



Crónicas de Dataverse: El despertar de Copilot Studio

Ramón Rautenstrauch
Toni Granell

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SPEAKER

Ramón Rautenstrauch



- 📍 Microsoft Copilot MVP 🤖.
- 📍 Apasionado ❤️ del Marketing & CMO 🎉.
- 📍 Evangelista Copilot 🤖.
- 📍 Consultor de IA y Dynamics 365 😍.
- 📍 Friki de la tecnología y de experimentar con la IA.
- 📍 Organizador Non Profit Community Day Spain
- 📍 Administrador Global Communities: AI & Low Code

🔗 <https://www.linkedin.com/in/ramonrautenstrauch/>

🔗 <https://www.consultor365.com/>

🔗 <https://www.meetup.com/es-ES/ai-low-code/>

🔗 <https://www.nonprofitday.es>



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SPEAKER

Toni Granell



- 📍 Microsoft Copilot MVP & MVS
- 📍 Nextraining Microsoft Ambassador
- 📍 IAMCP Spain Regional Director Baleares
- 📍 Organizador Non Profit Community Day Spain
- 📍 Administrador Global Communities: AI & Low Code
- 📍 Administrador Comunidad Power Platform Barcelona

<https://www.linkedin.com/in/tgranell/>

<https://www.meetup.com/es-ES/ai-low-code/>

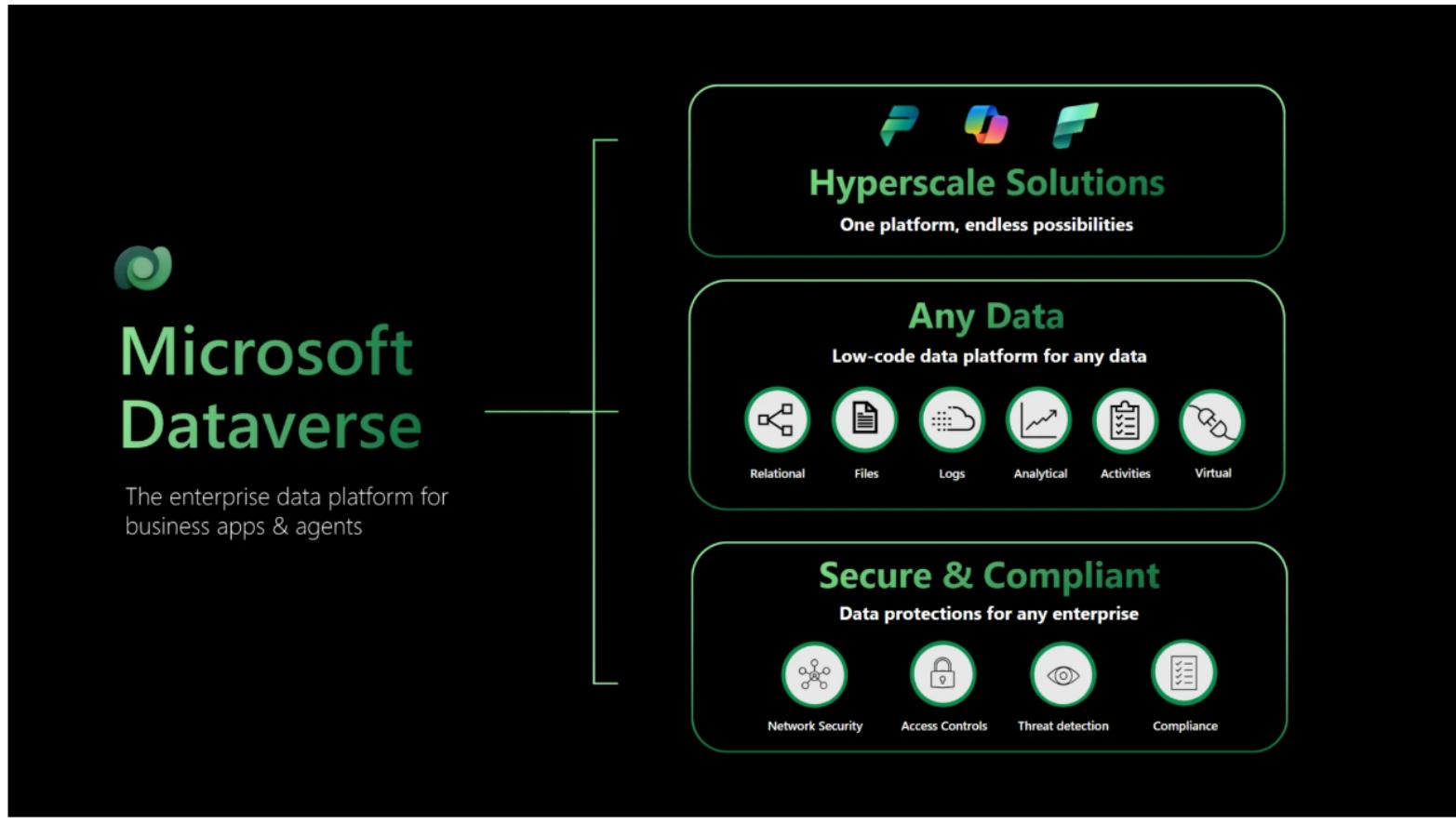
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NEX>TRAINING

Microsoft Dataverse: Enterprise Data Platform



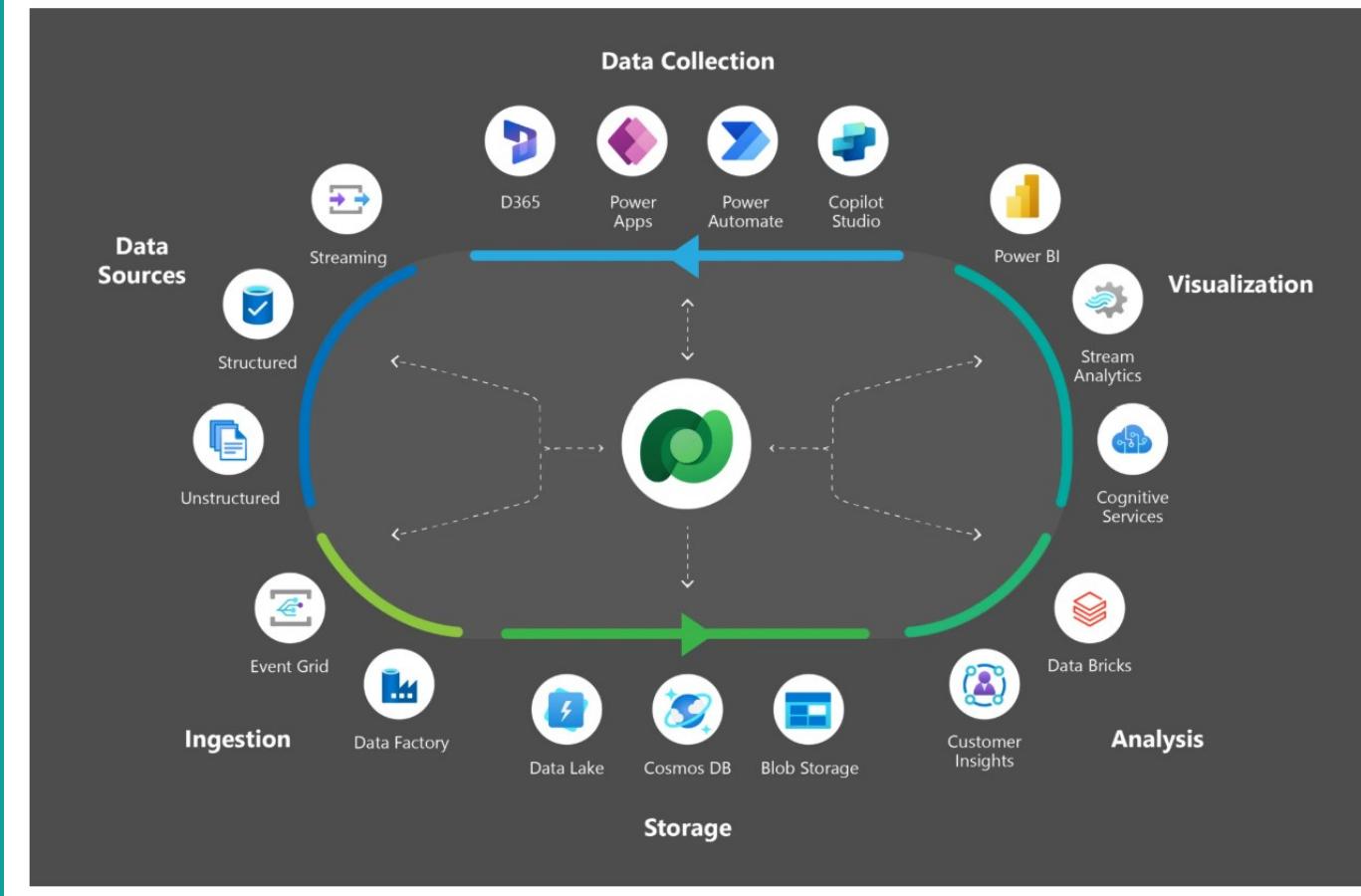
The image shows the Microsoft Dataverse landing page. On the left, there's a large green circular icon with a white 'D' inside. To its right, the text 'Microsoft Dataverse' is displayed in a large, bold, green font. Below it, a subtitle reads 'The enterprise data platform for business apps & agents'. A green bracket on the left side groups three callout boxes on the right. The top box is titled 'Hyperscale Solutions' with the subtext 'One platform, endless possibilities' and features three colorful icons (P, D, F). The middle box is titled 'Any Data' with the subtext 'Low-code data platform for any data' and shows six icons representing Relational, Files, Logs, Analytical, Activities, and Virtual data types. The bottom box is titled 'Secure & Compliant' with the subtext 'Data protections for any enterprise' and shows four icons for Network Security, Access Controls, Threat detection, and Compliance.

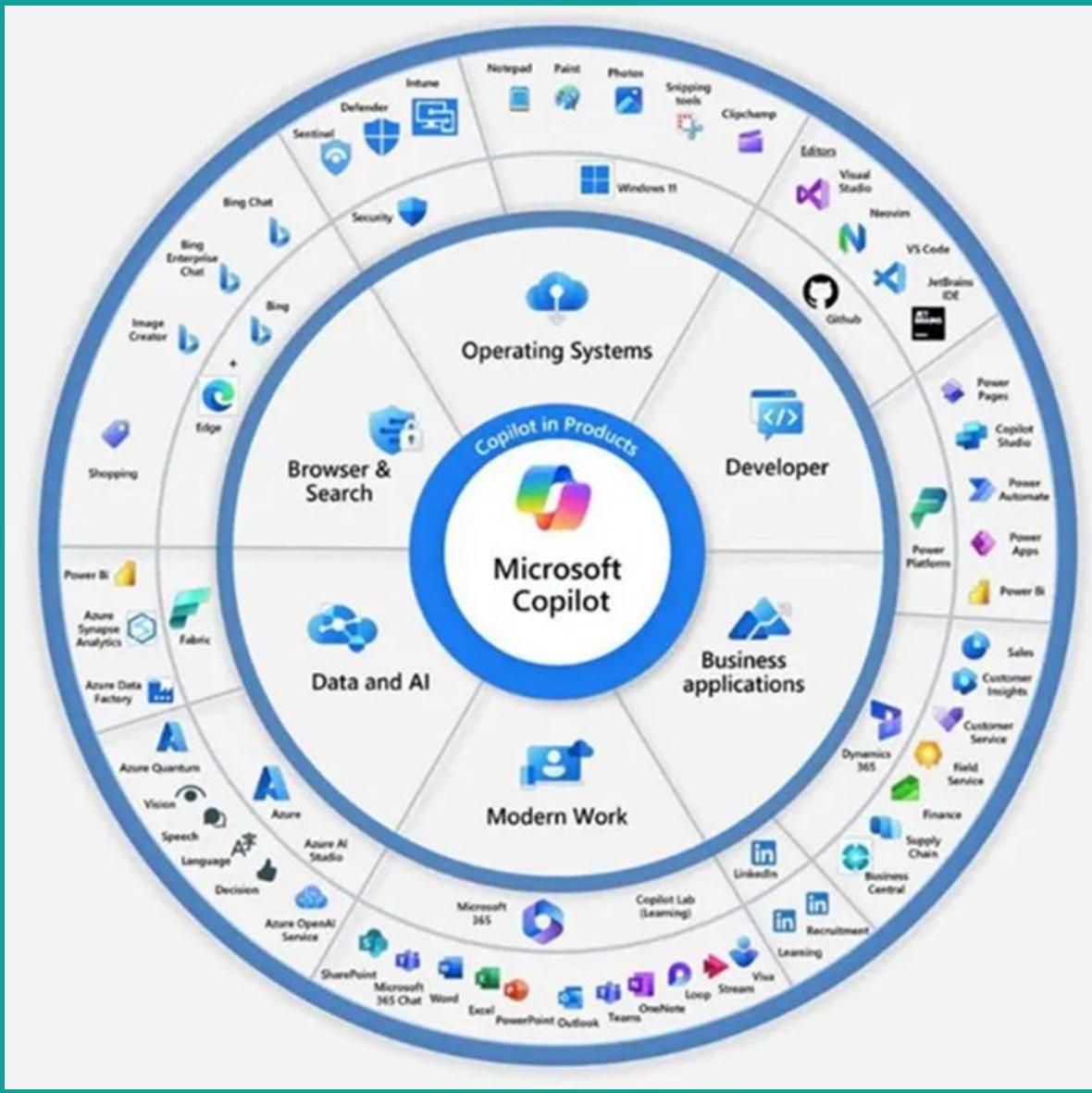
Hyperscale Solutions
One platform, endless possibilities

Any Data
Low-code data platform for any data

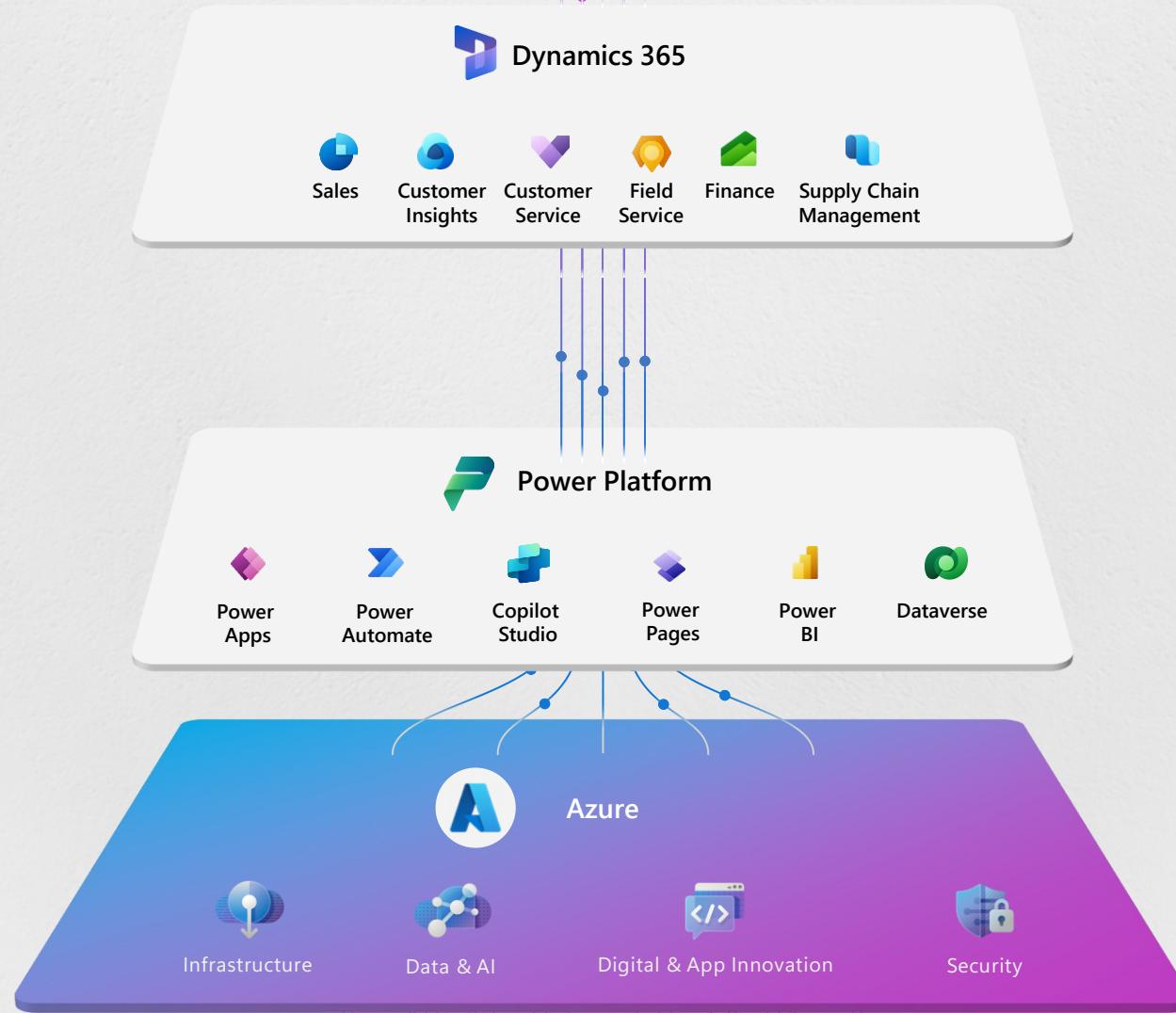
Secure & Compliant
Data protections for any enterprise

Modern Data Platform Architecture

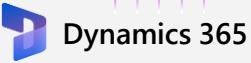




Enterprise AI Platform



Enterprise AI Platform



Extensions



Azure



Infrastructure



Data & AI



Digital & App Innovation



Security

Enterprise AI Platform

Modern Work

Dynamics 365

Digital Contact Center Platform



Power Platform

Power Apps

Power Automate

Copilot Studio

Power Pages

Power BI

Dataverse

Extensions



Azure

Kubernetes Service

App Service

Container Apps

Azure Functions

Logic Apps

API Management

Azure SQL

Cosmos DB

Defender

Entra

Sentinel

Purview

Synapse Analytics

Analysis Services

Fabric

AI Foundry

Model-Driven Apps - Ultimate Cheat Sheet

Essential reading before starting an MDA project...

Setting Up For Success

1) PID Doc.

"If it's not worth writing down, it's not worth doing."

PID Document
A PID is a business document that defines how your organization works, its processes, roles, and other crucial details. It's the first step in setting up your MDA.

2) ALM

The Power Platform ALM Cheat Sheet provides a quick reference for navigating the Microsoft DevOps ecosystem, including GitHub, Azure DevOps, and Power BI.

The Dataverse

Dataverse Is The Native Power Platform Database

Why Dataverse?

Feature	SQL	Standard	Dataverse	Why
Relational Data Support	X	▲ Limited	Full	Relational data is key to creating powerful solutions.
Role-based Security	X	▲ Limited	Full	Role-based security is great for getting started.
Scaling to 100K+ Records	▲ Easy	▲ Hard	No	Scalability is a concern for large datasets.
Business Logic (Rules, Triggers)	X	▲ Hard	Advanced	Business logic allows for complex workflows.
Model-Driven App Support	X	▲ Limited	Required	Model-Driven Apps are built on Dataverse.
Copilot & AI Builder Integration	X	▲ No	No	Integration with AI tools like Copilot Studio and AI Builder.
Power BI Integrations	▲ Hard	▲ No	No	Power BI integrates with Dataverse.

Dataverse Table Types

Type	General	Microsoft Data	Particular
Table	General	Microsoft Data	Particular
Relationship	General	Microsoft Data	Particular
Index	General	Microsoft Data	Particular
View	General	Microsoft Data	Particular
Query	General	Microsoft Data	Particular
File	General	Microsoft Data	Particular
Image	General	Microsoft Data	Particular

Dataverse Core 3

A diagram showing the relationships between various Dataverse components: Tables, Relationships, Views, Indexes, Queries, Files, and Images.

Building Your MDA

Views

Views are what records the user sees in a MDA list.

Forms

A Form is the user's single-record experience in a MDA.

Security

Security Groups Vs Security Roles

Aspect	Security Groups	Security Roles
What are they?	Groups are collections of users that have been assigned to a security role.	Groups are collections of users that have been assigned to a security role.
Business Rules	Groups who can edit and delete their own records.	Groups who can edit and delete other users' records.
Open a view or form	Groups who can edit and delete their own records.	Groups who can edit and delete other users' records.
Quick View Form	Groups who can edit and delete their own records.	Groups who can edit and delete other users' records.
Quick View Form	Groups who can edit and delete their own records.	Groups who can edit and delete other users' records.
Business Rule Editor	Groups who can edit and delete their own records.	Groups who can edit and delete other users' records.

Different View Types

Type	Description
List View	Shows a list of records with columns for each field.
Card View	Shows a card for each record with summary information.
Form View	Shows a form for each record with detailed information.
Grid View	Shows a grid of records with multiple columns for each field.
Card Grid View	Shows a grid of cards for each record with summary information.
Form Grid View	Shows a grid of forms for each record with detailed information.
Table View	Shows a table of records with rows and columns for each field.
Card Table View	Shows a table of cards for each record with summary information.
Form Table View	Shows a table of forms for each record with detailed information.

Business Rules

A business rule is a no-code logic snippet that applies to a table or form.

Scope of Business Rules

Business rules can be applied to specific fields or entire tables.

Security Role Editor

A diagram showing the hierarchy of permissions for security roles, including General, Specific, and Advanced permissions.

Extending Your MDA

Why JavaScript is essential in MDA's:

- Missing Business Rule Features
- Instant field changes and validation
- Complex Business Logic
- Extending the Modern Experience
- Developer Growth

MDA Extension Options

- Use PCF Controls to extend Model-Driven App functionality not available out-of-the-box.
- Use Business Process Flows (BPFs) to structure repeatable processes in your MDAs so staff don't get confused.
- Use Power Automate to automate repetitive tasks, run approvals, and make automatic changes to data.
- Configure a Copilot Studio agent for your MDA to help your staff with Gen AI capabilities.

MDA Forms - JS Best Practices

Best Practice	Who It Matters	Bad Word Example
Keep One Form	When there's one record per row.	Keep lots of records in one form.
Use Form Validation	When you need to validate form data.	Don't validate form data.
Use Business Process Flows (BPFs)	When you need to repeat a process.	Don't use BPFs.
Use Power Automate	When you need to automate repetitive tasks.	Don't use Power Automate.

Download this cheat sheet high-resolution and join 1000s of Power Platform professionals on [powercademy.com](https://www.powercademy.com)

Power Platform 2025 Skill Market

The skills hiring managers are paying for now

1) Dataverse

WHAT IS IT?

Gives you tables, relationships, business logic, security roles, and ALM-friendly entities, all under one roof.

WHY LEARN IT?

Works natively with AI technology like Copilot Studio, AI Builder, and Azure AI Foundry, which Microsoft are investing in extensively.

2) Core Data Skills

WHAT IS IT?

Relational Data - Understanding relational data is key to creating effective models.

WHY LEARN IT?

Words of wisdom: Relational data is the base line, not the screen.

HOW TO LEARN IT

3) Model-Driven Apps

WHAT IS IT?

Why Learn It? Fact is, it's quick and easy to govern. Most Dynamics 365 and enterprise Power Platform projects require skills to move from unstructured to structured processes. The development process is certainly evolving with tools such as the Plan Designer, but I believe this is a future-proof skill full of learning opportunities.

4) Copilot Studio & Agents

WHAT IS IT?

You ground them on trusted data (Dataverse, SharePoint, websites) and wire actions via connectors.

HOW TO LEARN IT

5) Process Automation

AI Builder & Power Automate

HOW TO LEARN IT

HOW TO LEARN IT

7) Power Pages

WHAT IS IT?

Why Learn It? Organizations are loving the Power Platform and Dataverse, but often want to expose all of that beautiful data to other users. There is also a shortage of Power Pages developers who are really skilled in their craft, because the demand is just so high.

8) D365 Business Central

WHAT IS IT?

Why Learn It? BC adoption is booming, and teams need makers who can bridge ERP with Dataverse - think order-to-cash portals, customer self-service, approvals, and analytics. Understand that this isn't part of the original "stack", but understanding what it is, and how to integrate with Dataverse can be powerful.

HOW TO LEARN IT

Download this cheat sheet high-resolution and join 1000s of Power Platform professionals on [powercademy.com](https://www.powercademy.com)

Aspecto	App	Agente
Interacción	Directa y manual	Autónoma o semiautónoma
Inteligencia	Limitada o nula	Basada en IA o lógica
Objetivo	Ejecutar tareas específicas	Cumplir metas o ayudar al usuario
Ejemplo de uso	Abrir y usar una app de mapas	Pedirle al agente que te lleve a una dirección

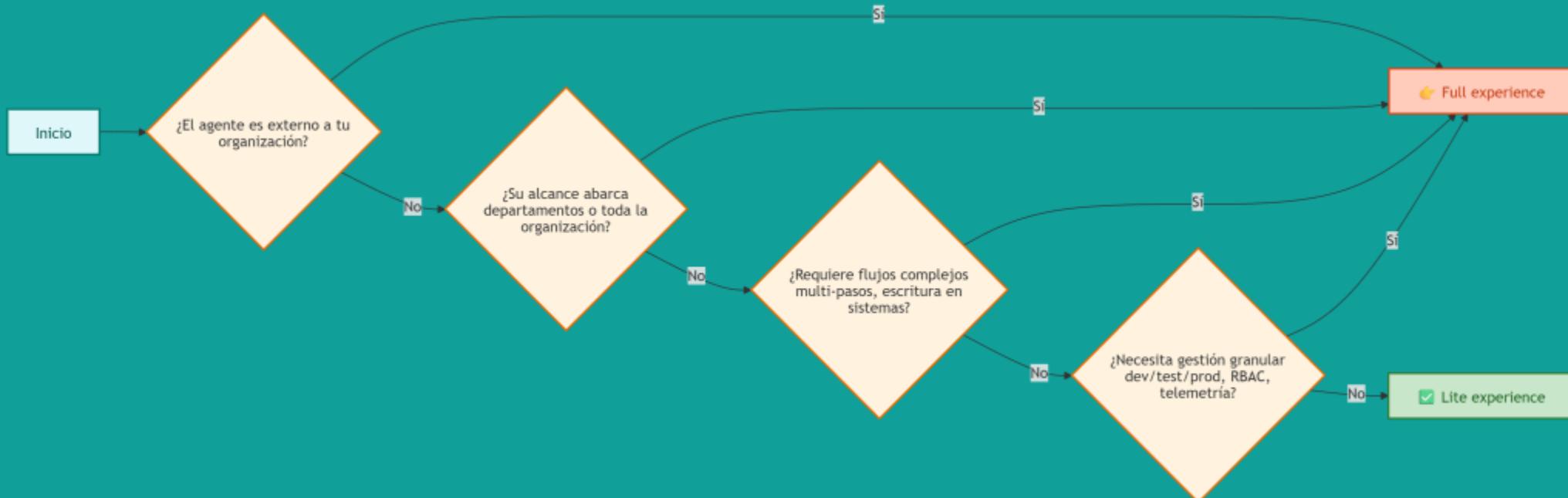
Aspecto	Agente	Agente autónomo
Autonomía	Limitada	Alta
Necesita supervisión	Sí, generalmente	No necesariamente
Toma decisiones propias	No (o muy básicas)	Sí, basadas en objetivos
Ejemplo	Chatbot de atención al cliente	Asistente de IA que gestiona tareas

Microsoft Agentic Ecosystem

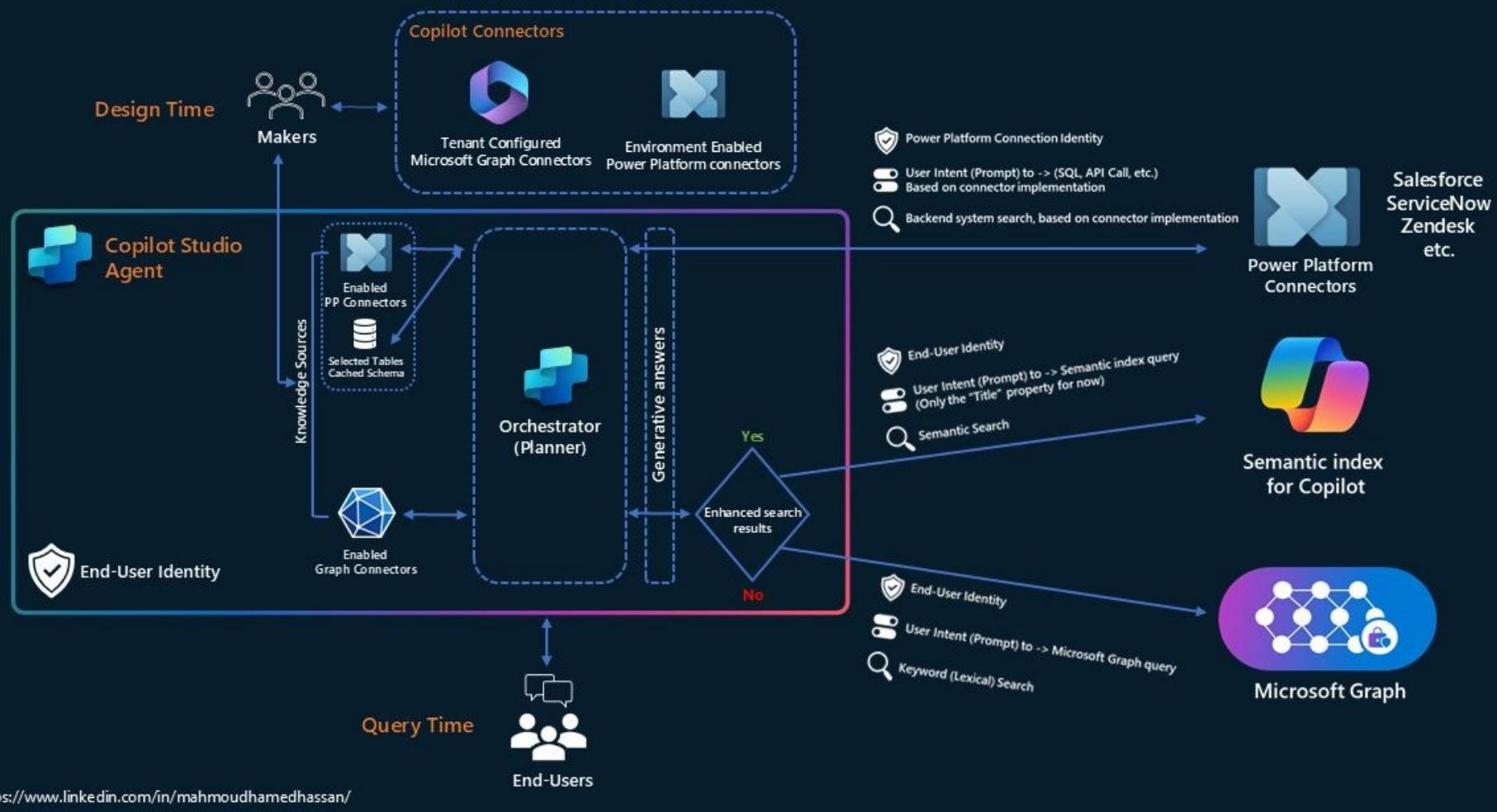
Build and extend across your integrated Microsoft platform

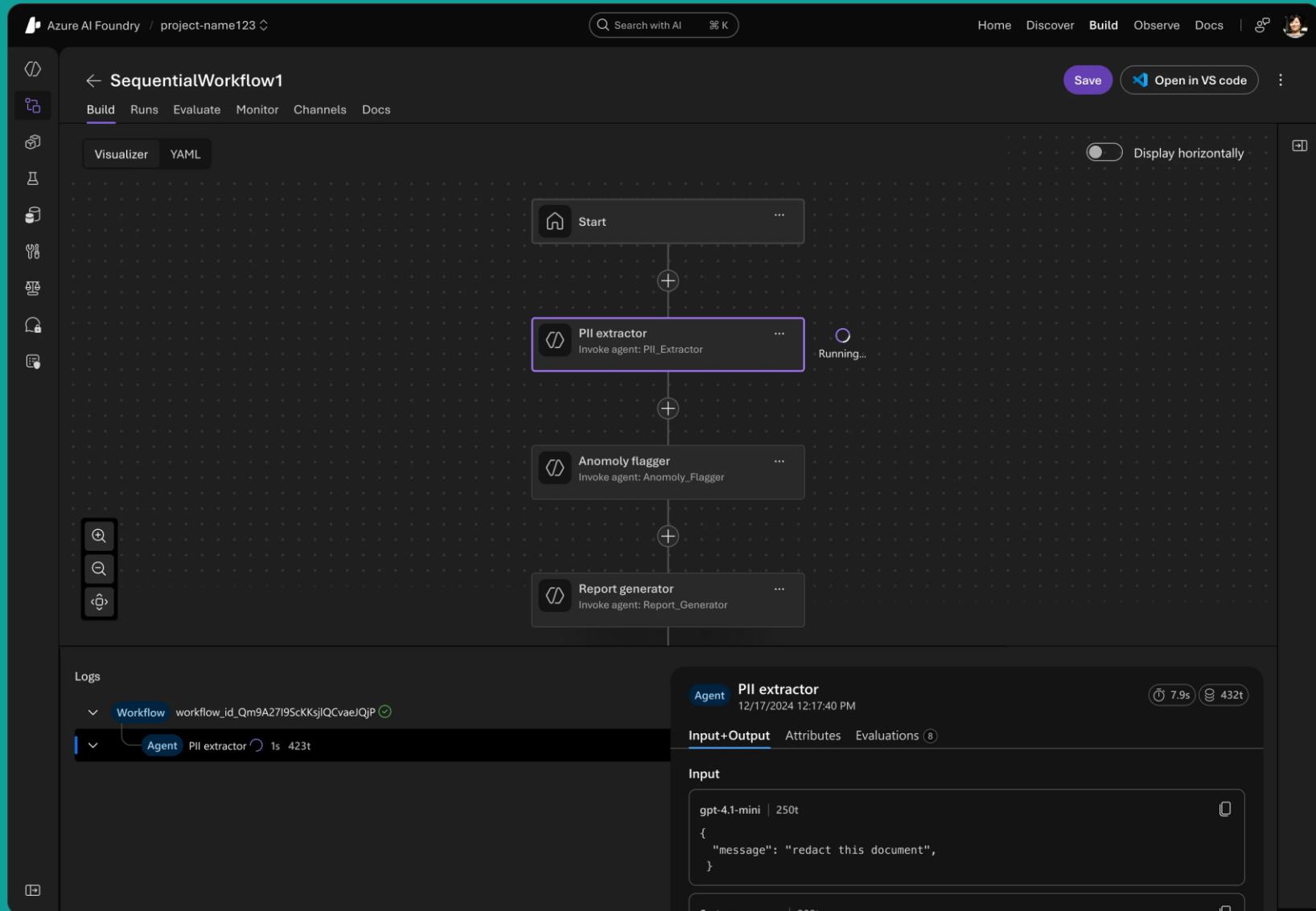


Copilot Studio Full versus Light



Microsoft Copilot Studio - Copilot Connectors





AI Decision Matrix: Which One Should I Use?

AI Tool	Best For	Key Features	Difficulty/Skill Required
M365 Copilot 	Individual productivity, content generation, data analysis.	Integrated with Office apps, natural language queries, content summarization.	1 star
AI Builder 	Document processing, prediction models, object detection.	Pre-built models, custom model training, Power Apps/Flow integration.	2 stars
Copilot Studio 	Custom chatbots, process automation, knowledge base creation.	Low-code bot building, topic branching, human handoff.	3 stars
Azure AI Foundry 	Complex AI requirements, enterprise-scale solutions.	Advanced ML models, custom neural networks, high-performance AI	5 stars



Add a Model Context Protocol server (Preview)

X



Model Context Protocol

Server name *

Server name...

Server description *

Describes the purpose of the server...

Server URL ⓘ *

Streamable endpoint

ⓘ Enter the complete server path to continue

Authentication

None API key OAuth 2.0

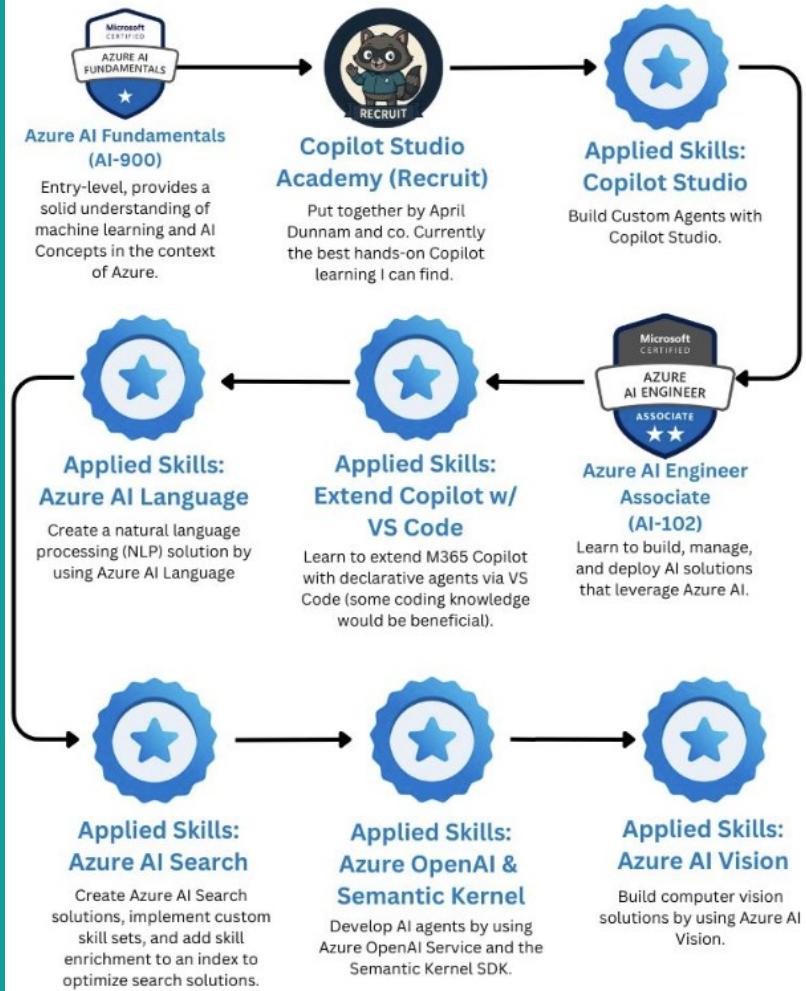
Create

Back

0/2000



Agent Expert Certification Roadmap



<https://microsoft.github.io/agent-academy/recruit/>

Traditional vs Generative Pages

	Traditional Power Apps	Generative Pages
UI Creation	Drag-and-drop only	AI-assisted + Drag-and-drop
Code Customization	Limited	Full React/TypeScript
Security & Governance	Manual	Natural language prompts
Learning Curve	Moderate	Enterprise-grade
Learning Curve	Medium	Very Low for Makers

The screenshot shows the Copilot Studio Agent interface. On the left sidebar, there are icons for Home, Create, Agents, Flows, Tools, and three dots. The main navigation bar includes Agent, Overview, Knowledge, Tools, Agents, Topics, Activity, Analytics, and Channels. The search bar has a magnifying glass icon, and the top right features Publish, Settings, and Test buttons.

Activity map section:

- A card for "Get emails (V3)" is highlighted with a red border and labeled "Incomplete".
- Below it, another card for "Get emails (V3)" is also labeled "Incomplete".

Test your agent section:

- A message from the AI agent: "Hello, I'm 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." with a timestamp "Just now".
- A button to "Check requests from customers".
- An error message: "Error Message: This message was blocked by threat detection tools. Error Code: SecurityWebhookBlocked Conversation Id: cd37031dc17a-4a0b-a5c3-fe3919e895bc Time (UTC): 2025-09-03T09:44:45.423Z".
- A text input field: "Ask a question or describe what you need" with a character limit of "0/2000".
- A note at the bottom: "Make sure AI-generated content is accurate and appropriate before using. [See terms](#)".



IT'S DEMO TIME

COPILOT

Para estar al día



Magda Teruel



David Hurtado



Toni Granell



Ramón Rautenstrauch

¿Preguntas?



iGracias!



Redes sociales y contacto



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<https://twitter.com/bizzsummites>



<http://youtube.com/bizzsummites>



info@bizzsummit.es