Microsoft Copilot Studio

Lab 01: Create your first agent in Microsoft Copilot Studio

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: • Create a new custom agent by using the unified authoring canvas in Microsoft Copilot Studio. • Create your first topic and add content to the topic, including rich text responses and more. • Use the Copilot feature in Microsoft Copilot Studio to create a topic with AI. • Learn how to test your bot in Microsoft Copilot Studio. • Publish your agent on a demo website.	The time to complete this lab is [40] 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 "classic" (in Settings, Generative AI)**

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Exercise 1: Sign in to create an agent

In this exercise, you will use the provided credentials to log into the Microsoft Copilot Studio authoring experience.

Task 1: Setup your browser experience

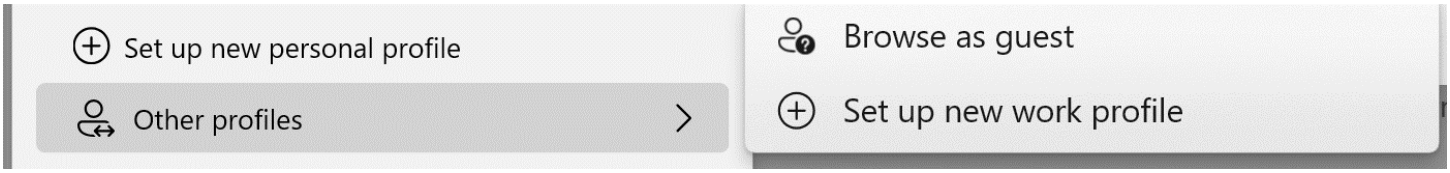
To avoid conflicting with your existing logged-in experiences, you can do these labs by using **one** of these 3 options:

1. **Set up a new work profile** specific to that workshop

> **Pro tip**: best option to switch between your work and trial environments while keeping history of your work. Ideal if you want to continue using the account later.

2. Or **browse as a guest**.

3. Or **start an InPrivate session**.



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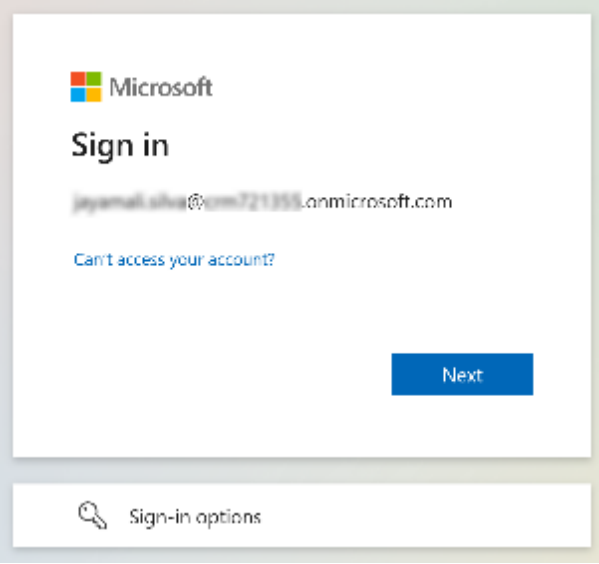
Task 2: Log into Copilot Studio

1. Navigate to aka.ms/CopilotStudioStart
2. Enter the provided username, click **Next**
3. Enter the provided password, click **Sign in**
4. If prompted, choose whether to **stay signed in**.



5. The first time you access Microsoft Copilot Studio, you'll be prompted to choose your country/region. You can choose a value or leave the default option and click **Get Started**.

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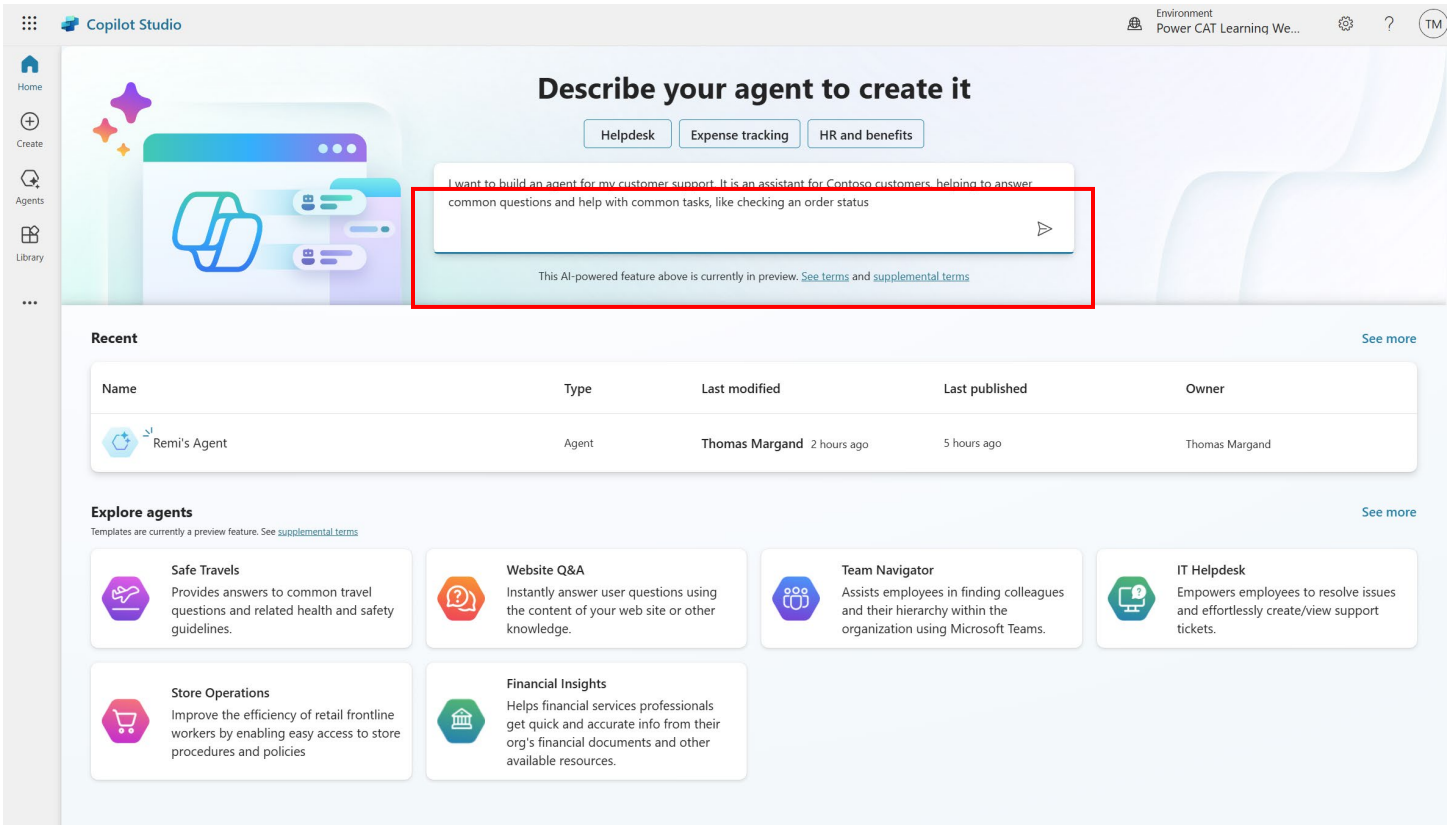
Task 3: Create an agent

1. From the Microsoft Copilot Studio **Home** page, **describe** your agent to create it.

```
I want to build an agent for my customer support. It is an assistant
for Contoso customers, helping to answer common questions and help
with common tasks, like checking an order status
```



2. You will get redirected to a conversational experience to further customize your agent. You can provide further details to the description (you can **decline** to do so), and you will also be prompted for a **tone of voice**.

```
Playful tone, joyful, customer focus, but professional
```

3. You will get asked to **provide a name** for your agent.

```
Call this agent [insert name]
```

4. You will also get asked for **publicly accessible websites** to get information from.

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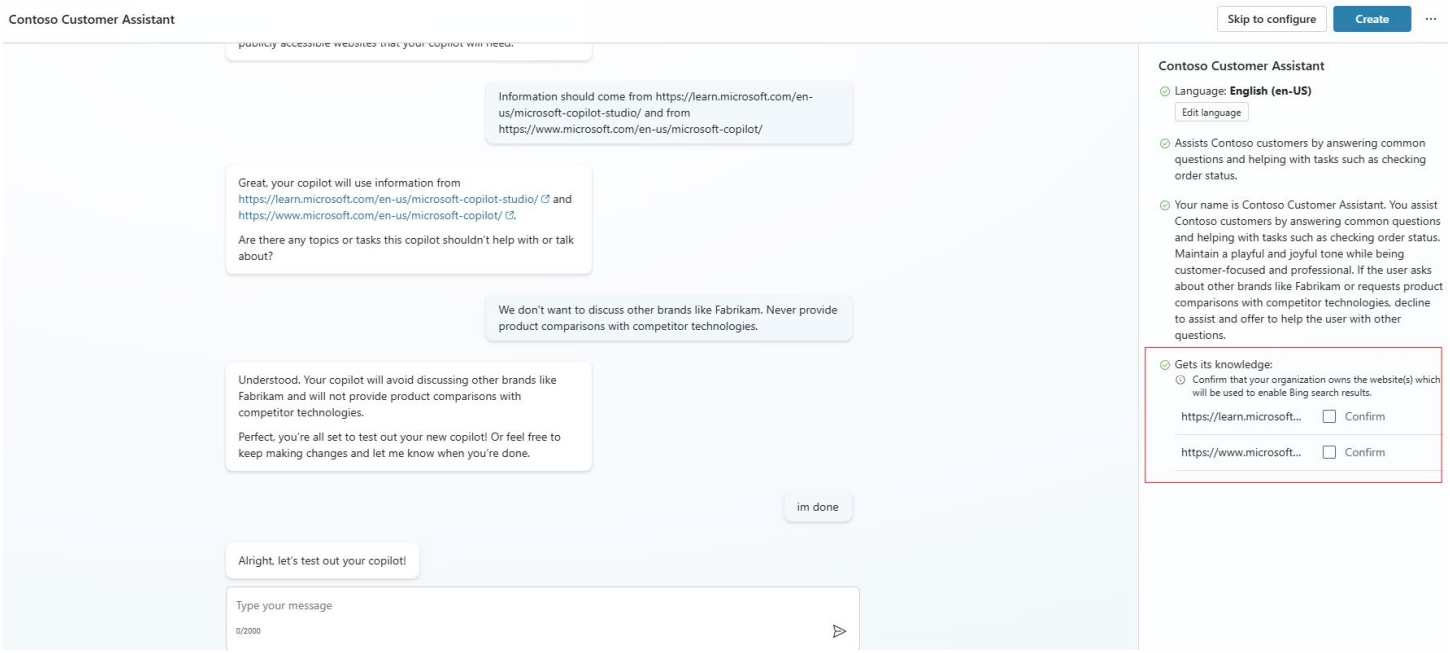
```
Information should come from https://learn.microsoft.com/en-
us/microsoft-copilot-studio/ and from https://www.microsoft.com/en-
us/microsoft-copilot/
```

5. Don't forget to confirm the utilization of the website in the chat panel.



6. You will also get asked **topics or tasks** the agent **shouldn't help with or talk about**.

```
We don't want to discuss other brands like Fabrikam. Never provide
product comparisons with competitor technologies.
```

7. When prompted, you can answer `I'm done`

8. Before you create your copilot, go the "**...**" and "**Edit advanced settings**" menu to update the agent **schema name by appending your First and Last name** (because contrary to the agent *display* name, the schema name is a technical property that can't be changed afterwards and must be **unique across your environment**) and save it a **solution** (e.g. "Copilot Studio Workshop") to be able to export it later and inherit from the solution publisher prefix).

⚠ **Make sure you pick a unique name for your custom agent by appending your First and Last name to both display name and schema name.**

9. You can then choose "**Create**".

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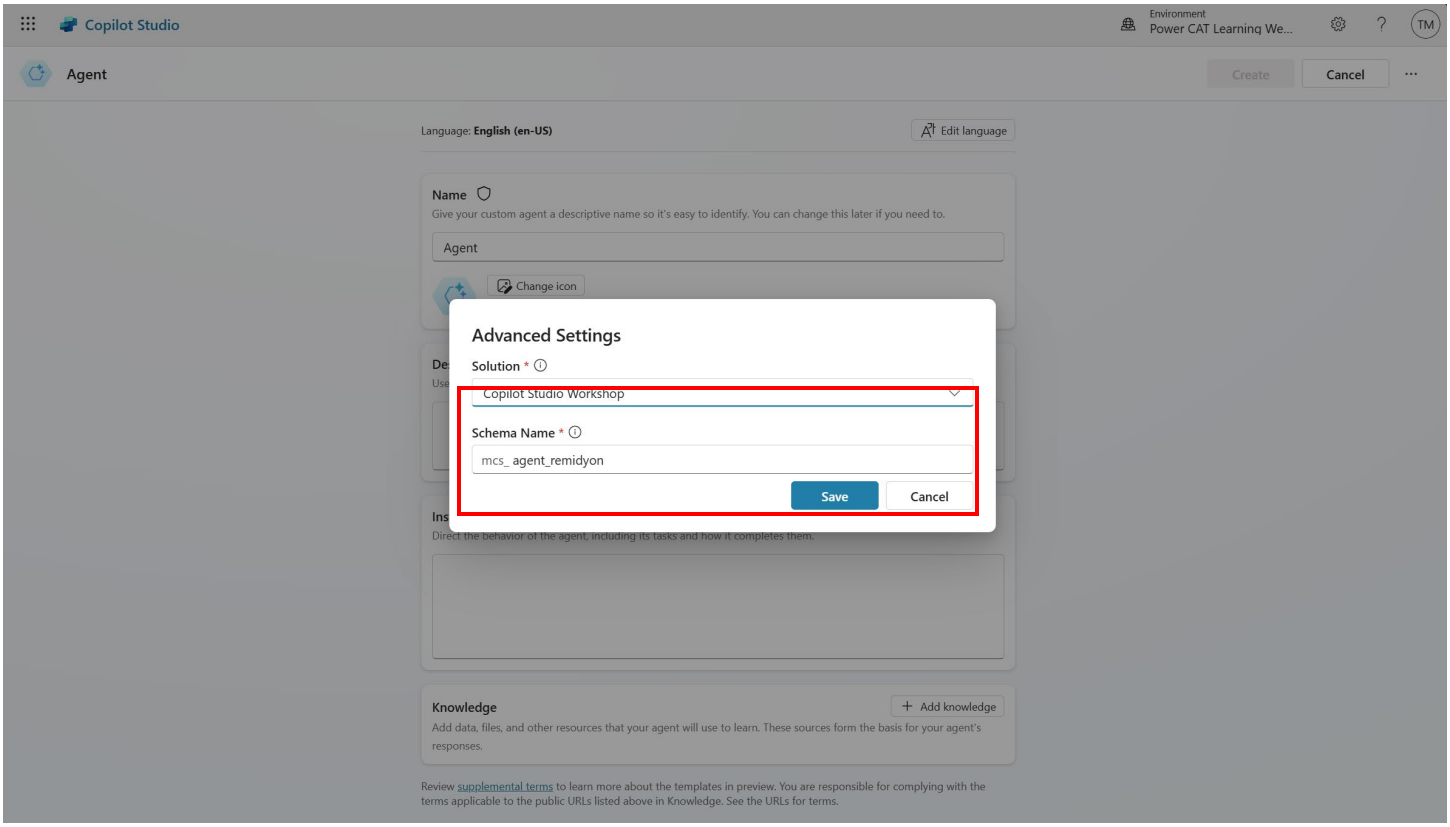

1. You can choose to avoid the conversational creation experience by selecting "**Skip to configure**"
2. You can set the copilot's primary language in the "**Settings**" menu. For the lab, be sure to remain in English (en-US).
3. It is best practice to always configure your agent in the **context of your own solution** and **publisher**, so that the agent is created with the desired publisher prefix, and so that you can easily **export it and deploy it to other environments**.

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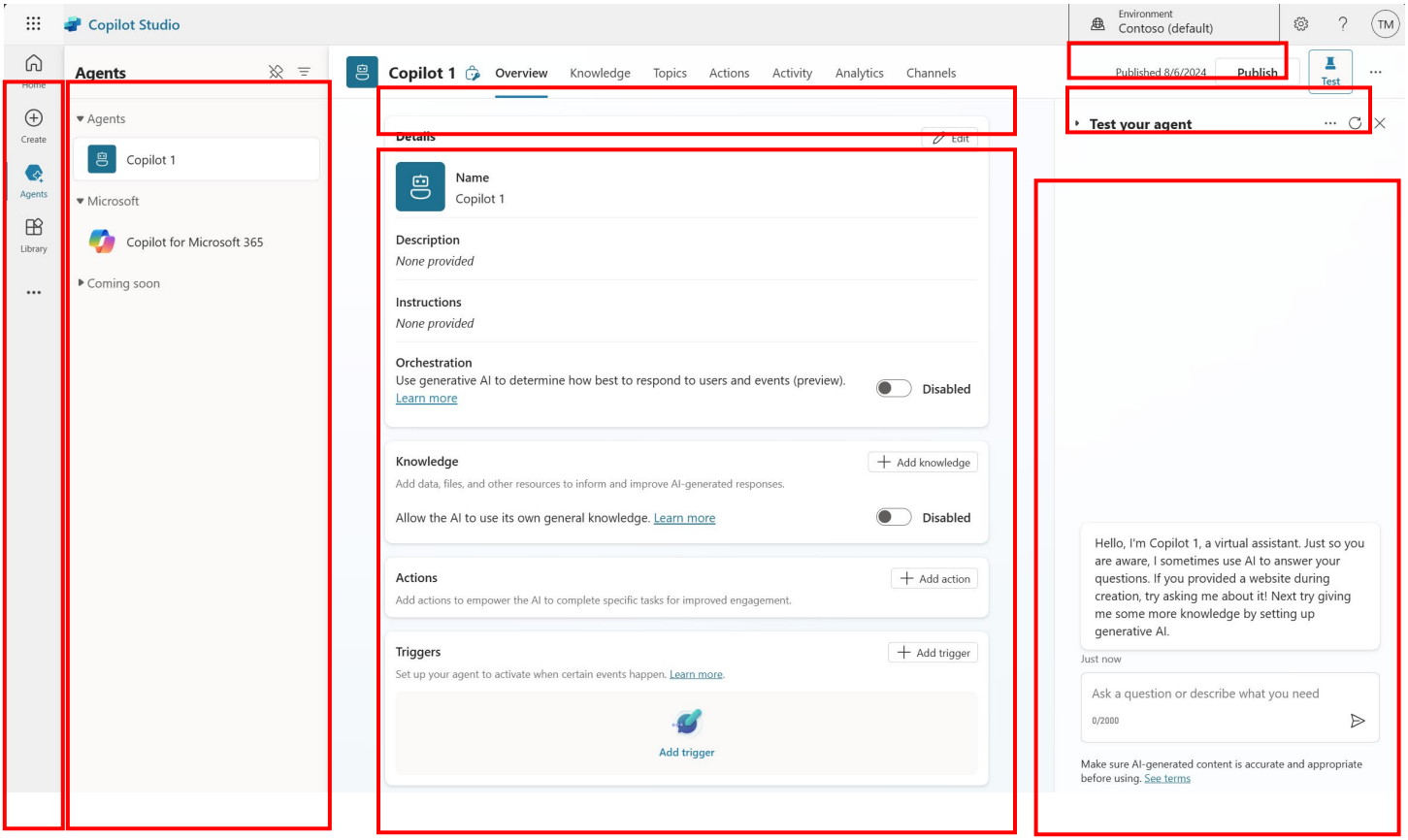
Exercise 2: Take a quick tour of the user interface

Microsoft Copilot Studio makes it easier for you to build basic to advanced Copilots. The following section reviews the main pages of the maker experience for Microsoft Copilot Studio.

Main interface



A. **Home** – Displays Microsoft Copilot Studio home page. This is the page where you initially landed. You can start creating **new copilots** from here, it contains the **list of recent copilots**, a **list of templates** to avoid creating new copilots from scratch, as well as **learning resources**.
Create – This menu gets you to the **conversational agent creation experience**.
Agents – List of all the agents your user has access to in the environment.
Library – List of **connectors** available for the extension of **Microsoft 1st-party copilots.**

B. **Agents**– List of available agents that you can **customize** and **quickly navigate to (you can pin/unpin this panel)**.

Pro tip: when you work on a single agent, you should **unpin the list of agents** to get more screen real estate for your authoring.

C. **Menu** – Tabbed navigation between the most useful Copilot Studio capabilities.
Overview – Description of the copilot, its instructions, and quick view of its configuration (knowledge

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sources, topics, actions, publish status, etc.)
Knowledge – Where you manage the agent knowledge sources (website, files, etc.)
Topics - Where you manage custom and system topics. Topics are the core building blocks of a copilot. Topics can be seen as the agent competencies: they define how a conversation plays out. Topics are discrete conversation paths that, when used together, allow for users to have a conversation that feels natural and flows appropriately.
Actions – Where you manage action. Actions are pieces of logic with inputs and outputs. They leverage Power Platform components such as connectors, Power Platform cloud flows, AI Builder custom prompts, or Bot Framework skills. Actions are useful to leverage generative AI to both prompt the user for the necessary inputs but also to summarize the output of the action in the desired format.
Analytics – Where you can view metrics to monitor how well your agent is serving your users and identify ways to improve it.
Channels – Where you configure how your agent is being made available to your users (e.g. Teams, website, etc.)

D. **Overview –** Where you can edit the agent description, its generative AI instructions, and where you can have a quick view of its configuration (knowledge sources, topics, actions, publish status, etc.)

E. **Environment** – Where you can identify the Power Platform environment you're working from. You would typically create and author a agent in a development environment and deploy it to test and production environments.

F. **Publish** – Where you can make the latest version of your agent available to your users. Apart from the test pane, changes are not reflected to your end-users until you publish the agent.
Settings – Where you can manage your agent configuration (advanced settings, security, language, etc.)

G. **Test your agent** – The test pane allows you to immediately test your agent and your customizations, even without needing to save.

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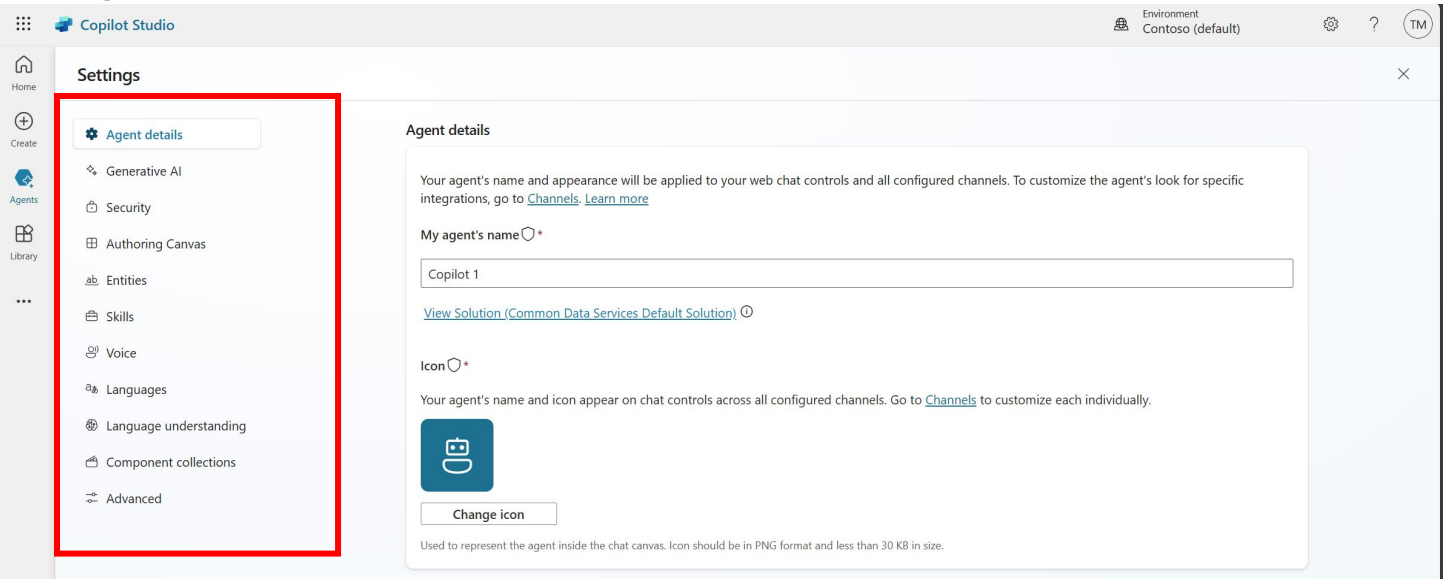
Settings interface



1. **Agent details** – Where you can update the agent display name, icon, and modify advanced settings (e.g. configure the Azure Application Insights integration)

2. **Generative AI** – Where you can choose to replace the more classic natural language understanding approach for topic triggering and entity extraction with one that's based on a large language model to do multi-intent detection and more complex entity extraction. This is also where you can configure content moderation setting for knowledge sources (to reduce risks of hallucinations).

3. **Security** – This is where you configure end-user authentication settings (the type of authentication and whether it is enforced or not), and web channel security, that allows you to further secure the Direct Line channel that is used for any web or custom application deployment.

4. **Authoring Canvas** – Enable Optimized Canvas for topics with a high number of nodes, improving performance and usability.

5. **Entities** – Copilot Studio comes with a lot of pre-built entities to help identify key information in a user utterance (e.g. a city, date, number, etc.). This menu is also where you can define your own closed-list entities or regular expression entities.

6. **Skills** – Where you register external Bot Framework skills that your Copilot Studio agent can call, or where you can configure how existing Azure Service Bot can use your Copilot Studio agent as a skill.

7. **Voice** – Make sure your agent works for you with voice-first features like advanced speech recognition and dual-tone multi-frequency (DTMF) input.

8. **Languages** – Where you can configure additional languages your agent can be used in and localized into.

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9. **Language understanding** – Where you can configure custom language models developed and trained on Azure AI Language, in Azure Conversational Language Understanding (CLU). When configured, this effectively replaces the out-of-the-box natural language understanding model (NLU) for intent detection and can also replace entity detection and extraction.

10. **Component collections** – Group components together in a collection to distribute across copilots.

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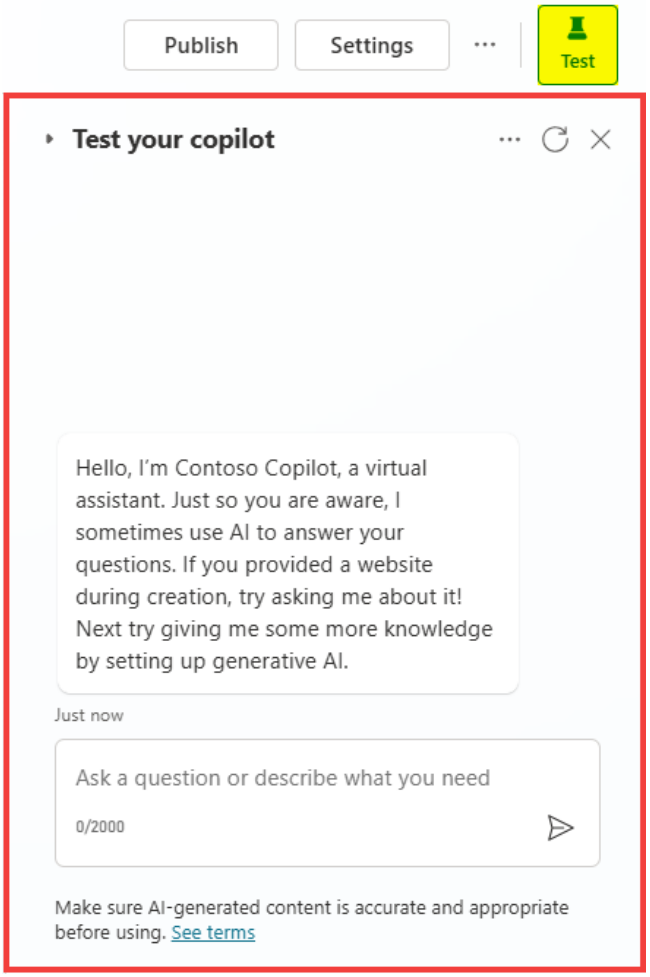
Exercise 3: Test your copilot

1. To show the **Test agent** pane, in the top-right corner of the screen, select **Test**.



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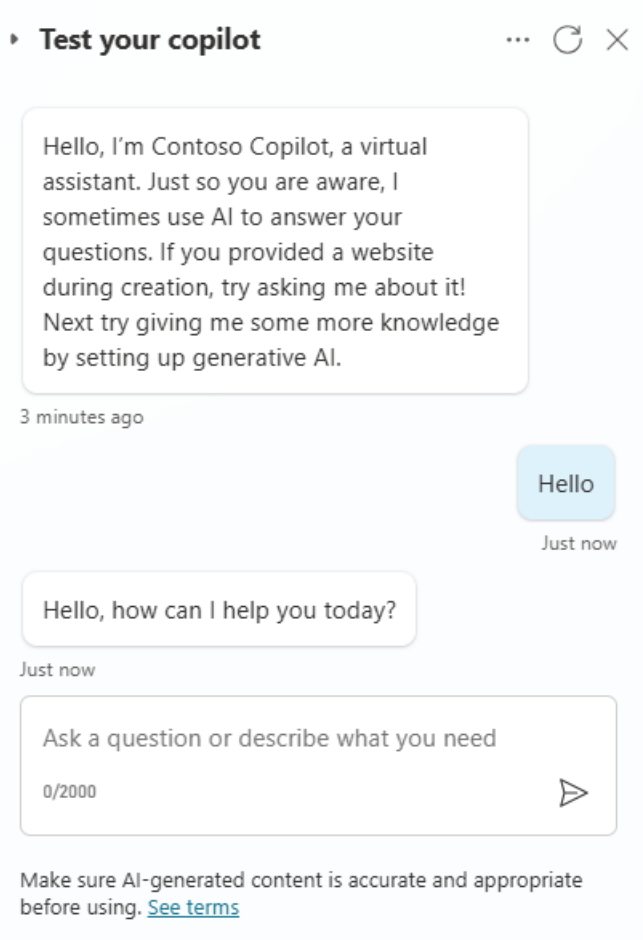
2. The **Test agent** pane shows that a message has already been sent to you from the copilot. This message was sent from the **Conversation Start** topic, which begins automatically. At the **Ask a question or describe what you need** prompt, at the bottom of the **Test agent** pane, enter `Hello` and then select the **Send** button.



The Copilot will offer a greeting in the **Test Copilot** pane

Pro tips:

- **Click on a message** in the test pane to get redirected to the exact topic and node it was used in.
- When in a topic, you can access the **variables values** (**Topic** variables, **Global** variables or even **Environment** variables) in the **Variables** menu (It's OK if you don't have any environment variables on your environment). Within this menu, the **Test** tab displays the current value at run time
- You can **search** through your variable names by clicking the magnifying glass

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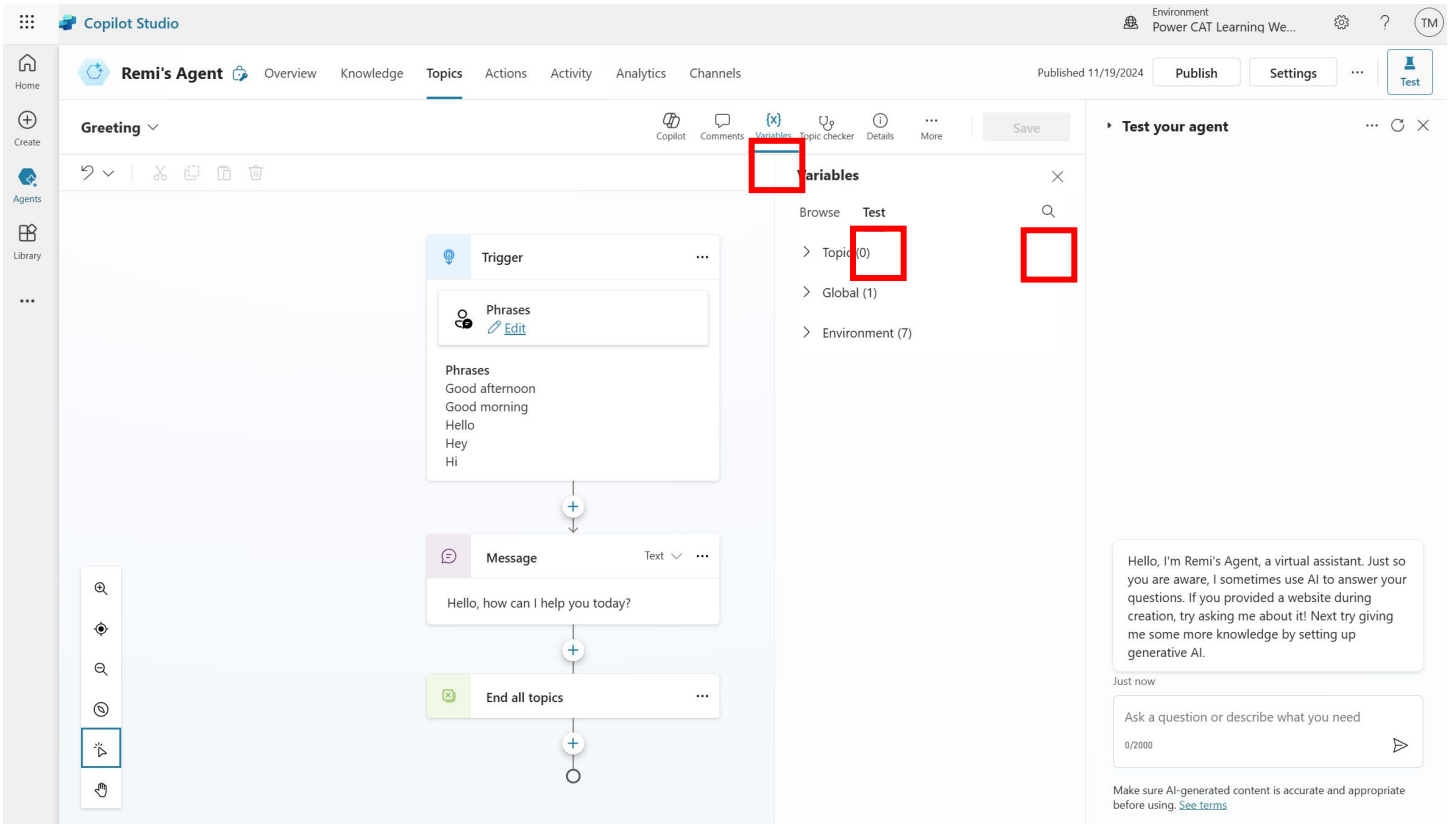

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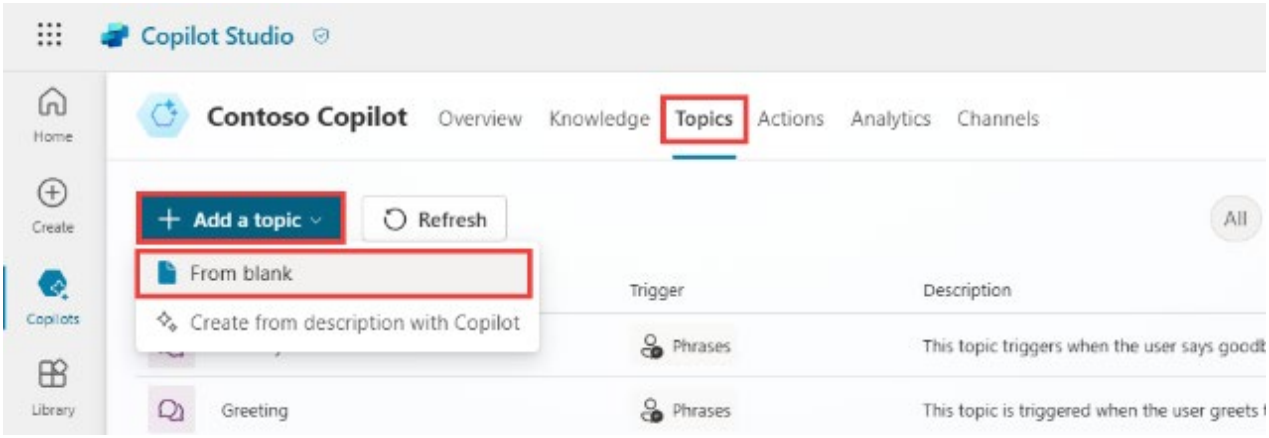
Exercise 4: Create your first topic

Task 1: Create a new topic manually

In this first task, you manually create a new topic by following these steps:

1. Select **Topics** from the left menu within Microsoft Copilot Studio.
2. From the **Add a topic** drop down at the top of the screen, select the **From blank** option.



3. Rename your topic title, by clicking on **untitled** and renaming it to `Check Order Status`.
4. Select **Phrases**, under the topic Trigger, and select **Edit**.
5. Paste the following **phrases** and hit **enter** or click the **(+) button** next to the text box to add them all at one.

```
order status
track my order
where is my package
check order status
has my order shipped
```

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6. Select the **Details** button within the top right corner to open the **Topic details** pane.
   This is where you can set a different **Display name** (what the end-user may see) from the configured topic **Name** (what the maker sees).

Pro tips:

- The **Display name** is used in case of **disambiguation** (for example, when multiple topics match a user utterance, the user is prompted to choose between two or three recognized topics, in a "Did you mean…" question.
- When **generative AI orchestration** is used instead of the built-in natural language understanding for topic triggering, the display name is called the **Model display name** and is used in addition to the **Model description** as part of the **intent detection process**.
- The **Details pane** is also where you can configure topic **input** and **output** variables. This is useful when the topic is invoked by another topic, or when generative AI orchestration is turned on, effectively using a large language model to slot fill the necessary variables and automatically prompting the user for missing inputs.

7. Select **Save**.

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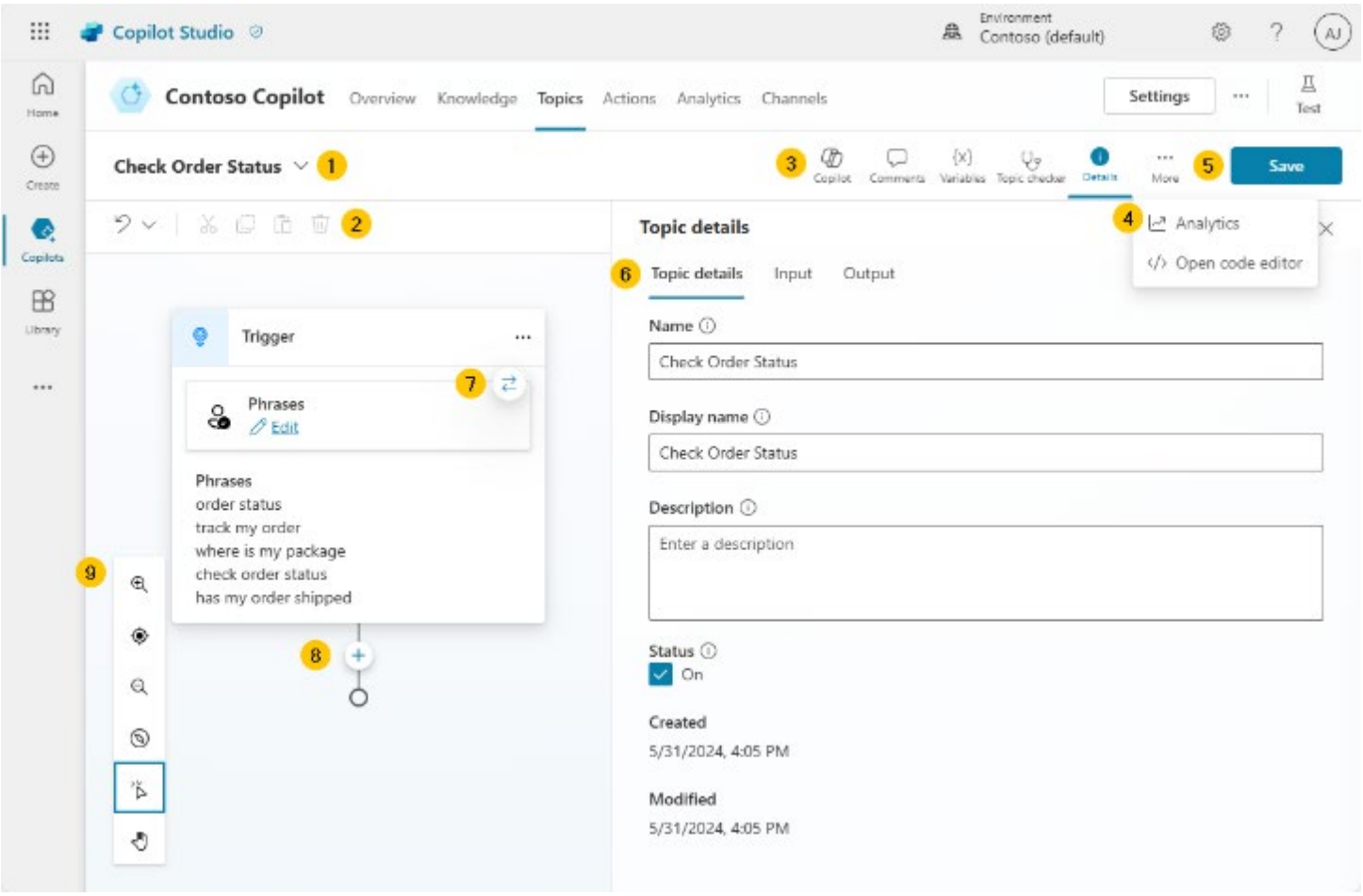
Task 2: Review the topic user interface

Now that you created your first topic, albeit without content except trigger phrases, you can explore the authoring user interface (UI) to become more familiar with it.



1. **Topic title** – The name of the topic that you're currently editing, which is visible on the Topics page.

2. **Productivity bar** – Where you have access to tools, such as **cut**, **copy**, **paste**, and **delete** for the nodes (messages, questions, etc.).

3. **Copilot, Comments, Variables, Topic checker, Details, Analytics, Open code editor, and Reset to default buttons** – This area includes: **Copilot**, which helps you create and update topics using descriptions in natural language; **Comments**, where authors can collaborate and leave comments on nodes; the **Variables** menu, to see the list of topic-level and global variables, and their runtime value in the test tab; **Topic checker**, which you can run anytime from the authoring canvas to check if errors have occurred in your topic that the platform can detect (and if left unresolved would prevent you from publishing the bot); the **Details** button to access the topic properties.

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4. **… More** – **Analytics** shows topic usage metrics; **Open code editor** switches the user interface from a no-code/low-code experience to a pro-code view of the underlying YAML configuration of the topic that developers can edit directly. For some system topics, a **Reset to default** option is available to revert the topic content to its original state.

5. The **Save** button saves the topic changes.

6. The **Topic details** menu allows the maker to update the topic **Name**, **Display name**, **Description** and **Status** (active/inactive). When generative AI orchestration is enabled, display name is replaced with **Model display name** and **Model description** becomes available. It also allows the configuration of **inputs** and **outputs**. The inputs can be automatically slot filled when using generative AI as the orchestrator.

7. The **trigger switcher** button is present at the **Trigger node** of every topic. By default, new topics have the **Phrases** trigger (or **Triggered by copilot**, when generative AI orchestration is enabled), but this can be switched to **Message received**, **Event received**, **Activity received**, **Conversation update received**, **Invoke received**, **Redirect** and **Inactivity**.

8. **Add a new node** – the add a new node button allows the maker to add activities to a topic, such as send a message, ask a question, add a condition, etc., to build the dialog logic.

9. **Authoring canvas controls** - You can use these controls to navigate the authoring canvas, which can become large for extensive topics. The included controls are a **map of the canvas**, **zoom**, **hand**, **selection** and **reset**.

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Task 3: Add content to your topic

This exercise doesn't cover how to add a large amount of content to your topic; rather, it provides the steps to add a single question node, message node, and topic redirection so that you can become familiar with the overall process of creating a topic, testing, and publishing in Microsoft Copilot Studio. The Publish demo exercise in this module covers a more in-depth review of the authoring capabilities in Microsoft Copilot Studio.

The next section of this exercise covers foundational knowledge for understanding the central components of Microsoft Copilot Studio and creating topics.

Fundamental knowledge: Question node

As an agent author, you should use the Question node when you're expecting a response from the user, and you want to do something based on that information. The user response is stored in a variable, and question nodes can also use entities and slot filling features, both concepts that are covered later in this exercise.

The Question node uses many functions that a Message node does, such as rich text, speech authoring, and rich text response types such images, videos, and Adaptive Cards.

1. In the topic that you have open from the previous task, select the **+ button** below the existing node in the canvas and then select **Ask a question** to add a new Question node.

2. Enter
   `What would you like to do with your order?`
   in the field and then set the Identify value to **User's entire response**. This node is asking the question after the topic is triggered about what the user wants to do. The Publish demo exercise extends this task to using entities and slot filling.

3. By default, the user response is saved as a variable named **Var1**. You can **click on the variable name** to change its name, for example to `OrderRequest`.

Pro tips:

- It is a best practice to **always properly name variables** so they can be clearly identified when you reference them in your logic, and it also adds clarity when doing tests and checking the variable values at runtime.
- Customers and partners can **define and follow naming conventions** for their variables, for consistency and ease of maintenance.

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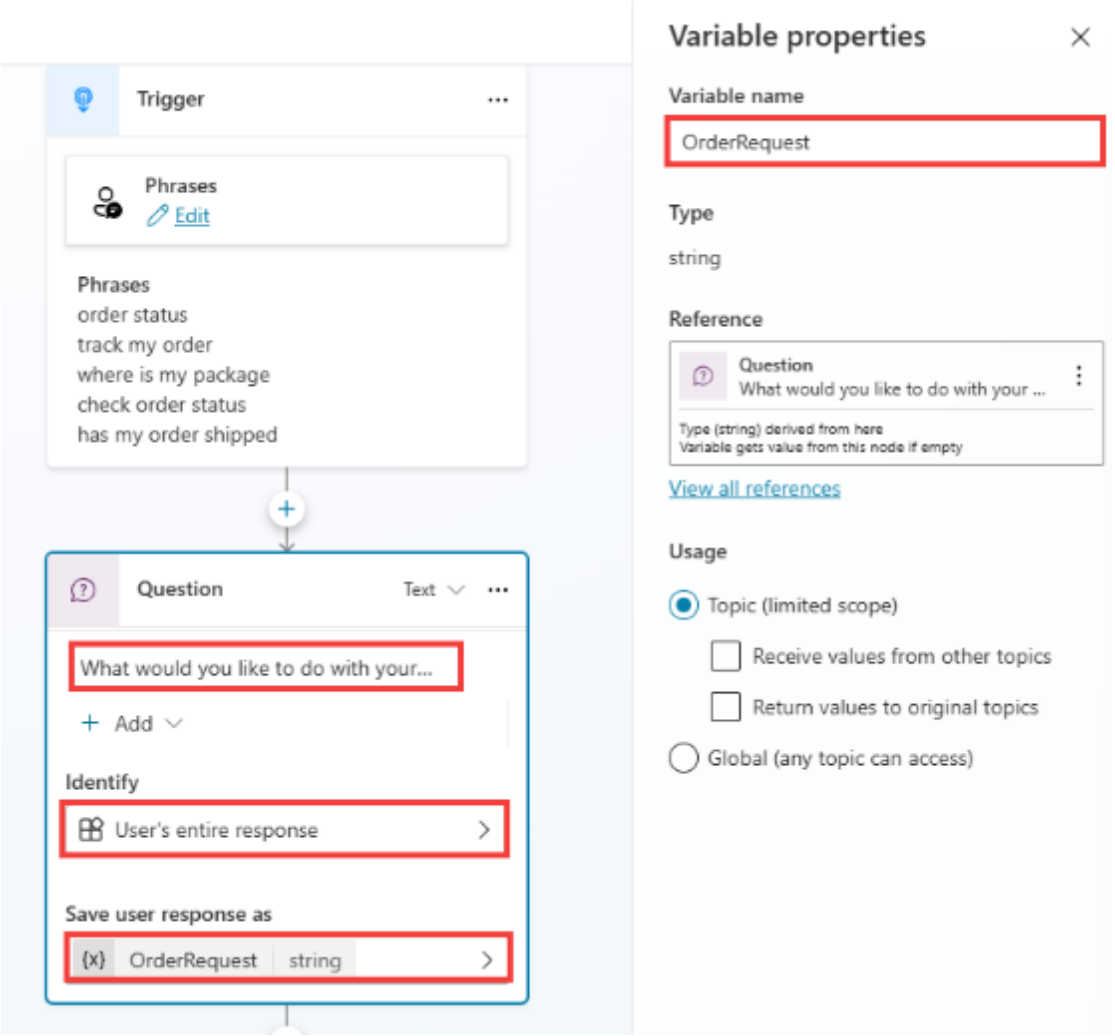

Pro tips:

- Question behavior can be customized by clicking **…**, **Properties**, and **Question behavior**. From here, you can define if the question can be **skipped**, **how many times it should be re-prompted** to the user, **validation rules**, and **what should happen if the user doesn't answer** as expected.
- You can also define whether a user can **jump to another topic** without answering the question, and you can define the **list of topics that are allowed in case of interruption**.
- It is a best practice to **define retry prompts** in case the user doesn't understand what is expected from them the first time. It is then OK to be much more explicit with the user when trying to help them properly answer a question.

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Fundamental knowledge: Message node

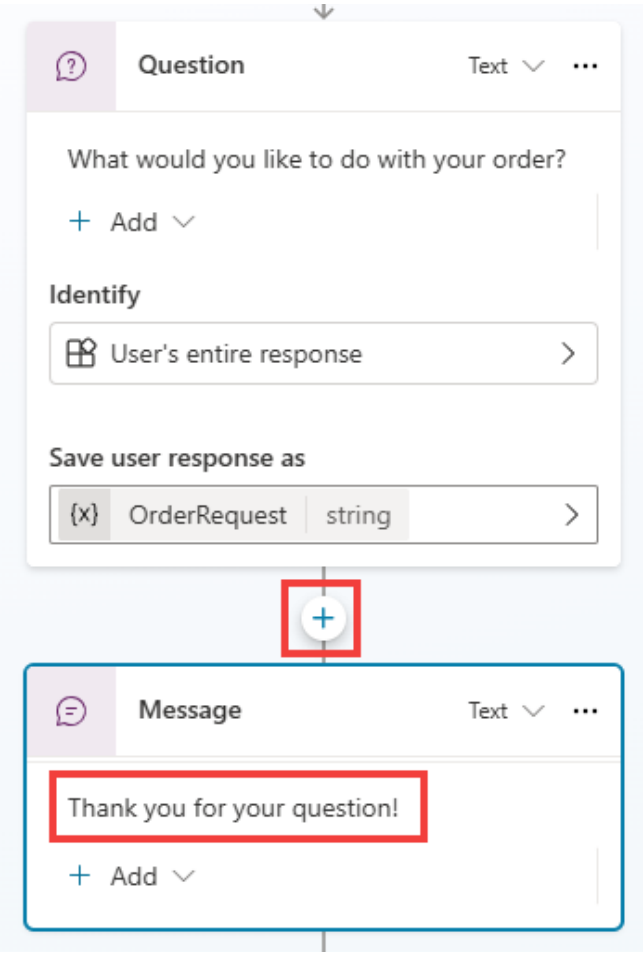
You can use the Message node to display a message to the user. This message can be simple based on the topic of the conversation. In direct contrast to the Question node, the Message node doesn't expect or store an answer from the user. The Message node also has rich text options that you can display in text, or advanced options like cards, images, videos, and Adaptive Cards.

Pro tips:

- To make the agent sound more natural and human, you can configure **message variations**, so that the agent will send one of the configured messages, avoiding strict repetition of the same message.

You can also use variables within message nodes in the body of text displayed to the user, which is dynamic based on the data stored within them. This capability allows messages to be more personal, such as "*Hello {System.User.FirstName}, I can get those order details for you, one moment*". Variables can also store data to perform automation or calculations on them. Later exercises cover variables more in depth. Last, you can also add Power Fx formulas to create even more dynamic content.

1. To add another node, select the **+ button** below the Question node. Then, select "**Send a message**". Enter a message that acknowledges the customer's question, such as `Thank you for your question!`



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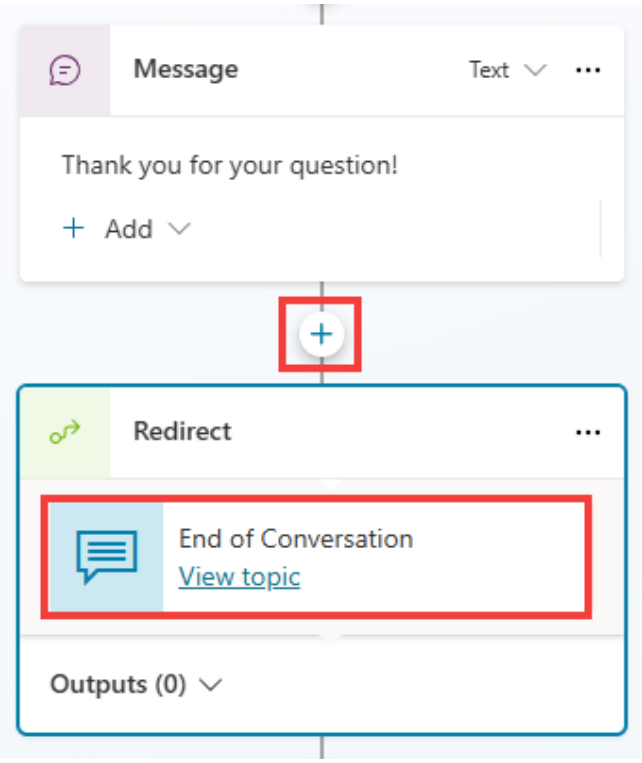
2. End the conversation for the customer in this demo scenario. Select the **+ button** below the message node within the authoring canvas. Hover over the **Topic management** option, and then select **Go to another topic** and select **End of conversation**. This will redirect to a topic dedicated to ending a chat session, asking if the question has been answered and suggesting filling a customer satisfaction survey.



Pro tip: It is the best practice to end discrete dialog paths with the **End of Conversation** topic. That way, the end-user can confirm their question was addressed. When a user confirms, a **customer satisfaction (CSAT)** survey is displayed. **Resolution** rates and **CSAT** scores are both displayed in the agent **analytics**.

3. Then, within the top right-hand corner of the screen, select the **Save** button.

4. Use the **Test** pane to validate that your bot behaves as expected.
Make sure you **Refresh** before doing a new test.

```
I'd like to check the status of my order please
```

Pro tip: Trigger phrases don't need to be an exact match of all the utterances a user might say.

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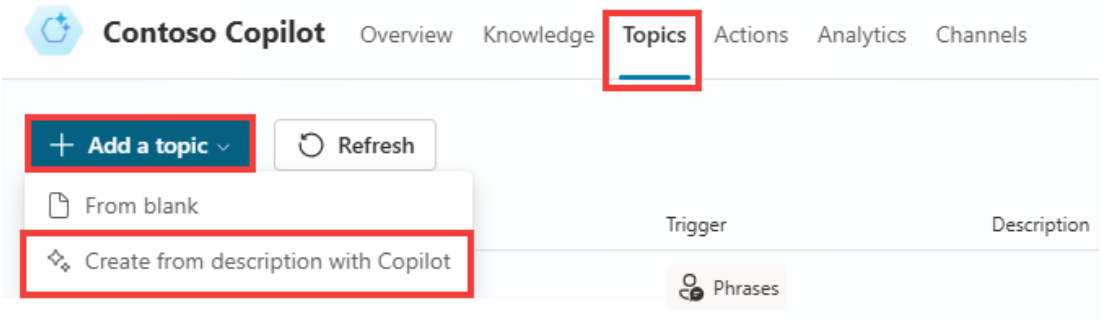
Task 4: Use Copilot to create a topic

Creating topics in Microsoft Copilot Studio is more effortless than before. Now, you can create a topic in Microsoft Copilot Studio by using natural language to describe what you want the topic to do. With the **Create from description with Copilot** feature, you can automatically build a topic, reducing some manual steps that you experienced from the first task in this unit. In this task, you'll learn how simple and quick creating a topic with Copilot can be.

1. Select **Topics** from the navigation pane to the left of the screen.

2. Select the **+ Create** drop down and choose **Topic** and then **Create from description with Copilot**. A new window appears, asking you to **Name** your topic and enter a description in the **Create a topic to...** space.



3. Enter
   `Support Ticket`
   in the **Name** your topic field.

4. In the **Create a topic to** space, enter the description of what your topic should do.

```
Create a support ticket, including a title, severity (high / medium /
low), description and an email address to send update notifications
to. Define variables following this naming pattern: Topic.TicketTitle.
```

5. Select **Create**.

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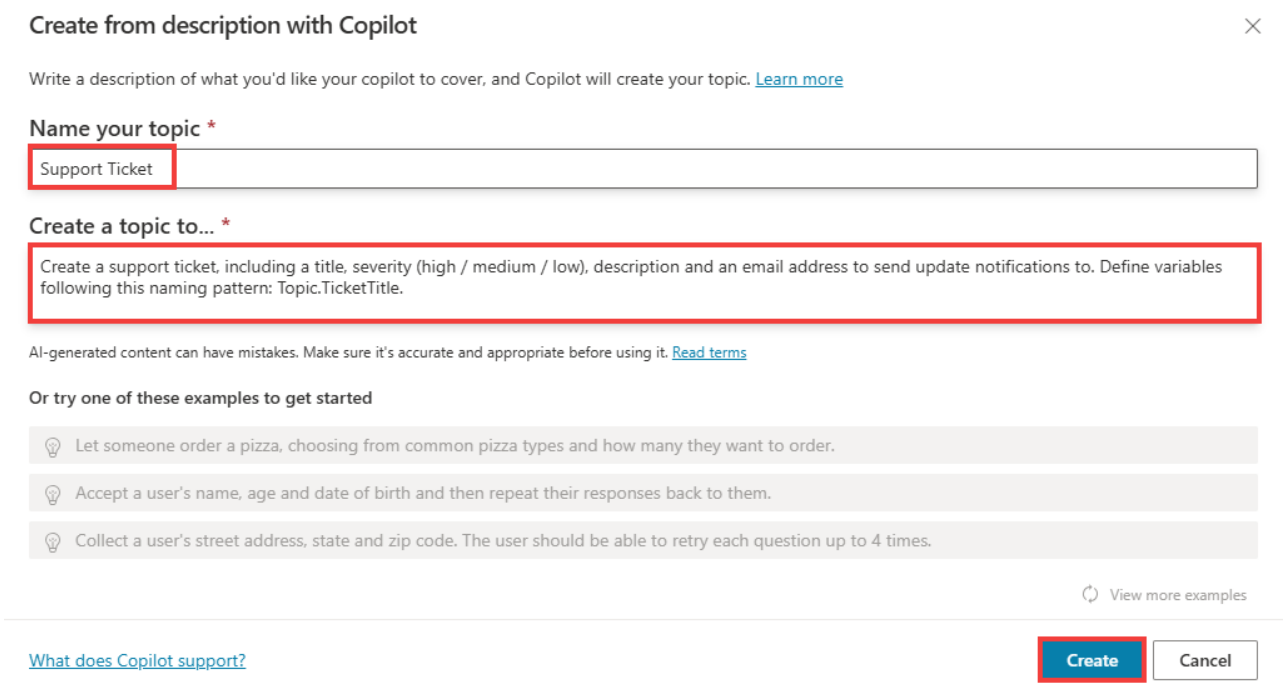
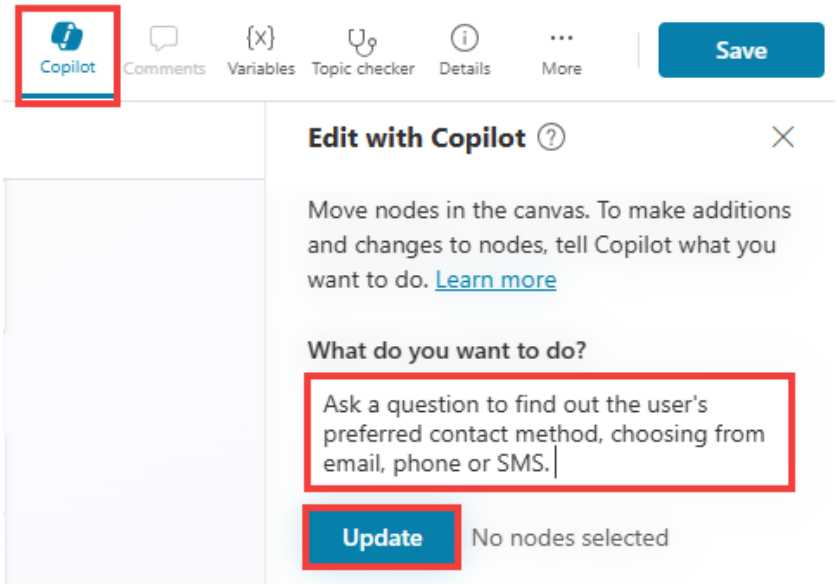


Copilot creates your topic, including the trigger phrases, question nodes, entity selection, variable naming, and message node confirmation.

6. Select the **Copilot** button in the upper part of the authoring canvas (if the **Edit with Copilot** panel isn't open already). Within the **Edit with Copilot** panel, in the field **What do you want to do?** Add additional instructions and then select **Update.**

```
Ask a question to find out the preferred contact method, choosing from
email, phone or SMS.
```



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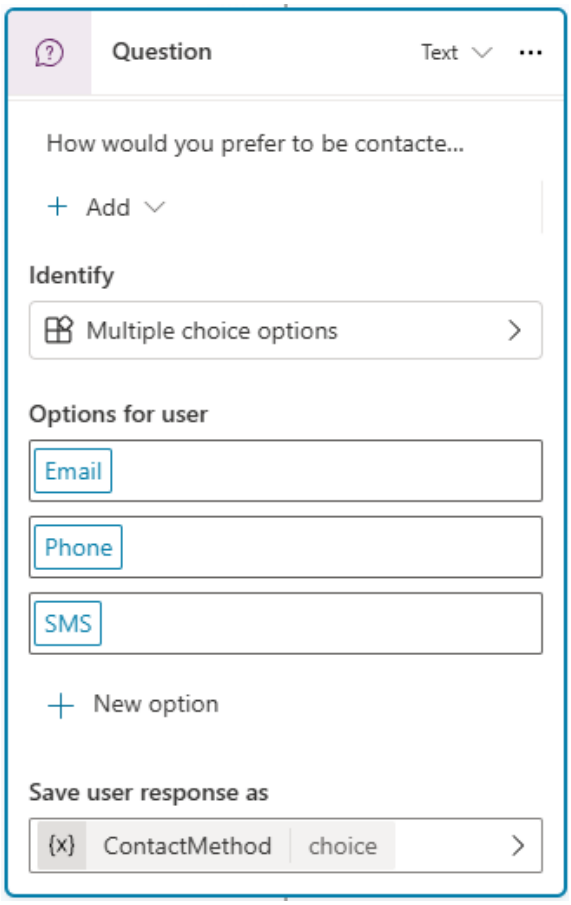
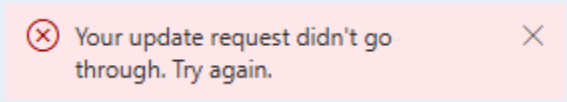
Copilot automatically adds a question node, which both asks the customer for their contact method, and stores their choice in a variable.



Note: you can skip this step if you run into the below error:



The Copilot feature in Microsoft Copilot Studio drastically reduces authoring time, allowing you to create new topics and edit topics by using natural language. Additionally, the **Edit with Copilot** panel shows what updates have been created, and it provides suggestions for what you can update in your topic.

7. **Save** your new topic.

8. Use the **Test pane** to validate that your bot behaves as expected.
   Don't hesitate to use the refresh icon to start from a new conversation and not resume an old one.

```
I have an issue with my laptop and need to open a support ticket
```

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Exercise 5: Publish your agent to the demo website for testing

Task 1: Change your agent authentication

For the purposes of this demo, we will set the bot to no authentication so that anyone with a link to the demo site is able to test it. To do this, follow the below steps:

1. Click **Settings** in the top-right navigation
2. Go to **Security**
3. Select **Authentication**
4. Select **No authentication** in the panel that opens and select **Save**
5. Select **Save** in the **Save this configuration?** Panel that opens

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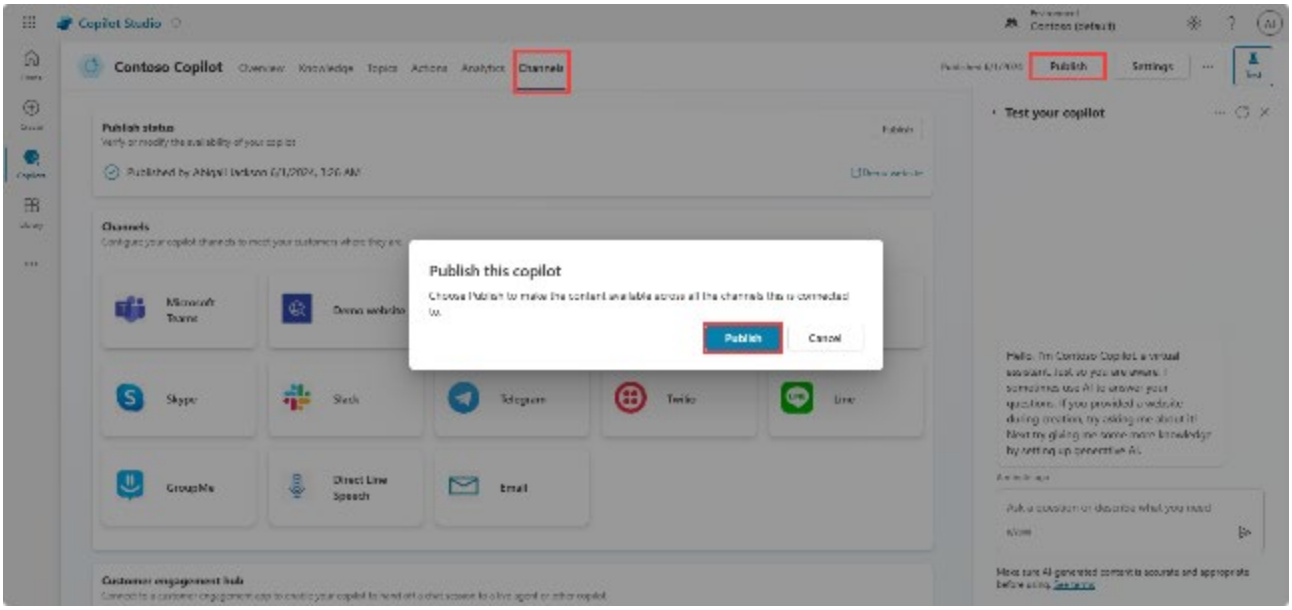
Task 2: Publish your copilot

Microsoft Copilot Studio provides a demo website so that you can invite anyone to test your agent by sending them the URL. This demo website is useful for gathering feedback to improve your content before you activate the agent for your real end-users.

1. In Microsoft Copilot Studio, go to the **Channels** tab

2. Select **Publish** to push the latest topics updates to the demo website. You'll need to complete this action before you use the demo website the first time and after you make changes to the topics that you want people to test on the demo website. You will see a warning popup "Your agent does not require end user authentication", **this is normal** – we want to warn user when this is the case.



Pro tips:

- When you've created your real copilot, you'll publish whenever you want to make updated topics available in your deployed channels.

The publishing process checks for errors in the topics whose Status is On. Publication should take only a few minutes.

After you've selected the Publish option, a green banner notification will show at the top of the screen when publishing is complete.

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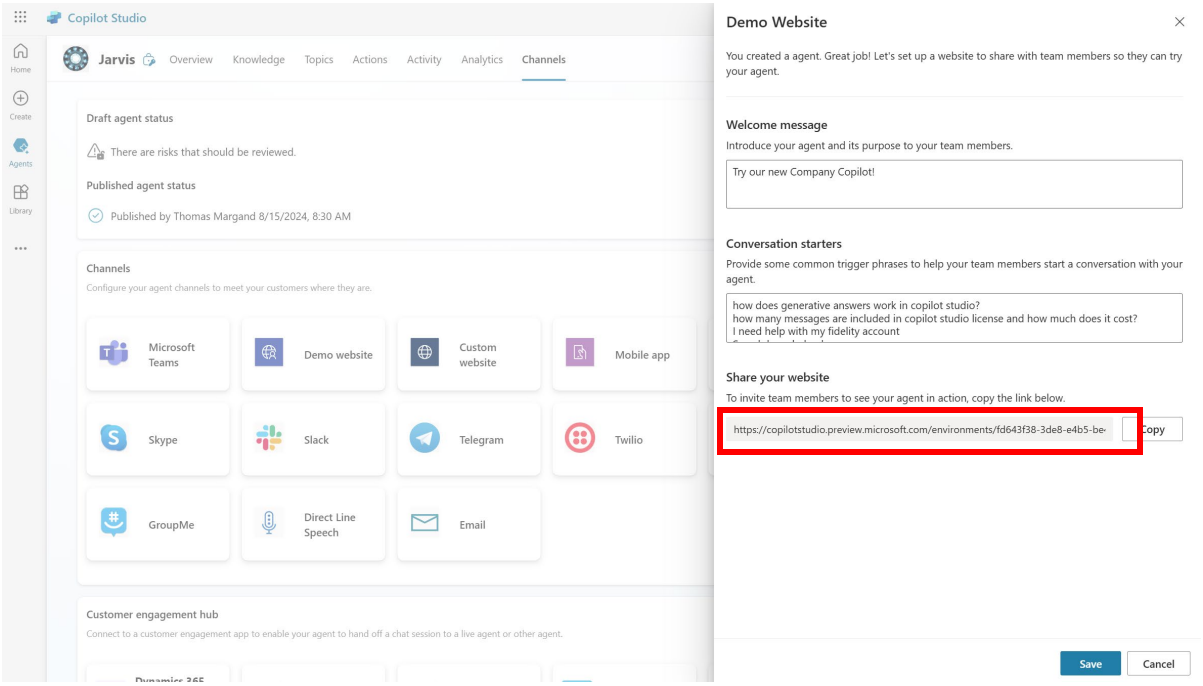
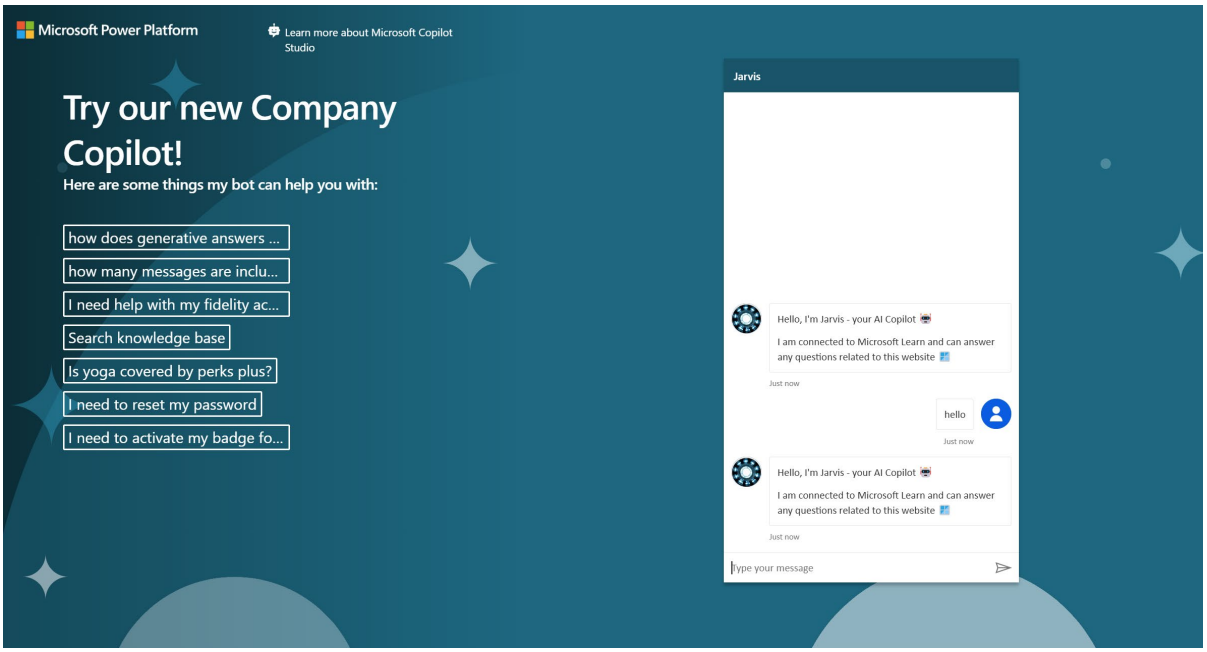
3. Select the link for the **demo website**, as shown in the following screenshot.



4. When the demo site window opens, you can interact with the agent by typing at the Type your message prompt or by selecting a starter phrase from the provided options.



Congratulations, you've now built and published your first copilot!

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