



Microsoft Copilot Studio

Lab 03: Knowledge sources, AI knowledge, and custom instructions

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

<p>After this lab you will be able to:</p> <ul style="list-style-type: none">• Make your bot instantly smart by pointing to your website and other knowledge sources.• Navigate to the Generative AI settings• Navigate to the Conversational Boosting system topic• Set custom prompt instructions	<p>The time to complete this lab is [30] minutes.</p>
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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 “classic” (in Settings, Generative AI)**
- **“Allow the AI to use its own general knowledge” should be set to “Disabled” (in the Overview tab)**

Knowledge

Add data, files, and other resources to inform and improve AI-generated responses.

Allow the AI to use its own general knowledge. [Learn more](#)

+ Add knowledge

☐ Disabled

- **Access to external websites (learn.microsoft.com, www.microsoft.com, adoption.microsoft.com)**

Knowledge sources

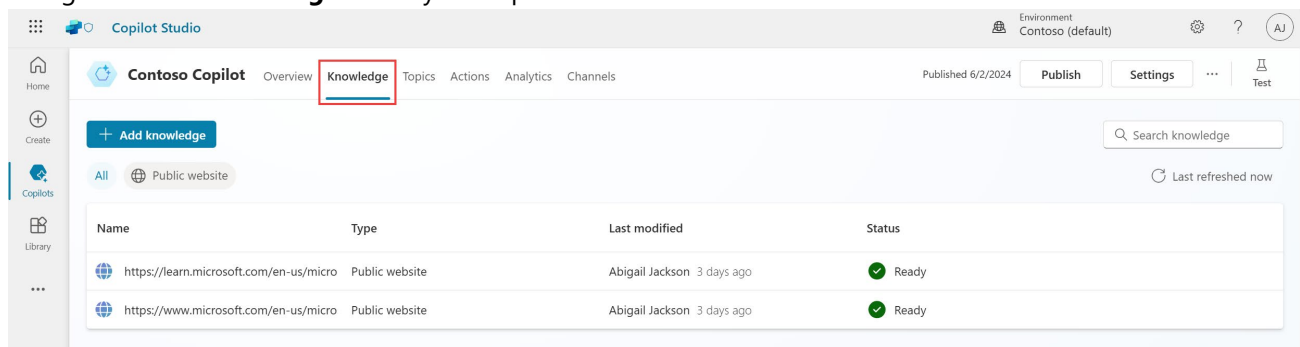
Knowledge in Microsoft Copilot Studio allows you to add enterprise data from Power Platform, Dynamics 365 data, and external systems, so your Copilots provide relevant information and insights for your end users. In addition, knowledge can be incorporated with [Generative answers](#) in copilots. Published copilots that contain knowledge use the configured knowledge sources to ground the published copilot.

For more information regarding each knowledge sources, please refer to the documentation: [Knowledge sources overview - Microsoft Copilot Studio | Microsoft Learn](#)

Websites

Task 1: Configure website knowledge sources

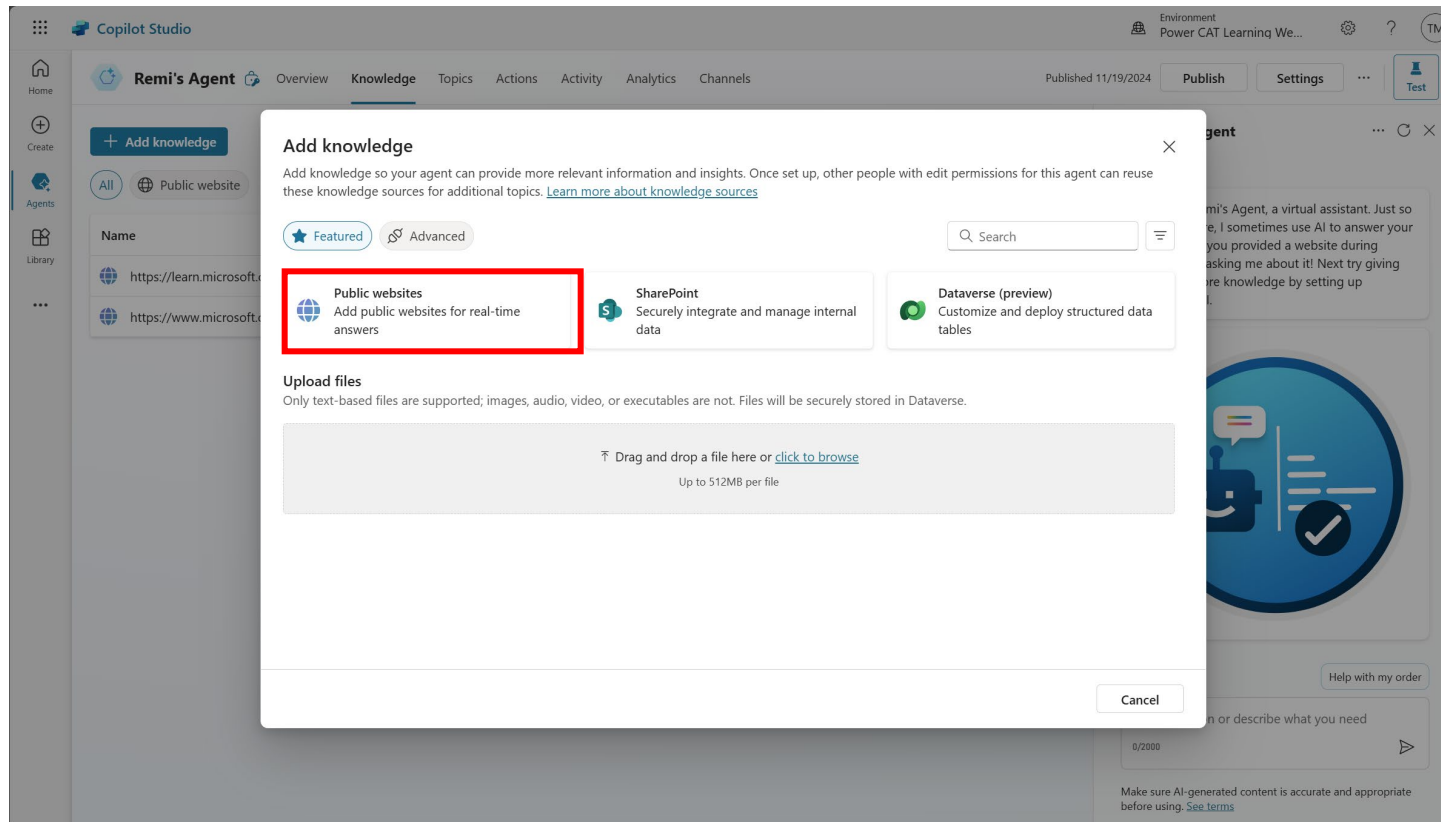
1. Navigate to the **Knowledge** tab of your copilot



From previous labs, you may see existing knowledge sources, such as public websites. If that is not the case, please add the following website for this lab:

- <https://learn.microsoft.com/en-us/microsoft-copilot-studio/>
- <https://www.microsoft.com/en-us/microsoft-copilot/>

2. Select **Add knowledge**.
3. Consider adding a new **website**, such as <https://adoption.microsoft.com/en-us/>
Make sure **each** knowledge source has a good **name** and explicit **description** of what it can return.

**Pro tips:**

- When using the default **built-in natural language understanding** model, knowledge sources are invoked from the **Create generative answers** node. By default, user sentences that don't trigger a topic will go to the **Conversational boosting** topic, where a generative answers node is pre-configured.
- When **generative AI orchestration** is enabled, the large language model will look at each knowledge source model **description** to know what data source to use to answer a user query.

Task 2: Test website knowledge sources

1. Launch the **Test** pane
2. Ask a question that doesn't match an existing topic to trigger the **Conversational boosting** topic.

What is Microsoft Copilot Studio?

3. Notice that it generates an answer and includes **citations** to ground its answer on and offer the user the option to navigate to the **sources** that were used to generate this answer.



What is Microsoft Copilot Studio?

Just now

Microsoft Copilot Studio is a graphical low-code tool for creating and maintaining copilots, which are AI-powered conversational interfaces based on large language models. These copilots can handle a range of requests, from providing simple responses to resolving complex conversations, and can engage with customers and employees across various channels [1] [2] [3].

3 references ▾

- 1 [Microsoft Copilot Studio overview...](#)
- 2 [Microsoft Copilot Studio | Extend...](#)
- 3 [Official Microsoft Copilot Studio d...](#)

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4. Ask a **follow up** question.

What knowledge sources does it support?



What knowledge sources does it support?

Just now

Microsoft Copilot Studio supports various knowledge sources, including Public Website, Documents, SharePoint, OneDrive, Dataverse, and Enterprise data via graph connections [1].

1 reference ▾

- 1 [Knowledge sources overview - Mic...](#)

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Notice that even though the follow up question didn't refer to the specific product this question applied to, the generative answers features made sure context was preserved and that the follow up question was interpreted in context of the previous messages in the conversation.

Files

Task 1: Configuring the Files knowledge source

1. Download the **Azure - Compliance Offerings** document from <https://servicetrust.microsoft.com/DocumentPage/7adf2d9e-d7b5-4e71-bad8-713e6a183cf3>
2. Navigate to the **Knowledge** tab of your agent and select **Add knowledge**.
3. Select **Files, Upload** the document downloaded in step 1, and click **Add**.

Task 2: Test the Files knowledge source










1. Navigate to the **Knowledge** tab of your copilot.
For the file you have uploaded, wait for the status to be **Ready**.
Click the **refresh** button to get an update on the status.
Make sure the "Allow the AI to use its own knowledge" is **turned OFF**.


+ Add knowledge

Search knowledge

AllFilesPublic website

Last refreshed now

Name	Type	Last modified	Status
 https://learn.microsoft.com/en-us...	 Public website	Thomas Margand 39 minutes ago	 Ready
 https://www.microsoft.com/en-us...	 Public website	Thomas Margand 39 minutes ago	 Ready
 Azure - Compliance Offerings (Septem...	 Files	Thomas Margand 1 minute ago	 Ready

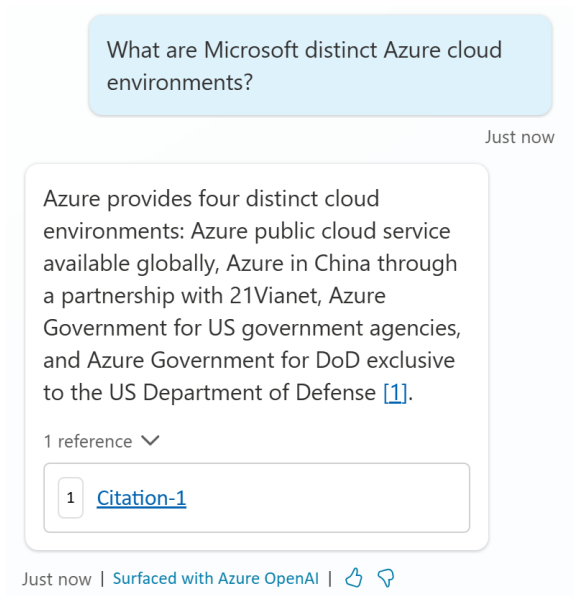


Tip: While the file is indexing, explore and complete the other lab’s data sources and tasks.

2. Launch the **Test** pane
3. Ask a question that doesn’t match an existing topic to trigger the **Conversational boosting** topic.

What are Microsoft distinct Azure cloud environments?

4. Notice how the **citation** is rendered differently.



Dataverse

Task 1: Configuring the Dataverse knowledge source

The Dataverse knowledge source allows users to make natural language queries over structured data, stored in Dataverse tables.

1. Because **Dataverse** is an internal data source, end-users have to be authenticated. If it's not the case, go to **Settings, Security, Authentication**, choose **Authenticate with Microsoft**, then **Save**.
2. Navigate to the **Knowledge** tab of your agent and select **Add knowledge**.
3. Select **Dataverse** and select the **Account** and **Contact** tables and click **Next**.
4. Check the table contains data and click **Next**.
5. To improve the understanding of questions about specific attributes of the table, in **Synonyms**, select **Edit**.


For **Address 1**, add

Address

as a **Synonym**, with

Complete address of the account

as the **Description**.

 **Synonyms** ×

Improve data discovery with synonyms
Increase your copilot's data retrieval accuracy by adding synonyms for complex or unclear column names in your tables.

Select table

Account ▼

Column name	Synonyms	Description
Address 1: City	+ Add synonyms	<input type="text" value="Enter description"/>
Address 1	<u>Address</u>	<input type="text" value="Complete address of the account"/>
Address 1: Country/Region	+ Add synonyms	<input type="text" value="Enter description"/>

Back Cancel

For **Primary Contact**, add


Main contact

and Contact as a **Synonym**, with

Primary point of contact person for a given account


as the **Description**.

- Then select **Back**.
- To improve the understanding of user questions about accounts, in **Glossary**, select **Edit**.
In this example, add
Customer
as a **Term**, with
Customer is a synonym for account
as the **Description**. Then select **Next**, then **Back**.

 **Glossary** ×

Build your data glossary
Enhance your copilot's understanding and responses by defining domain-specific terms and acronyms.

Next

Term	Description	
Customer	Customer is a synonym for account	

8. Keep the default values **Knowledge name** and **Knowledge description**.

9. Click **Add**.



Pro tip: This data source requires authentication because any search is done in the context of the connected end-user. So, only records the end-user has at least read access to are returned and summarized.

Task 2: Test the Dataverse knowledge source

10. Launch the **Test** pane
11. **Ask** these 2 below questions, one after the other.

What customers are located in Redmond? I need their name and address

Thanks. Who's our main contact at city power and light?

What customers are located in Redmond?
List them in a table with their name and address.

Just now

There are 3 customers located in Redmond. Here are their names and addresses:

Customer Name	Address
A. Datum Corporation	2137 Birchwood Dr, Redmond, WA 78214, U.S.
City Power & Light	3397 Rancho View Drive, Redmond, WA 90000, U.S.
Contoso Pharmaceuticals	9906 Oak Grove Road, Redmond, WA 80803, U.S.


1 reference ▼

1 <org18cf08f2.crm.dynamics.com> 

Just now | Surfaced with Azure OpenAI |  

Thanks. Who's the primary contact at city power and light?

Just now

The primary contact at City Power & Light is Scott Konersmann. [1 .

1 reference ▼

1 <org18cf08f2.crm.dynamics.com> 

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SharePoint

Task 1: Configuring a SharePoint knowledge source

12. Navigate to the **Knowledge** tab of your agent and select **Add knowledge**.
13. Select **SharePoint** and use this URL: `https://csudpp.sharepoint.com/sites/KnowledgeBase`
Give it a description "Answer question about HR, health plan and benefits".



Pro tip: This data source requires authentication because any search is done in the context of the connected end-user. So, only documents and pages the end-user has at least read access to are returned and summarized.

Task 2: Test the SharePoint knowledge source

1. Launch the **Test** pane
2. Ask a question that doesn't match an existing topic to trigger the **Conversational boosting** topic.

What is the Northwind Standard plan?

Notice that it generates an answer and includes **citations** to ground its answer on and offer the user the option to navigate to the **sources** that were used to generate this answer

What is the Northwind Standard plan?

2 minutes ago

The Northwind Standard plan is a basic plan that provides coverage for medical, vision, and dental services. It also includes coverage for preventive care services and prescription drug coverage. This plan allows you to choose from a variety of in-network providers, including primary care physicians, specialists, hospitals, and pharmacies [1].

1 reference ▾

1 [Benefit_Options_1.pdf](#)

A minute ago | Surfaced with Azure OpenAI |

Graph Connectors

Task 1: Configuring a ServiceNow Knowledge graph connector knowledge source

1. Navigate to the **Knowledge** tab of your agent and select **Add knowledge**.
2. Select **Advanced**
3. Select **ServiceNow Knowledge**
4. Under "Select an existing connection:", choose the pre-created **ServiceNowKB1** connection.

**Pro tip:**

- This data source requires authentication because any search is done in the context of the connected end-user. So, only documents and pages the end-user has at least read access to are returned and summarized.
- The connection is realized through Microsoft Graph Data Connect on the tenant level. More info available here - <https://learn.microsoft.com/en-us/MicrosoftSearch/connectors-overview>

Task 2: Test the ServiceNow Knowledge graph connector knowledge source

1. Launch the **Test** pane
2. Ask a question that doesn't match an existing topic to trigger the **Conversational boosting** topic.

How do I configure the VPN on my iPhone?


Notice that it generates an answer and includes **citations** to ground its answer on and offer the user the option to navigate to the **sources** that were used to generate this answer


How do I configure the VPN on my iPhone?

Just now


To configure the VPN on your iPhone, follow these steps:

1. Open the Settings app on your iPhone.
2. Go to General.
3. Select VPN.
4. Click on Add VPN Configuration.
5. Enter the required information for your VPN configuration.

These steps will help you set up a VPN on your iPhone .

1 reference 

1

 How to configure VPN for...

Just now | [Surfaced with Azure OpenAI](#) |  

Custom instructions

Prompt modification allows you to expand the capabilities of generative answers and knowledge sources, by adding custom instructions. When using custom instructions, it's important to follow best practices for prompt engineering. Here are some tips to help you get the most out of this feature:

- **Be specific** – Custom instructions should be clear and specific, so the agent knows exactly what to do. Avoid vague or ambiguous language that could lead to confusion or incorrect responses.
- **Use examples** – Provide examples to illustrate your instructions and help the agent understand your expectations. Examples help the agent generate accurate and relevant responses.
- **Keep it simple** – Avoid overloading your custom instructions with too many details or complex logic. Keep your instructions simple and straightforward so the agent can process them effectively.
- **Give the agent an “out”** – Give the agent an alternative path for when it's unable to complete the assigned task. For example, when the user asks a question, you might include "respond with 'not found' if the answer isn't present." This alternative path helps the agent avoid generating false responses.
- **Test and refine** – It's important to test your custom instructions thoroughly to ensure they're working as intended. Make adjustments as needed to improve the accuracy and effectiveness of your copilot's responses.

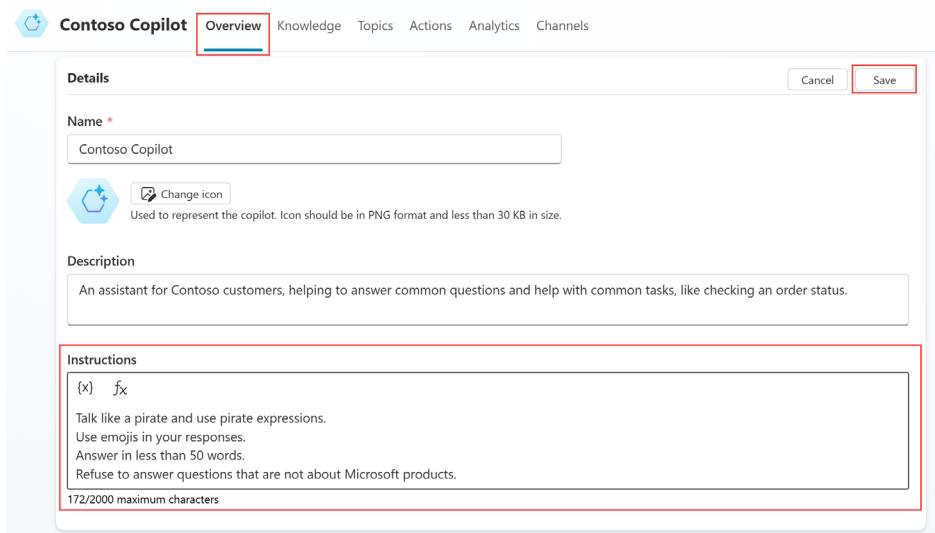
Task 1: Configure custom instructions for Generative AI Orchestration

Custom instructions can be set in distinct places, depending on whether you use **Generative AI Orchestration** as the main intent recognition mechanism, or if you use the **Classic** natural language understanding approach. When **Generative AI Orchestration** is enabled, instructions need to be set at the **agent** level.

1. Let's first make sure Generative AI orchestration is enabled. From the navigation, go to **Settings** tab.
2. Navigate to the **Generative AI** menu.
3. In **How should your agent decide how to respond?** select **Generative (preview)**.
4. **Save** and **Close** the settings.
5. From the navigation, go to the **Overview** tab.
6. In the **Details** area, select **Edit**.
7. Update/replace the **Instructions**
Notice that you can use variables that are specific to the user context.

Talk like a pirate and use pirate expressions.
Use emojis in your responses.
Answer in less than 50 words.

8. Save



The screenshot shows the 'Contoso Copilot' interface with the 'Overview' tab selected. The 'Details' section is visible, containing fields for Name, Description, and Instructions. The 'Instructions' field is highlighted with a red box and contains the following text:

(x) f_x

Talk like a pirate and use pirate expressions.
Use emojis in your responses.
Answer in less than 50 words.
Refuse to answer questions that are not about Microsoft products.

172/2000 maximum characters

Task 2: Configure custom instructions for classic orchestration (optional)

When **Classic** orchestration is enabled for intent recognition, instructions need to be set at the **Create generative answers** node level, typically in the **Conversational Boosting** system topic (as this node can be added anywhere).

1. Let's make sure **Classic** orchestration is enabled. From the navigation, go to **Settings** tab.
2. Navigate to the **Generative AI** menu.
3. In **How should your agent decide how to respond?**, select **Classic**.
4. **Save** and **Close** the settings.
5. From the navigation, go to the **Topics** tab.
6. Select the **System** topics area.
7. Select the **Conversational boosting** topic.
8. Go to the **Create generative answers** node **properties**
9. In **Customize your prompt with variables and plain language**. Add your custom instructions here.

Talk like a pirate and use pirate expressions.
Use emojis in your responses.
Answer in less than 50 words.

Content moderation ⓘ

High



{x} f_x

Customize your prompt with variables and plain language

0/2000 maximum characters

10. **Save**

Task 3: Test custom instructions

1. Launch the **Test** pane

2. Ask a question that doesn't match an existing topic to trigger the **Conversational boosting** topic.

What is Microsoft Copilot Studio?

What is Microsoft Copilot Studio?

Just now

Arrr! Microsoft Copilot Studio be a graphical low-code tool fer creatin' and maintainin' copilots, which be AI-powered conversational interfaces. Ye can use it to handle a range o' requests, from simple responses to complex conversations, across various channels. [🔗](#) [\[1\]](#) [\[2\]](#) [\[3\]](#)

3 references ▼

1 [Microsoft Copilot Studio overview...](#)

2 [Microsoft Copilot Studio | Extend...](#)

3 [Official Microsoft Copilot Studio d...](#)

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AI general knowledge

In addition to knowledge sources, you can use AI general knowledge to allow your agent to find and present information in response to your customer's questions. General knowledge saves you from needing to manually author multiple topics, which might not even address all your customer's questions.

This capability allows the agent to try and answer questions with its own knowledge, outside of any grounding data from your knowledge sources. It is like asking questions to ChatGPT.

Task 1: Configure the use of AI general knowledge

1. From the navigation, go to the **Overview** tab.
2. In the **Knowledge** area, make sure **Allow the AI to use its own general knowledge** is switched on.

Task 2: Test the use of AI general knowledge

1. Launch the **Test** pane
2. Ask a question that neither matches an existing nor a configured knowledge source.

Can you list the planets from closest to farthest from the sun?

Can you list the planets from closest to farthest from the sun?

Just now

Arrr, matey! Here be the planets from closest to farthest from the Sun:

1. Mercury 🌞
2. Venus ☀️
3. Earth 🌍
4. Mars 🔴
5. Jupiter 🌀
6. Saturn 🪐
7. Uranus 🌌
8. Neptune 🌊

Fair winds and following seas! 🚢 ⚓

AI-generated content may be incorrect

Just now | Surfaced with Azure OpenAI | 👍 🗨️

The conversational boosting topic and the generative answer node

With the built-in, default, natural language understanding model, any user utterance that doesn't trigger a topic goes to the Conversational boosting topic (and then goes to fallback, if no answer is identified).

Like any other topic, the logic in the Conversational boosting topic can be configured to further meet your scenarios.

Task 1: Access the Conversational boosting topic

1. From the navigation, go to the **Topics** tab.
2. Select the **System** topics area.
3. Select the **Conversational boosting** topic.

The screenshot shows the Copilot Studio interface for 'Contoso Copilot'. The 'Topics' tab is selected in the top navigation bar. Below the navigation bar, there are buttons for 'Add a topic', 'Refresh', and a filter dropdown set to 'System (9)'. A table lists system topics, with the 'Conversational boosting' topic highlighted by a red box. The table has columns for Name, Trigger, Description, Errors, Editing, and Modified by.

Name	Trigger	Description	Errors	Editing	Modified by
Conversation Start	On Conversation Start	This system topic triggers when the bot receives an Activity i...			AJ Abigail Jackson an hour ago
Conversational boosting	On Unknown Intent	Create generative answers from knowledge sources.			AJ Abigail Jackson an hour ago
End of Conversation	On Redirect	This system topic is only triggered by a redirect action, and g...			AJ Abigail Jackson 3 days ago
Escalate	On Talk to Agent	This system topic is triggered when the user indicates they w...			AJ Abigail Jackson 3 days ago
Fallback	On Unknown Intent	This system topic triggers when the user's utterance does no...			AJ Abigail Jackson 3 days ago
Multiple Topics Matched	On Select Intent	This system topic triggers when the bot matches multiple To...			AJ Abigail Jackson 3 days ago
On Error	On Error	This system topic triggers when the bot encounters an error...			AJ Abigail Jackson 3 days ago
Reset Conversation	On Redirect				AJ Abigail Jackson 3 days ago
Sign in	On Sign In	This system topic triggers when the bot needs to sign in the ...			AJ Abigail Jackson 3 days ago







Task 2: Review the generative answers node

1. In the **Conversational boosting** topic, go to **Create generative answers** node **properties**
2. With the **Search only selected sources**, see that you hand-pick the **knowledge sources** that should be used when entering that specific node.
3. For example, select **all** but the SharePoint knowledge sources (at it's currently the slowest one).


Knowledge sources

Get search results from the knowledge sources using selected mode.

☒ Search only selected sources

<input type="checkbox"/>	Name	
<input checked="" type="checkbox"/>	Microsoft Copilot Studio Docu	
<input checked="" type="checkbox"/>	Microsoft Copilot Documentat	
<input checked="" type="checkbox"/>	Microsoft Adoption Document	
<input type="checkbox"/>	Company SharePoint	
<input checked="" type="checkbox"/>	Azure - Compliance Offerings	
<input checked="" type="checkbox"/>	Account	

4. You can also choose to **disable AI to use its own general knowledge**, and you can also set **additional custom instructions**. The **Content moderation** setting is the level of controls you apply to avoid the agent from hallucinating (i.e., coming up with a wrong answer to a question, for example by misinterpreting or overinterpreting grounding data).

 Allow the AI to use its own general knowledge (preview)

Content moderation ⓘ

High >

{x} f_x
Customize your prompt with variables and plain language
0/2000 maximum characters

Latency Message
In text conversations this message will be sent once.
In voice conversations, this message will loop until the operation is complete.
☐ Send a message



> Classic data

> Advanced

5. **Save**



Pro tip: You may disregard the authentication warning as this won't apply to the tests done in this lab

 **Data sources**
 [Edit](#)

Authentication must be enabled to use Microsoft internal websites.

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