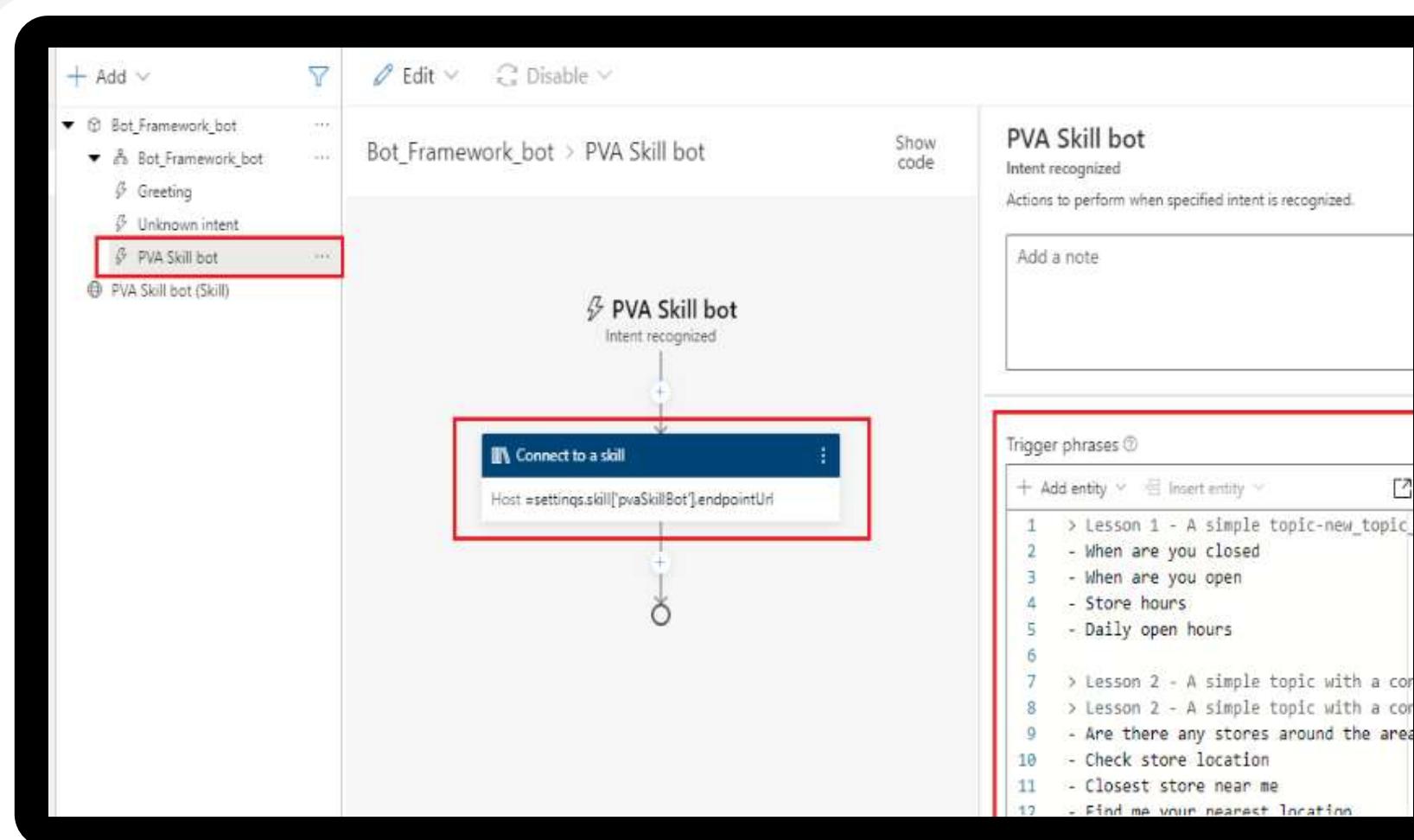
## Extend Bot Framework bots with Copilot Studio functionality

Manage which Copilot Framework bots can use a Copilot Studio Copilot as a skill

Add Copilot Studio bots as a skill in Composer and Copilot Framework SDK and easily download the Copilot skill manifest

Invoke Copilot Studio Topics from Copilot Framework bots - based on a user utterance

Create bots collaboratively and easily connect the Copilot ecosystems

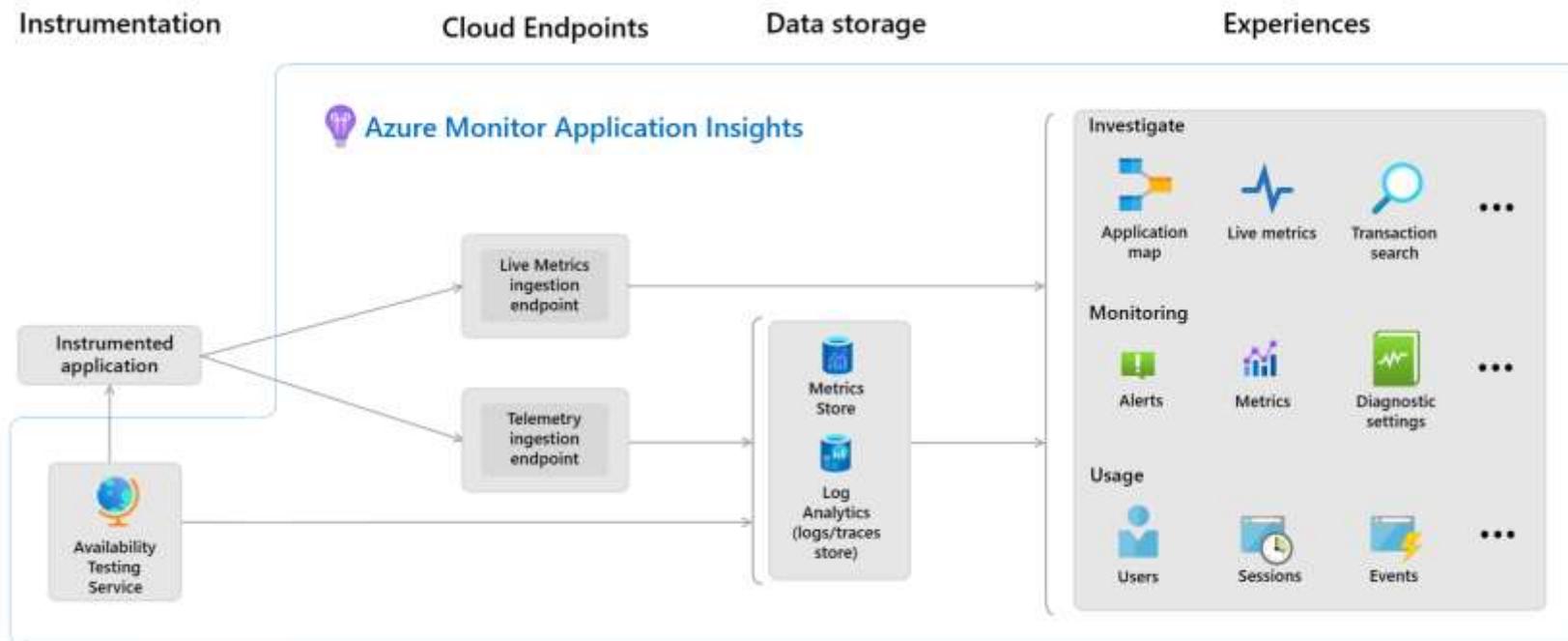


# Monitoring

In addition to the native analytics features within Copilot Studio, you can send telemetry data to Azure Application Insights.

In addition to the native analytics features within Copilot Studio, you can send telemetry data to Azure Application Insights.

- Telemetry offers insights into your copilot by tracking:
- Logged messages and events sent to and from your bot
- Topics to be triggered during user conversations
- Custom telemetry events that can be sent from your topics



## Questions to discuss:

- How do you plan to technically monitor your copilots? Azure App insights?
- How do you plan to technically monitor your integrations and cloud flows?
- Do you have other technical monitoring requirements and plans? Like client load time

# Azure Application Insights example

## Monitoring generative answers results and moderation

The screenshot shows the Azure Application Insights search interface. On the left, a query is displayed:

```
customEvents
| where name == "GenerativeAnswers"
// | where cloud_RoleInstance == "MS Learn Chatbot" // Bot Name
extend cd = todynamic(customDimensions)
extend conversationId = tostring(cd.conversationId)
extend topic = tostring(cd.TopicName)
extend message = tostring(cd.Message)
extend result = tostring(cd.Result)
extend SerializedData = tostring(cd.SerializedData)
extend Summary = tostring(cd.Summary)
extend feedback = tostring(todynamic(replace_string(SerializedData, "$", "")).value)
project cloud_RoleInstance, name, timestamp, conversationId, topic, message, result, feedback, Summary
order by timestamp desc
```

The results table on the right displays the following data:

| cloud_RoleInstance            | name              | timestamp [UTC]             | conversationId                 | topic                               | result                                 | feedback                            | Summary   |
|-------------------------------|-------------------|-----------------------------|--------------------------------|-------------------------------------|--|-------------------------------------|---|
| MS Learn Chatbot              | GenerativeAnswers | 11/22/2023, 4:52:30.856 PM  | 302287e9-9ca7-44e2-860c-985... | Conversational                      | What is the patient discharge process? | Answered                            | The patient discharge process involves cohesive joint w...    |
| Microsoft Copilot Studio Demo | GenerativeAnswers | 11/21/2023, 9:15:28.783 AM  | ANGtaAV/vlu21EFxrlegV3n-us     | SharePoint or OneDrive for Business | What is the patient discharge process? | Answered                            | The patient discharge process involves cohesive joint w...    |
| MS Learn Chatbot              | GenerativeAnswers | 11/20/2023, 3:31:36.750 PM  | 9094d8ba-d29d-46cf-bdea-645... | Conversational boosting             | What is Copilot Studio?                | Answered                            | Microsoft Copilot Studio is a platform that allows you to ... |
| MS Learn Chatbot              | GenerativeAnswers | 11/20/2023, 3:14:22.060 PM  | 9094d8ba-d29d-46cf-bdea-645... | Conversational boosting             | What is Power Virtual Agents?          | Answered                            | Power Virtual Agents is a platform that allows you to cr...   |
| MS Learn Chatbot              | GenerativeAnswers | 11/20/2023, 3:13:04.886 PM  | 98787c69-ccea-45ab-878d-73f... | Conversational boosting             | microsoft store                        | Filtered by High Content Moderation |   |
| Microsoft Copilot Studio Demo | GenerativeAnswers | 11/18/2023, 6:53:26.307 PM  | FoeHwLeXvYjYFq52ye8vZ-us       | SharePoint or OneDrive for Business | What is the patient discharge process? | Answered                            | The patient discharge process involves cohesive joint w...    |
| Microsoft Copilot Studio Demo | GenerativeAnswers | 11/18/2023, 6:51:51.553 PM  | e933479a-bb63-4221-a9e7-c4e... | SharePoint or OneDrive for Business | What is the patient discharge process? | Answered                            | The patient discharge process involves cohesive joint w...    |
| MS Learn Chatbot              | GenerativeAnswers | 11/18/2023, 12:18:38.803 AM | E4gKZ9mQMWCI210GAtlv3f-us      | Conversational boosting             | what is copilot?                       | No Search Results                   |   |
| MS Learn Chatbot              | GenerativeAnswers | 11/16/2023, 11:28:00.962 PM | 9juuiz7RlI5FdYf6asqSxS-us      | Conversational boosting             | copilot studio                         | Filtered by Open AI                 |   |
| MS Learn Chatbot              | GenerativeAnswers | 11/16/2023, 11:27:43.621 PM | 9juuiz7RlI5FdYf6asqSxS-us      | Conversational boosting             | what is copilot?                       | No Search Results                   |   |
| Microsoft Copilot Studio Demo | GenerativeAnswers | 11/16/2023, 9:36:46.399 PM  | Cqz1Ukrp9Mml2WH03V4vtv-us      | SharePoint or OneDrive for Business | What is the patient discharge process? | No Search Results                   |   |
| MS Learn Chatbot              | GenerativeAnswers | 11/15/2023, 12:43:05.627 AM | ee81d804-feb6-4bac-acdf-b0d... | Conversational boosting             | What is Power Apps?                    | Answered                            | Power Apps is a suite of apps, services, and connectors ...   |
| MS Learn Chatbot              | GenerativeAnswers | 11/15/2023, 12:42:43.349 AM | ee81d804-feb6-4bac-acdf-b0d... | Conversational boosting             | what is power automate?                | Answered                            | Power Automate is a service that allows you to automa...      |

# Manage

# Administration & Management



## Infrastructure management

No infrastructure to manage

No services to stand up

Available in geo-distributed multi-tenant SaaS



## Global by default

Available worldwide in many commercial clouds (23 data centers)

Available in government clouds

Supports 19 languages



## Compliance

Supports many Compliance offerings like HIPAA, HITRUST, FedRAMP, PCI, SOC, ISO & more



## Security & governance

Govern using unified Power Platform admin center

Data encryption – data stays secure while at rest and in transit

Data loss prevention

Customer Lockbox

# Compliance offerings

Copilot Studio is a Core Online Service, as defined in the Online Services Terms (OST), and is compliant with or covered by

- Federal Risk and Authorization Management Program (**FedRAMP**)
- Health Insurance Portability and Accountability Act (**HIPAA**) coverage
- Health Information Trust Alliance (**HITRUST**) Common Security Framework (**CSF**)
- System and Organization Controls (**SOC**)
- Various International Organization for Standardization (ISO) certifications
- Payment Card Industry (**PCI**) Data Security Standard (**DSS**)

# Easily optimize with data-driven insights

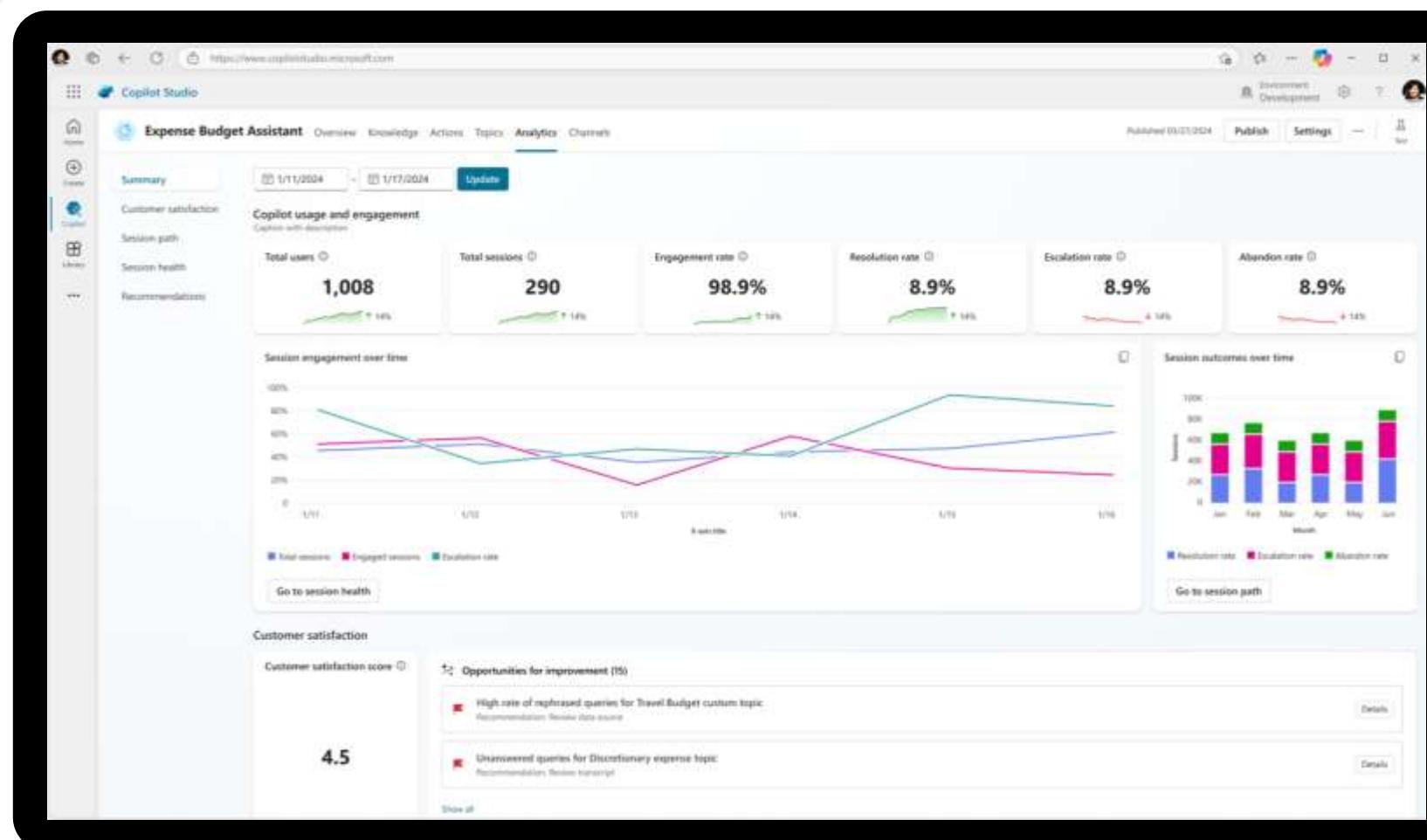
Preview

See which topics are having the greatest impact on **escalation, abandon and resolution rates**.

Quickly gain a sense of the **most common questions** your users are asking your copilot.

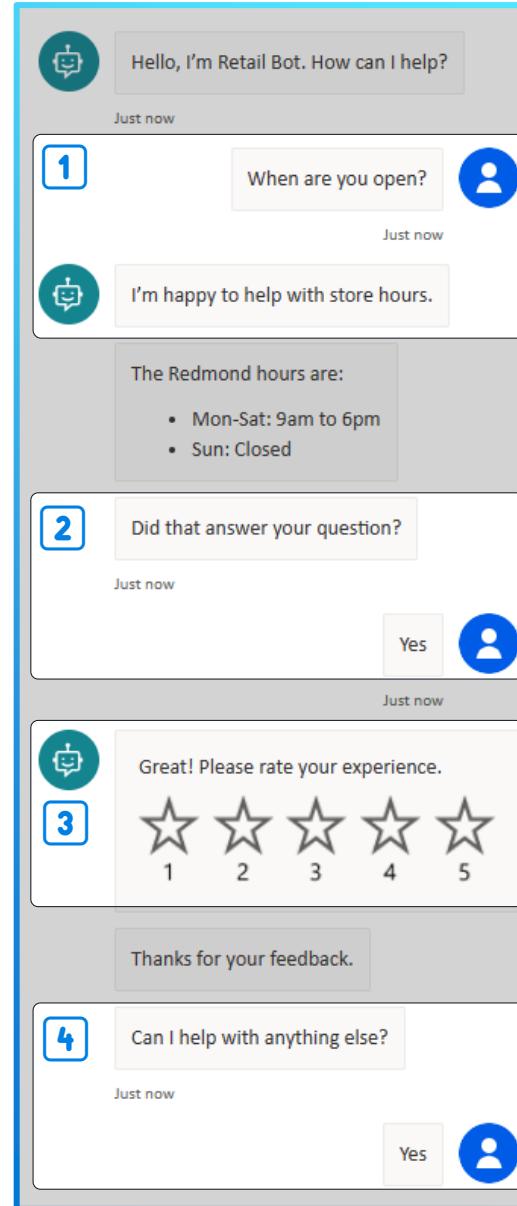
Get access to detailed **CSAT data, session transcripts, content moderation insights** and more.

Identify where your copilot **didn't successfully return an answer** so you can fill in the gaps.



# Engagement and outcomes

- Tracking conversation engagement and outcomes is crucial to **measure the copilot performance metrics** and spot areas for improvements in the analytics dashboard.
- A **conversation** with a Copilot Studio copilot can generate one or multiple **sessions**.
- A conversation can have multiple sessions when a user has new questions after an initial conversation completed (❸).
- Sessions are either **Unengaged** or **Engaged**. Unengaged sessions always have an outcome of **None**.
- A session is engaged (❶) by either triggering a **custom topic** or the **Escalate** topic.
- Engaged sessions outcome can be either:
  - ✓ **Abandoned**
  - ✓ **Resolved**
  - ✓ **Escalated**
- It's important to end conversation with the **End of Conversation** topic (❷) so that the end-user can confirm their issue was resolved or not (and potentially escalate).
- The **Confirmed Success** topic displays a **CSAT survey** (❸) to capture a 0-5 score.
- A 'conversationOutcome' can also be set at the node level in the code editor view.



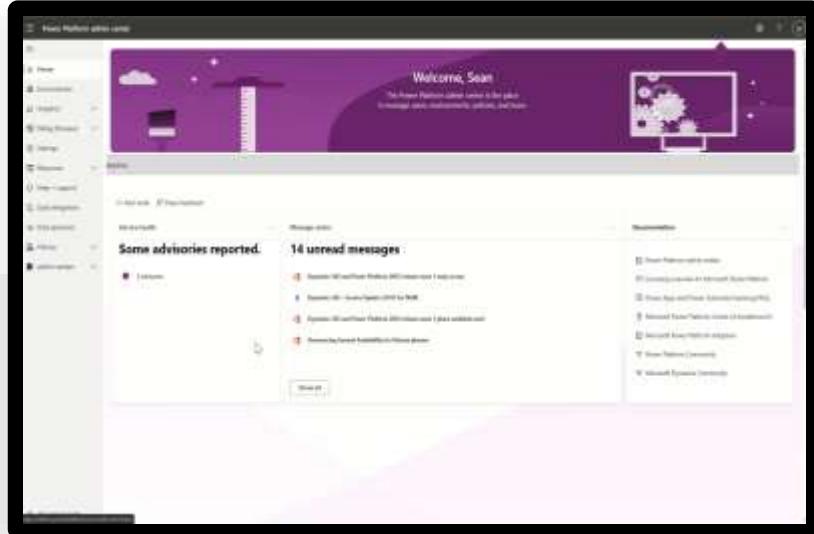
## Questions to discuss:

How do you track engagement and session outcome? For example:

- Every conversation path, including Generative Answers ones, end with the End of Conversation topic.
- End of Conversation topic is customized to make the resolution validation as simple as possible for the end-user.
- Conversation outcomes are also set at specific node levels (in the YAML).

# The right tools for your governance requirements

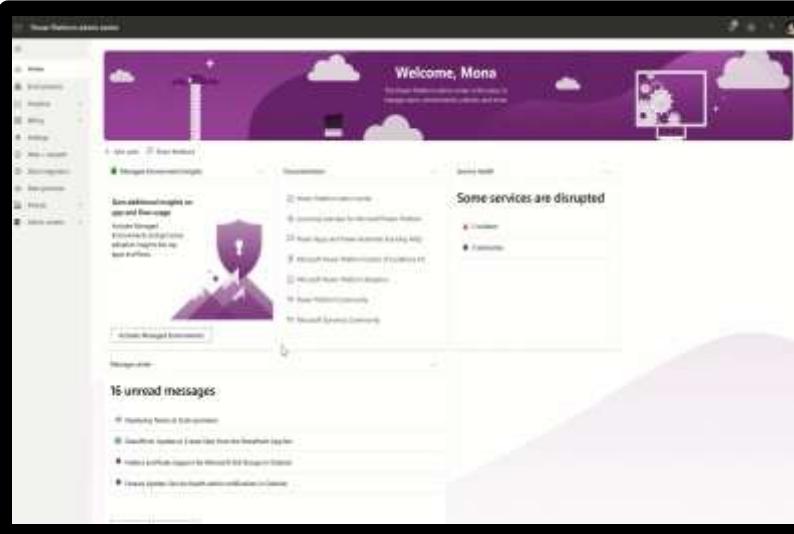
## Power Platform Admin Center



Standard governance offering:

- **Build** guardrails around data, apps, and environments
- View analytics on low code assets across your organization

## Managed Environments for Power Platform



Premium governance offering:

- **Enable** governance-at-scale without additional IT resources
- Proactively build and enforce best practices while gaining key insights and analytics

## Center of Excellence Kit



Extensible governance add-on:

- **Enhance** your governance journey with powerful open-source tools
- Drive innovation and improvement faster

# Center of Excellence

- As organizations use Microsoft Power Platform to enable citizen developers across their organizations, they also seek capabilities to govern and monitor usage.
- The Microsoft Power Platform CoE Starter Kit is a collection of components and tools that are designed to help organizations develop a strategy for adopting and supporting Power Platform.

## CoE Starter Kit features for Copilot Studio

- Keep track of the number of conversations per copilot over time, with daily aggregates.
- Allocate a number of conversations per environment
- Receive capacity email alerts when environment add-ons get near or over their allocated number of conversations.
- Get an overview dashboard of Copilot Studio usage in a tenant over time as well as an all-up conversation consumption versus allocation.

### Questions to discuss:

- Do you plan to use the Center of Excellence Starter Kit to monitor your copilots in your tenant?
- Do you have specific governance requirements such as charge-back models?
- Do you allow users to create copilots using Copilot Studio for Teams?
- Do you allow users to create Copilot Studio trials or do you want them blocked?

The screenshot shows a Microsoft Power Platform dashboard titled "Production\_CoEDashboard". The top navigation bar includes "File", "Export", "Share", "Chat in Teams", "Explore this data", "Get insights", and "Subscribe". On the left, a sidebar lists various Power Platform components: Home, Create, Browse, OneLake (data hub), Apps, Metrics, Monitoring hub, Workspaces, Get Workspace, and Production\_CoEDashboard. The main content area is titled "Power Virtual Agent Bots" and displays three summary cards: "# Bots" (8), "# Published bots" (8), and "# Bot makes" (8). Below this is a table titled "Bot Details" with columns: Chatbot name, Maker Name, Environment Name, # Sessions, State, and Created On. The table lists several bot entries, including "AI Tour Copilot Demo", "Bot 1", "Customer Self Service 1 bot", "Customer Service Copilot Bot", "HR Copilot", "HR Copilot Dynamic Chaining", and "Sales Copilot Power Virtual Agents Bot". Each entry includes a "Published" status indicator and a timestamp.

| Chatbot name                           | Maker Name           | Environment Name | # Sessions | State     | Created On             |
|--|----------------------|------------------|------------|-----------|------------------------|
| AI Tour Copilot Demo                   | System Administrator | DEV-Operations   | 6          | Published | 3/20/2024 10:00:00 AM  |
| Bot 1                                  | System Administrator | USR-admin        | 1          | Published | 10/11/2023 10:00:00 AM |
| Customer Self Service 1 bot            | System Administrator | PRD-Dynamics 365 | 1          | Published | 4/24/2024 10:00:00 AM  |
| Customer Service Copilot Bot           | SYSTEM               | PRD-Dynamics 365 | 1          | Published | 4/24/2024 10:00:00 AM  |
| HR Copilot                             | System Administrator | DEV-Operations   | 72         | Published | 12/12/2023 10:00:00 AM |
| HR Copilot Dynamic Chaining            | System Administrator | DEV-Operations   | 24         | Published | 12/13/2023 10:00:00 AM |
| Sales Copilot Power Virtual Agents Bot | SYSTEM               | PRD-Dynamics 365 | 3          | Published | 12/4/2023 10:00:00 AM  |

# Application Lifecycle Management

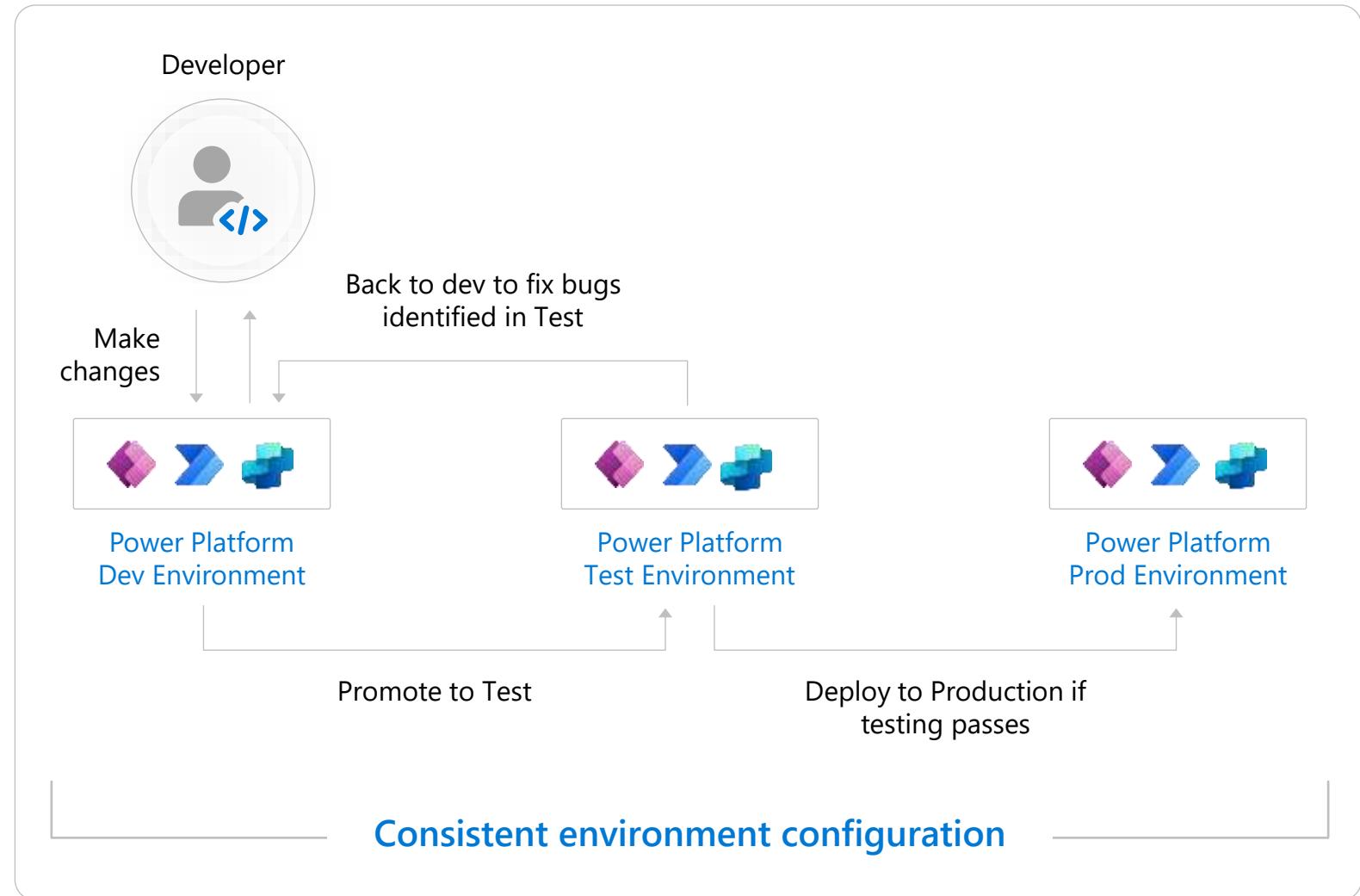
Customers have bot lifecycle management requirements - governance, development, and maintenance.

Customers can export and import copilots across multiple environments – development, test and production.

**Learn more:**

[aka.ms/PVA/export-import](https://aka.ms/PVA/export-import)

[aka.ms/powerplatform/ALM](https://aka.ms/powerplatform/ALM)

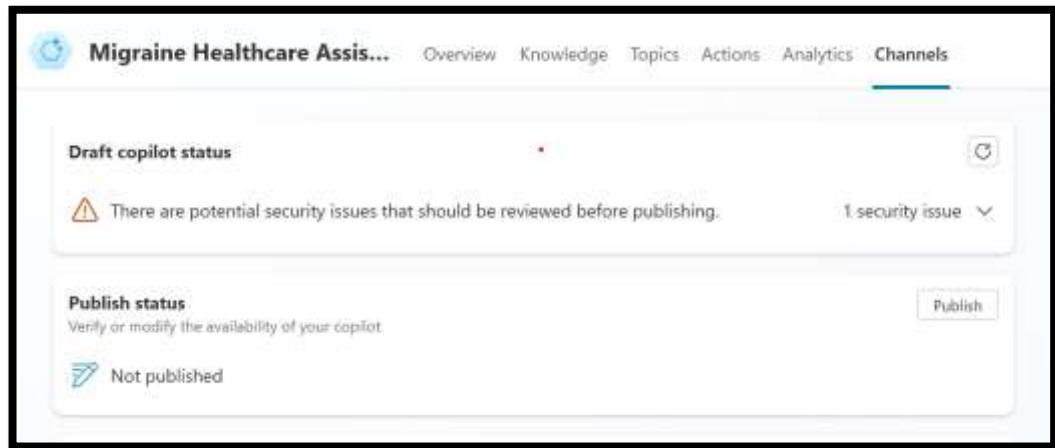


# New features

Generally available

## Safer defaults

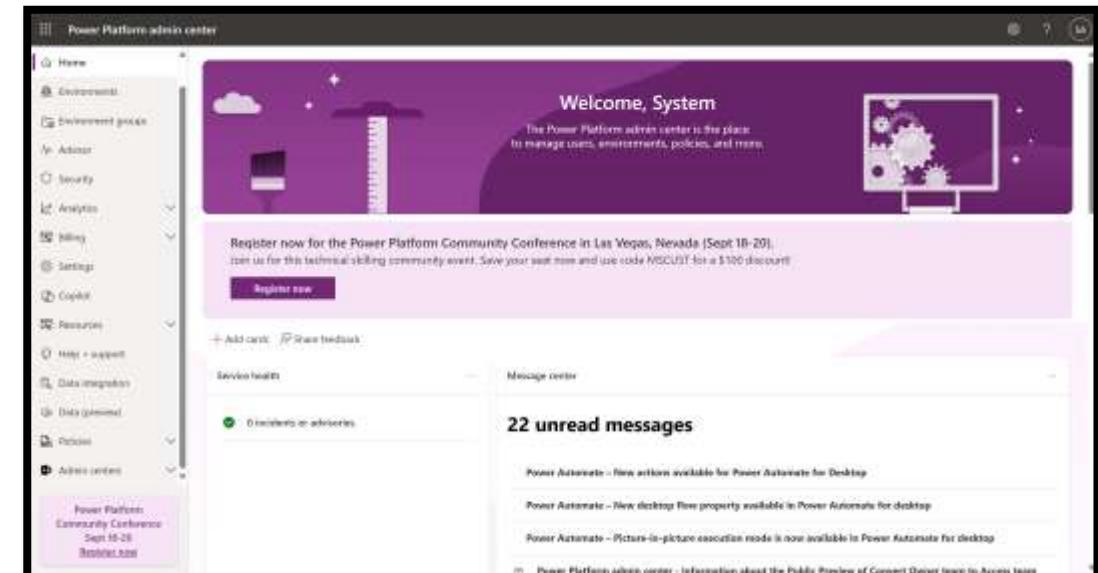
Apply safer defaults and provide in-product communication if those defaults are changed by makers. For example: all copilots are now created requiring authenticated access, and makers no longer have access to transcripts by default.



Generally available

## Granular controls

Provide granular governance levers that give admins more control on the copilots in their tenants. Granular controls include: generative AI, Knowledge, App Insights, & Authentication.



# New features

Generally available

## End user and maker authentication opportunities

Default experience going forward for copilots that are configured with authentication is to add these objects in the end-user authentication setting

Prompt users of the copilot to login when they encounter actions that need more permissions

Step 1 of 3: Choose an action  
Create an action or browse through our list of actions you want to use to get information from external sources. [Learn more](#)

End user authentication

User authentication

User authentication  
 Copilot author authentication

Describes the purpose of the connector action 0/2000 maximum characters

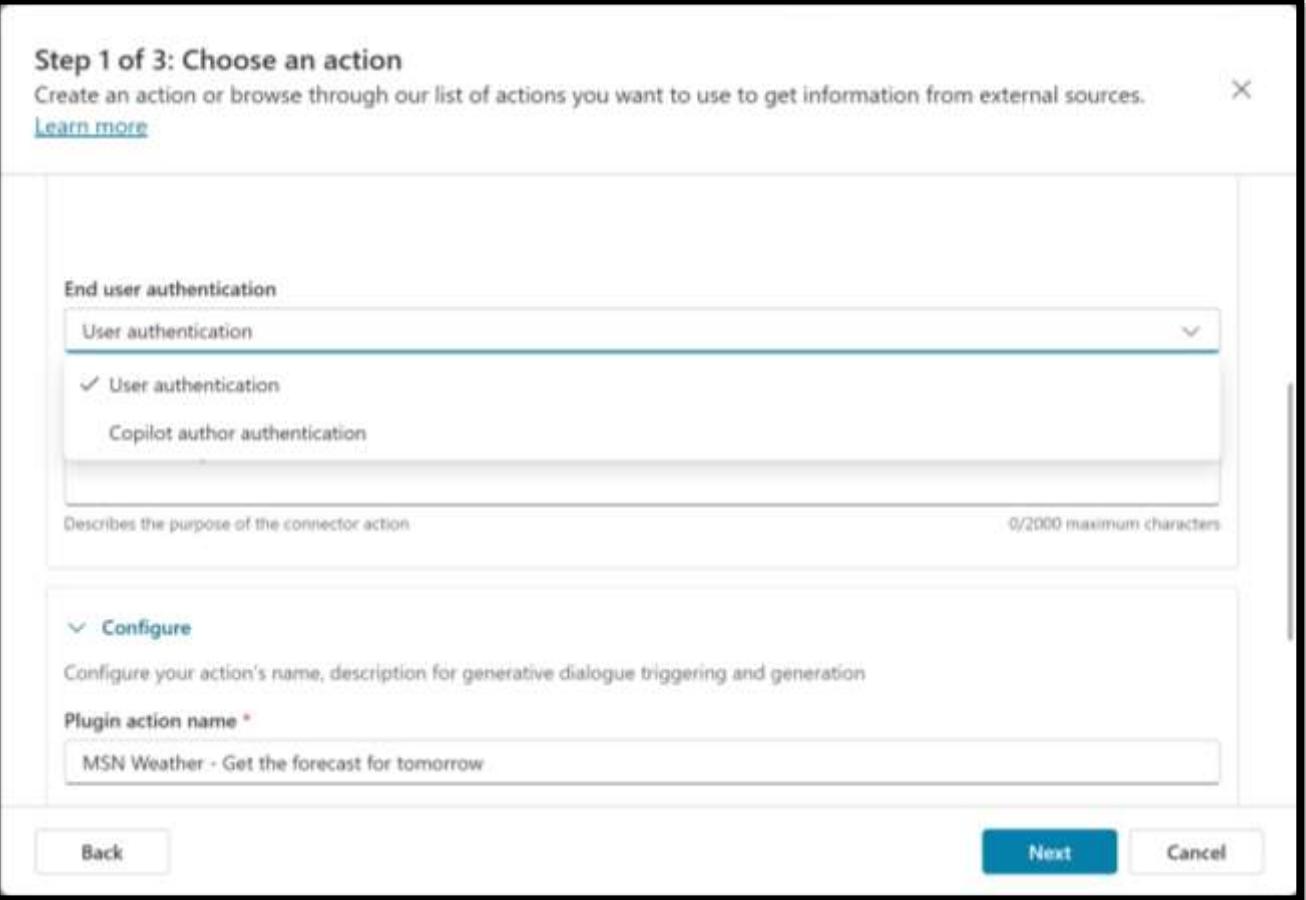
Configure

Configure your action's name, description for generative dialogue triggering and generation

Plugin action name \*

MSN Weather - Get the forecast for tomorrow

Back Next Cancel



# New features

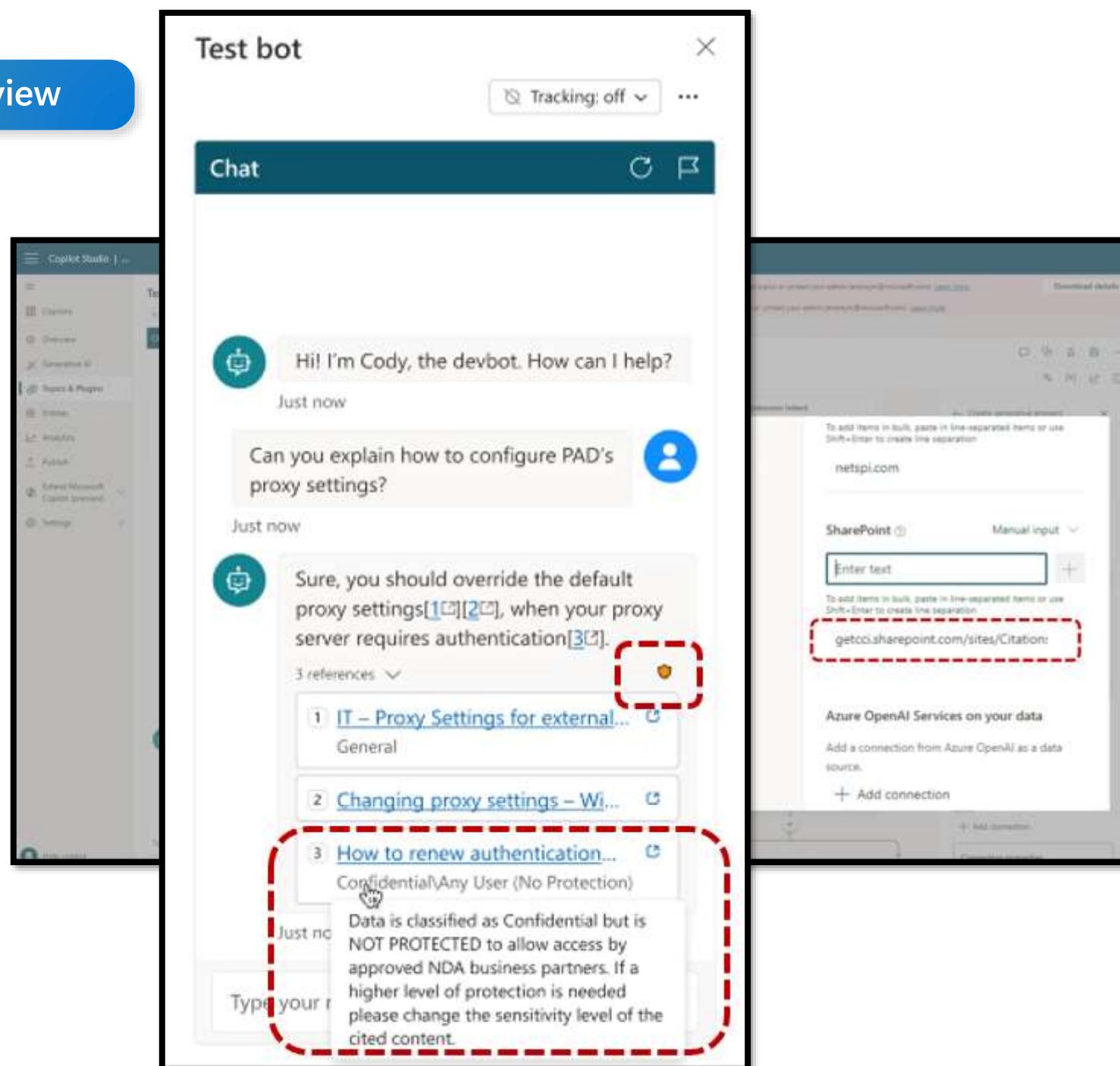
Public preview

## Sensitivity labels in responses prevent oversharing

Users can see the sensitivity of the document referenced in the custom copilot output.

Copilot conversation inherits the most restrictive sensitivity labels from the references used to formulate a response.

Custom copilots honor the rights management control associated with sensitivity labels



# New features

Private preview

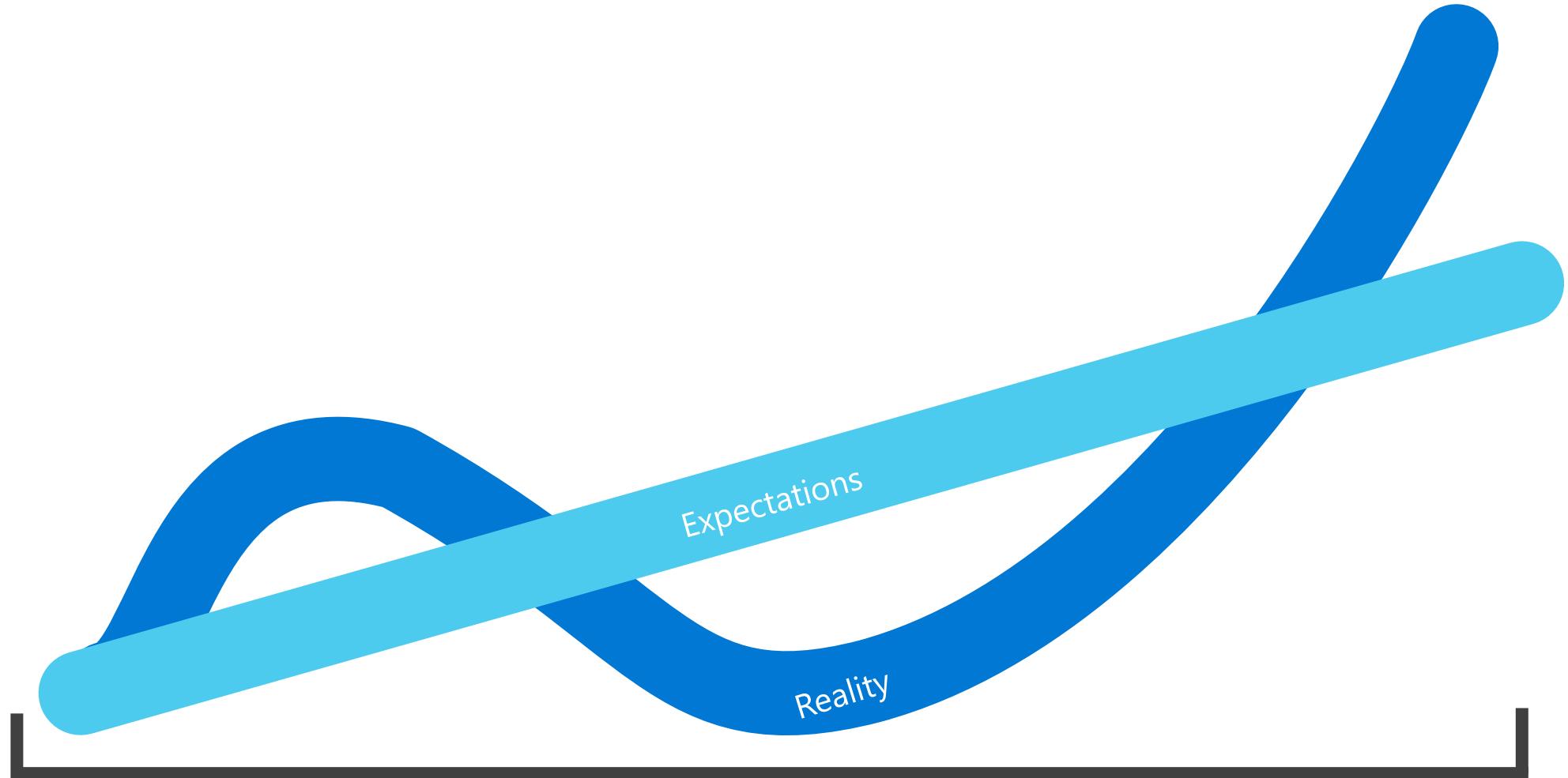
## Copilot hub

Provides a location for documents, insights, and governance for Microsoft Copilot in Power Platform. With simple access to Copilot resources, admins can learn, prepare, configure, deploy, and measure usage of generative AI features across their organizations.

The screenshot displays the Microsoft Power Platform admin center interface, specifically the Copilot hub section. The left sidebar shows navigation options like Home, Environments, Environment groups, Security, Copilot (selected), Analytics, Billing, Settings, Resources, Help + support, Data integration, Data, Policies, Admin center, and Copilot. The main content area is titled 'Copilot' and includes tabs for Summary, Readiness, Usage, and Governance. The 'Readiness' tab is active, featuring a 'Learn how Copilot works' video thumbnail, a 'Prepare for Copilot' sidebar with links to Copilot Playbook, Security, privacy, and data residency, Readiness checklist, License management, and Permissions and data best practices, and a 'What's new' sidebar listing recent updates. The 'Usage' section shows monthly usage statistics with a chart titled 'Copilot users in the last 28 days' showing growth from January to June. The 'Copilot usage by product' section provides counts for Copilot Studio, Power Apps, Power Automate, and Power Pages. The 'Governance' section includes a 'Content moderation' chart showing total requests over time and a 'Power Apps settings' sidebar with sections for Preview, Generally available, and Dynamics, each with status indicators for various Copilot features.

# How to plan a copilot agent project

# Copilot agent rollout



# Questions to help you get started

- What does it mean for your agent to **truly answer** their questions?
- What are some **unexpected responses** your agent may encounter?
- What **data might you need** access to and need to integrate with various systems to do so?
- What **assumptions do your users have** when they engage with your agent?
- What **context do your users have** when talking with your agent, and does this solution fit that mental model?
- How can you design an agent that is **easy for your users** to navigate and find the answers they are looking for?

# How to build effective conversational experiences

# Who is a “user”?



## User

A person who uses a product or service.

## Things to keep in mind

---

- Who is your user?
- What types of conversations will your bot be having with this audience?
- And lastly where will these conversations take place?
- Don't forget who you're designing for

# Users talking to agents

They know they're **not talking to a person.**

They know it's **not reciprocal.**

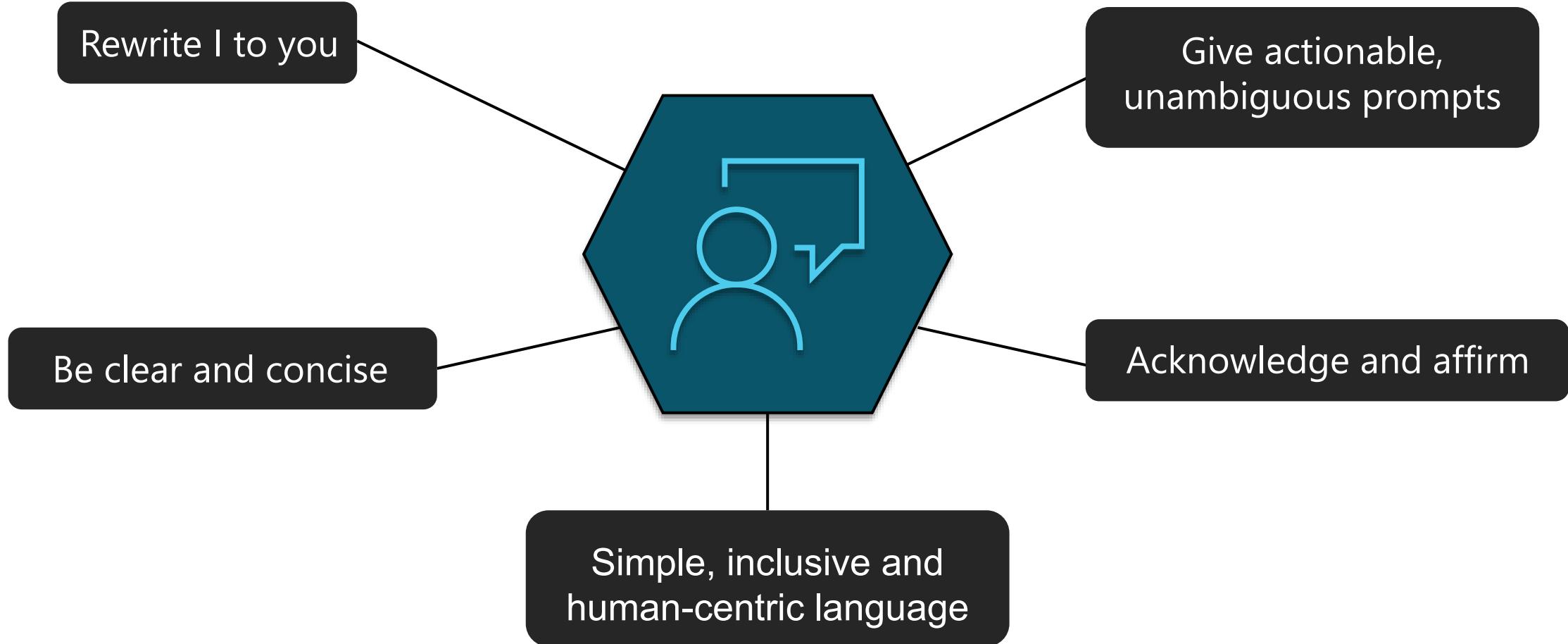
But their **emotional response** is very real.



# Useful Conversational Experiences

- Pick a scenario that will delight and will be requested repeatedly: is the scenario conversational?
- Does the agent easily solve the user's problem with minimal back and forth turns?
- Is the agent discoverable and easy to invoke?
- Mimic human to human conversation in your design of the transcript
- Prototype to uncover what is working
- Create a test plan

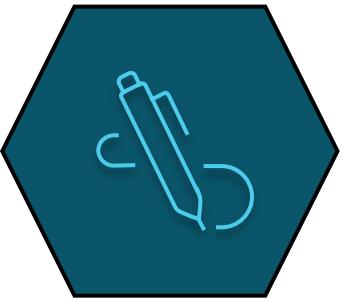
# Focus on user-centric language



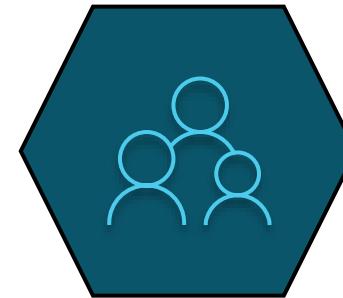
# Best practices



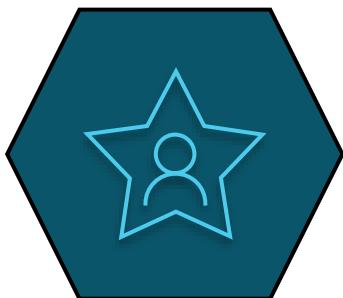
**Understand your user**



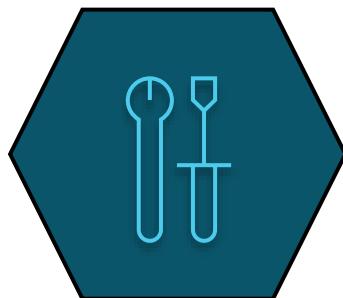
**Keep it simple and clear**



**Be inclusive**

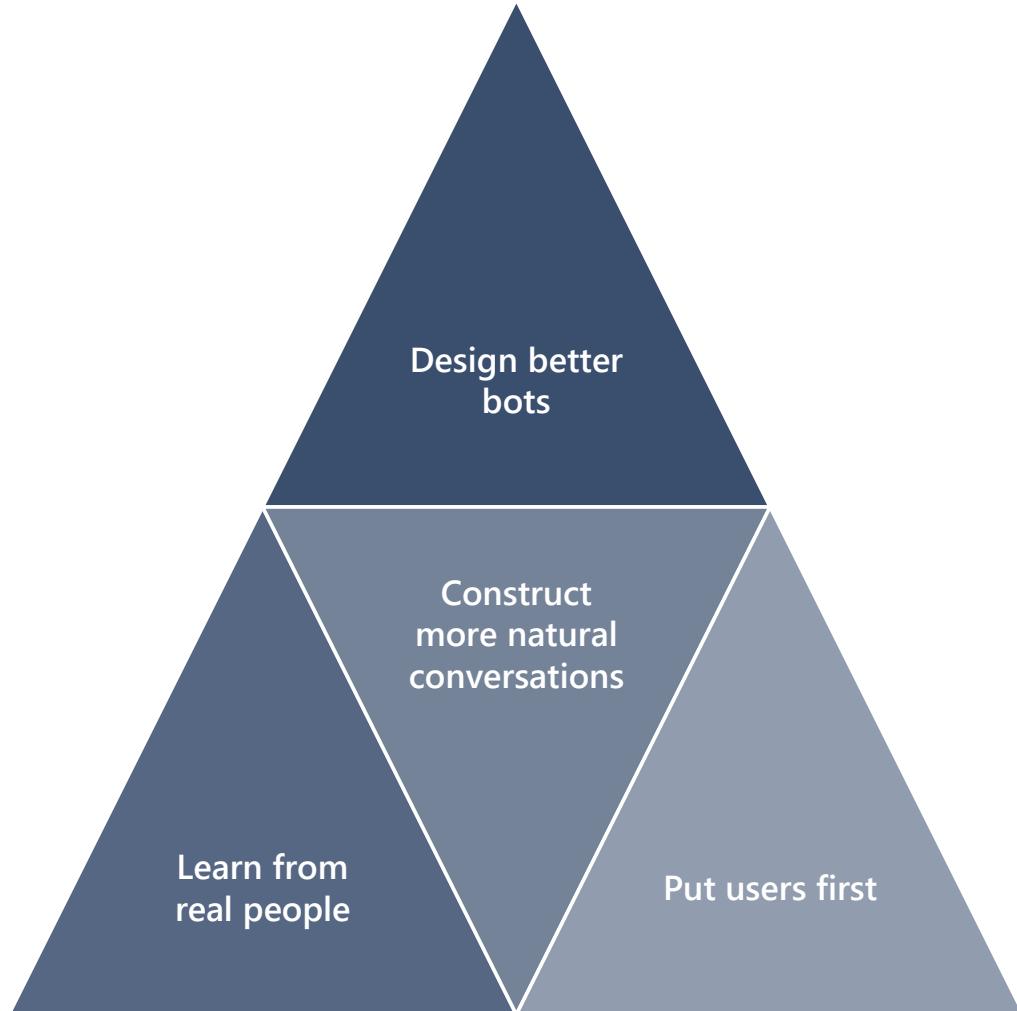


**Personality is important**



**Use the right tools**

# Essence of inclusive design



# Agent brand & personality



## What's my name?

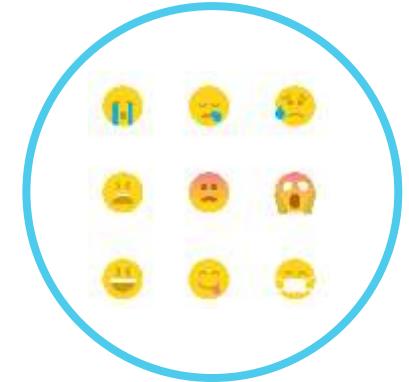
Think about your name and how it reflects your brand and the type of bot you are designing.



## How do I look and react?

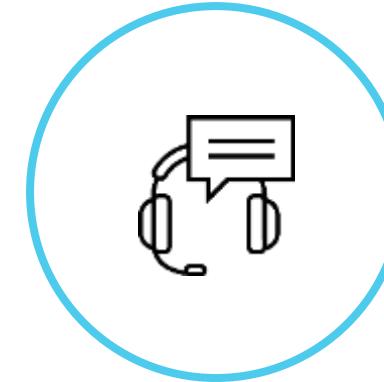
Just like a mobile app your assistant icon is really important.

The interactive changing state of your bot is highly recommended: listening, waiting, responding etc.



## How should I sound?

Tone of voice is the primary way you will inject your brand into a bot.



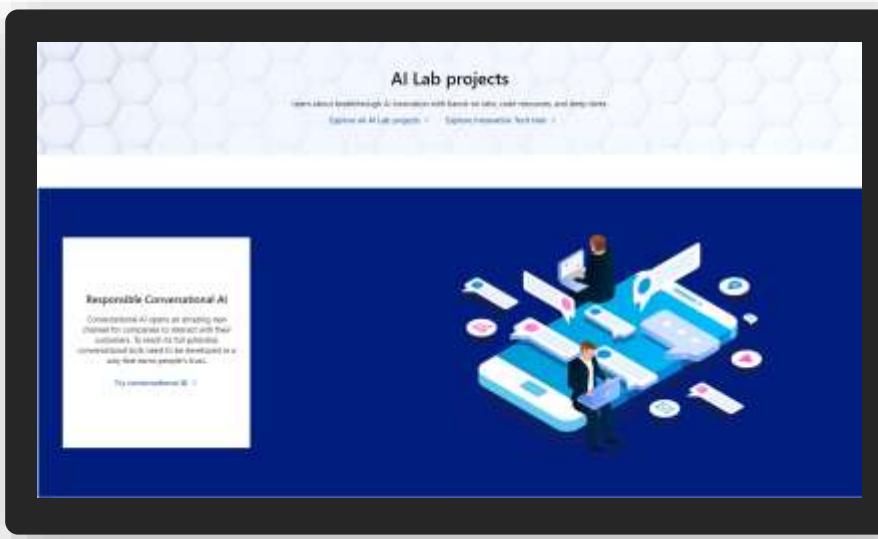
## When should I ask for help?

No matter how smart your bot is, there will be cases where you still need to let a human take control of the conversation.

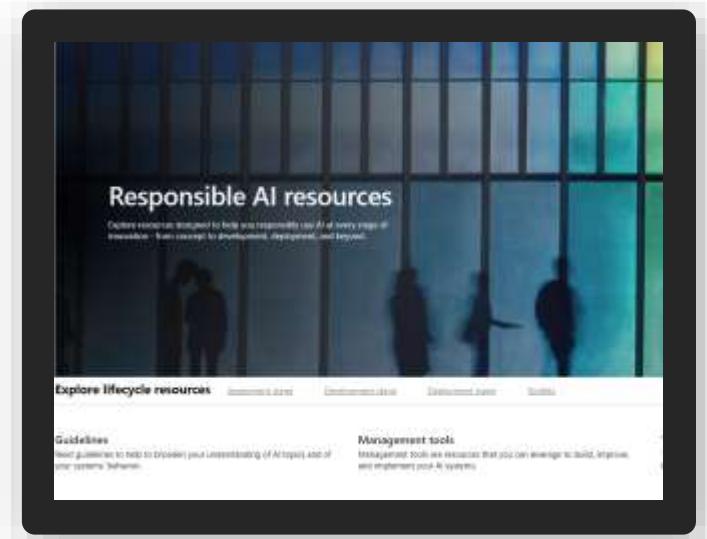
# Ethical considerations



**Microsoft's framework  
for building AI systems  
responsibly**  
[aka.ms/MSFTAIFramework](https://aka.ms/MSFTAIFramework)



**Responsible Conversational AI –  
Microsoft AI Lab**  
[aka.ms/ResponsibleConvAI](https://aka.ms/ResponsibleConvAI)



**Responsible AI Resources –  
Microsoft AI**  
[aka.ms/Responsible-AI-Resources](https://aka.ms/Responsible-AI-Resources)

# Brainstorm worksheet

**ENVISIONING YOUR BOT**  
A BRAINSTORMING WORKSHEET

| IDENTITY   |  |
|--|--|
| NAME IDEAS (Does it have a name? Or just a title?)   | REGIONS (Where will the bot be used?)  |
| ICON IDEAS (Brand icon, graphic, logo, monogram, etc.)   | LANGUAGES (With what other humans does your bot interact?)   |
| AUDIENCE   |  |
| WHO USES YOUR BOT<br><small>(Who is your audience? Describe them here.)</small>  | 3 REASONS THEY USE IT<br><small>(Please write out your top 3 reasons why the top 3 things it does are useful.)</small>   |
|  | REASON 1   |
|  | REASON 2   |
|  | REASON 3   |
| TONE OF VOICE (These are the key characteristics of your brand—and therefore, the key characteristics of your bot.)  |  |
| 5 TRAITS WE EMBODY<br><small>(What are your brand's top 5 characteristics? Write them down here.)</small>  | SIMILAR CHARACTERS<br><small>(Identify actual people or characters who look like your brand.)</small>  |
|  | 5 TRAITS WE AVOID<br><small>(What are the top 5 characteristics your brand avoids? Write them down here.)</small>  |
| BRAND EXAMPLES<br><small>(Are there any brands that have a tone similar to yours?)</small>   |  |
| TRAITS (This is how your voice changes depending on the situation.)  |  |
| 3 REASONS PEOPLE USE MY BOT<br><small>(Now, take the traits you wrote in the <b>Tone of Voice</b> and write them again down below.)</small>  | 3 THINGS THAT COULD HAPPEN<br><small>(For each reason someone might use your bot on the left, write down a specific situation one of your customers might find themselves in.)</small>   |
| REASON 1   | HOW MY BOT RESPONDS<br><small>(Beside each of the 3 traits you came up with in the <b>Tone of Voice</b> column, rank on the scale of 1 to 5 the extent to which your bot makes this trait a priority in its response.)</small> |
| REASON 2   | Trait 1: _____ 1 2 3 4 5<br>Trait 2: _____ 1 2 3 4 5<br>Trait 3: _____ 1 2 3 4 5<br>Trait 4: _____ 1 2 3 4 5<br>Trait 5: _____ 1 2 3 4 5   |
| REASON 3   | Trait 1: _____ 1 2 3 4 5<br>Trait 2: _____ 1 2 3 4 5<br>Trait 3: _____ 1 2 3 4 5<br>Trait 4: _____ 1 2 3 4 5<br>Trait 5: _____ 1 2 3 4 5   |
| CONTENT STYLE (This is how your tone is expressed. Or: How your bot talks, like the words it says and how it says them.)   |  |
| QUICK LIST<br><ul style="list-style-type: none"><li><input type="checkbox"/> Emojis</li><li><input type="checkbox"/> GIFs &amp; memes</li><li><input type="checkbox"/> Images</li><li><input type="checkbox"/> Videos</li><li><input type="checkbox"/> _____</li></ul> | PUNCTUATION<br><br>SENTENCE CONSTRUCTION<br><br>CAPITALIZATION<br><br>JARGON & SLANG   |

Microsoft

<https://aka.ms/ConversationalAIWorksheet>

[Conversational user experience in the Bot Framework SDK - Bot Service | Microsoft Docs](#)

# Align the agent with your organization's goals

- Handling repetitive information requests when a skilled human agent is not required
- Reducing the time it takes to get answers to end users
- Lowering support call volume, while also handling high call volume
- Improving support KPIs
- Using an agent as part of the brand strategy

# Additional recommended content

## Copilot Studio implementation guide

Provides a framework to do a 360-degree review of your 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.

<https://aka.ms/CopilotStudioImplementationGuide>



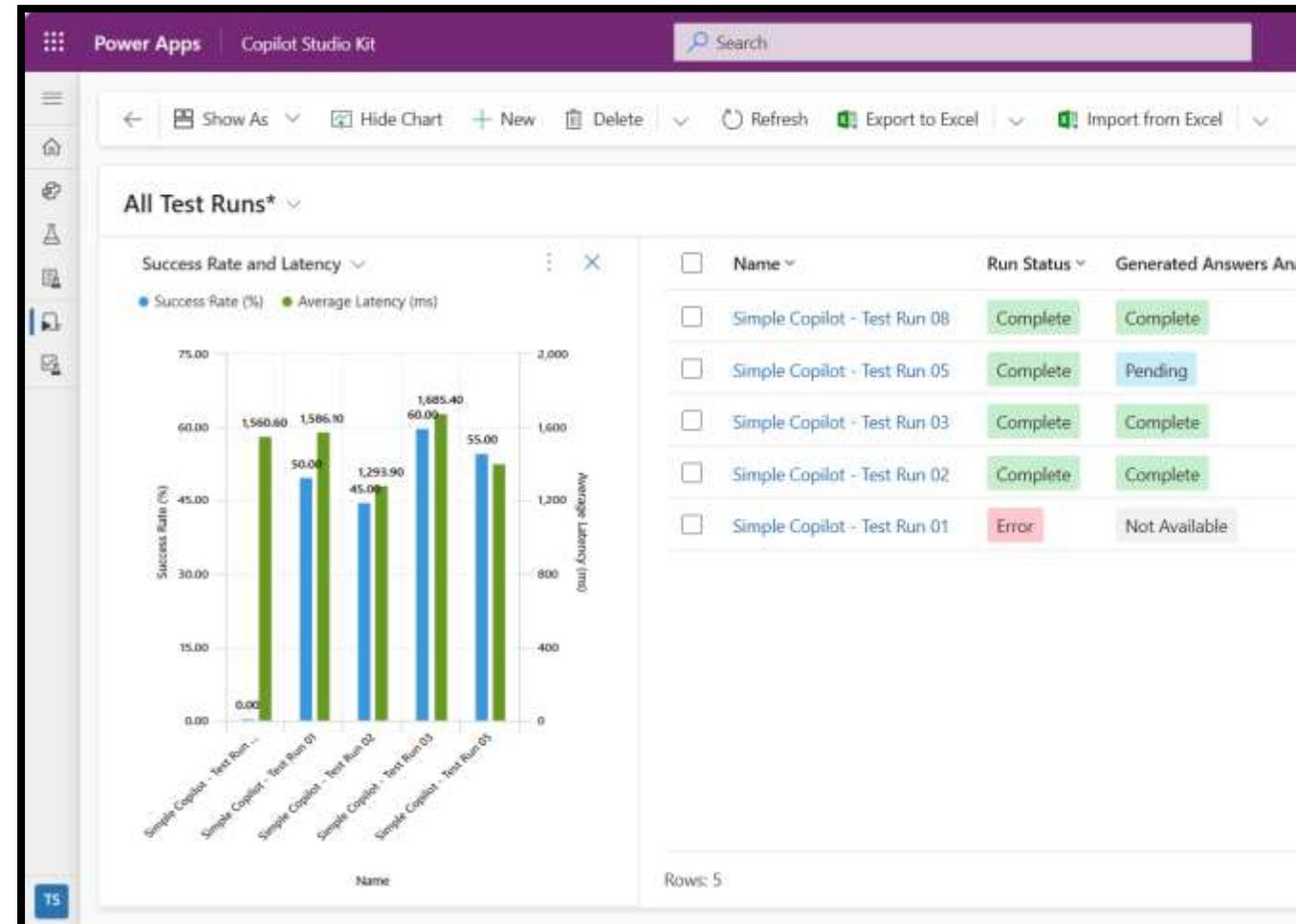
# Additional recommended content

## Power CAT Copilot Studio Kit

It is a user-friendly application that empowers makers to configure copilot agents and tests sets. It has native capabilities such as Excel export or import for bulk creation and updates.

By running individual tests against the Copilot Studio APIs (Direct Line), it **evaluate** copilot responses against **expected results**, using additional data points from **Azure Application Insights** and from **Conversation Transcript records** storage on Dataverse

For AI-generated answers, that are by nature non-deterministic, **AI Builder prompts are used** to compare the generated answer with a sample answer or with validation instructions.



<https://github.com/microsoft/Power-CAT-Copilot-Studio-Kit>

# Copilots with agent capabilities (private preview)

# Build copilots with agent capabilities

Complete tasks independently with a copilot tailored to a specific tasks or functions

Operate **independently** of the user  
to fully automate tasks

Respond to events in addition to copilot  
or human requests

Act on behalf of a **company**,  
department, or team – not just a user

The screenshot shows the Microsoft Copilot Studio interface. On the left, the 'IT Helpdesk' tab is selected under 'Copilot Studio'. A central modal window displays the message: 'Your copilot is ready! Here's what's next:' followed by a list of actions: 'Add instructions to refine and improve how it responds', 'Add actions so your copilot can perform specific tasks', 'Test your copilot to ensure its comprehension', and 'Publish your copilot so others can use it'. Below this, the 'Overview' section shows a 'Goal' to 'Assist users through new hire support, troubleshooting, and hardware procurement'. It lists 'Channels' (Outlook, Teams, Microsoft Copilot) and 'Triggers' (New Hire Detection, Employee hardware refresh). The 'Instructions' section contains a bulleted list of actions: 'Send email request on preference on operating system and screen size for hardware.', 'If request deviates from standard offered package, send for approval to manager.', 'Procure hardware package as per company policy.', and 'Provide guidance on how to resolve hardware issues when requested.' The 'Actions' section lists three actions: 'Send email request' (to sarahjones@microsoft.com), 'Create record' (to sarahjones@microsoft.com), and 'Send for approval' (to sarahjones@microsoft.com). On the right, a 'Test your copilot' window shows a conversation log: 'Let's test your copilot! You have a trigger that requires interaction from an outside source like a person, channel or something else. You may perform a real-world test or a simulated test. Let me know if I can tell you more.' with buttons 'Run a simulated test' and 'Run a real world test'. Below this, a message says 'Ok, great. I will contact the user <entity>, include the <delivery date> and a request for temporary laptop in the interim. I saved this as a Learned Response, and added an Arrange a temporary laptop action.' A note 'AI generated content may be incorrect.' is shown. At the bottom, there are tabs 'Teach' and 'Test', and a button 'Start a conversation to test this out...'.

# Copilots with agent capabilities - The new 'app' in a gen AI world

## Problem

Unique business processes, industries, circumstances, and customers



Complex processes, form-heavy apps, labor intensive systems, and high setup and maintenance costs

Copilots can handle this variability and complexity at infinite scale

## Solution



Automates long-running processes



Reasons over actions and user inputs



Leverages memory and knowledge



Monitor, learns and improve



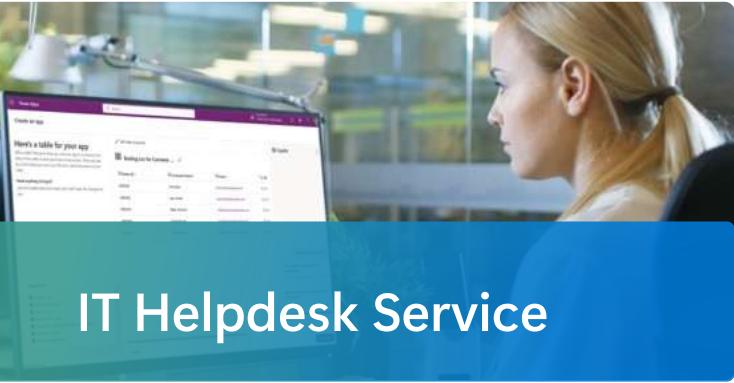
Follows human guardrails and asks for help

## How

### Two key breakthroughs

1. Guard-rail agentic architectures to control and manage LLM-based orchestration.
2. Action models and fine tuning of these action models for specific tasks.

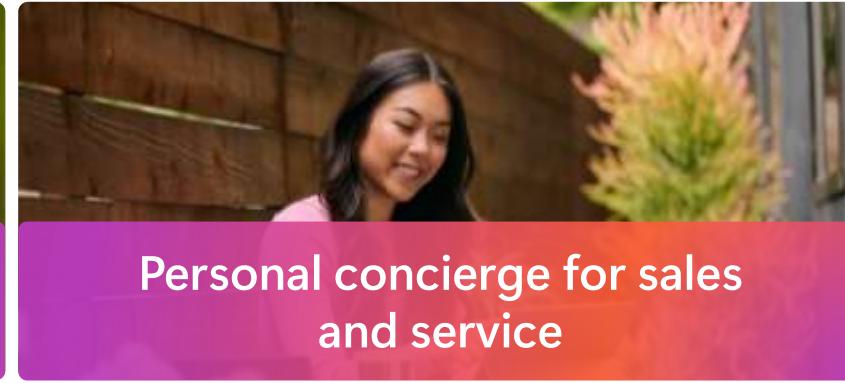
# Unlock more use cases with agent capabilities



## IT Helpdesk Service



## Employee onboarding



## Personal concierge for sales and service

- Interface with IT service management applications
- Create POs for device refresh
- Resolve IT tickets with context and memory
- Handle managers' approvals

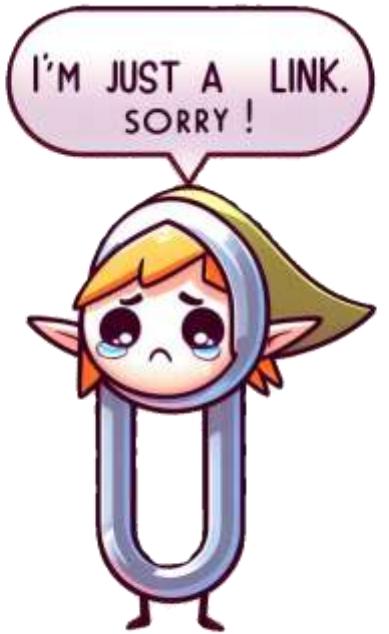
- Greets you
- Reasons over HR data to answer your questions
- Introduces you to your buddy
- Provides the training and deadlines
- Helps with required forms
- Sets up your first week of meetings

- Provide personal recommendations based on memory
- Make reservations
- Handle complaints
- Answer questions about products / services
- Propose new ways of handling customer scenarios
- Upsell to customers

Sales leads qualification + nurture • Developer bug triaging • Automated Q&A • Partner / customer implementation + product support • Conversational form filler  
• Knowledge base management + refresh • Case lifecycle management + summarization • Customer email responses + follow up for unresponsive customers

# Demo

- Copilot Studio agent capabilities (8 mins)



Start me at 11:38  
Stop me at 19:56

## Before you go

# Plan your Power Platform adoption

## Learn about your low-code maturity level

Learn how low-code can underpin your **successful digital transformation** and scale Microsoft Power Platform adoption to your **entire organization** with our adoption guide.

- Get guidance to help you **create** and **implement** the **business** and **technology strategies** to succeed with Power Platform.
- Learn about **themes**, **patterns**, **practices** and **behaviors** that underpin successful Power Platform implementations.
- Learn about how to **kickstart** your **Center of Excellence (CoE)**.

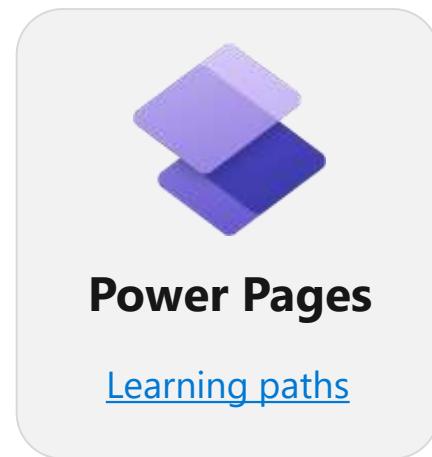
[Learn more!](#)

The image shows a screenshot of the Microsoft Power Platform Adoption landing page. The main title is "Microsoft Power Platform Adoption". Below it, a sub-section titled "Adoption workbook" is shown with a "Download workbook >" button. To the right, another section titled "Adoption best practices" is shown with a "Get the best practices >" button. In the top right corner, there's a mobile phone displaying a Power App with a message that says "Good morning, Katie." and "Inspect tasks". In the bottom right corner, there's a snippet of a Microsoft Teams interface showing a channel named "Northwind Board-702211". The overall theme is professional and tech-oriented.

# Get training

**Use online resources or organize a “in a Day” workshops**

**Microsoft Learn** have **online learning paths** from beginner to advanced level. **“In a Day”** workshops let you have a hands-on experience of building great business apps without writing code.

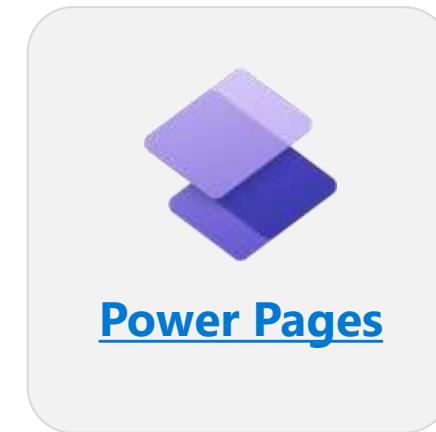
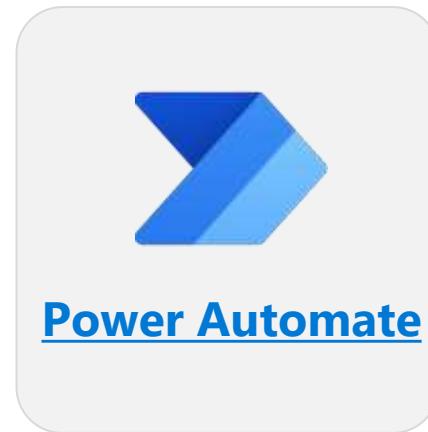
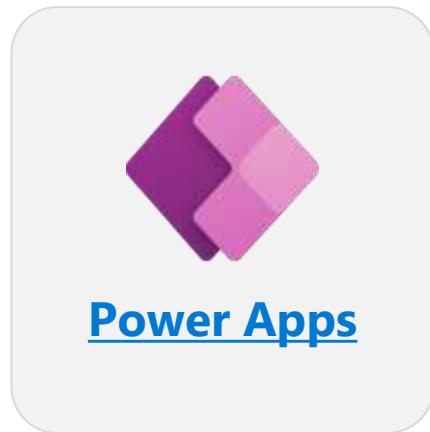


[Power Platform “In a Day” workshops](#)

# Establish guidelines and best practices

## Use official documentation as a starting point

These guidelines provides **best practices**, **implementation**, and **architecture guidance** information from the **Microsoft teams** that works with our enterprise customers.



# Establish guidelines and best practices

## Address complex topics with Power Platform whitepapers

Get **in-depth information, solutions, and recommendations** to help you address complex scenarios and inform your decision-making.

| Whitepaper   | Description   |
|--|---|
| <a href="#">Develop a tenant environment strategy to adopt Power Platform at scale</a> | Shows you how to align your Power Platform tenant environment strategy with the product capabilities and vision.  |
| <a href="#">Enterprise security with Power Platform</a>                                | Shows you how to align Power Platform with your security practices.   |
| <a href="#">Activating Managed Environments</a>  | Explores the features of Managed Environments in Power Platform.  |
| <a href="#">Application modernization with Power Platform</a>                          | Explores the benefits, strategies, and best practices of modernizing applications with Microsoft Power Platform.  |
| <a href="#">Migrating apps and flows from the default environment</a>                  | Outlines considerations and best practices for migrating apps and flows from the default environment.   |
| <a href="#">Architecture white paper</a>   | Provides a comprehensive view of the capabilities of the Power Pages platform and how it scales, offer high reliability and availability, and protect business data |
| <a href="#">Security white paper</a>   | Describes how Power Pages offers enterprise grade security and the tools and capabilities   |

# Establish guidelines and best practices

## Power Platform Well-Architected

A framework that can improve the quality of your Power Platform workloads

- A set of **best practices, architecture guidance, and review tools** to help you make informed decisions about the design, planning, and implementation of Power Platform workloads.
- Based on the methodology and guidance of the [Azure Well-Architected Framework](#).
- Have an [assessment tool](#) to help **identify areas of enhancement** and **iteratively improve** your workloads.

[\*\*Learn more!\*\*](#)

The screenshot shows the homepage of the Power Platform Well-Architected website. The header features the title "Power Platform Well-Architected". Below the title is a brief description: "Microsoft Power Platform Well-Architected is a set of best practices, architecture guidance, and review tools to help you make informed decisions about the design, planning, and implementation of modern application workloads with Microsoft Power Platform." A button labeled "What is Power Platform Well-Architected?" is visible. At the top right, there are navigation links: "What's new", "Pillars", "Workloads", "Implementing recommendations", and "Assessment tool". The main content area has a dark blue background with white text. It reads "POWER PLATFORM WELL-ARCHITECTED" and "Design modern application workloads that are built to change and built to last." To the right, there is a diagram showing the relationship between "Power Platform Well-Architected" and four pillars: Reliability (blue), Security (orange), Operational Excellence (green), and Performance (yellow). A note at the bottom states: "Power Platform Well-Architected helps you design your modern application workloads to both meet current requirements and adapt to future needs and challenges. Start with the pillars, and then align".

## Closing: Wrap up and next steps

# Continue sua jornada de **conhecimento**

## Demonstrações técnicas de Power Platform

Eventos no **Microsoft Teams** conduzidos pelos especialistas em Power Platform da Microsoft Brasil. Para participar procure seu **gestor(a) de conta** (AE) ou **especialista** (SSP).



### Desenvolvimento de aplicativos

#### Tópicos

- Canvas Apps
- Microsoft Dataverse
- Model Driven Apps
- Power Pages

#### Duração

03 horas

[Saiba mais](#)

### Governança e ALM

#### Tópicos

- Governança
- Segurança
- Monitoramento
- Centro de Excelência (CoE)
- ALM/DevOps

#### Duração

03 horas

[Saiba mais](#)

### Hiper automação

#### Tópicos

- Process e Task Mining
- Cloud flows (DPA)
- Desktop flows (RPA)
- Gerenciamento e monitoramento
- Hosted machines (VMs SaaS)
- Automações e integrações

#### Duração

03 horas

[Saiba mais](#)

### Criando copilots com Copilot Studio

#### Tópicos

- Ecosistema Microsoft de copilots
- Visão geral do Copilot Studio
- Recursos baseados em IA generativa
- Automações e integrações

#### Duração

03 horas

[Saiba mais](#)

# Continue sua jornada de **conhecimento**

## Power Platform Connect

Site mantido pelos especialistas em **Power Platform** da **Microsoft Brasil**. Nele você encontrará:



### Biblioteca de conteúdo

Coleção de links oficiais das soluções que compõem a Power Platform

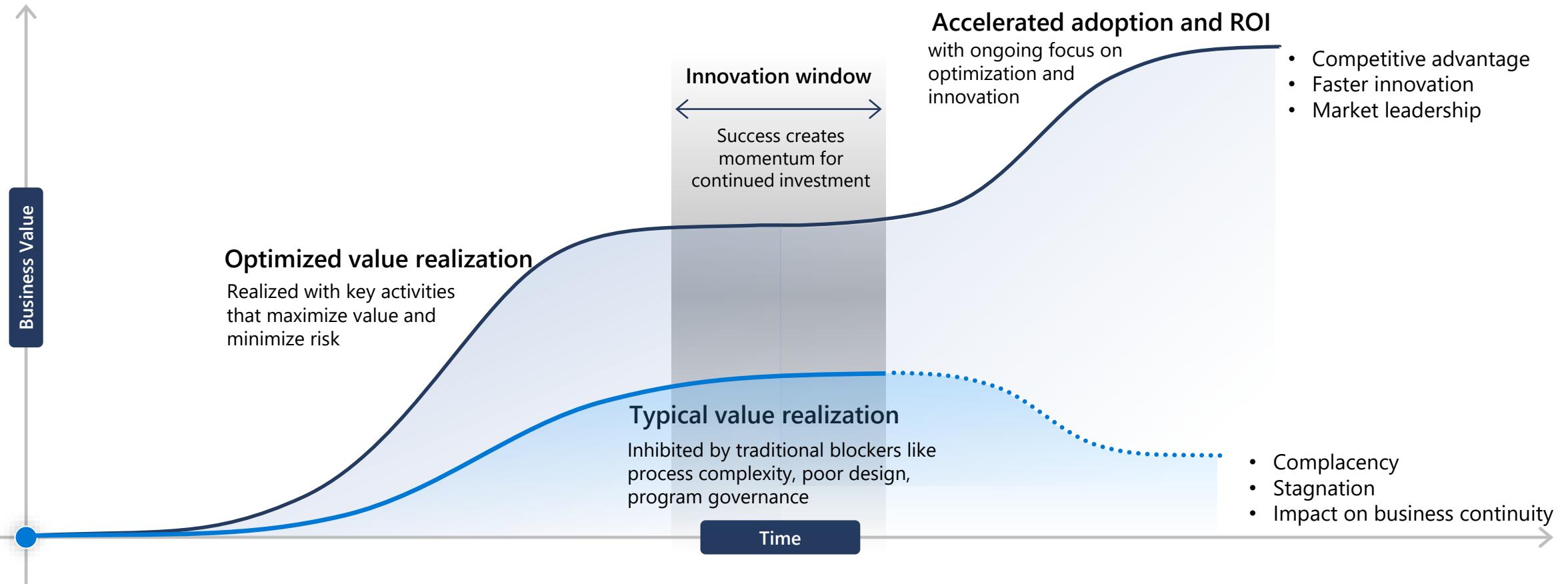
### Eventos online

Eventos online promovidos pela Microsoft ou seus parceiros.

<https://microsoft.github.io/powerplatformconnect>

# Maximize seus investimentos com o Microsoft Unified

Acelere seu tempo de implantação com serviços liderados por especialistas, desde o planejamento até a implantação e muito mais



# Conte com especialistas para construir seus aplicativos

Com acesso direto aos especialistas da Microsoft, você pode criar aplicativos personalizados usando o Power Platform para resolver desafios de negócios e automatizar processos de negócios

## O que você quer alcançar...

- Estabeleça um modelo de governança e padrões e prepare-se para a IA
- Implantação bem-sucedida da plataforma de energia em toda a empresa
- Validação de processos de projeto e desenvolvimento de arquitetura de soluções

## Como entregamos...

- Assistência na criação de um Centro de Excelência (COE) para governar a criação de aplicativos e acelerar a adoção em toda a organização
- Orientação prescritiva de especialistas para acelerar a implantação com workshops de Maker e Developer para melhorar as habilidades da equipe
- Revisões técnicas e funcionais para validar planos e abordar problemas e riscos

## Saiba Mais

Visite [aka.ms/Enhanced-Solutions](https://aka.ms/Enhanced-Solutions) para agendarmos uma sessão com objetivo de determinar como nossas **Soluções Aprimoradas** podem ajudá-lo a alcançar os resultados desejados

# Thank you!

## Ricardo de Souza

Technology Specialist - Power Platform

 rdesouza@microsoft.com

 <https://www.linkedin.com/in/ricardodesouza/>

## Appendix

# Differences and similarities between Copilots



# Copilot Studio

What can you build?



Included in Copilot for M365

## Build a plugin for Copilot for M365

Customize Copilot for M365 with your own data and workflows to meet your unique business needs.



Standalone



Azure AI Studio

What is it for?

## For internal use cases only

Employees using Copilot for M365

## Build a custom copilot for different channels

Build your own copilot for knowledge discovery, customer service and/or task automation scenarios.

Build a custom multi-modal copilot, enhance search, deliver call center solutions, develop bespoke applications, or a combination of these.

How do you build it?

## Low code

Access a subset of Copilot Studio capabilities for customization purposes only

## Low code + Pro code

Access the full capabilities of Copilot Studio including advanced capabilities for devs

## Pro code

Access dedicated advanced dev experience

## Software as a Service (SaaS)

No infrastructure to manage and built in security and governance

## Platform as a Service (PaaS)

Manage own infrastructure, custom dev and security

## Out-of-the-box LLM

Configure gen AI-powered, rule-based responses by creating and managing custom plugins

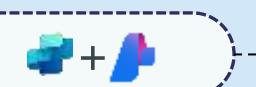
Design gen AI-powered, rules-based dialog with full dialog orchestration/management

## Train your own LLM

Use prompt orchestration to build, test, deploy and manage AI innovations



Extend with  
Azure AI Studio



Interoperability with other services

Who uses the product?

Copilot for M365 customers

Business devs, pro devs & IT admins

Enterprise devs & cloud solution architects

Who are we selling to?

ITDMs & LOB

CIOs & ITDMs

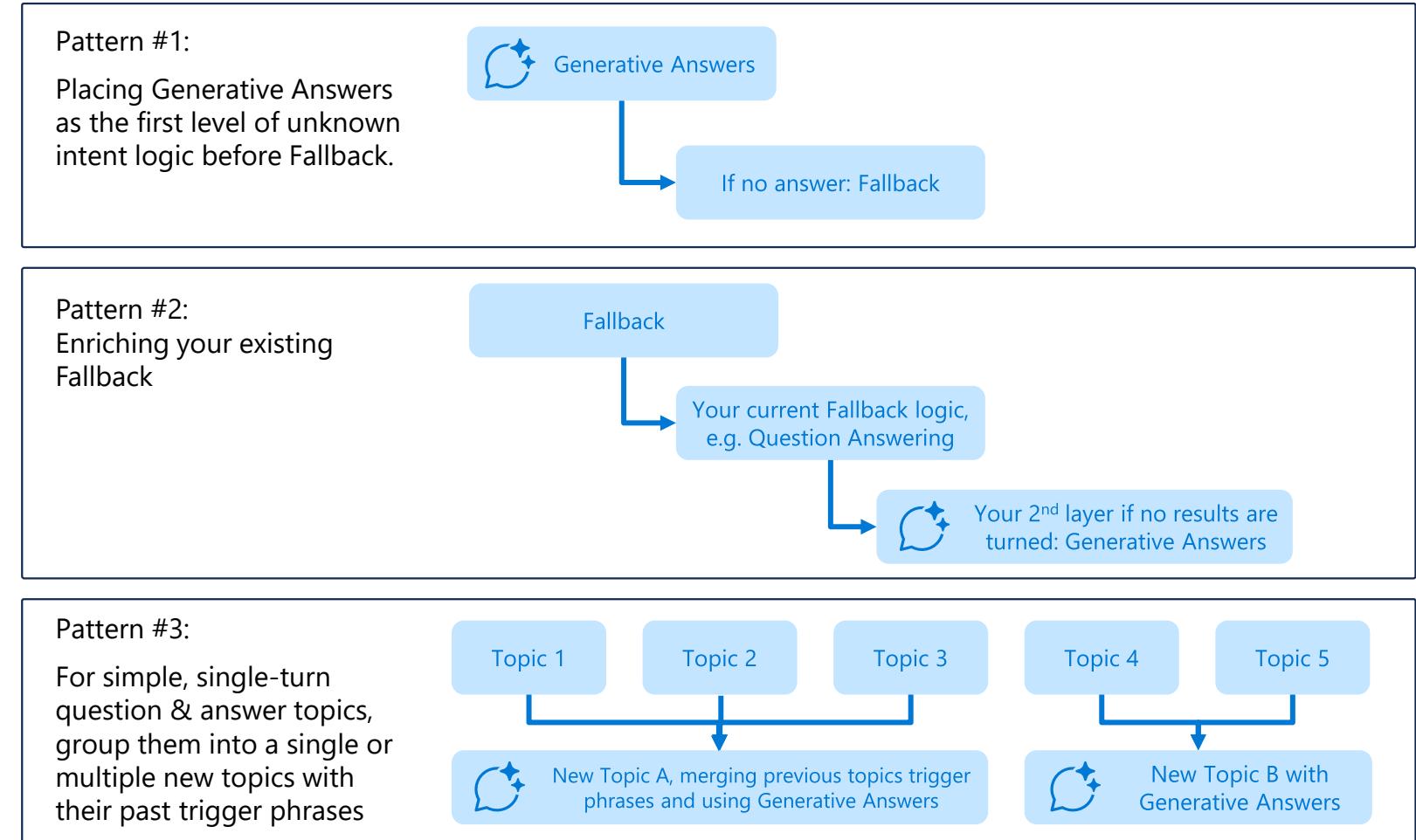
Pro devs

# Generative AI usage patterns

# Infusing generative AI into topics example

## Finding the right place for generative AI in your new or existing copilots

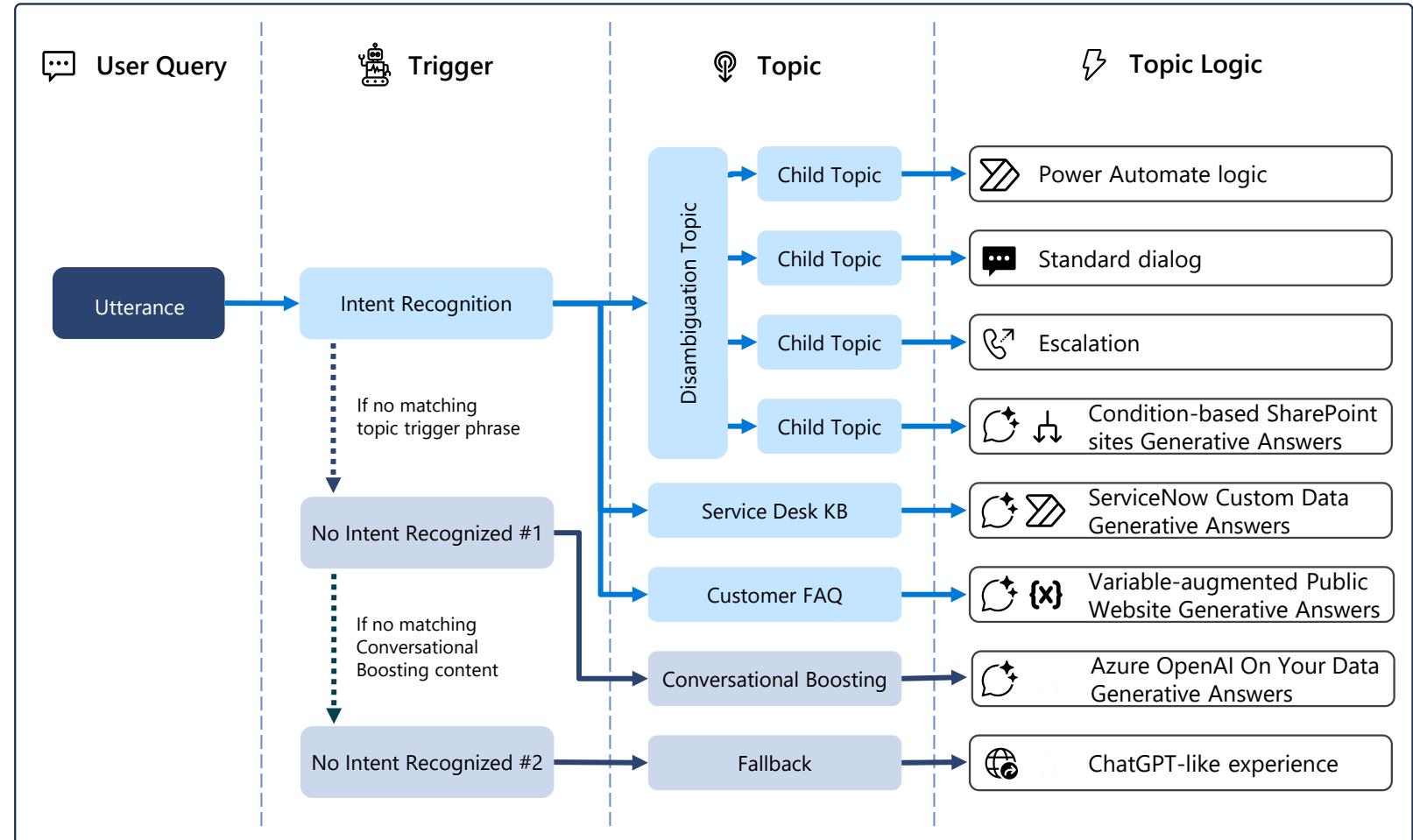
- Generative answers unlock new use cases for copilots where dialog paths no longer need to be fully anticipated.
- By plugging generative answers into your internal and external data sources, the copilot can search and summarize answers for user queries.
- It's not an 'either' choice: you can configure generative answers wherever you choose in your topics, and the data sources can both be dynamic, hard coded, or enriched with context variables.
- It's still a good idea to have generative answers also configured in the Conversational boosting topic that triggers before Fallback, to try to catch and answer user queries with broader data sources before they get to Fallback.
- While planning for generative answers, it's important to plan for follow-up questions (should they remain in context of the previous answer or trigger a new topic?) and how you will measure, track, and validate that the generated answers are accurate and answer the user questions.



# Infusing generative AI into topics example 2

## Mixing scripted dialog paths and generative answers from different data sources

- Generative answers unlock new use cases for copilots where dialog paths no longer need to be fully anticipated.
- By plugging generative answers into your internal and external data sources, the copilot can search and summarize answers for user queries.
- It's not an 'either' choice:** you can configure generative answers wherever you choose in your topics, and the data sources can both be dynamic, hard coded, or enriched with context variables.
- It's still a good idea to have generative answers also configured in the Conversational boosting topic that triggers before Fallback, to try to catch and answer user queries with broader data sources before they get to Fallback.
- While planning for generative answers, it's important to plan for follow-up questions (should they remain in context of the previous answer or trigger a new topic?) and how you will measure, track, and validate that the generated answers are accurate and answer the user questions.



# 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

Native Azure OpenAI moderation layer

Responsible AI moderation layer

Grounding validation / hallucination removal

3

