

# Copilot Studio - Hands on Lab

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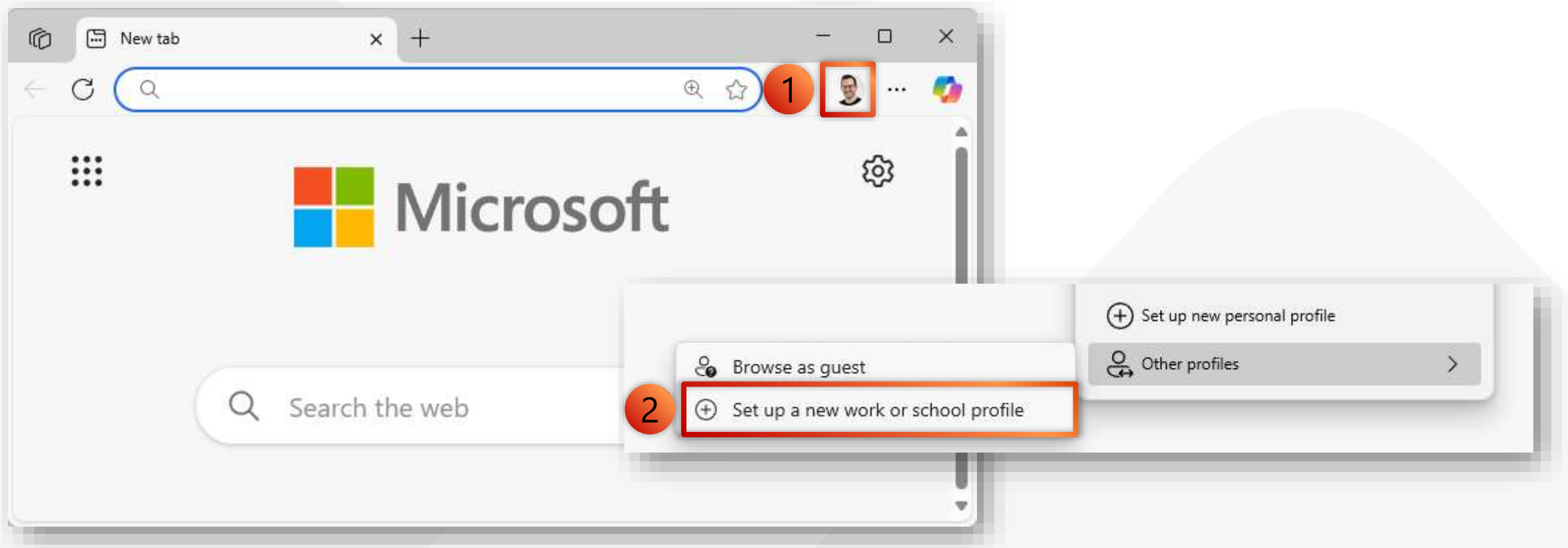
<https://aka.ms/mcslabhyd>  
<https://copilotstudio.microsoft.com/>

## DAY 1 LABS

|               |  |          |
|---------------|--|----------|
| <b>LAB 01</b> | Create your own AI assistant with Copilot Studio agent builder | 15-min   |
| LAB 02        | Set yourself up for success & discover ALM best practices      | 15 - min |
| <b>LAB 03</b> | Give your public website chatbot a brain and make it an agent  | 15-min   |
| <b>LAB 05</b> | Unlock new levels of productivity with autonomous agents       | 15-min   |

# IMPORTANT LAB INSTRUCTIONS

- For a best experience, create a new work profile in your browser.
- You can delete it at any time after the user

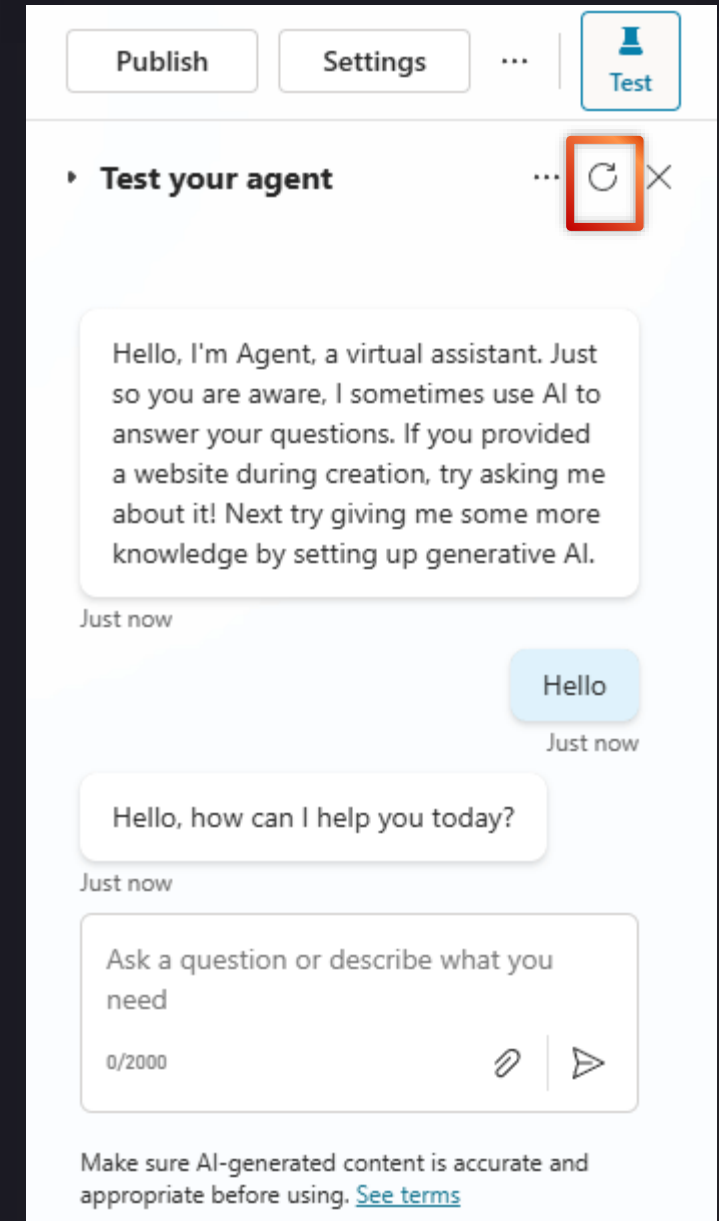


# IMPORTANT LAB INSTRUCTIONS

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



# Productivity tip: Refresh the conversation between tests



## DAY 2 LABS

### LAB 04

Create an 'Ask me anything' agent for your employees

25-min

### LAB 11

Create an engaging user experience for your agent

15-min

### LAB 12

Measure success: Track conversation outcomes and user feedback on AI responses

15-min



## Lab 01

**Create your own AI assistant with  
Copilot Studio agent builder**



DEMO

The screenshot displays the Copilot Teacher application interface. On the left is a vertical sidebar with icons for Home, Copilot, Create, OneDrive, Pages, and Apps. The main area features the Copilot Teacher logo and four question cards: 'M365 Copilot vs Copilot Chat', 'DA vs CEA', 'Governance of Copilot Agents', and 'Pay-as-you-go for Copilot Chat'. A bottom bar contains a 'Message Copilot' input field and a user profile icon labeled 'AJ'. On the right, a sidebar shows the 'Copilot' header, 'Agents' section with 'Copilot Teacher' selected, and options to 'Get agents' and 'Create an agent', followed by a 'See more' link.

Home

Copilot

Create

OneDrive

Pages

Apps

Copilot Teacher

M365 Copilot vs Copilot Chat

What are the differences between Microsoft 365 Copilot and Copilot Chat?

DA vs CEA

What are the differences between declarative agents and custom engine agents?

Governance of Copilot Agents

How is governance handled for Copilot agents?

Pay-as-you-go for Copilot Chat

What are the pay-as-you-go options for Copilot Chat?

Message Copilot

AJ

Copilot

Agents

Copilot Teacher

Get agents

Create an agent

[See more](#)

# Key concepts: Microsoft Copilot



- **Microsoft 365 Copilot and Copilot Chat (internal, employee experiences – B2E)**
- When a user has access to **both**, they see a tab toggle in the user interface to switch between the **Work** (Microsoft 365 Copilot) and **Web** experiences (Copilot Chat).
- **Microsoft 365 Copilot** is a per-user license (\$30/user/mo.) with premium features:
  - Advanced agents like the research and analysts Frontier ones, grounded on enterprise data and using the latest reasoning models.
  - Surface areas (e.g., integration with Office applications),
  - Features, like image generation, code interpreter, etc.
  - Knowledge sources (e.g., your enterprise data from Outlook, Teams or SharePoint).
- **Copilot Chat** can be seen as a free enterprise equivalent to ChatGPT. It can use the same underlying GPT models and can use data from the Web to generate answers to user queries.

Augmenting Copilot Chat with premium capabilities with a pay-as-you-go subscription

Copilot Chat can even leverage premium capabilities like organization-tenant grounding for answers (e.g., for example by generating answers from a SharePoint source) when tied to a pay-as-you-go Azure subscription.

# Key concepts: Copilot agents



Microsoft 365 Copilot and Copilot Chat offer predefined experiences for employees. They can be augmented and specialized with agents.

## Two types of agents can be surfaced in Microsoft 365 Copilot or Copilot Chat.

These are referred to as **Copilot agents**:

- **Declarative agents**

They use Copilot as their core. They simply scope their tasks with specific instructions, pre-defined prompts, knowledge sources, and actions.

Ideal for simple scoped knowledge retrieval or task-specific use-cases.

- **Custom engine agents**

They don't use Copilot at their core – they come with their own orchestration, knowledge, skills, etc. and they can run on a different platform than Microsoft Copilot.

Ideal for more advanced or complex use-cases.

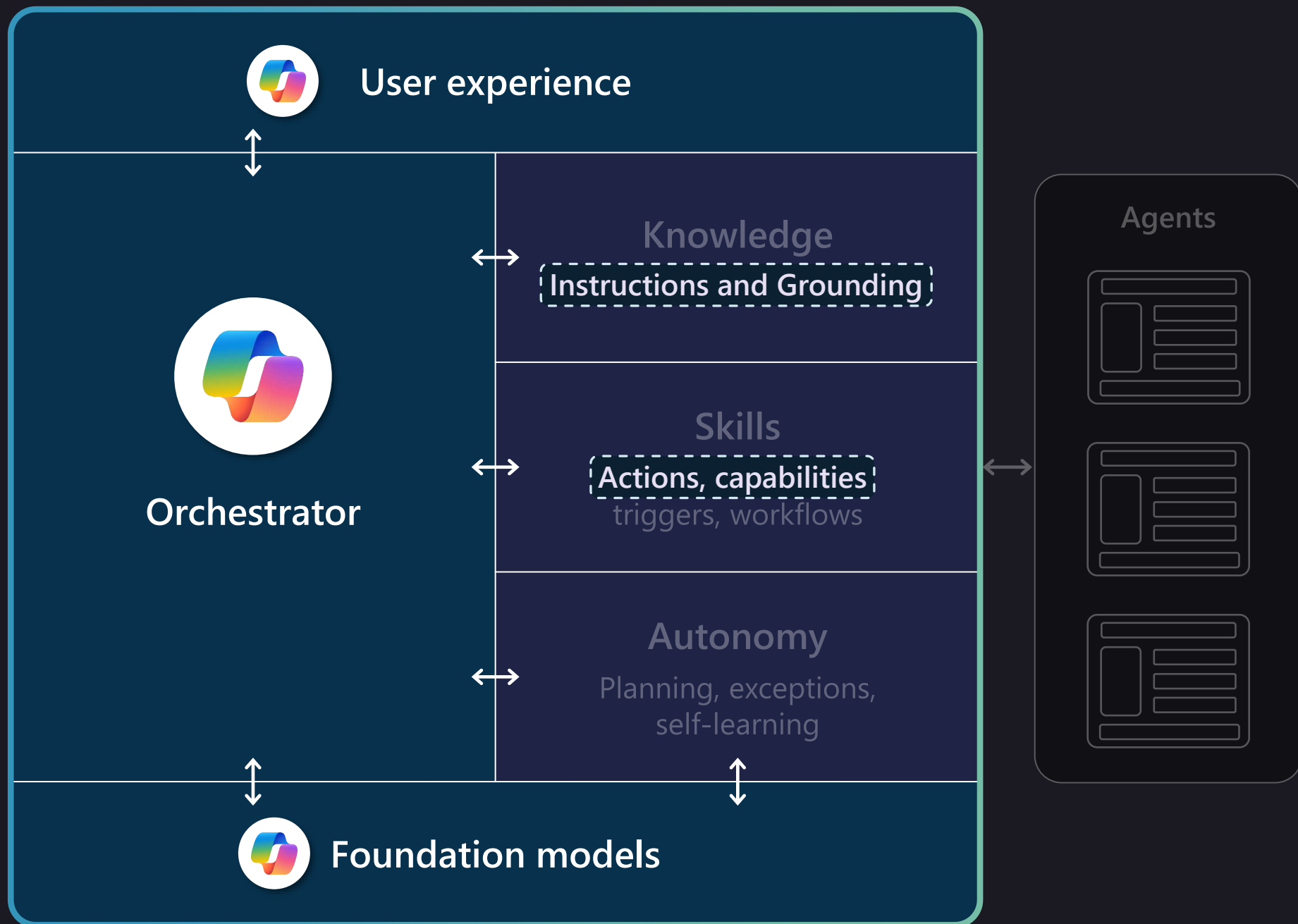
# Declarative agents

## With Copilot Studio agent builder

Note: other tools can be created to create declarative agents

 Microsoft provided

Developer provided



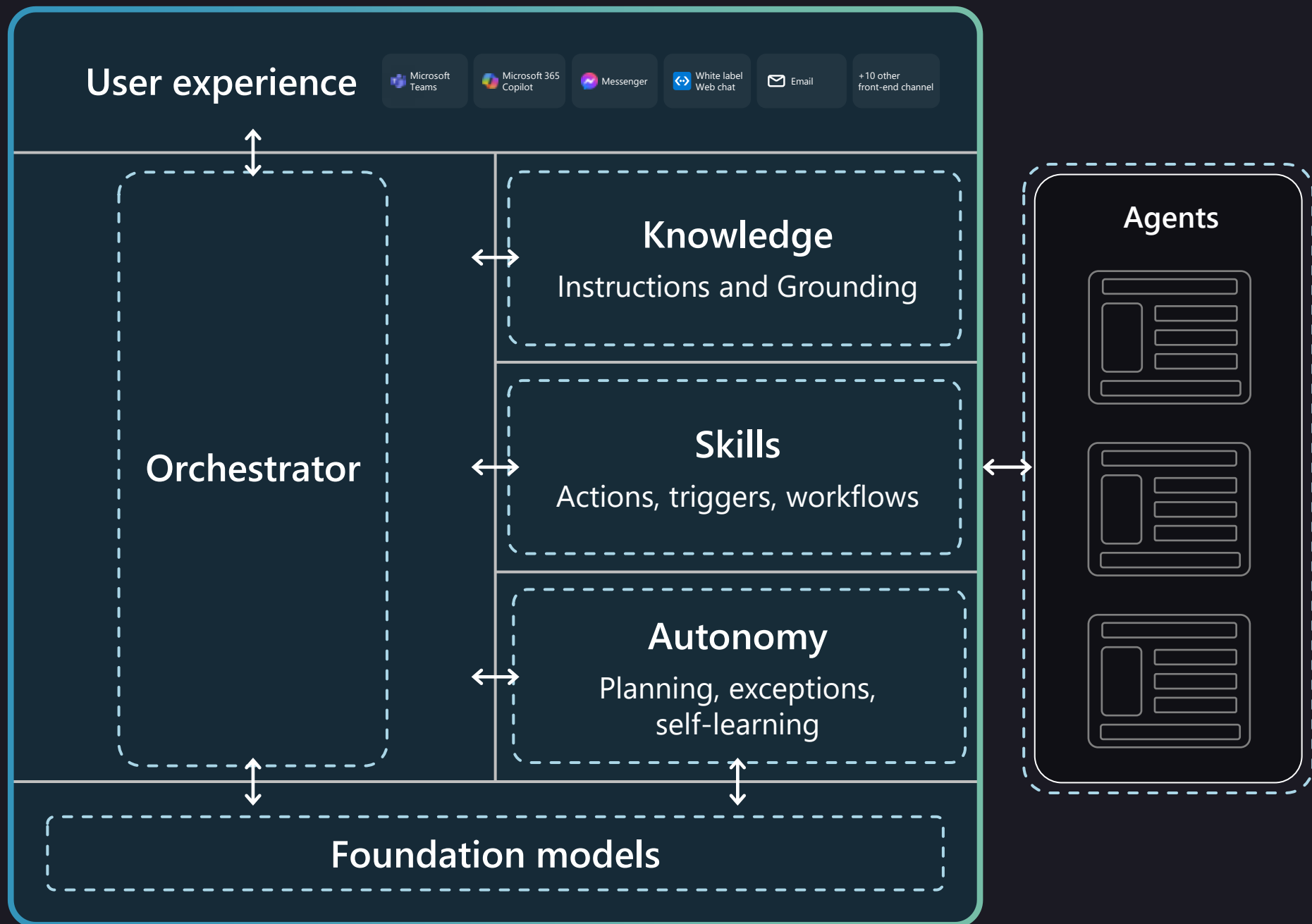
# Custom engine agents

## With Copilot Studio

Note: other tools can be created to create declarative agents

Microsoft provided

Developer provided



● Included ▲ Included — Metered

|                        |   | Microsoft 365 Copilot Chat | Microsoft 365 Copilot |
|------------------------|---|----------------------------|-----------------------|
|                        |   | Free + Consumption         | \$30 pupm             |
| Chat                   | Copilot Chat – Web grounded (powered by GPT-4o)   | ●                          | ●                     |
|                        | Copilot Chat – Work grounded (work data in your tenant's Microsoft Graph and 3rd party data via Graph connectors)     |                            | ●                     |
|                        | Copilot Pages   | ●                          | ●                     |
|                        | File upload <sup>1</sup>  | ●                          | ●                     |
|                        | Code Interpreter <sup>1</sup>   | ●                          | ●                     |
|                        | Image generation <sup>1</sup>   | ●                          | ●                     |
| Agents <sup>2</sup>    | Create agents using Copilot Studio <sup>3</sup> , including SharePoint agents   | ●                          | ●                     |
|                        | Discover and pin agents   | ●                          | ●                     |
|                        | Use agents grounded in Web data   | ●                          | ●                     |
|                        | Use agents grounded in work data (work data in your tenant's Microsoft Graph and 3rd party data via Graph connectors) | ▲                          | ●                     |
|                        | Use agents that act independently using autonomous actions  | ▲                          | ▲                     |
| Personal assistant     | Copilot reasons over personal work data (e.g., Outlook, OneDrive, Teams meeting transcripts and chats)                |                            | ●                     |
|                        | Copilot in Teams  |                            | ●                     |
|                        | Copilot in Outlook  |                            | ●                     |
|                        | Copilot in Word   |                            | ●                     |
|                        | Copilot in Excel  |                            | ●                     |
|                        | Copilot in PowerPoint   |                            | ●                     |
|                        | Copilot Actions   |                            | In preview            |
|                        | Pre-built M365 agents (Interpreter, Facilitator, Project Manager, Employee Self-Service)                              |                            | In preview            |
| Copilot Control System | Enterprise Data Protection (EDP)  | ●                          | ●                     |
|                        | IT management controls  | ●                          | ●                     |
|                        | Agent management  | ●                          | ●                     |
|                        | SharePoint Advanced Management  |                            | ●                     |
|                        | Copilot Analytics to measure usage and adoption <sup>4</sup>  |                            | ●                     |
|                        | Pre-built reports and advanced analytics to measure ROI   |                            | ●                     |

1. Limits apply. 2. Applies to employee-facing agents only. 3. Learn more about the full capabilities of Copilot Studio: [aka.ms/CopilotStudioCapabilities](https://aka.ms/CopilotStudioCapabilities) 4. Basic reporting in Microsoft Admin Center available for Copilot Chat.



## Lab 02

**Set yourself up for success & discover  
ALM best practices**

# Key concepts: Application Lifecycle Management (ALM)

**Copilot Studio is built on the same foundations as Power Platform and offers rich options when it comes to Application Lifecycle Management.**

- **Environment strategies** apply (e.g. to work on a development version without impacting the one in production)
- **Solution concepts** apply (to transport components across environments)
- **Environment variables** for environment-specific settings and **connection references** for environment-specific connections/credentials.
- **Continuous integration and continuous delivery** (CI/CD) deployment options (pipelines, Azure DevOps or GitHub integrations...)
- **Source control** with git integration.






# Application Lifecycle Management

Example solution configuration

## Development


**Agent** 1.0

- Contoso Agent
- Agent Components




**Cloud Flows** 1.2

- ServiceNow Flow
- Internal API Flow



**Connectors & Variables** 1.3


- Connection Reference
- Env. Variables
- Custom Connector



## Test


**Agent** 1.0

- Contoso Agent
- Agent Components




**Cloud Flows** 1.1

- ServiceNow Flow
- Internal API Flow



**Connectors & Variables** 1.3

- Connection Reference
- Env. Variables
- Custom Connector



## Q.A.


**Agent** 1.0

- Contoso Agent
- Agent Components




**Cloud Flows** 1.1

- ServiceNow Flow
- Internal API Flow



**Connectors & Variables** 1.3

- Connection Reference
- Env. Variables
- Custom Connector



## Production


**Agent** 1.0

- Contoso Agent
- Agent Components




**Cloud Flows** 1.1

- ServiceNow Flow
- Internal API Flow



**Connectors & Variables** 1.2

- Connection Reference
- Env. Variables
- Custom Connector



Learn from agent usage in production to make improvements in dev for future releases

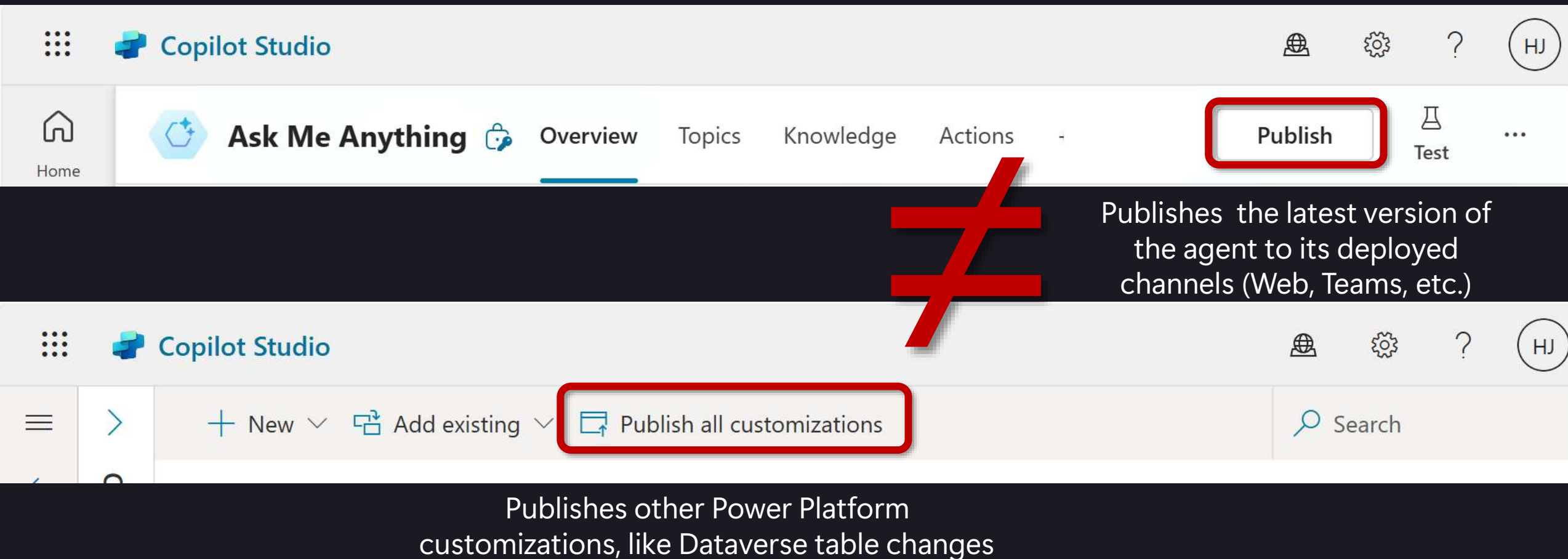
# ALM Golden Rules



- ✓ Work in the context of solutions
- ✓ Create separate solutions only if you need to deploy components independently.
- ✓ Use a custom publisher and prefix.
- ✓ Use environment variables for settings and secrets that change across those.
- ✓ Export and deploy solutions as managed, unless setting up a dev environment.
- ✓ Don't do customizations outside of dev.
- ✓ Consider automating ALM for source control and automated deployments.

# What 'Publish' really does in Copilot Studio

Publishing an agent in Copilot Studio and publishing customizations in a solution are not the same thing.



The image shows two screenshots of the Copilot Studio interface. The top screenshot highlights a 'Publish' button in the top right corner, which is described as publishing the latest version of the agent to its deployed channels. The bottom screenshot highlights a 'Publish all customizations' button in the bottom left corner, which is described as publishing other Power Platform customizations. A large red '≠' symbol is placed between the two buttons to indicate they are not the same action.

**Top Screenshot:** The 'Publish' button is highlighted with a red box. It is located in the top right corner of the Copilot Studio interface, next to the 'Test' button. The text next to it says: "Publishes the latest version of the agent to its deployed channels (Web, Teams, etc.)".

**Bottom Screenshot:** The 'Publish all customizations' button is highlighted with a red box. It is located in the bottom left corner of the Copilot Studio interface, next to the 'Add existing' button. The text next to it says: "Publishes other Power Platform customizations, like Dataverse table changes".

**Comparison:** A large red '≠' symbol is placed between the two buttons, indicating that these two actions are not the same.

# Copilot Studio-specific ALM considerations

- There are a few specific settings in Copilot Studio that are not solution-aware.
- That means they don't follow normal solution deployment and require post-deployment steps on the downstream environment.
  - Azure Application Insights settings
  - Manual authentication settings
  - Direct Line / Web channel security settings
  - Deployed channels
  - Sharing (with other makers, or with end-users)

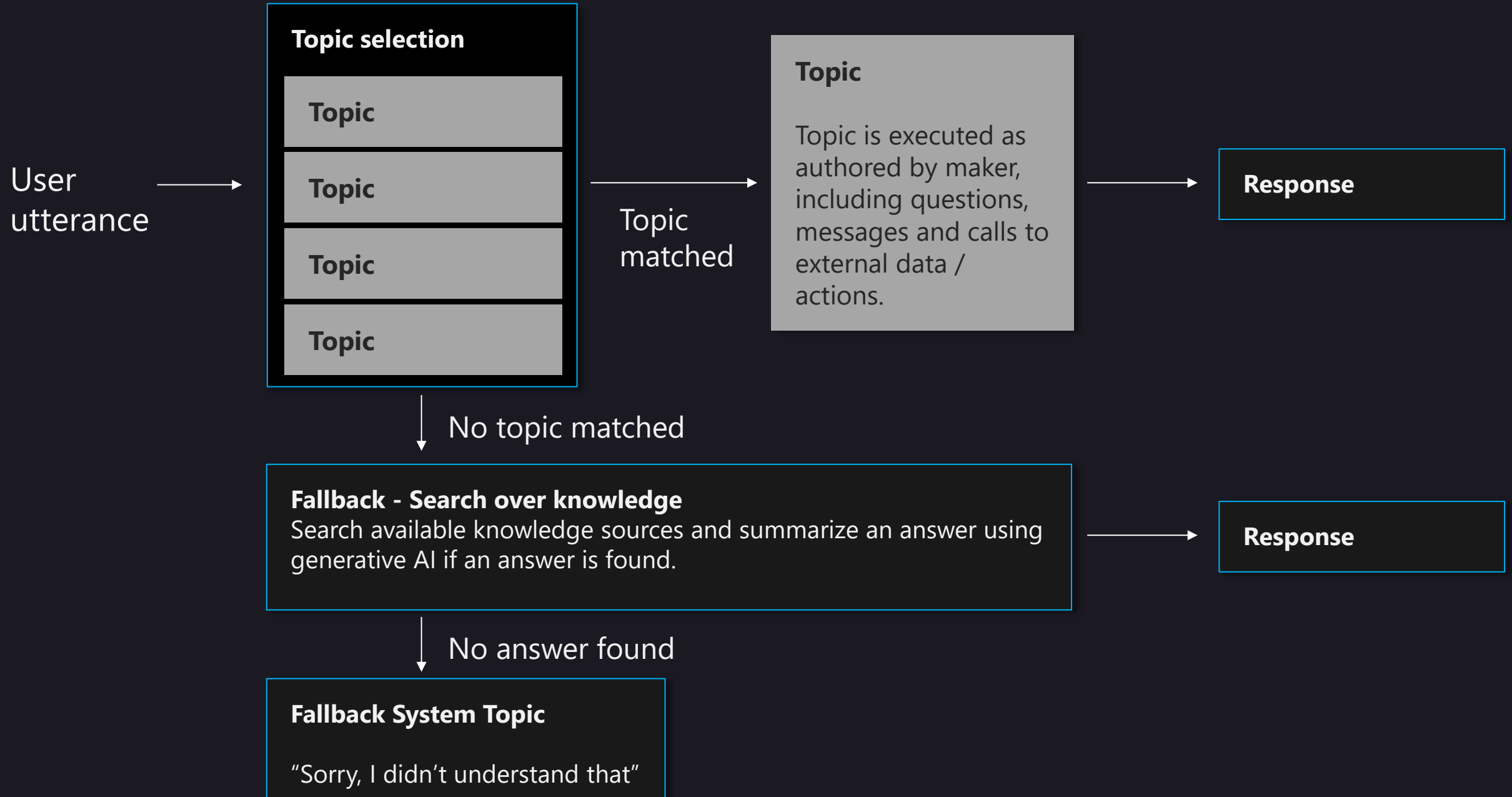


## Lab 02

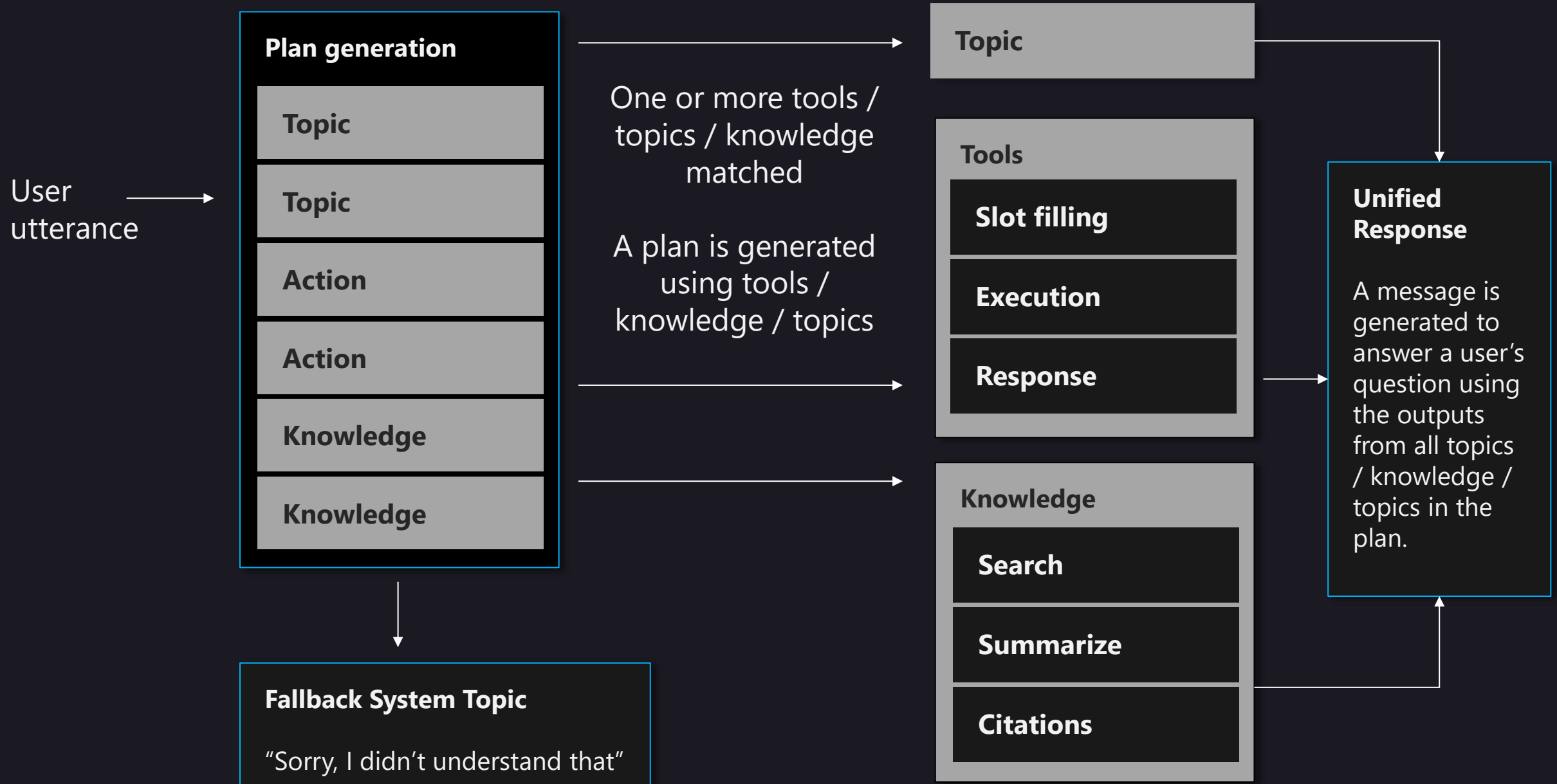
**Give your public website chatbot a brain and make it an agent**



# Classic orchestration



# Generative orchestration







Home



Create



Copilots



Library



## Contoso Agent



Overview

Knowledge

Topics

Actions

Activity

+2

Publish

Settings



Test



Activity map



Review



Variables



Track between topics



Session started

### Test your copilot



Hello, I'm Contoso Agent, 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.

A minute ago

Hey, what's your address and when are you opened? I need to return an item I purchased online (ORD-1234), but I don't know if I can still return it for a refund. What's your policy on this?

Ask a question or describe what you need

0/2000



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# Thank You