



Microsoft Copilot Studio

Lab 07: Use generative orchestration to interact with your connectors

Hands-on lab step-by-step

January 2025

UDPP Copilot Studio Workshop

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Microsoft Copilot Studio

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Goals for this lab

After this lab you will be able to:

- Understand the basics of plugin actions
- Use Copilot Studio to request data from another data source using plugin actions in a basic use case (using the MSN Weather Connector) and return the data in a conversational dialog with a customer or user

The time to complete this lab is **20** minutes.

Prerequisites

Labs have been designed to be completed with only a Microsoft Copilot Studio trial. You can start most labs without having to complete the previous module but note that some exercises may reference previous labs. To fully experience the features and functionality of the product, it is recommended that you make sure to have completed all pre-requisites below before starting this lab.

For this lab you need:

- A computer with internet access.
- Be able to log into the provided Microsoft tenant (some companies enforce users to only connect to their company tenant) or your own enterprise tenant with a Copilot Studio User License (or trial)
- **Generative AI should be set to "Generative" (in Settings, Generative AI)**

Generative orchestration

By default, a agent responds to users by triggering the topic whose trigger phrases match most closely the user's query, and it fills topic inputs from the conversation context. You can configure your agent to use generative AI to choose not only from topics you created, but also from actions you added to extend the copilot.

In generative mode, a agent can fill topic inputs, not only from the conversation context but also by generating questions to prompt the user for values. To learn more about this behavior and how to manage it, see [Manage topic inputs and outputs](#).

Using generative AI to determine how your agent responds can make the conversation more natural and fluid for the users. When a user sends a message, your agent selects one or more actions or topics to prepare its response. Multiple factors determine the selection. The most important factor is the description of the topics and actions. Other factors include the name of a topic or actions, any input or output parameters, and their names and descriptions. Descriptions make it possible for your agent to be more accurate when it associates a user's intent with actions and topics.

In generative mode, a agent can select multiple actions or topics at once, to handle multi-intent queries. Once actions and topics are selected, the agent generates a plan that determines their execution order.

When you test a agent that uses generative mode in Copilot Studio, you can open the conversation map to follow the execution of the plan.

Task 1: Enable generative orchestration

1. Go to **Settings** and to the **Generative AI** options
2. In **How should your agent decide how to respond?** select **Generative**, then **Save**

Using generative AI in conversations

How should your copilot interact with people?

- ☐ Classic – Use the topics you build to respond to trigger phrases—actions can only be called from inside a topic.
- ☒ Generative (preview) - Use generative AI to respond with the best combination of actions, topics, and knowledge.

How strict should the content moderation be?

- ☐ Low - More creative ☐ Medium - More balanced ☒ High - More precise

Save

Actions

When you turn on generative mode, your agent can automatically select the most appropriate action or topic, to respond to a user at runtime. In classic mode, a agent can only use topics to respond to the user. However, you can still design your agent to call actions explicitly from within topics.

Actions are based on one of the following core action types:

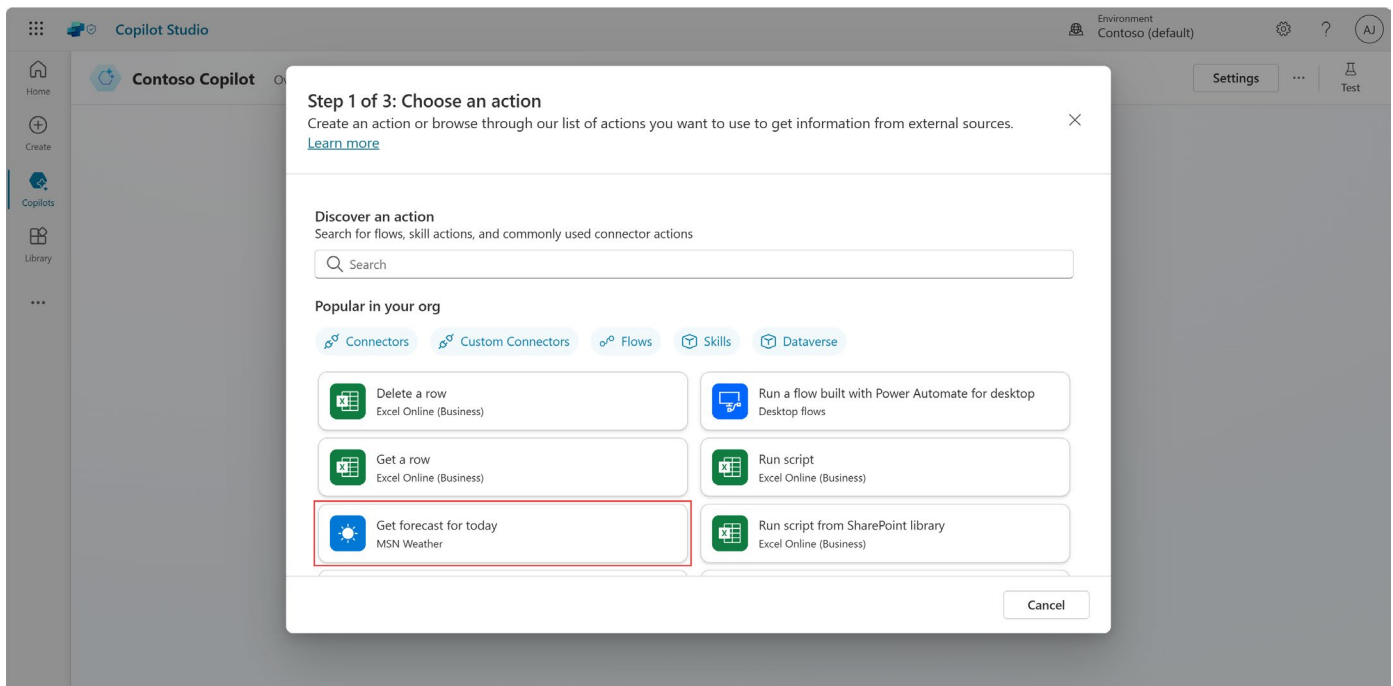
- Prebuilt connector action
- Custom connector action
- Power Automate cloud flow
- AI Builder prompts
- Bot Framework skill

Each core action has additional information that describes its purpose, allowing the agent to use generative AI to generate questions. These questions are required to fill the inputs needed to perform the action. Therefore, you don't need to manually author question nodes to gather all inputs needed, such as the inputs on a flow. Inputs are handled for you during runtime.

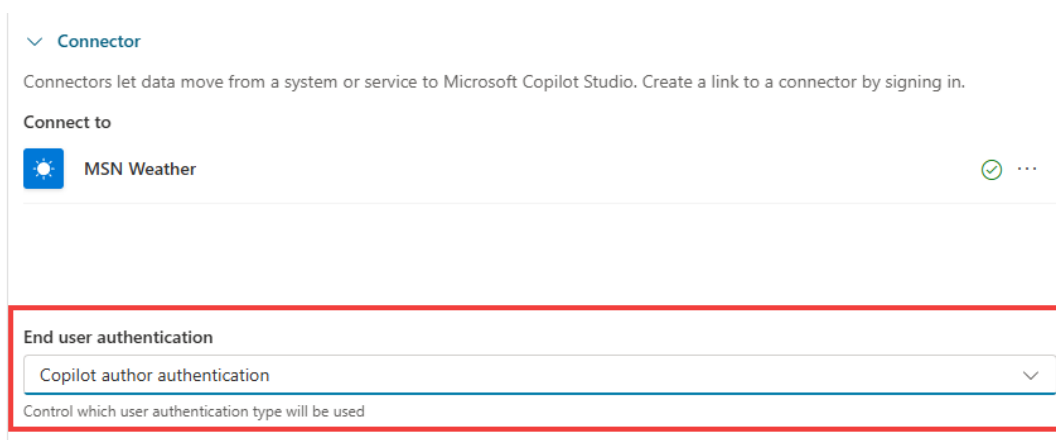
Actions can generate a contextual response to a user's query, using the results of the action. Alternatively, you can explicitly author a response for the action.

Task 1: Create an action

1. From the **navigation**, go to the **Actions** tab
2. Select **Add an action**.
3. Select the **Get forecast for today** connector.



4. Wait for the **connection to get automatically created**.
5. **Scroll down**, in **End user authentication**, choose **Copilot author authentication**. That way, the agent can work without using the end-user connection when using the weather connector. Instead, the connection the maker has setup will be used. Leave other properties from that screen as is.



6. Select **Next**.
7. Select **Edit inputs**.
8. Leave the **Location** one as is, but for **Units**, choose **Set as a value**, in **How will the agent fill this input?**
9. Choose the **I** value (Imperial)
10. **Save**, and then select **Next**.
11. Review the configuration and select **Finish**.

Task 2: Test your action

1. Go to the **Test** pane.
2. Ask a **question**

What is the weather?

3. In the **Test** pane, click on the **Conversation map** to see how the agent interprets questions and prompts for answers.

The screenshot displays the Copilot Studio interface. The top navigation bar includes 'Home', 'Create', 'Copilots', and 'Library'. The main area is divided into two panes. The left pane, titled 'Conversation map', shows a 'Copilot context' box with the text 'Get the current weather using the Get-forecast-for-today tool (Location is missing)'. Below this is a 'Get forecast for today Connector' box with a description 'Get the forecast for the current day in the specified location.' and two input fields: 'Units' (set to 'I') and 'Location' (empty). A red warning box indicates 'Missing required information'. The right pane, titled 'Test your copilot', shows a chat interface with a message 'What is the weather?' and a response 'What location would you like to get the forecast for today? Please provide the city, region, state, country, landmark, postal code, latitude, or longitude.' The interface also includes a 'Settings' button and a 'Test' button in the top right corner.

4. Answer with a city

Chicago

5. See the agent **automatically updates the inputs** with the city and provides an answer.6. Tell the bot you made a mistake and **change your query**.

Wait, I meant the weather for London. Also list every information you have in bullet points, please.

The screenshot displays the Copilot Studio interface. On the left, a sidebar contains navigation icons for Home, Create, Copilots, Library, and a menu. The main area is titled 'Conversation map' and shows a 'Copilot context' box with the text: 'Get the forecast for London using Get-forecast-for-today tool (Location has a value from _query).' Below this, a connector card for 'Get forecast for today' is visible, showing its description and inputs/outputs. The inputs are 'Units' (String) and 'Location' (String), with values 'I' and 'London' respectively. The outputs include 'Moon Phase' (String) with value 'Waning Crescent', 'Moon Phase Code' (String) with value 'WaCr', and 'Moonrise Time' (DateTime). On the right, a 'Test your copilot' panel shows a chat history. The first message is 'precipitation. the wind be blowing at 60 mph. Avast! 🌪️'. The second message is 'Wait, I meant for London. Also please list every piece of information you have on the weather in bullet points, please.' The third message is a list of weather details for London: Moon Phase: Waning Crescent (WaCr), Moonrise: 01:53 AM, Moonset: 04:44 PM, Sunrise: 03:46 AM, Sunset: 08:10 PM, Weather Summary: Mostly cloudy, high of 67°F, low of 57°F, Wind Speed: 6 mph, Chance of Precipitation: 20%, and UV Index: 2 (Low). The bottom of the test panel has a text input field with the placeholder 'Ask a question or describe what you need' and a 'Test' button.

7. See how the agent **updates its query** to the connector and see how it also **reacts to the instructions** to list all information available to it.

Summary

Thank you for completing the lab 'Use generative AI orchestration to interact with your connectors. You have successfully:

- Created an action in Copilot Studio
- Displayed dynamic data back to the user in Copilot Studio
- Leveraged conversational context to ask follow-up questions

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