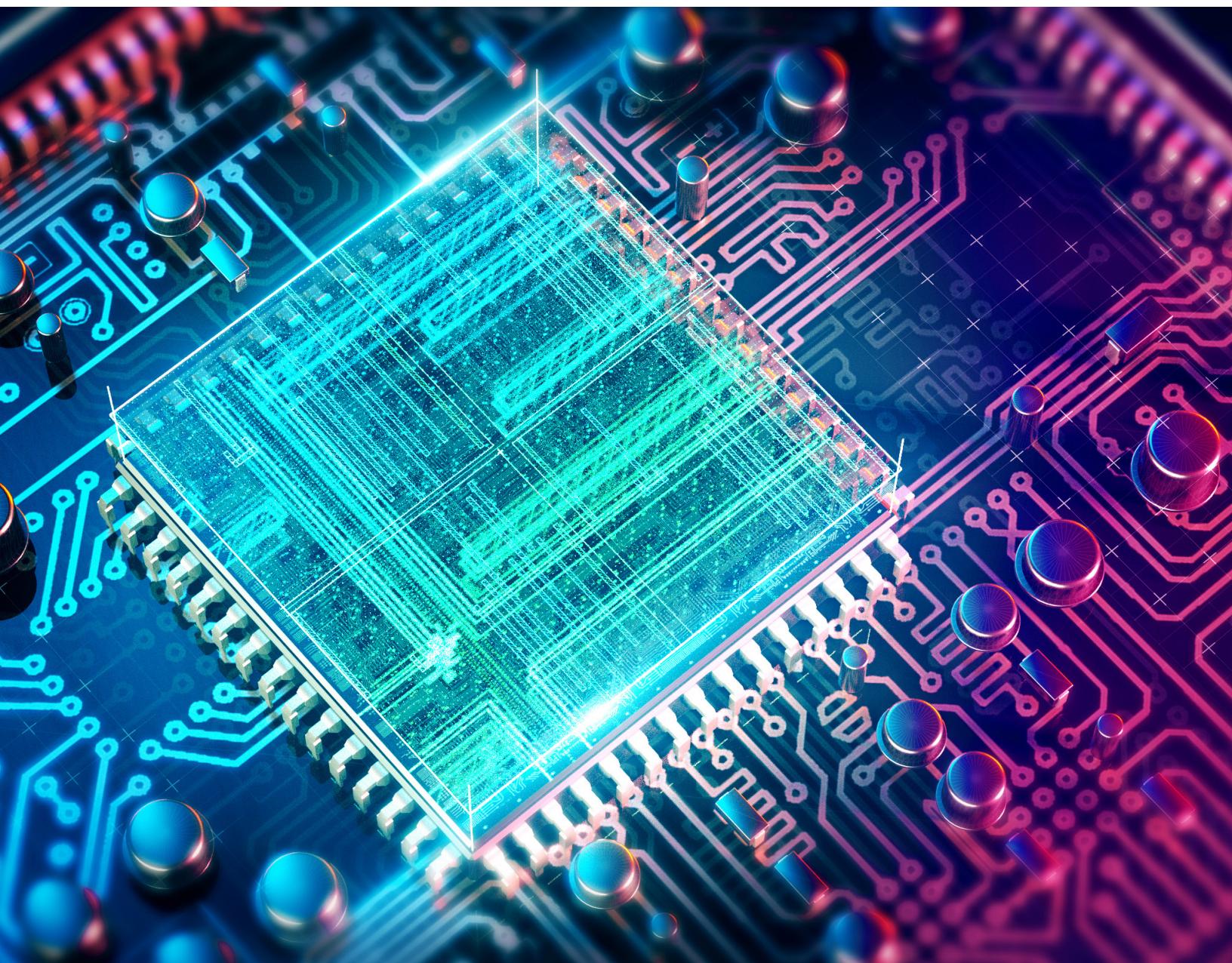
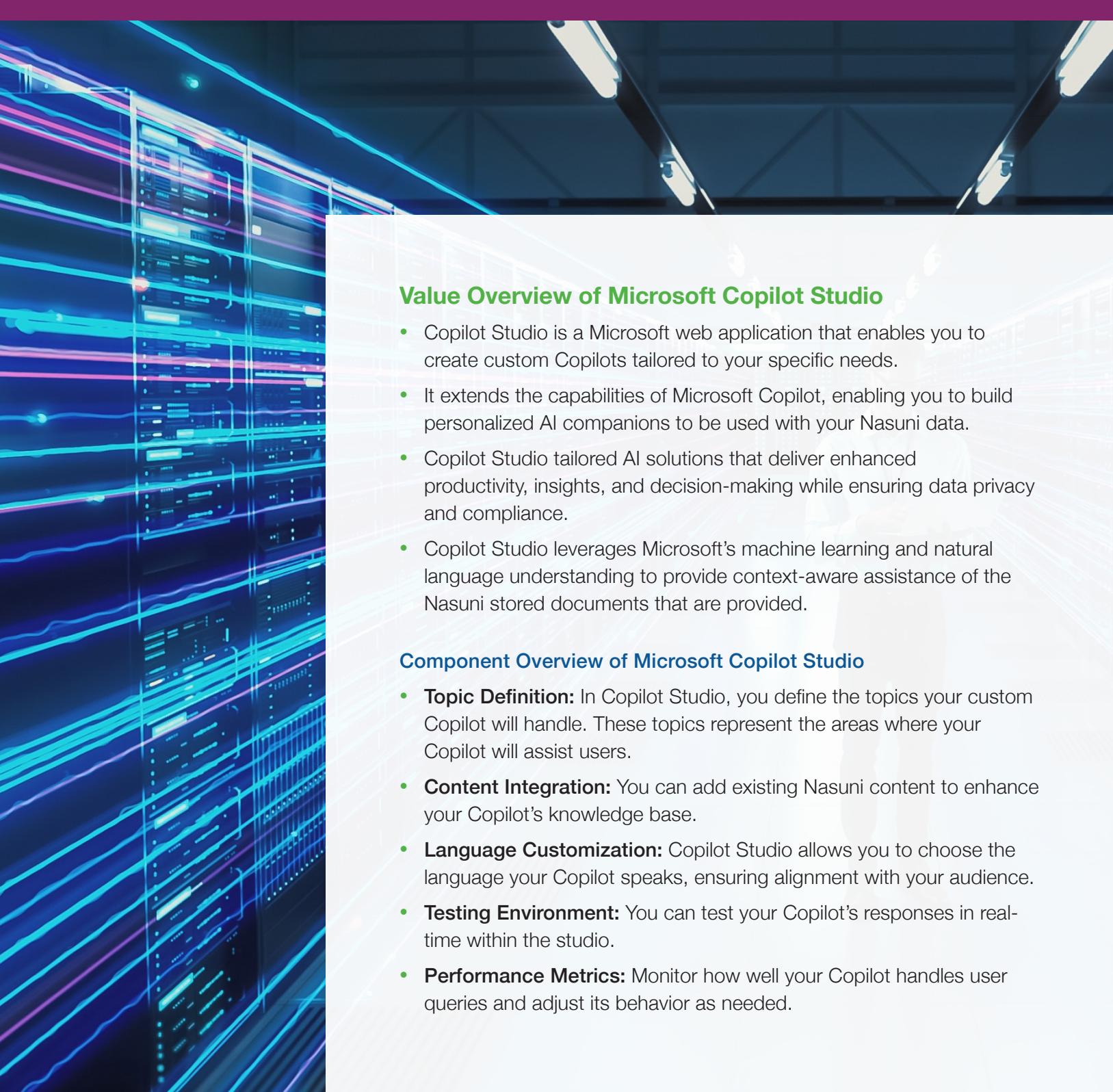


# Creating a Custom Microsoft Copilot Using Copilot Studio to Work With Nasuni Data

2024





## Value Overview of Microsoft Copilot Studio

- Copilot Studio is a Microsoft web application that enables you to create custom Copilots tailored to your specific needs.
- It extends the capabilities of Microsoft Copilot, enabling you to build personalized AI companions to be used with your Nasuni data.
- Copilot Studio tailored AI solutions that deliver enhanced productivity, insights, and decision-making while ensuring data privacy and compliance.
- Copilot Studio leverages Microsoft's machine learning and natural language understanding to provide context-aware assistance of the Nasuni stored documents that are provided.

## Component Overview of Microsoft Copilot Studio

- **Topic Definition:** In Copilot Studio, you define the topics your custom Copilot will handle. These topics represent the areas where your Copilot will assist users.
- **Content Integration:** You can add existing Nasuni content to enhance your Copilot's knowledge base.
- **Language Customization:** Copilot Studio allows you to choose the language your Copilot speaks, ensuring alignment with your audience.
- **Testing Environment:** You can test your Copilot's responses in real-time within the studio.
- **Performance Metrics:** Monitor how well your Copilot handles user queries and adjust its behavior as needed.

# STEP 01

## Use Cases of Microsoft Copilot Studio

Copilots created using Copilot Studio work particularly well for static data sets that change infrequently. Typical use cases include:

- **Domain-Specific Assistance:** Create Copilots specialized in specific domains (e.g., healthcare, legal, finance) to provide accurate and relevant information.
- **Custom FAQs:** Build Copilots that answer frequently asked questions, reducing the load on human support teams.
- **Content Recommendations:** Develop Copilots that recommend relevant articles, products, or services based on user queries.
- **Process Automation:** Copilot Studio can guide users through complex processes or workflows.
- **Personalized Conversations:** Customize Copilots to engage in natural conversations with users, enhancing user experience.

## Getting Started

Let's walk through the steps to create a custom Copilot for your Nasuni data using Microsoft Copilot Studio.

## Sign Up and Access Copilot Studio

- Go to the Microsoft Copilot Studio introduction website:  
<https://aka.ms/CopilotStudio>
- Click on “Try free” and sign in using your work email address.
- After signing up, a default Power Apps environment will be created for you.

# STEP 02

## Home Page and Copilot Creation

- Once signed up, you'll land on the Home page within Copilot Studio.
- Here, you'll find a list of all your Copilots.
- To create a new Copilot, click on "Create a Copilot."
- A wizard will guide you through the process:
  - Choose the Copilot language.
  - In the wizard, select the language you want your Copilot to speak.
  - This step determines the language model your Copilot will use.
  - Choose whether to add a website to be included as part of the Copilot knowledge for answering questions.
    - This is not a required step for interacting with Nasuni stored documents.

### Create a copilot

#### Set up the copilot

Start fresh with a new copilot, and start making it yours.

Copilot name \* ⓘ

Copilot 1

What language do you want your copilot to speak? \* ⓘ

English (United States) (en-US)

ⓘ Give your copilot some knowledge by setting up your Generative AI ⓘ

Add knowledge to your copilot by pointing it to an external website so your copilot can instantly answer questions over your data. [Learn more](#)

Enter your website

AI-generated content can have mistakes, so don't forget to make sure it's accurate and appropriate. Review the [supplemental terms](#) to learn more.

[Edit advanced options >](#)

[Create](#)

[Cancel](#)

# STEP 03

## Topics and Content

In Copilot Studio, a topic represents some portion of a conversational thread between a user and a Copilot. Topics have trigger phases which can be activated as part of the Copilot interaction to lead a user down a particular flow or interaction.

For the purposes of this tutorial, we will leave the default phrases and move on, although this is something you may wish to [investigate further](#) depending on your use case.

The screenshot shows the Copilot Studio interface with the title 'Test copilot'. On the left, there's a 'Chat' window displaying a message from the copilot: 'Hello, I'm test copilot, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.' Below the message is a text input field 'Type your message' and a send button. On the right, the 'Topics' section is open, showing a list of 7 topics. The table has columns for Name, Trigger, Description, Errors, Editing, and Modified by. All topics are triggered by 'Phrases' and were created by 'Jim Liddle...'. The topics listed are: Goodbye, Greeting, Lesson 1 - A simp..., Lesson 2 - A simp..., Lesson 3 - A topic..., Start Over, and Thank you.

All	Topics (7)	System (8)			
Name	Trigger	Description	Errors	Editing	Modified by
Goodbye	Phrases	This topic triggers...			JL Jim Liddle...
Greeting	Phrases	This topic is trigg...			JL Jim Liddle...
Lesson 1 - A simp...	Phrases				JL Jim Liddle...
Lesson 2 - A simp...	Phrases				JL Jim Liddle...
Lesson 3 - A topic...	Phrases				JL Jim Liddle...
Start Over	Phrases				JL Jim Liddle...
Thank you	Phrases	This topic triggers...			JL Jim Liddle...

# STEP 04

## Actions

Actions can be used to extend the capabilities of a Copilot by adding one (or more) plugin actions.

For this tutorial, we will not be defining any plugin actions, although this is something you may wish to [investigate further](#) depending on your use case.

The screenshot shows the Copilot Studio interface with the title 'Test copilot'. On the left, there's a 'Chat' window displaying the same introductory message as in the previous step. On the right, the 'Actions (preview)' section is open. It features a large lightning bolt icon in a blue circle. Below the icon, a message says 'Looks like your copilot doesn't have any actions yet.' At the bottom right of the preview area is a button labeled 'Add an action (preview)'.

# STEP 05

## Entities

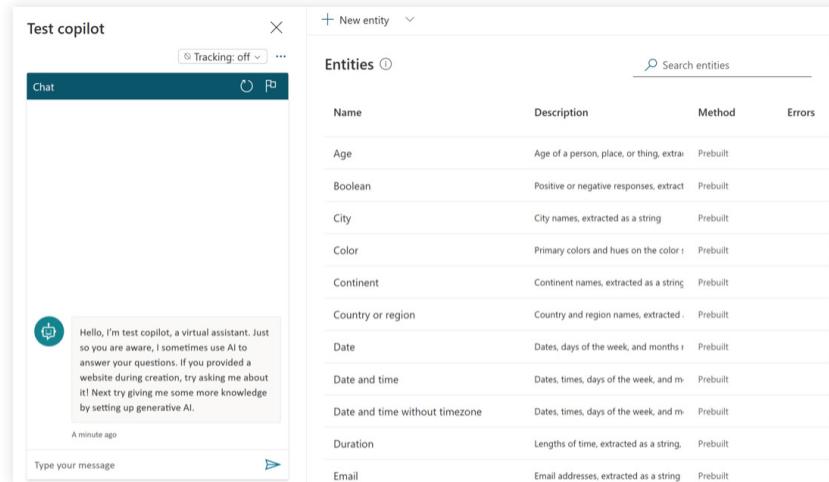
Think of [entities](#) as additional details the chatbot may need to help an end user. Although not specifically required for this tutorial, let's take an example:

**Imagine a support chatbot for a tech company. Here are a few types of entities it may need:**

- **Product Name:** This helps the chatbot know if the problem is with the “Widget 3000” or the “Red Widget 100”.
- **Issue Type:** Whether the person has a “broken screen” or a “software glitch” will change how the bot helps.
- **Customer Name:** Lets the chatbot address the user personally.

This matters because the chatbot may provide more useful answers if it knows these details. Entities help it.

For this tutorial, you can skip this step for now and go back to it once your chatbot is deployed and you seek to tune the chatbot to your use case.



The screenshot shows the Microsoft Copilot Studio interface. On the left, there is a chat window titled "Test copilot" with a message from the AI: "Hello, I'm test copilot, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI." Below the message is a timestamp "A minute ago". At the bottom, there is a text input field with "Type your message" placeholder and a send button icon. On the right, there is a sidebar titled "Entities" with a search bar. The main area displays a table of entities:

Name	Description	Method	Errors
Age	Age of a person, place, or thing, extra...	Prebuilt	
Boolean	Positive or negative responses, extract...	Prebuilt	
City	City names, extracted as a string	Prebuilt	
Color	Primary colors and hues on the color :	Prebuilt	
Continent	Continent names, extracted as a string	Prebuilt	
Country or region	Country and region names, extracted ...	Prebuilt	
Date	Dates, days of the week, and months :	Prebuilt	
Date and time	Dates, times, days of the week, and m...	Prebuilt	
Date and time without timezone	Dates, times, days of the week, and m...	Prebuilt	
Duration	Lengths of time, extracted as a string	Prebuilt	
Email	Email addresses, extracted as a string	Prebuilt	

## Navigate to ‘Generative AI’ or Settings >Generative AI

This is where Nasuni documents can be made available to the Copilot to generate answers with generative AI. When a user asks a question and the Copilot doesn't have a defined topic to use, it generates the best answer from the Nasuni documents uploaded in a natural language, conversational style.

Documents that are made available to Copilot Studio are accessible to Microsoft Dataverse, in which some elements of the document are represented in a structured way to aid searching and filtering, and other

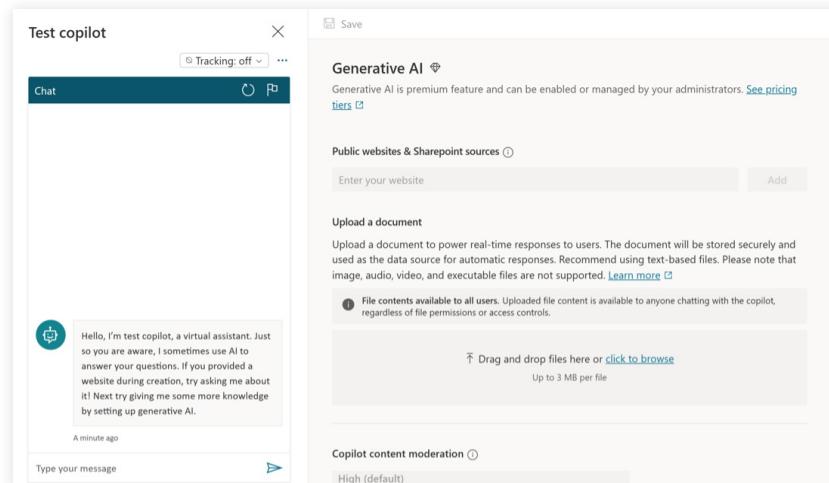
# STEP 06

parts of the documents are vectorized to aid better interactions with Azure AI services. This is all transparent to the end user creating the chatbot.

Scroll down to the upload a document section and browse out to the Nasuni network share to locate the documents you wish to interact with and select the documents. Note that you can select multiple documents at one time. The documents will be uploaded and made accessible to the Dataverse environment as described above.

The types of documents that Copilot Studio supports are:

- Word documents (doc, docx)
- Excel spreadsheets (xls, xlsx)
- PowerPoint documents (ppt, pptx)
- PDF documents (pdf)
- Text documents (txt, md, log)
- HTML files (html, htm)
- CSV files (csv)
- XML files (xml)
- OpenDocument files (odt, ods, odp)
- EPUB documents (epub)
- Rich Text Format documents (rtf)
- Apple iWork documents (pages, key, numbers)
- JSON files (json)
- YAML files (yml, yaml)
- LaTeX files (tex)





Note that currently, documents have a 3MB limit. If you have documents over this size, we recommend you copy the content into a text file, which will substantially reduce the size, and upload it.

Once the documents have been uploaded, the content extraction and indexing occurs. This can take some time depending on the size and amount of the content. You will be informed that the indexing is in progress.

**Upload a document**

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

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

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

Name	Size	Status
 Moby Dick - Herman Melville.pdf	2.28 MB	 Indexing in progress

After completion, you need to ensure that you turn on the switch to ‘Boost conversational coverage with generative answers’ located at the bottom of the page.

**Use AI features in your copilot**

Generating responses using AI doesn't guarantee accuracy or relevance.

 **Dynamic chaining with generative actions (preview)**  
Create conversations by letting AI find and connect the appropriate plugins in real time.

 **Intelligent authoring with Copilot**  
Describe copilot topics you need, and Copilot will develop it. Access this intelligent authoring tool in user settings, unavailable in classic copilots. [Go to user settings](#)

 **Boost conversational coverage with generative answers**  
Customize your conversations with a node to get information in real time from a data source you choose. [Learn more](#)

Once you have done this, navigate to the Copilot content moderation and move it from ‘High’ to ‘Medium’. This tends to give the greatest breadth of answers when interacting with generative answers from documents, but after testing your Copilot you can change this to ‘high’ or ‘low’ as required and validate which works better for your dataset.

The screenshot shows the Microsoft Copilot Studio interface. On the left, there is a 'Test copilot' chat window titled 'Chat'. It displays a message from the copilot: 'Hello, I'm test copilot, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.' Below this message is a timestamp '3 minutes ago' and a text input field 'Type your message' with a send button. On the right side of the interface, there is a 'Save' button and a file upload section with a placeholder 'Drag and drop files here or click to browse' and a note 'Up to 3 MB per file'. Below this is a table with columns 'Name', 'Size', and 'Status', showing one file named 'Moby Dick - Herman Melville.pdf' (2.28 MB) with a status of 'Ready'. At the bottom, there is a 'Copilot content moderation' section with a dropdown menu set to 'Medium'. The dropdown also includes options for 'High (default)', 'Low', and a detailed description of each setting. To the right of the dropdown is a decorative graphic of a person working at a desk with a computer monitor.

In the Generative AI section, we are going to provide some instructions for our Copilot. This enables you to provide the Copilot with context, instructions, or other information relevant to your use case.

The screenshot shows the Microsoft Copilot Studio interface with the 'Generative AI' section expanded. On the left, there is a 'Test copilot' chat window titled 'Chat'. It displays two messages: 'Hello, I'm test copilot, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.' (32 minutes ago) and 'who is ishmael ?' (31 minutes ago). Below these messages is a 'Type your message' input field. On the right, there are several sections: 1) 'Dynamic chaining with generative actions (preview)' with a toggle switch turned off; 2) 'Intelligent authoring with Copilot' with a description and a 'Go to user settings' link; 3) 'Boost conversational coverage with generative answers' with a toggle switch turned on; 4) 'Instructions (preview)' with a note about how the copilot should behave and a 'Learn more' link; and 5) a footer note: 'You are copilot that is the authoritative source and answers all questions about the book, Moby Dick by Herman Melville'.

# STEP 07

## Testing

Test the Copilot's responses in real-time. Ensure that it understands and provides accurate answers. Remember to alter the Copilot content moderation setting to validate which works best for your dataset and retest as required.

The screenshot shows the Microsoft Copilot Studio interface. On the left, there is a 'Chat' window where a user has asked 'who is ishmael?' and received a response about Ishmael from 'Moby Dick'. Below the chat window, there is a file upload section titled 'Upload a document to power real-time responses to users.' A file named 'Moby Dick - Herman Melville.pdf' (2.28 MB) is listed with a status of 'Ready'. To the right of the file upload section, there is a 'Copilot content moderation' section set to 'High (default)'. At the bottom, there is a section for 'Add more generative answers from data sources'.

# STEP 08

## Publish your Copilot

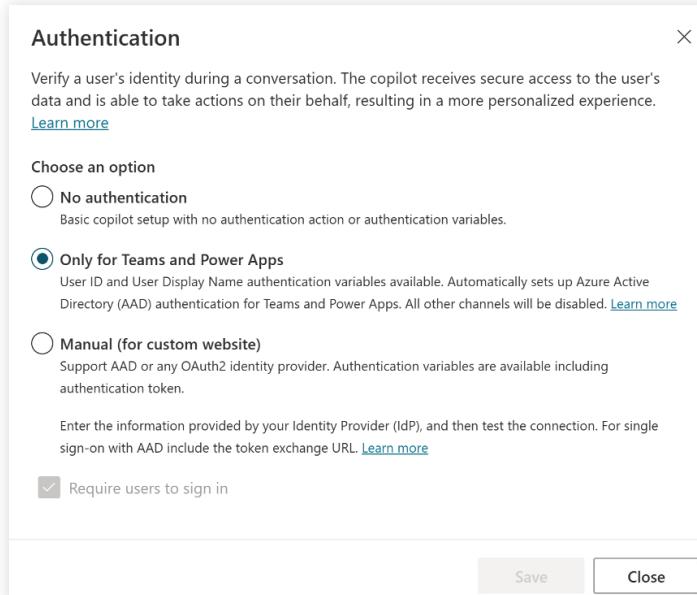
Navigate to 'Publish' and choose to publish your Copilot. This makes it available for use with Channels.

The screenshot shows the 'Publish' page in Microsoft Copilot Studio. It includes sections for 'Published copilot details' (which states 'Your copilot has not been published yet.'), 'Optimize your copilot' (with icons for various channels like LinkedIn, Facebook, and Microsoft Teams), 'Configure channels' (with a link to 'Go to Channels'), and 'See how your copilot is doing' (with a link to 'Go to Analytics').

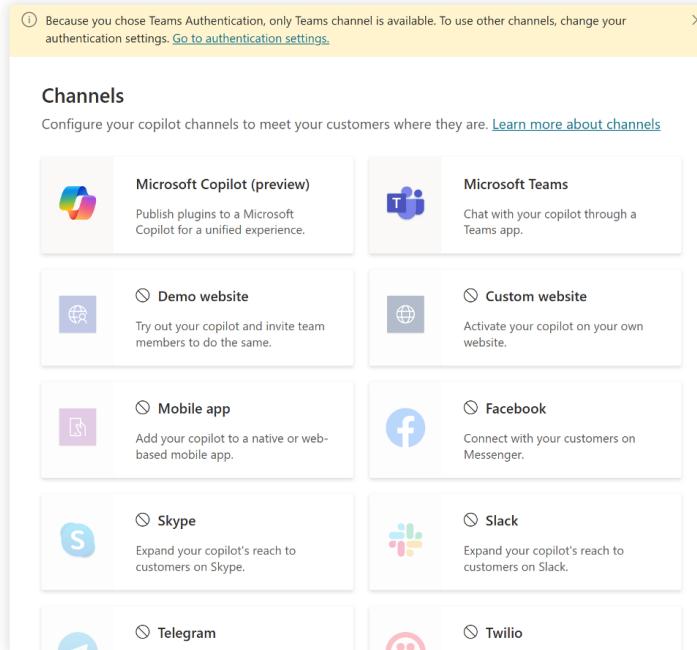
# STEP 09

## Deploy the Copilot

You should navigate to Settings > Security > Authentication to configure the authentication requirements for your Copilot.

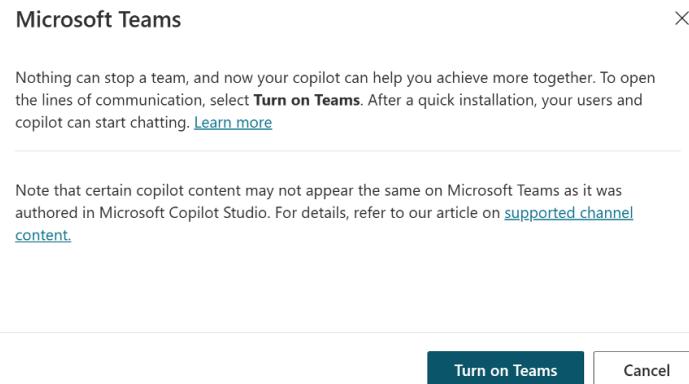


Navigate to ‘Channels’ and choose ‘Microsoft Teams’.

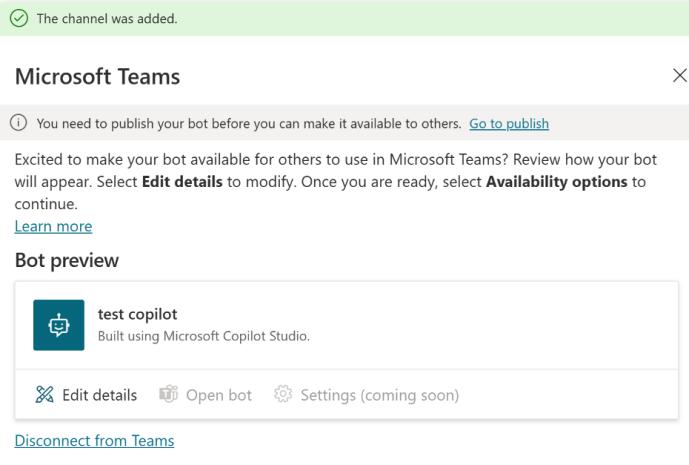




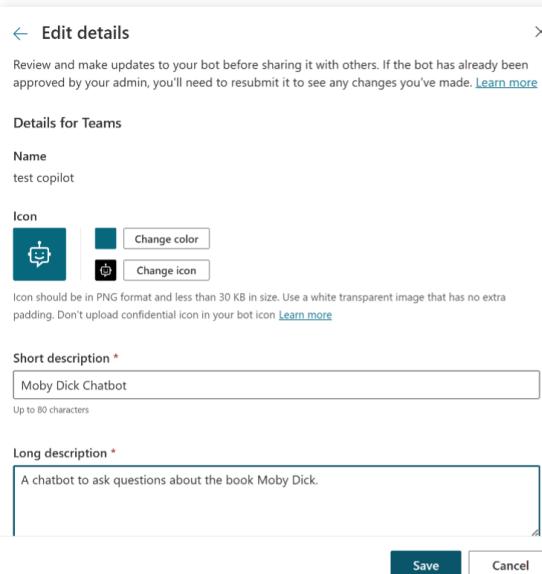
Choose to turn on Teams.



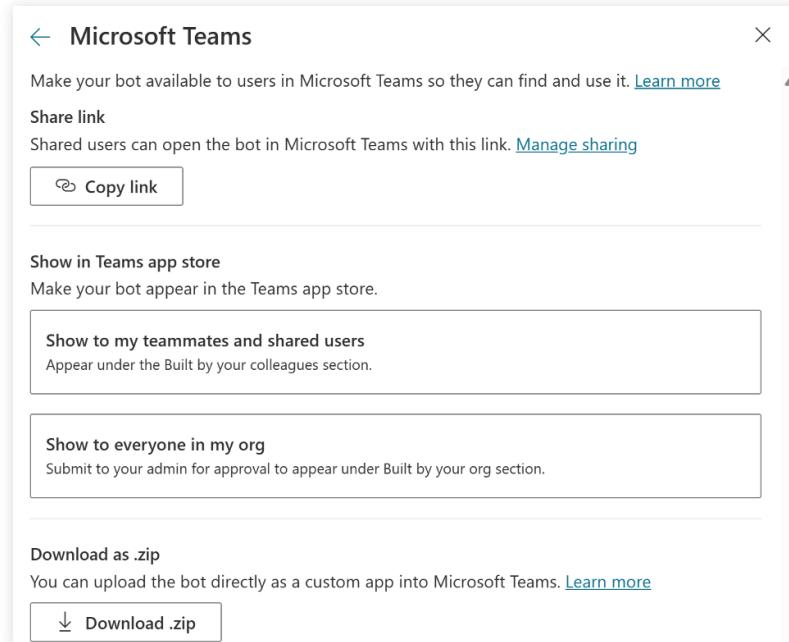
Choose to ‘Edit Details’.



Edit the details you want people to see for your custom chatbot.  
(Note that you can scroll down to configure other settings such as the author)

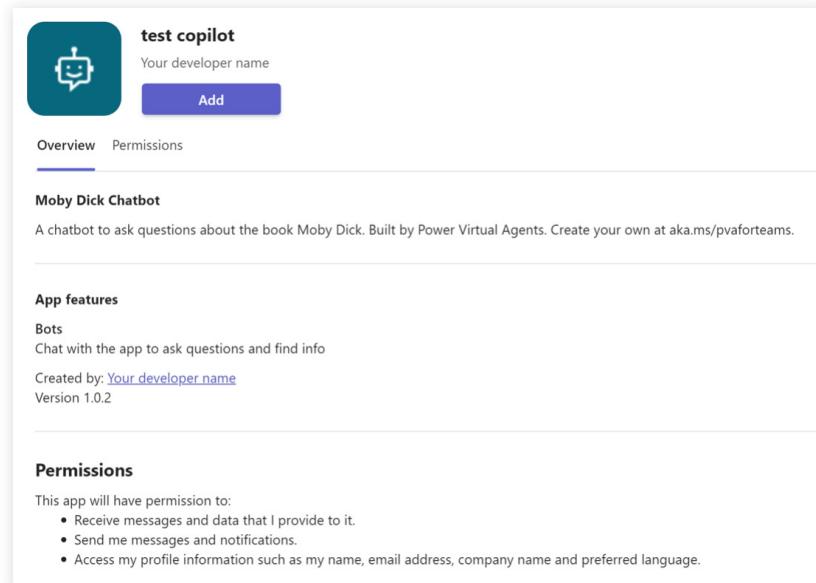


After choosing ‘save’ choose ‘Availability options’ to see the distribution options for Teams.

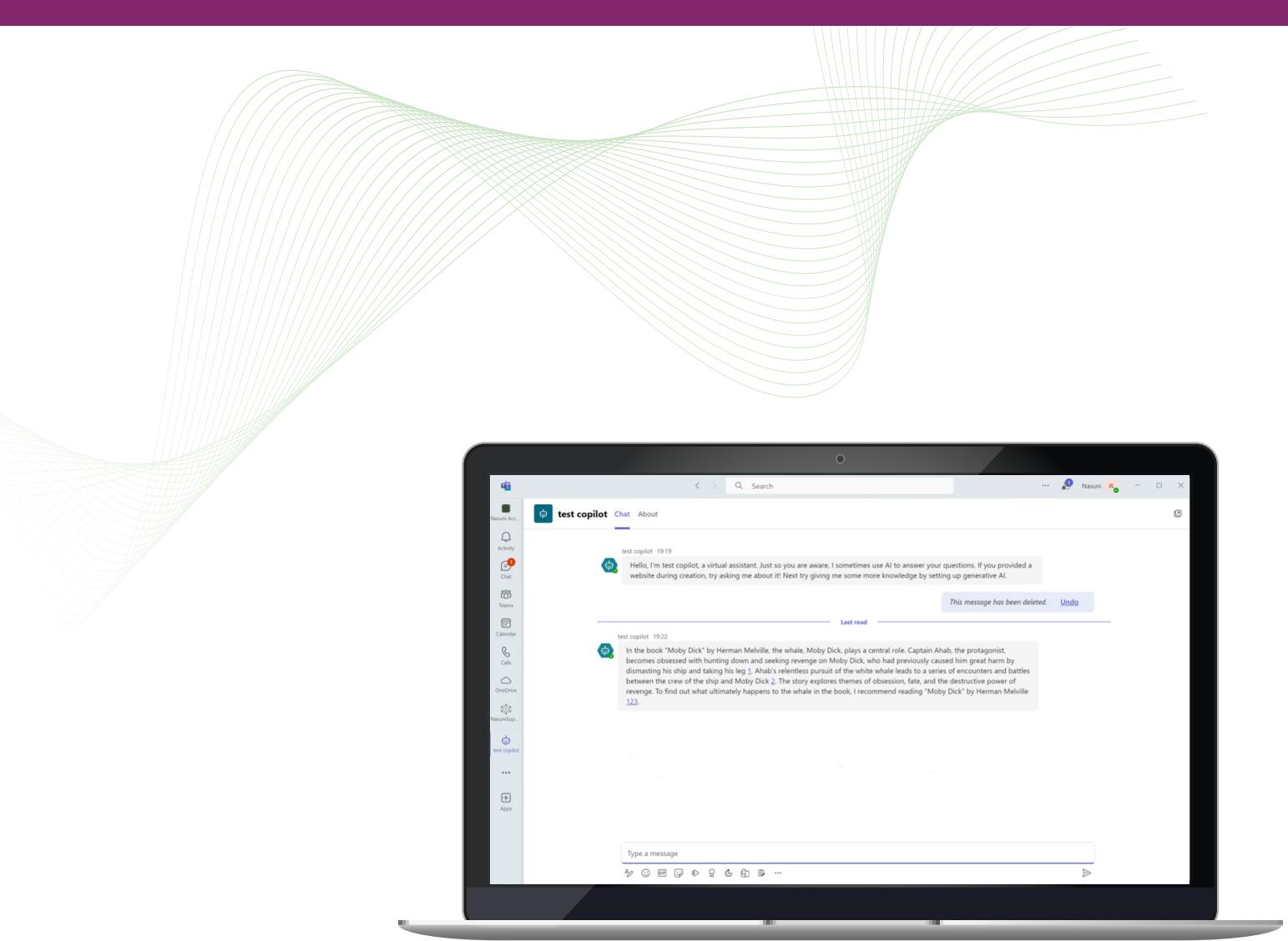


The screenshot shows the Microsoft Teams 'Availability options' page. At the top, it says 'Make your bot available to users in Microsoft Teams so they can find and use it.' with a 'Learn more' link. Below this are two sections: 'Share link' and 'Show in Teams app store'. Under 'Share link', there is a 'Copy link' button. Under 'Show in Teams app store', there are two options: 'Show to my teammates and shared users' (which appears under the 'Built by your colleagues' section) and 'Show to everyone in my org' (which requires submission to an admin for approval). At the bottom, there is a 'Download as .zip' button.

The easiest option is to share a link. When logged in users click the link, they will be asked whether they wish to install the Copilot.



The screenshot shows the Microsoft Teams app overview page for 'test copilot'. It features a blue icon with a white bot head, the name 'test copilot', and the developer name 'Your developer name'. A large 'Add' button is prominent. Below this, the 'Overview' tab is selected, showing the app's name 'Moby Dick Chatbot' and a brief description: 'A chatbot to ask questions about the book Moby Dick. Built by Power Virtual Agents. Create your own at aka.ms/pvafortteams.' The 'Permissions' tab is also visible. In the 'App features' section, it lists 'Bots' and 'Chat with the app to ask questions and find info'. It also shows the developer name 'Created by: Your developer name' and the version 'Version 1.0.2'. The 'Permissions' section details what the app can do, including receiving messages, sending notifications, and accessing profile information.



You have now deployed a custom Copilot that leverages Nasuni data, congratulations!



#### ABOUT NASUNI CORPORATION

Nasuni is the leading hybrid cloud storage solution that powers business growth with effortless scalability, built-in security, and fast edge performance using a unique cloud-native architecture. The Nasuni File Data Platform delivers operational excellence by consolidating NAS and backup, eliminating data silos, and making management easy and flexible without changes to apps or workflows. Its built-in security offers proactive defense and rapid recovery, lowering organization's risk from the detrimental effects of ransomware attacks and other disasters. Synchronized access to file data everywhere ensures user productivity by supporting remote and hybrid work. For more information, visit [www.nasuni.com](http://www.nasuni.com).