

Microsoft Partner Project Ready

Agentic AI Accelerator

■ Day 1 of 4

<Presenter Name>



Course Plan and Learning Objectives

Day 1

Showcasing AI Potential with Agentic AI

Module 1: Innovate with Microsoft 365 Copilot and agents

- M365 Copilot and agents
- How Copilot works
- Semantic index for Copilot
- M365 Copilot Chat
- Agents Use cases
- New agents in Microsoft 365
- Unlock more value with SharePoint agents

Module 2: Extend Microsoft 365 Copilot with Agents

- Microsoft 365 Extensibility Planning and approach
- Declarative agents and agent tooling
- Explore Copilot Studio Agent Builder
- Build declarative agents with Microsoft 365 Agents Toolkit
- Build custom agents with Copilot Studio
- Autonomous agents overview
- Agent Governance - Overview
- Gen-AI decision guide – when to build, buy or extend

Hands-on Labs

- Explore Copilot Studio Agent Builder
- Build HR Assistant Agent with Copilot Studio
- Incorporate actions in HR Agent
- Enable Autonomous Capabilities in Microsoft Copilot Studio for HR Activities

Day 2

Architecting Success with Multi-Agent AI Systems

Module 3: Customize Agents with Gen AI in Copilot Studio

- Customizing your agents – Orchestrator, UI, Knowledge, Actions, Autonomy
- Copilot Studio implementation guidance for architects
- Generative AI in Copilot Studio
- Copilot Studio + Power Platform
- Building voice-enabled agents
- AI Foundry integration
- Developing agents using Microsoft 365 Agents SDK

Module 4: Innovate with Azure AI Platform

- How language models work
- AI Foundry and SDK introduction
- AI Foundry Model Catalog
- Azure AI Services
- Azure OpenAI Service and model guidance
- Models-as-a-Service
- Azure AI Foundry Agent Service
- Safeguard with Trustworthy AI

Hands-on Labs

- Setup AI Project and perform Chat Completion from VS Code
- Build a simple AI Agent
- Develop a multi-agent system

Day 3

Multi-Agent AI: Advanced Agent Dev in Azure AI Foundry

Module 5: Customize, orchestrate and experiment with Azure AI Foundry

- Retrieval Augmented Generation (RAG)
- Customizing models – Fine tuning, distillation
- Responses API (preview)
- Azure AI Foundry Agent Service - Orchestrate and debug AI workflows

Module 6: Build your own multi agents with Semantic Kernel or AutoGen

- Multi-agent applications
- Understanding Semantic Kernel
- Understanding AutoGen Agents Framework
- Multi-Agent Collaboration & Orchestration with AutoGen / Semantic Kernel

Hands-on Labs

- Set Up Azure AI Foundry SDK and Provision Resources
- Build a Retrieval-Augmented Generation(RAG) Pipeline
- Evaluate and Optimize RAG Performance
- Semantic Kernel Fundamentals
- Semantic Kernel Plugins

Day 4

Enterprise Grade: Optimization and production at scale

Module 7: Enterprise grade production at scale

- Scaling challenges and agent controls
- Manage AI performance in production
- Observability Tools
- Enabling Enterprise governance and management
- Enterprise grade security and data protection
- Monitoring and observability

Module 8: Advanced AI risk evaluation and mitigation

- Identifying risks
- Azure AI Content Safety
- Evaluation and GenAI Ops
- Identity and access management
- Network Security for AI apps
- Continuous security for AI

Hands-on Labs

- Understanding the Lifecycle of Flow Development
- Building and Customizing Prompt Flows
- Evaluation Flow Setup
- Fine-Tuning Prompts for Optimal Performance
- Implementing Chat Flow and Tool Integration
- Ensuring Responsible AI Practices with Content Safety

Journey A – Deal-ready

Deal-ready assessment 

Journey B – Solution Design

Solution Architecture assessment 

Journey C – Project-ready

Capstone Project 



Showcasing AI Potential with Agentic AI

⌚ Day 1 (5 hours)



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⌚ 2 hours



⌚ 3 hours

Hands-on Labs

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Deal-Ready Assessment

Objective: Evaluate participants' ability to identify customer needs, effectively demonstrate AI value propositions, and articulate business benefits of Copilot and Agentic AI solutions in an industry scenario.

Live- Instructor led

On demand



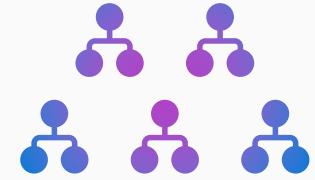
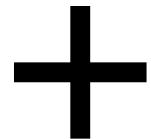
Module 1

Innovate with Microsoft 365 Copilot



Copilot

Every employee
has a Copilot

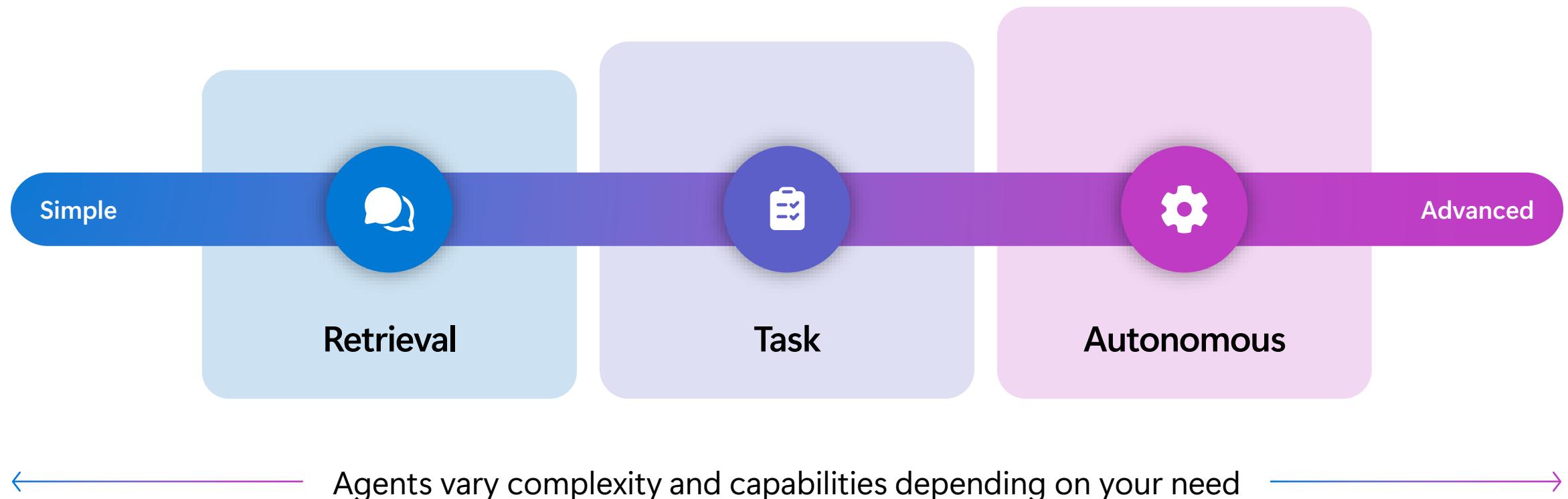


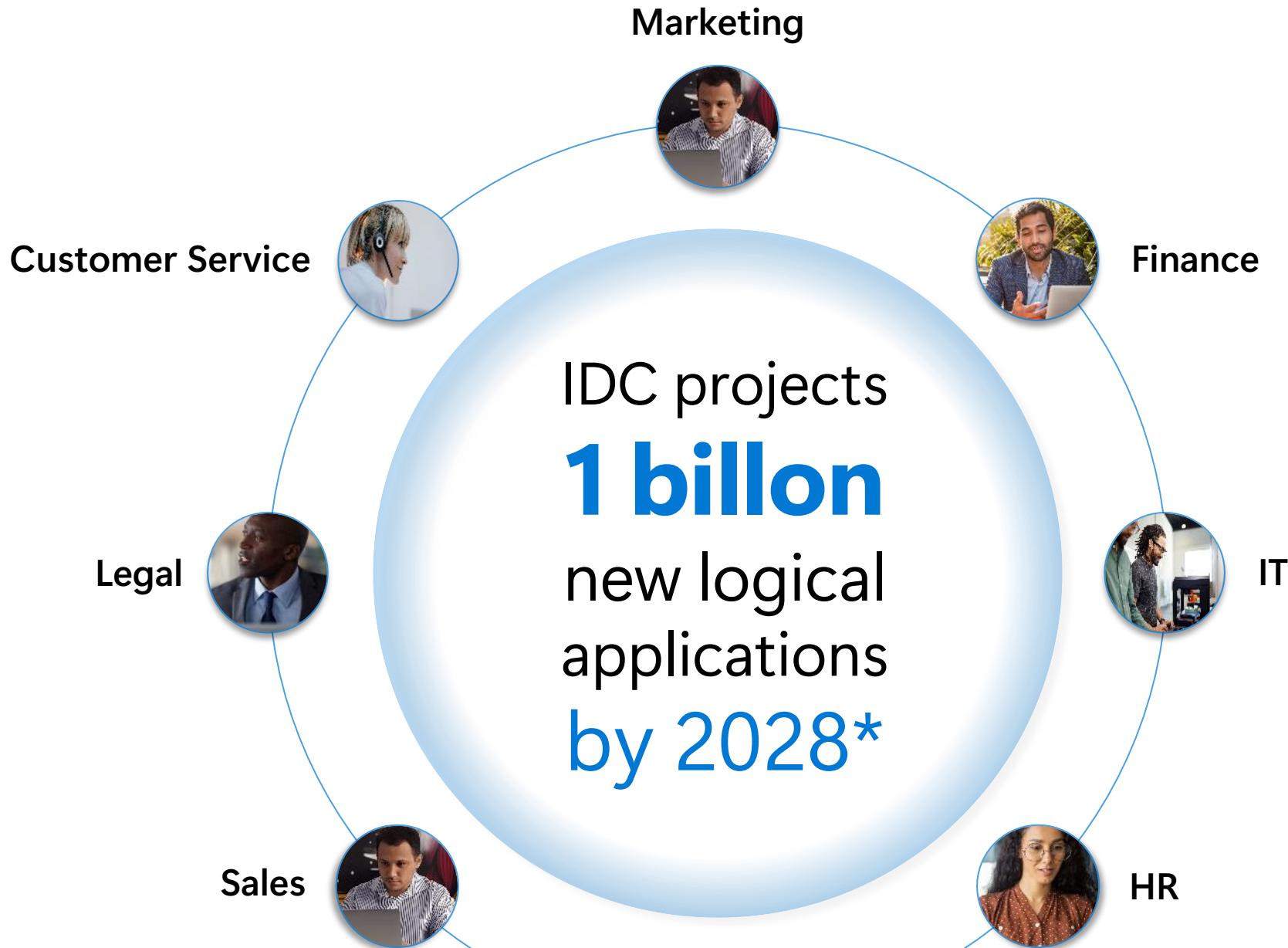
Agents

Every business process
transformed by agents

What are agents?

Agents use AI to automate and execute business processes, working alongside or on behalf of a person, team or organization





The problems agents address will continue to expand

User-led

Unlock innovation
at every level,
department & function

Apply new technology
to existing problem to
optimize

Fast and Iterative

Org-led

Create business-
changing agents

Apply new technology to
new problems

Top-down approach

Today

Apply new
technology to an
existing problem to
optimize existing
processes

Our Agents Ecosystem



Microsoft has the **best platform** for agents



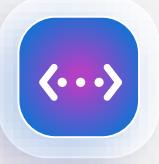
Integrated into UI for AI
(Microsoft 365 Copilot)



Grounded in your
company data



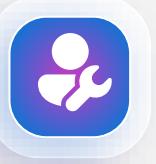
Enterprise-grade security, governance
& compliance



Act across systems & channels

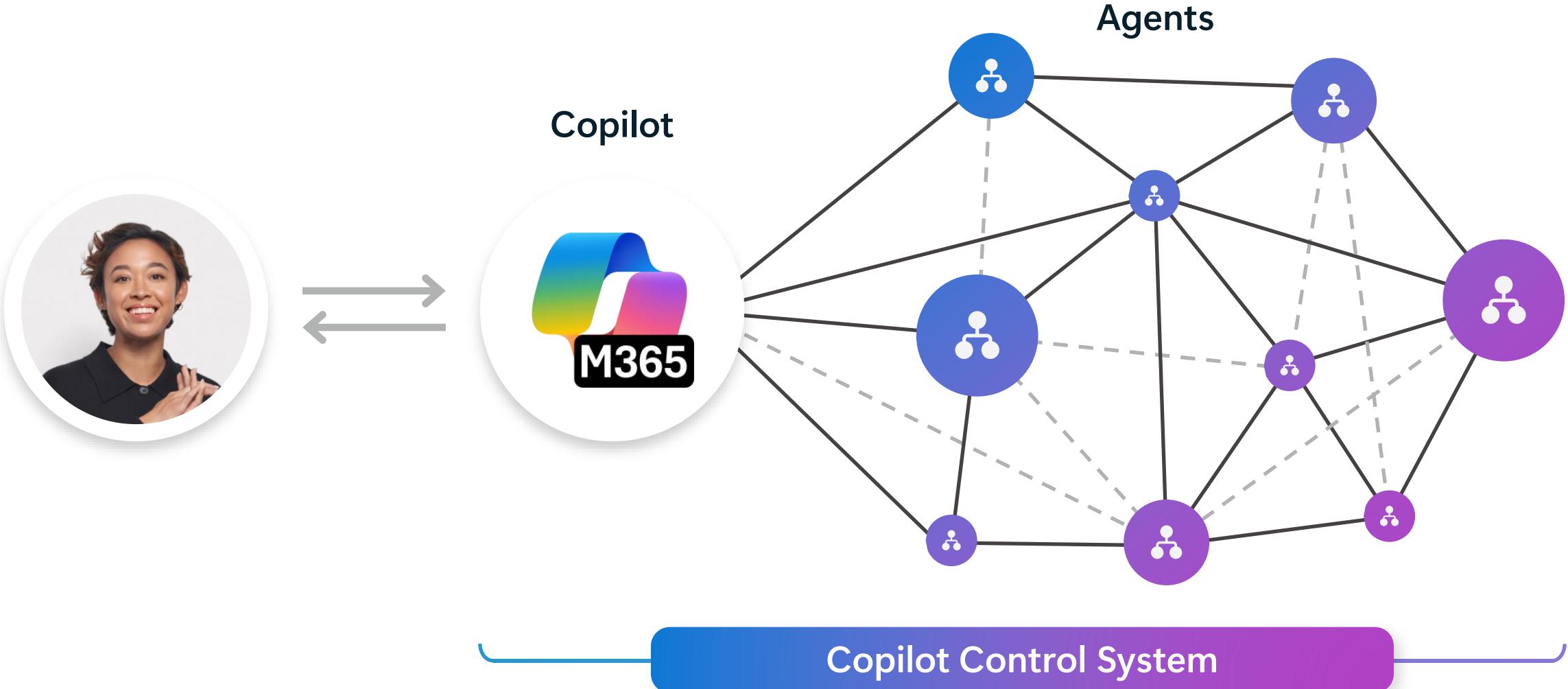


Latest models, orchestration & multi-
agent systems



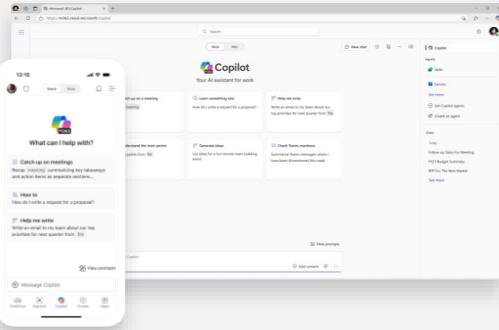
Build your agents, your way
(low code or pro code)

Copilot is the UI for AI



Microsoft 365 Copilot

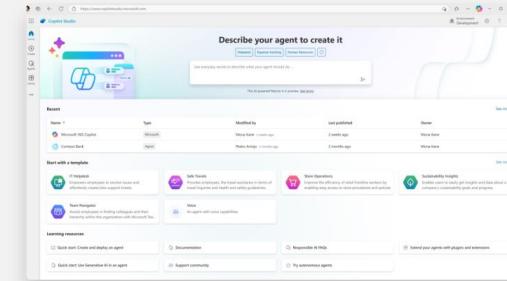
Your AI assistant for work



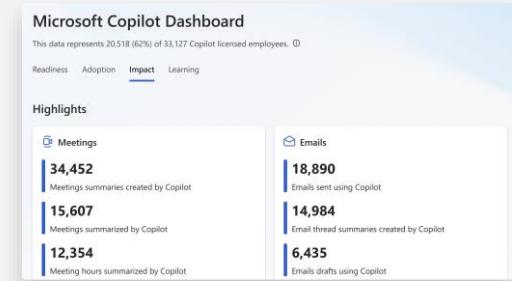
Copilot Chat
for web and work



Microsoft 365
apps



Copilot Studio &
agents



Adoption &
measurement

Copilot Control System

Microsoft 365 Copilot

Copilot Actions

The screenshot shows the Microsoft Copilot Actions interface. At the top right, there's a button labeled "Create action". Below it, a "Gather" action is listed with a green icon. The main area contains a message card with the text: "Message Lydia Bauer × Liz Kane × Launch to collect status updates on Project Share over email by Friday, December 20th". To the right of the message card, a dropdown menu for "Does not repeat" is open, showing options: Daily, Weekly (which is selected and highlighted in grey), Monthly, and Custom. A blue "Create" button is located at the bottom right of the dropdown.

Home

Copilot

Create

OneDrive

Pages

Actions

Apps

Gather

Does not repeat

- Daily
- Weekly
- Monthly
- Custom

Create

Microsoft 365 Copilot is built on trust



Security

Honors your existing permissions

Persistent label inheritance and DLP policies

Risk-based conditional access and endpoint management



Governance & Compliance

Ramp your data preparedness for AI

Detect and investigate non-compliant usage

Granular controls and transparency for web queries



Privacy

You control your data

Your data isn't used to train or enrich foundation models

You're protected against AI security and copyright risks

Your Microsoft 365 security, governance, compliance, and privacy policies

Microsoft 365 Copilot demo possibilities for partners



Click-through SMB demos

Simple to use

Little Copilot familiarity required

Quick setup

No risk of oversharing

aka.ms/CopilotSMBClickThruDemos



Build your own demo

Live demo in your Microsoft 365 tenant

Copilot familiarity required

Needs one-time setup

aka.ms/Copilot/Partner/DemoKit



Immersion experience

Simple to use

Role function-based demos

Quick setup

No risk of oversharing

aka.ms/CopilotImmersionCSPLed

Choose your preference

Microsoft 365 Copilot Partner Demo Kit

What's included

Demo setup guidance

Copilot Partner Demo Kit Demo Set Up Steps

This document will guide you through the process of setting up the demo assets. Some of the demo experiences give you the option to leverage simulated environments, rather than the live product because some experiences can be difficult to demonstrate live.

The demos you will be setting up are:

- 1. Copilot Mobile App (simulation available) 2-5 mins
- 2. Copilot in the Web scope 3 mins
- 3. Copilot in Teams (simulation available) 5 mins
- 4. Copilot in Outlook 5-7 mins
- 5. Copilot in Word 5-7 mins
- 6. Copilot in Excel 5-7 mins
- 7. Copilot Studio (simulation available) 2-5 mins

Demo set-up steps

Set up the customer-facing demo tab: To set up your demo environment follow these steps in the order they are listed.

1. Close Microsoft Edge
2. Download and unzip the file **Copilot Partner Demo Kit.zip** on your local PC.
- NOTE:** If you are using a Mac, you will need to download the file and then drag it to your desktop.
3. From the demo assets folder, open the file **Demo prompt library.txt** and review its contents.
- NOTE:** During the demos, we recommend you copy and paste prompts from this file into Edge to save time typing.

Step-by-step instructions

Teams & Outlook Setup Guidance

Prep setup session script

Follow these steps to set up the demo prep session.

Meeting 1: Creating the shared email thread

This section will help you create a fictitious email thread that's safe for customers to view while demonstrating Copilot in Outlook. Follow the instructions in this section to create an email thread you can use for demo purposes.

Session Setup

Before you begin, decide who will play each role in the email thread. There are three required personas:

- Marketing Manager - **Person 1**
- Marketing Associate - **Person 2**
- Marketing Intern - **Person 3**

Facilitator:

If it allows, replace the **<Person #>** placeholders in this script with the attendee names and share the script with the participants. If an "0" mention is used, please ensure you tag that person.

Role and actions	Email Body
<Person 2> , composes a new email message.	Hi <Person 1> , I hope you're doing well. Could you please let me know where I can find the latest training materials for this quarter? I've checked the shared drive but haven't been able to locate them.
<Person 2> , subjects Training Materials Location	<Person 1> , We're drafting a press release for the upcoming office launch and would love your input to highlight key benefits and features. Can you review the draft and suggest any enhancements to make an announcement impactful?
<Person 3> , composes a new email message.	<Person 1> , We're drafting a press release for the upcoming office launch and would love your input to highlight key benefits and features. Can you review the draft and suggest any enhancements to make an announcement impactful?

Fictitious script and emails

Demo guide & talking points

What to say	What to do
Now I can ask Copilot questions and get more information about the meeting. For example, let's ask Copilot to create an action items table for us.	7. In the Ask me anything about this meeting text box, copy or paste the prompt. Can you see action items and review it in table?
• talk about the responses	8. Select Send.
Copilot has recommended the literal text, but can also answer based on the transcript. I'll ask Copilot if there were any action items in the meeting.	9. In the Ask my anything about this meeting text box, copy and paste the prompt. Does this sound good in the meeting? How do you desire?
• talk about the responses	10. Select Send.
NOTE: Copilot's response is based entirely on the text transcript. Copilot does not read or analyze the email body.	NOTE: We can't yet ask Copilot, based on the meeting, what marketing plan would yield the best results?
How many elephants could fit in Dodger Stadium?	11. In the Ask my anything about this meeting text box, copy and paste the prompt. Based on the transcript, what marketing plan would yield the best results?
Can an elephant drink using its trunk? How does that work?	12. Select Send.
Could an elephant pull an F-150 400 yards? How would it work?	13. Select More prompts.
How many elephants could fit in Dodger Stadium?	14. Select List main ideas we discussed.
Can you summarize the December 2023 jobs report from the US Bureau of Labor Statistics?	15. Select Send.
Can you give me a list of the labor force participation rates from the Bureau of Labor Statistics over the last 5 years?	16. In the Copilot response, select one of the references.

What to say and do

Prompt library

File	Edit	View	Clipboard	Font	Alignment	Number	Conditional Formatting	Format as Table	Cells	Editing	Sensitivity	Sensitivity
MICROSOFT COPILOT DEMO PROMPT LIBRARY												
COPILOT IN MICROSOFT 365 ON THE WEB												
What can you tell me about elephants?												
Can an elephant drink using its trunk? How does that work?												
Could an elephant pull an F-150 400 yards? How would it work?												
How many elephants could fit in Dodger Stadium?												
Can you summarize the December 2023 jobs report from the US Bureau of Labor Statistics?												
Can you give me a list of the labor force participation rates from the Bureau of Labor Statistics over the last 5 years?												
Can you graph those numbers from 2019 to 2023?												
Can you give me a list of the labor force participation rates from the Bureau of Labor Statistics over the last 5 years? I also heard that you could code. Can you grab the data from bls.gov and then write the Python code that would produce the graph?												

Prompts to show off

Sample files

File	Home	Insert	Draw	Page Layout	Formulas	Data	Review	View	Autom	Help
Product List										
Comparison table										
Display Settings										
Ready Accessibility: Investigate										

Dummy content

Learn more

Microsoft 365 Copilot

Copilot Analytics

Business Impact

Report

Insights Copilot agent impact

Compliance agent impact

Start date: 5/1/2024 End date: 12/1/2024

Agent session success rate

66% ↑ 4%

Agent satisfaction score

72 /100 ↓ 4%

Estimated hours saved using agent ⌚ \$

3,542 hours ↑ 15%

Hours and value calculator

Top Copilot agents used

Incidents reviewed by Compliance agent

22%

Average compliance incident response

4 hr

1 hr
Compliance agent

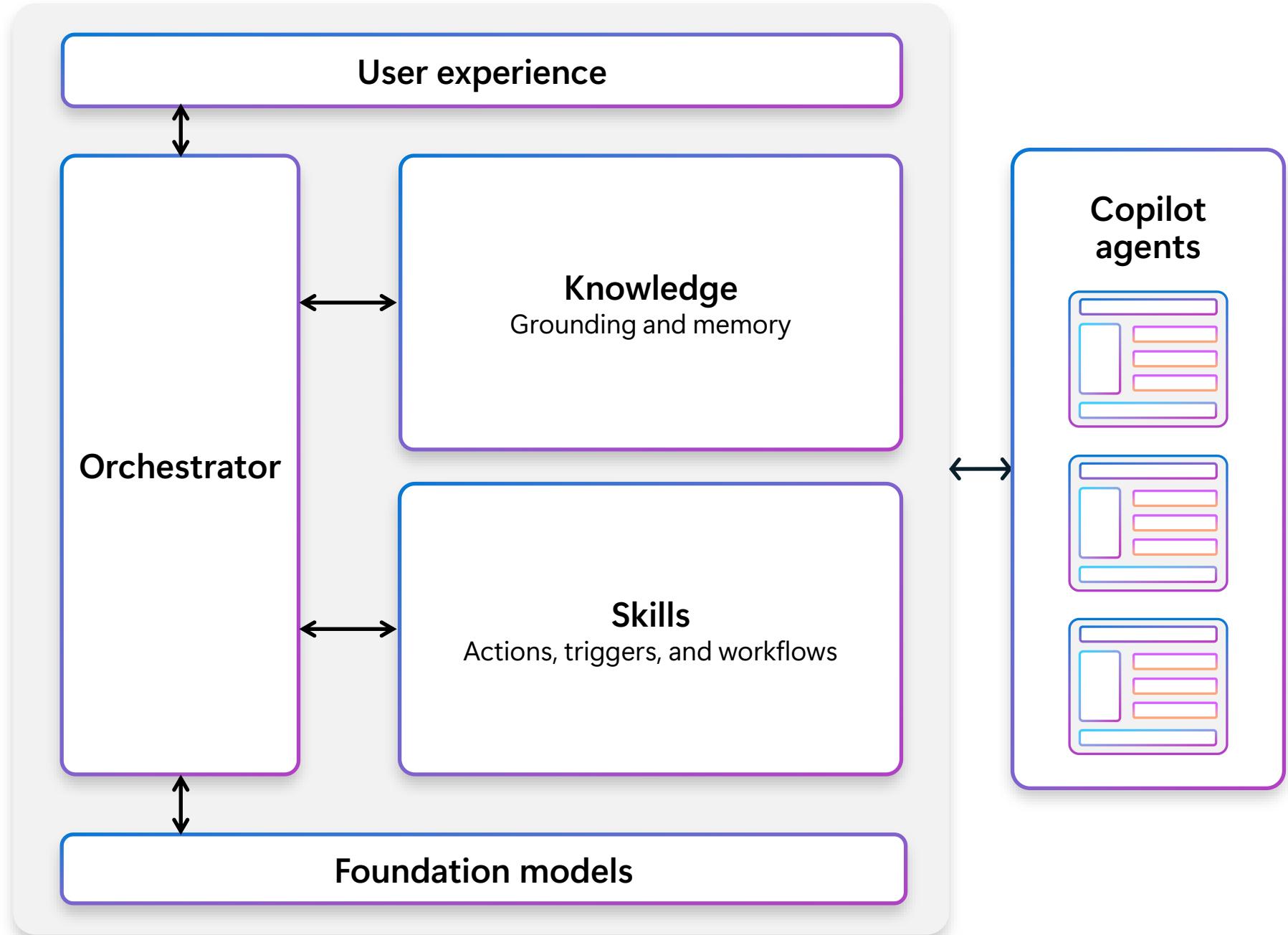
Hum

How Copilot works

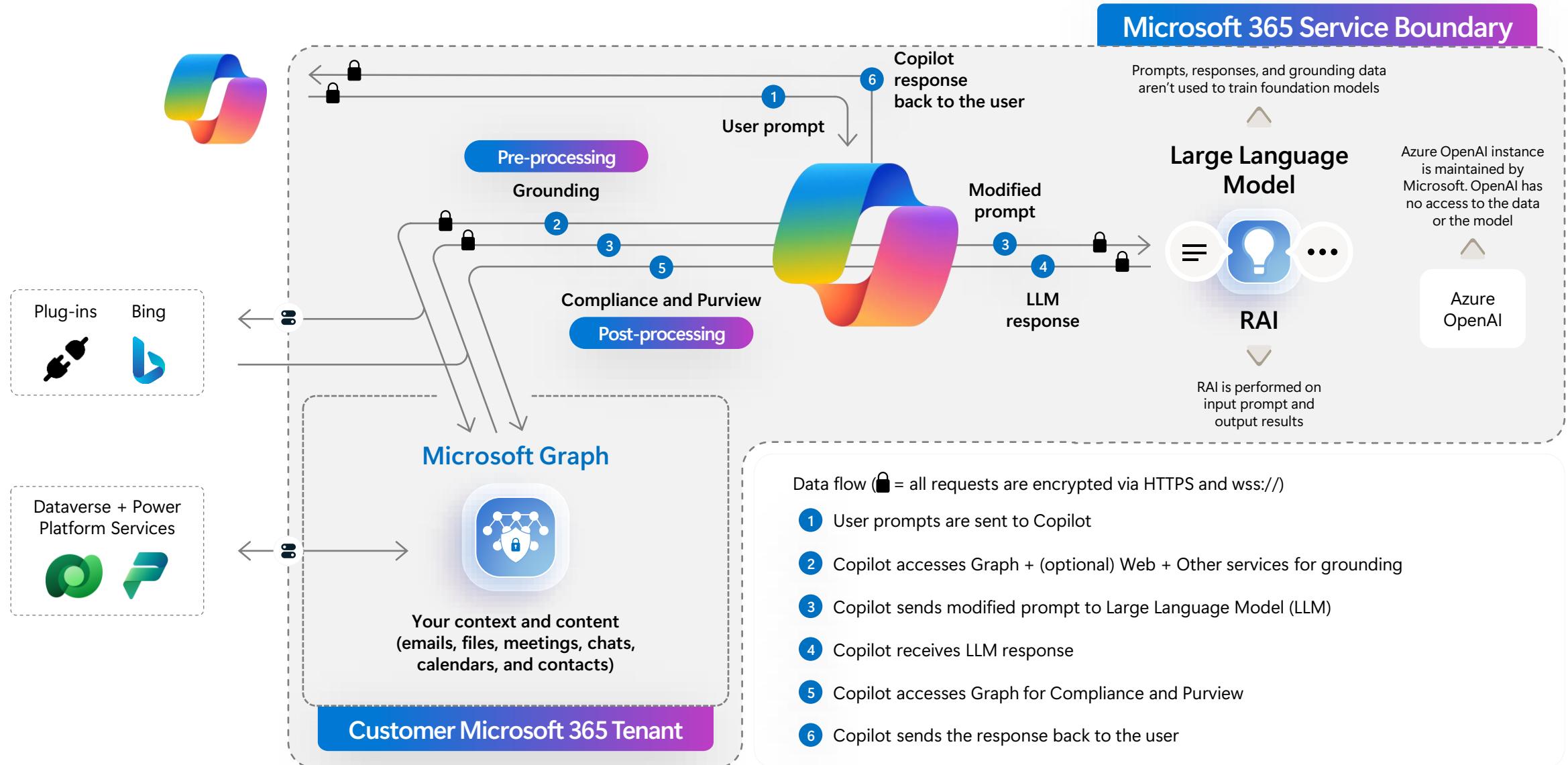


What is a copilot?

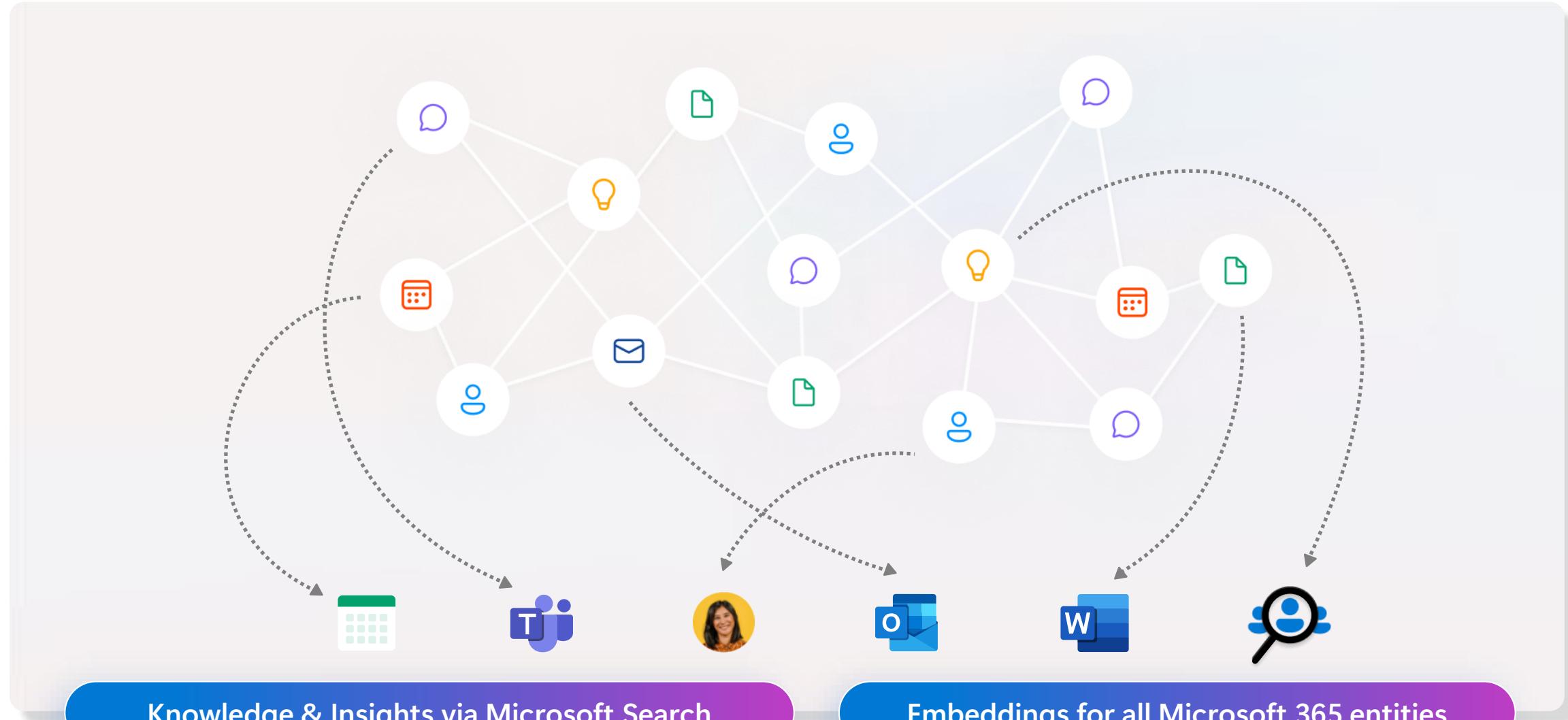
Copilots are intelligent AI assistants that help people achieve more through generative AI



Microsoft 365 Copilot architecture



Microsoft Graph



Retrieval Augmented Generation

Search finds grounding data

We don't "train" on your tenant data



User prompt

+



Grounding data

+



Chat history

+



System prompt

Semantic Index for Copilot



The next generation of search is coming to Microsoft 365

The Semantic Index for Copilot lays the foundation for the next generation of Search and Copilot experiences.



Choose what external data your organization works with

Microsoft Graph Connectors expand your organization's productivity, capacity, and creativity



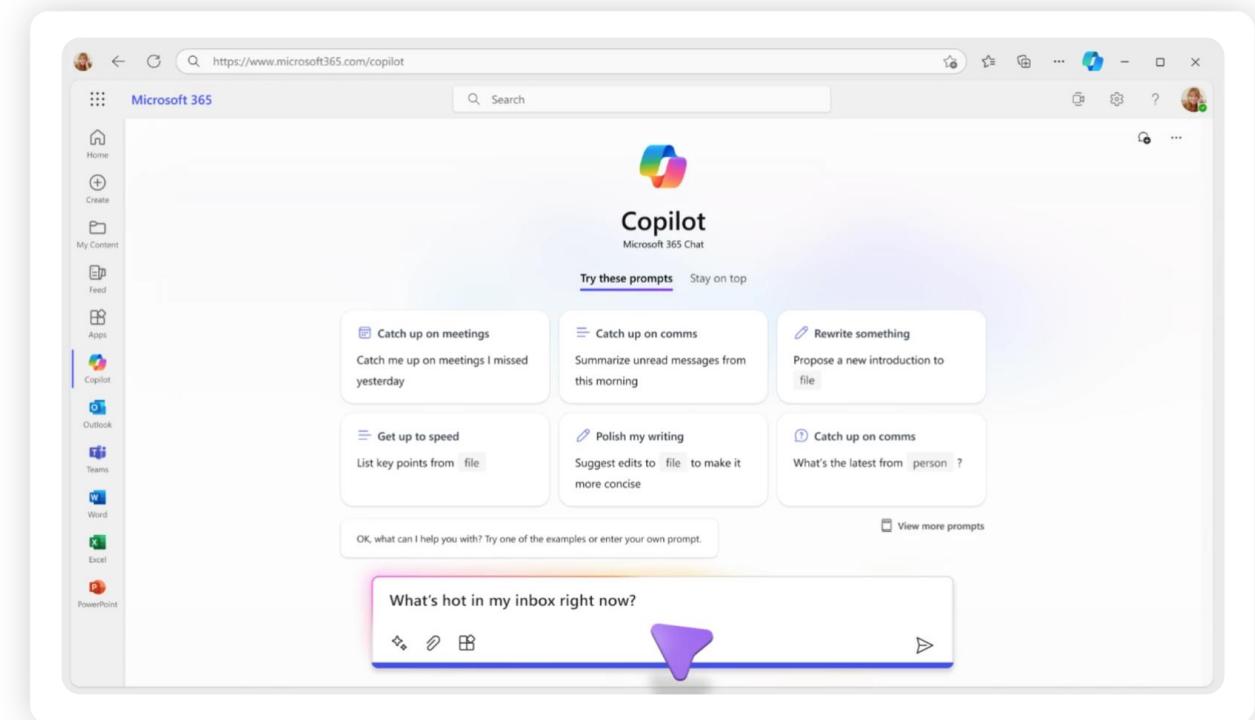
Receive contextually relevant responses

Semantic index connects you to the most relevant and actionable information through Microsoft Copilot and Microsoft Search



Semantic index is NOT a requirement for Copilot to operate

Semantic index will not provide a marked change in performance or accuracy for Microsoft 365 Copilot

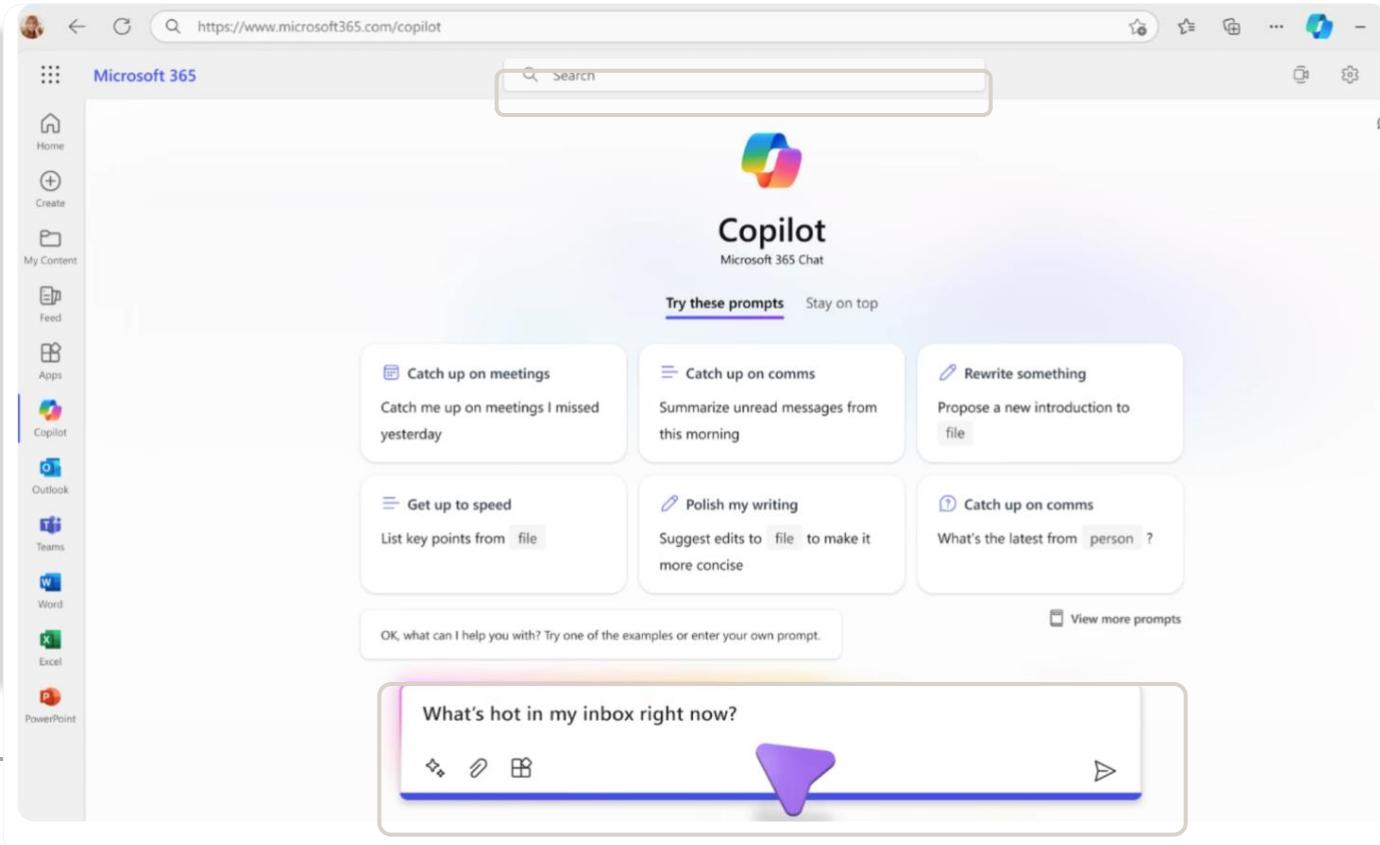


Interacting with the semantic index

Microsoft Copilot

Enables Microsoft Copilot with Graph-grounded chat to deliver relevant, actionable responses to prompts – and do so in a secure, compliant, privacy-preserving way.

Available for Microsoft 365 Copilot users



Microsoft Search

Uses conceptual understanding to determine your intent and helps you find what you need in Teams, SharePoint and the M365 app.

Coming soon for selected Microsoft 365 SKU's

How it works



Vector index creation

The semantic index can find the most similar or relevant data by creating a vector index for each user and tenant.



How do vectors work?

A vector is a numerical representation of a data point (e.g., word, image or pixel) & is arranged with close numbers placed in proximity to one another to represent similarity.

Vectors are stored multi-dimensional spaces where semantically similar data points are clustered together in the vector space, enabling Microsoft 365 to handle a much broader set of search queries beyond "exact match".



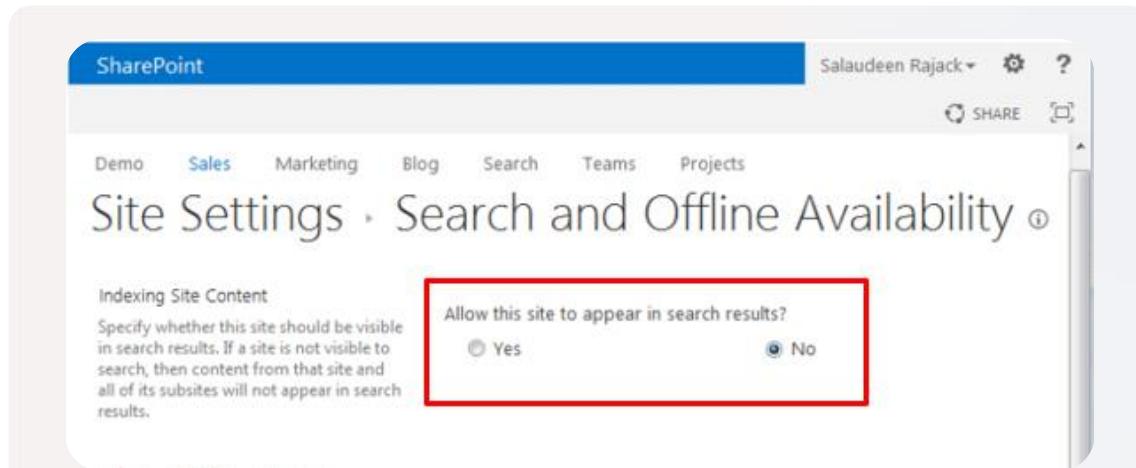
Benefits

This approach provides for fast and accurate similarity search and retrieval of data based on their vector distance or similarity.



The graphic uses text instead of numbers (used by vectorized indices) to show an example of similarity between data points

Administrative options



SharePoint

Salaudeen Rajack ?

SHARE

Demo Sales Marketing Blog Search Teams Projects

Site Settings > Search and Offline Availability

Indexing Site Content

Specify whether this site should be visible in search results. If a site is not visible to search, then content from that site and all of its subsites will not appear in search results.

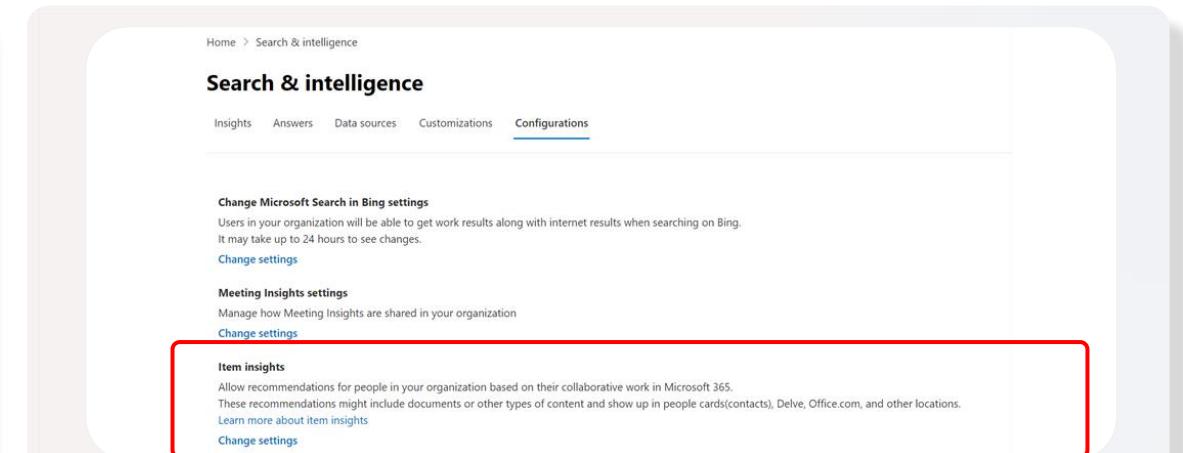
Allow this site to appear in search results?

Yes No



Excluding Content SharePoint Online

Exclude SharePoint Online files
Applies to semantic index & keyword search



Home > Search & intelligence

Search & intelligence

Insights Answers Data sources Customizations Configurations

Change Microsoft Search in Bing settings

Users in your organization will be able to get work results along with internet results when searching on Bing. It may take up to 24 hours to see changes.

[Change settings](#)

Meeting Insights settings

Manage how Meeting Insights are shared in your organization

[Change settings](#)

Item insights

Allow recommendations for people in your organization based on their collaborative work in Microsoft 365. These recommendations might include documents or other types of content and show up in people cards(contacts), Delve, Office.com, and other locations.

[Learn more about item insights](#)

[Change settings](#)



Controls Microsoft 365 admin center

Item insights shows connections to people
Reduced experience if disabled
Affects user experience, not the index

Information Protection

In the context of search, **Data Minimization** and **Reducing oversharing** are important for protecting your data.



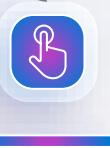
Use **Purview Data Lifecycle Management** to delete content that is no longer needed, with retention policies for management at scale, and retention labels for exceptions and granular control.



Reduce oversharing by inheriting exclusion lists for SharePoint Online sites and performing access control checks in real time. Use the **Syntex SharePoint Advanced Management** add-on to manage and govern these permissions.



Use sensitivity labels with **Purview Information Protection**, available with Microsoft 365 Business Premium and Microsoft 365 E3 and E5.



Limit access with **Purview Data Loss Prevention** could be used to retroactively and temporarily limit access to documents that have been reported as overshared, with Microsoft 365 E5.

Is my issue related to Semantic Index?

Top customer concerns and how to address for Microsoft 365 Chat

Cannot find relevant documents or information

Check if Enterprise Search is enabled in the Microsoft 365 admin center

Suggested meeting hours are not shown, results do not contain personalized relevance

Check if Item insights is enabled

Cannot see improved results in Microsoft 365 app, Teams and SharePoint Online search

Search improvements are coming soon, with updates on the Microsoft 365 public roadmap

Expected content is not showing up in search results

Use thumb icons for Microsoft 365 chat to rate response quality



Microsoft 365 Copilot Chat



Copilot for all



Microsoft 365 Copilot

Your AI assistant for work

\$30

Copilot Chat

Free, secure AI chat



Chat

Work-grounded

Copilot in Microsoft 365 apps

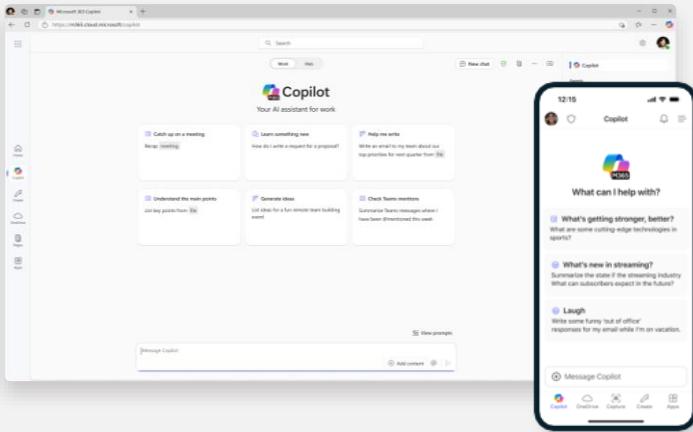
Teams, Outlook, Word, Excel, PowerPoint

Agents

Copilot Control System

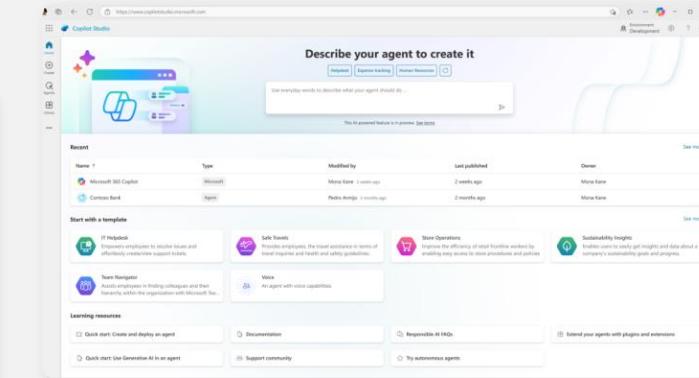
Copilot Analytics

Introducing Microsoft 365 Copilot Chat



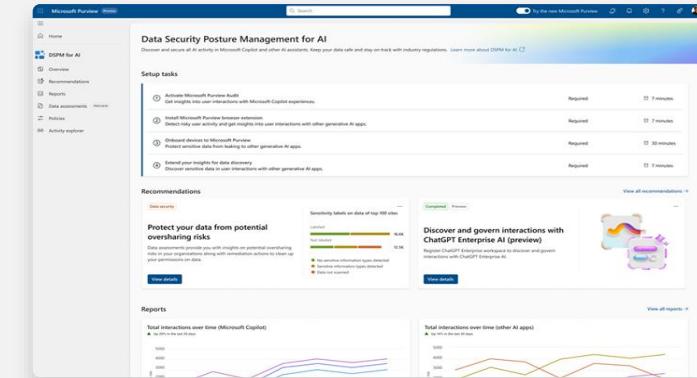
Chat

Free, secure AI chat powered by GPT-4o and web grounded



Agents

Integrated into the chat experience and paid for on a consumption basis



IT controls

Enterprise Data Protection and management

**FREE for all Entra account users
with a Microsoft 365 subscription**

Quickly and securely scale AI adoption in your business



Copilot Chat

Free, secure AI chat powered by GPT-4o and web grounded

- 🌐 Chat results from the latest web information
- 📄 Real-time content collaboration with people and AI through Copilot Pages
- 📁 File upload, Code Interpreter, image generation¹
- 💻 Create, discover, and pin web-grounded agents
- 🔒 Enterprise Data Protection (EDP), IT management controls, agent management

Use cases

Jumpstart the creative process

- Create a marketing campaign
- Generate high-quality images
- Propose new product names

Create great first drafts

- Write a strategy document
- Prepare a meeting agenda
- Draft a customer email

Query uploaded work docs

- Summarize key points in Word
- Analyze data from Excel
- Get PowerPoint suggestions

Expedite research

- Surface current market trends
- Find the latest industry stats
- Summarize expert reports

¹Limits apply

Microsoft 365 Copilot Chat

Enterprise-ready web chat

Copilot

What is the ratio of EV cars to EV chargers by region in the US for the past 3 years? Please show it in a table organized by region.

January 7, 2025 at 02:13 PM

Here's a table showing the ratio of electric vehicles (EVs) to EV chargers by region in the US for the past three years:

Region	Year	EVs per Charger
Northeast	2022	14:1
	2023	12:1
	2024	10:1
Midwest	2022	18:1
	2023	16:1
	2024	14:1
South	2022	20:1
	2023	18:1
	2024	15:1
West	2022	12:1
	2023	10:1
	2024	8:1

These ratios reflect the increasing number of EV chargers being installed across the country, particularly in regions like the West and Northeast, which have seen significant growth in EV infrastructure.

Is there anything else you'd like to know about EVs or their infrastructure?

1 Electric Vehicle Charging S... 2 Electric Vehicle Charging I...

All generated content may be incorrect

Edit in Pages Copy

Ask me anything...

What factors influence these ratios? How does this compare to other countries?



Microsoft 365 Copilot Chat

A screenshot showing the Microsoft 365 Copilot Chat interface. On the left is a desktop browser window displaying the chat interface with various AI prompts like 'Idea', 'Design', 'Create', 'Ask', 'Code', and 'Laugh'. On the right is a mobile phone screen showing a similar interface with prompts such as 'What's getting stronger, better?', 'What's new in streaming?', and 'Laugh'. Both screens show a central message input field and a circular 'Message Copilot' button at the bottom.

Chat

Free, secure AI chat –
powered by GPT-4o and web grounded



Secure and efficient
knowledge finding

Does not use your data
to train our AI models

Secure answers from the latest models and the web

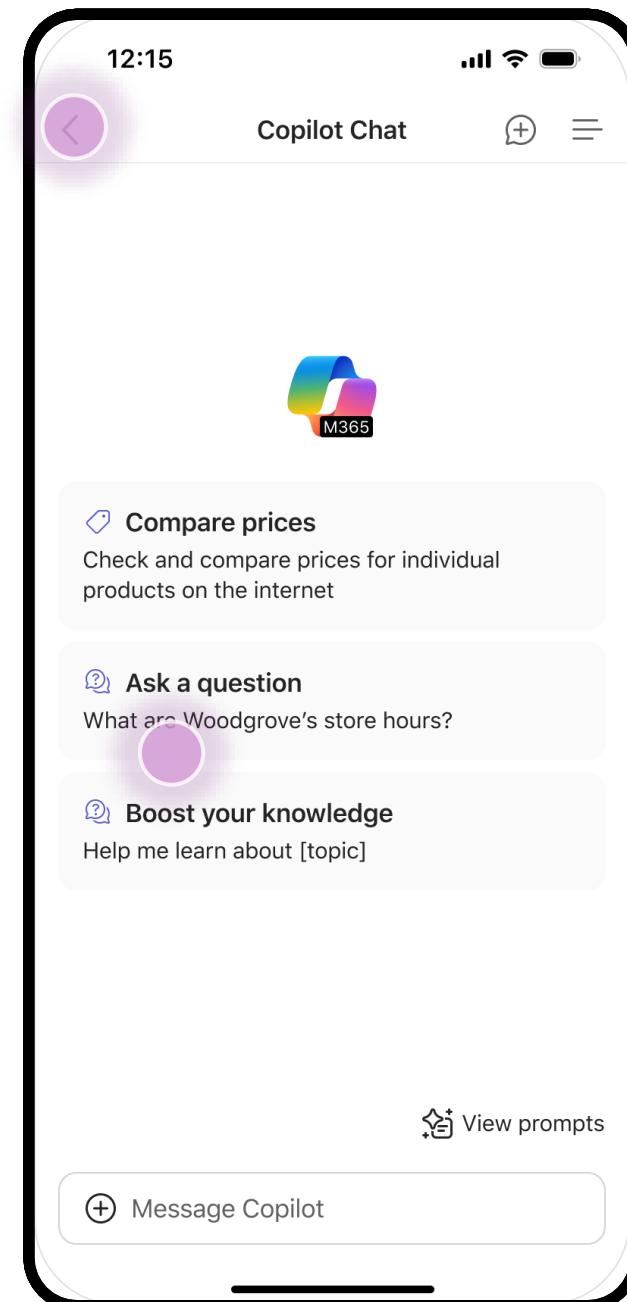
Benefits



Secure and efficient search



Does not use your data to train our AI
models



Retail

Secure answers from the latest models and the web

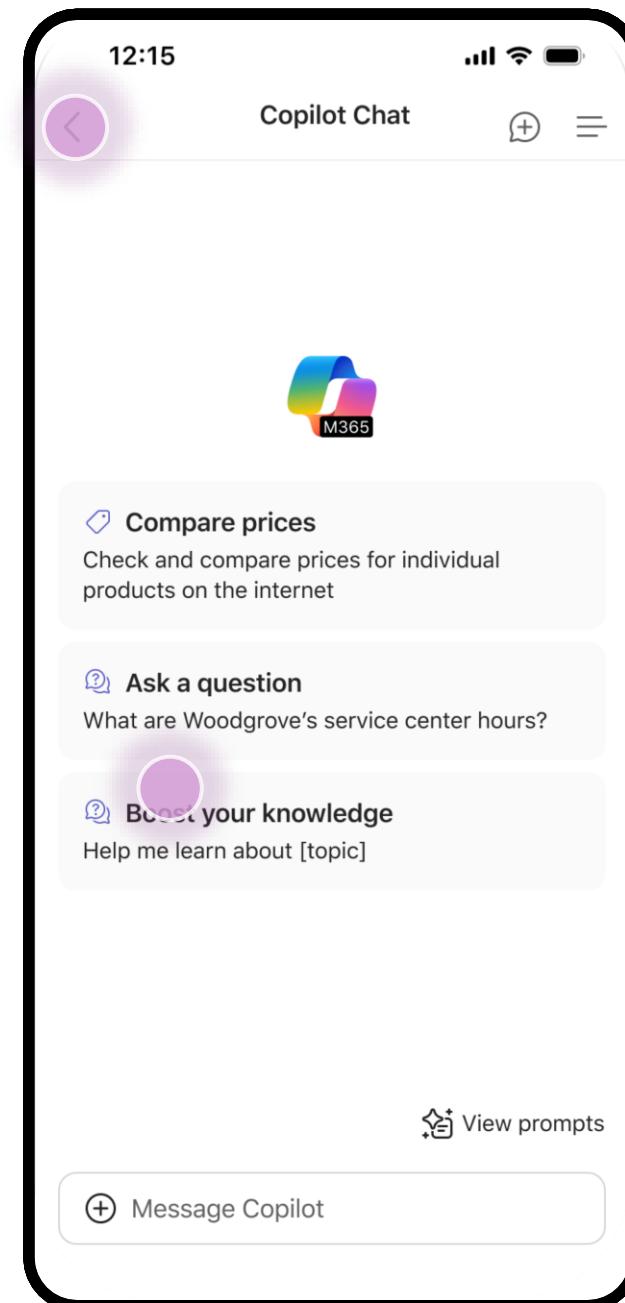
Benefits



Secure and efficient search



Does not use your data to train our AI
models



Manufacturing

Secure answers from the latest models and the web

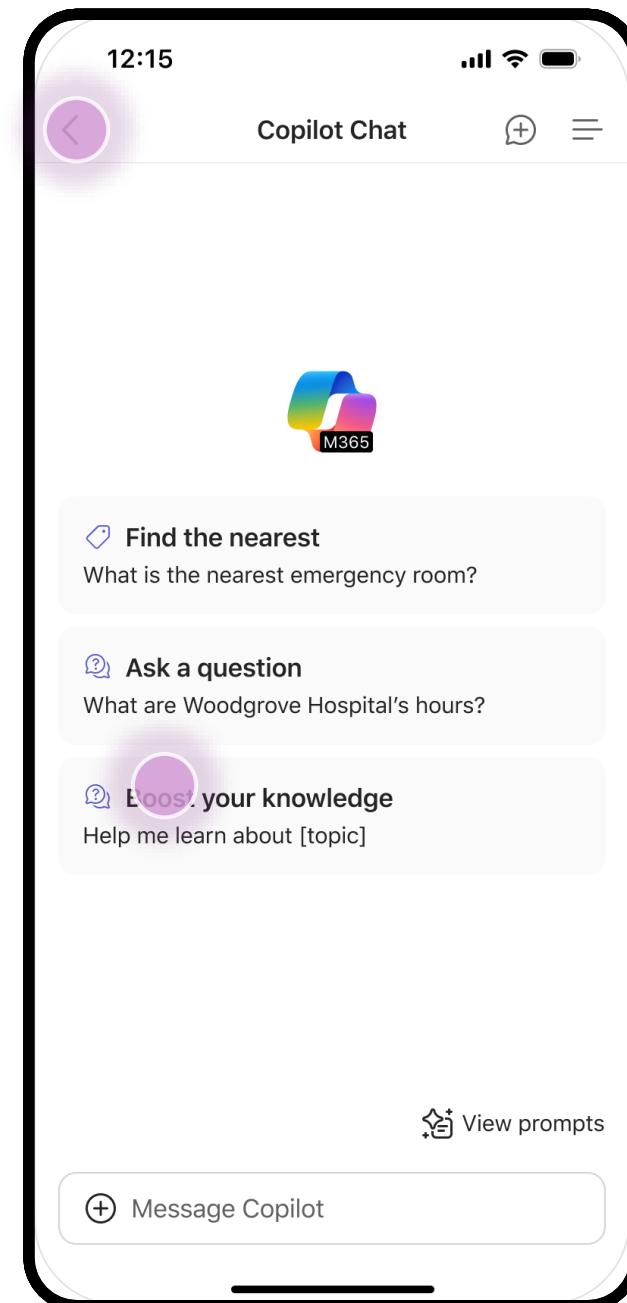
Benefits



Secure and efficient search



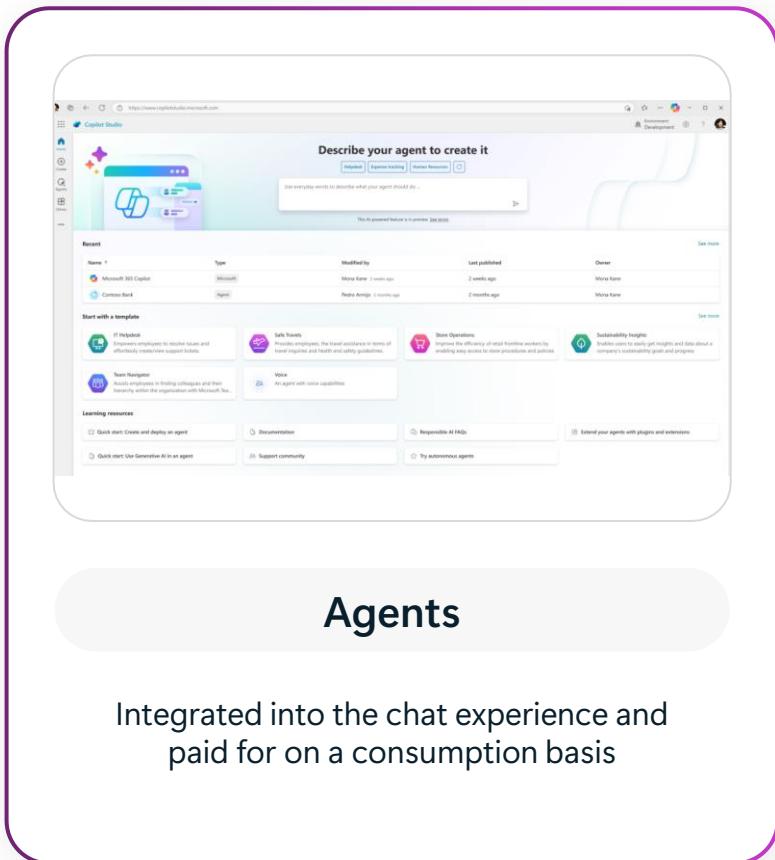
Does not use your data to train our AI
models



Healthcare



Microsoft 365 Copilot Chat



The screenshot shows the Microsoft Copilot Studio interface. At the top, it says "Describe your agent to create it" with tabs for "Model", "Expert training", and "Human powered". Below that is a search bar and a note about AI-generated feature availability. The main area shows a list of recent agents: "Microsoft 365 Copilot" (modified by Microsoft, last published 2 weeks ago) and "Common Bank" (modified by Pedro Arruda, last published 2 months ago). Below this is a section titled "Start with a template" featuring icons for IT Helpdesk, Safe Travel, Store Operations, Sustainability Insights, Team Manager, Voice, Documentation, Responsible AI FAQs, Extend your agents with plugins and extensions, Support community, and Try autonomous agents.

Agents

Integrated into the chat experience and paid for on a consumption basis



In-the-moment answers
from documentation

Simplify business processes
by connecting to industry systems

Find in-the-moment answers from internal documentation

Benefits



Reduced customer wait time

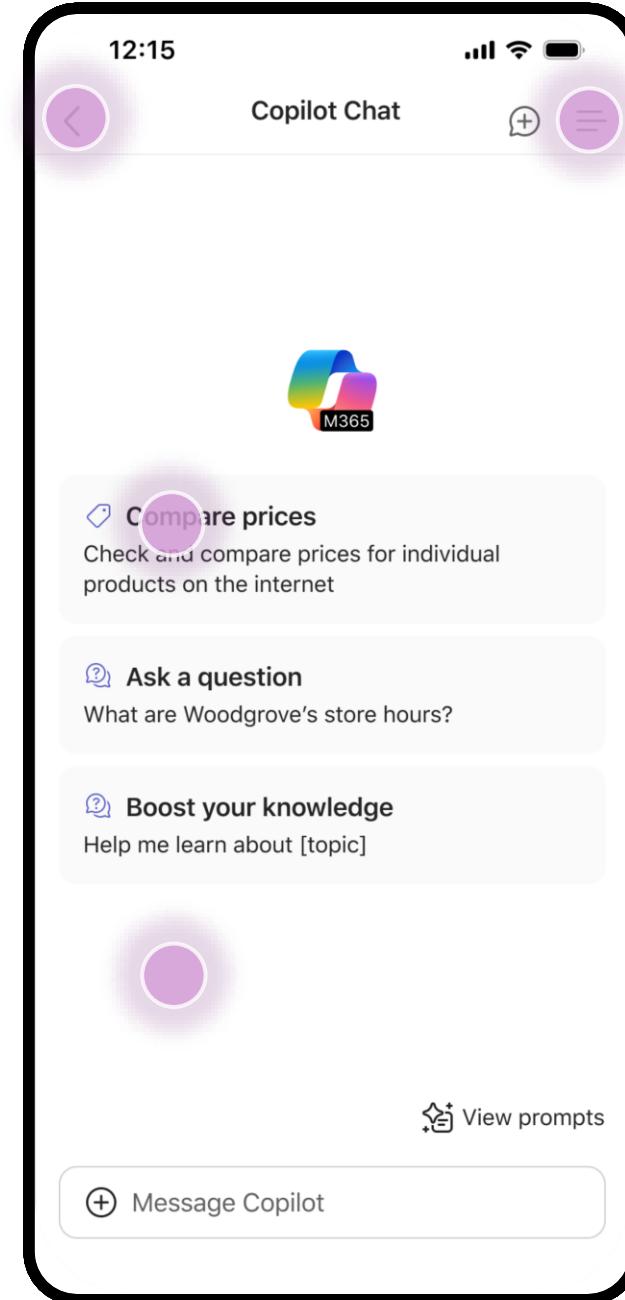


Faster information retrieval



Increased accuracy

Agents will be accessible via Copilot Chat in CY25 Q2



Find in-the-moment answers from internal documentation

Benefits



Reduced customer wait time

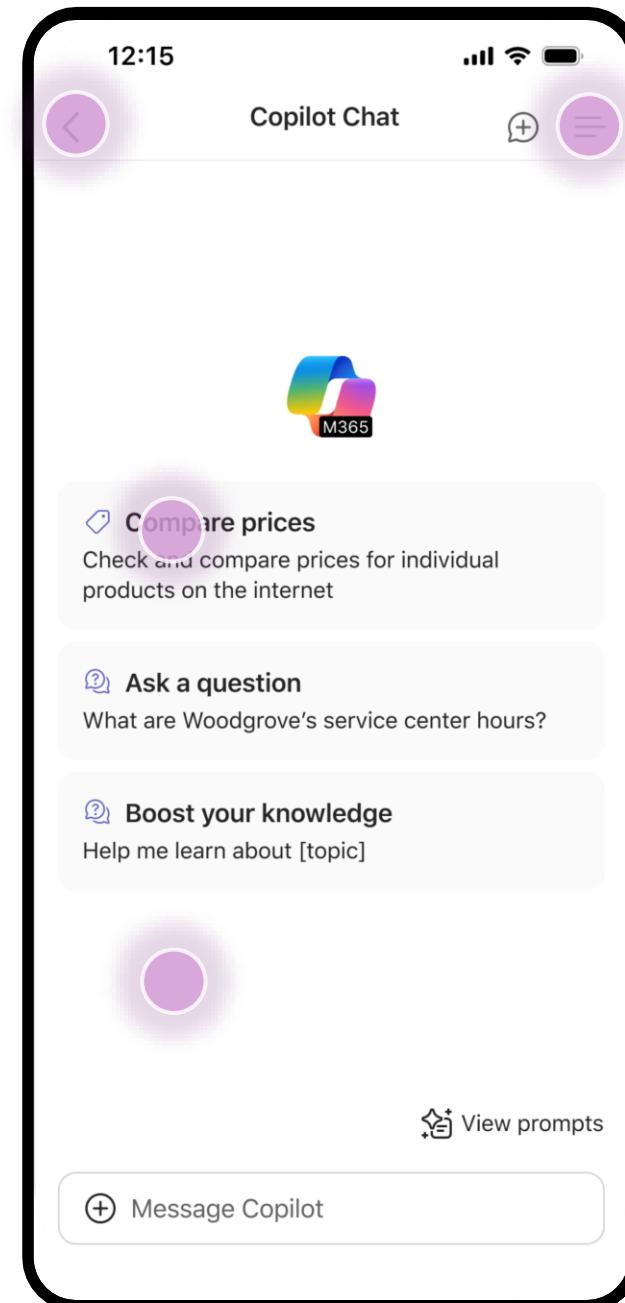


Faster information retrieval



Increased accuracy

Agents will be accessible via Copilot Chat in CY25 Q2



Manufacturing

Find in-the-moment answers from internal documentation

Benefits



Reduced customer wait time



Faster information retrieval



Increased accuracy

Agents will be accessible via Copilot Chat in CY25 Q2

The screenshot shows a mobile application interface. At the top, it says "12:15" and has icons for signal strength, battery, and connectivity. The title "Policy Buddy" is displayed, along with "Visiting hours" and a "to VISIT a patient in the ICU?" button. Below this is a message card with "AI generated" text and a "recom" (recommended) label. The main text reads: "Visitors with allergies are permitted to visit patients in the Intensive Care Unit (ICU). If there are signs of illness, like cough or fever, they are not permitted to enter the Intensive Care Unit (ICU)." A note below states: "It is recommended to provide the following guidance:" followed by a bulleted list: "• We understand that visiting patients in the Intensive Care Unit (ICU) is important and time-sensitive. However, our top priority is to keep our patients safe, so we cannot permit ill visitors." At the bottom of the message card, it says "2 references". Below this is a "References" section with two items: "General Visiting Hours" (with a document icon) and "Visitor Guidelines - ICU" (with a document icon). Both items have a "... more" link.

Healthcare

Simplify business processes by connecting to systems

Benefits



Reduced customer wait time

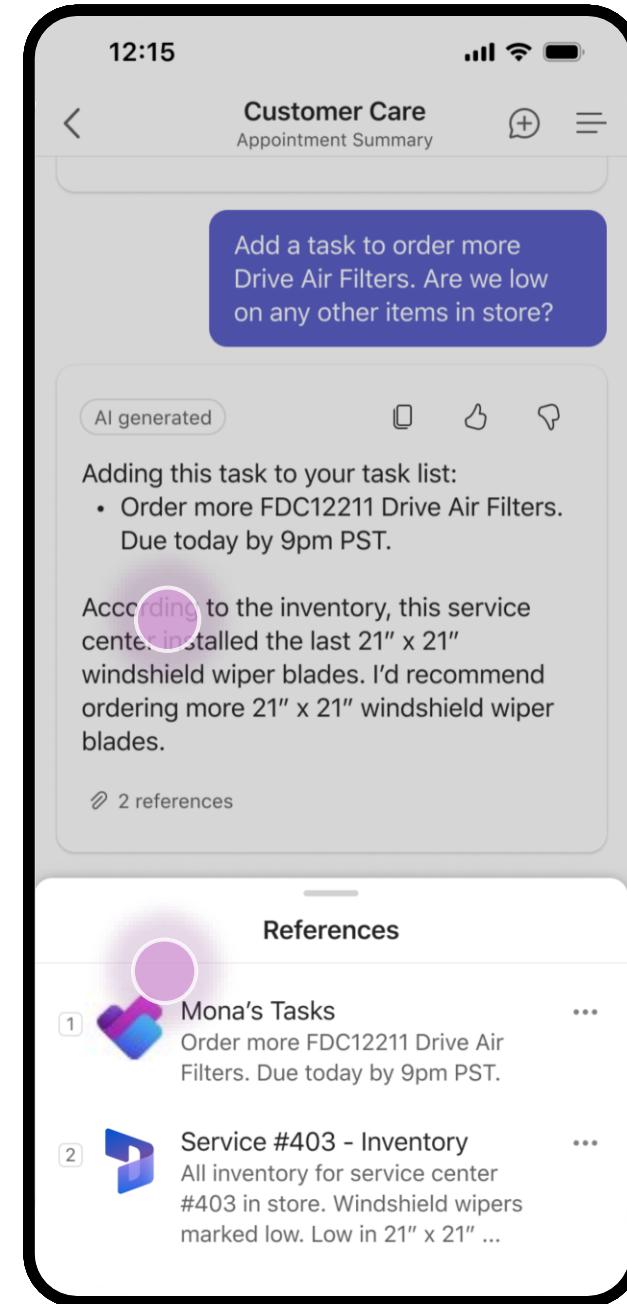


Faster information retrieval



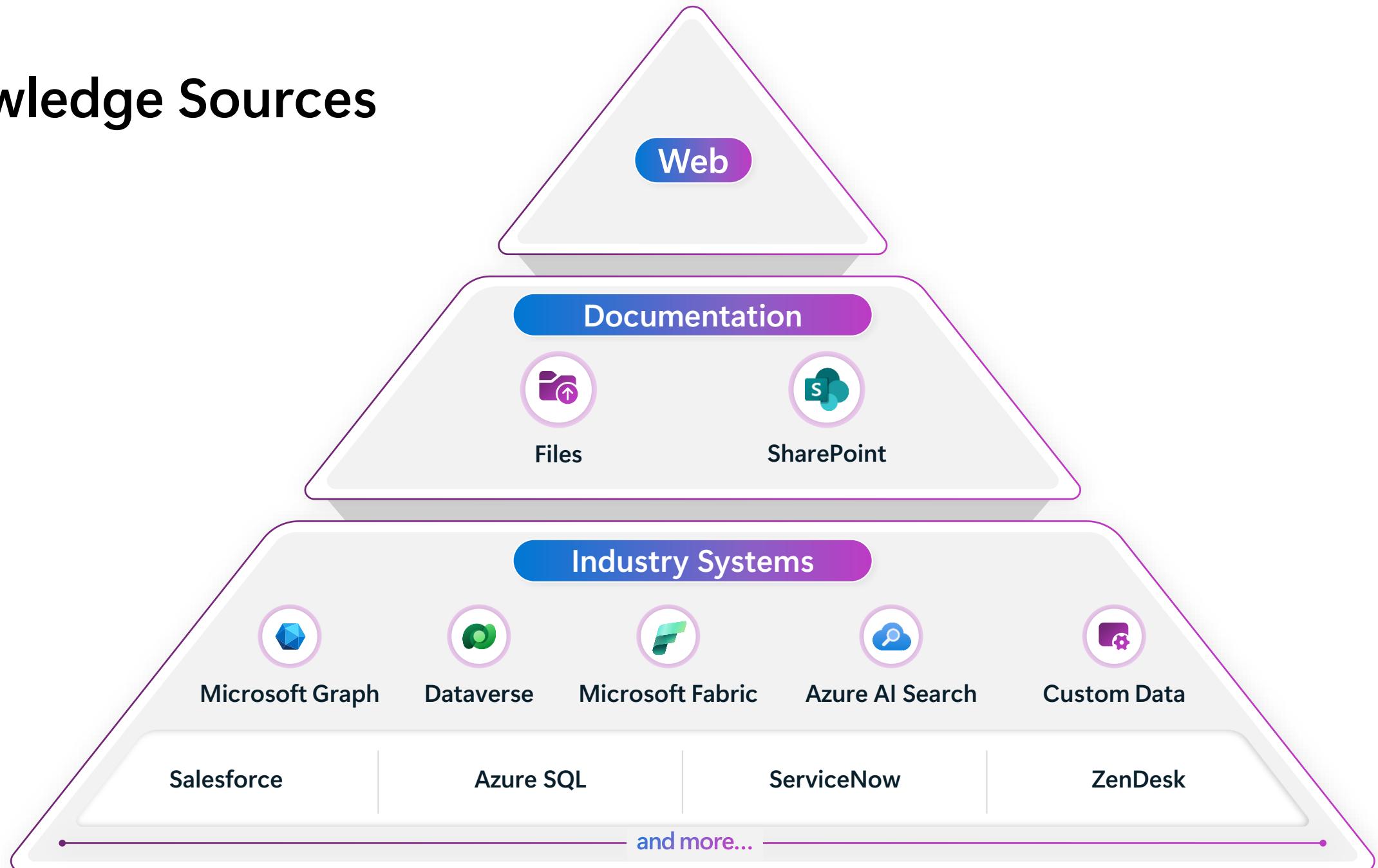
Increased accuracy

Agents will be accessible via Copilot Chat in CY25 Q2



Manufacturing

Knowledge Sources





Microsoft 365 Copilot Chat

IT Controls

Enterprise Data Protection and agent management



Keep your data secure with
Enterprise Data Protection (EDP)

Maintain your same Microsoft 365
security, governance, compliance,
and privacy policies

Microsoft Copilot plans

● = Included
▲ = Included – Metered

		Commercial Copilot for businesses		Consumer Copilot for individuals	
		Microsoft 365 Copilot Chat	Microsoft 365 Copilot	Microsoft Copilot	Microsoft Copilot Pro
Chat	Copilot Chat – Web grounded (powered by GPT 4o)	●	●	●	●
	Copilot Chat – Work grounded (work data in your tenant's Microsoft Graph and 3P data via graph connectors)		●		
	Copilot Pages	●	●		
	File upload ¹	●			●
	Code Interpreter ¹	●	●	●	●
	Image generation ¹	●	●	●	●
	AI Features in Designer ¹	●	●	●	●
	Copilot Voice ¹			●	●
Agents	Create agents using Copilot Studio ² , agent builder, and SharePoint	●	●		
	Use agents grounded on web data	●	●		
	Use agents grounded in work data, including SharePoint agents ³	▲	●		
	Use agents that act independently using autonomous actions	▲	▲		
	Use any agent that is externally facing (e.g. public websites)	▲	▲		
Personal assistant	Copilot reasons over personal work data (i.e. Outlook, OneDrive, Teams meeting transcripts and chats)		●		
	Copilot in Teams (Copilot in Meetings and Meeting Recap, insights from screen-shared content coming soon)		●		
	Copilot in Outlook (Prioritize my inbox, schedule focus time and 1:1 meetings, draft agendas, summarize emails)		●		●
	Copilot in Word (Suggestions for structure, flow, and tone, draft and summarize documents)		●		●
	Copilot in Excel (Python, getting started experience, create formulas and visualizations using natural language)		●		●
	Copilot in PowerPoint (Narrative Builder, presentation translation, generate company branded slides or images)		●		●
	Copilot in OneNote (summarize your notes, create actionable to-do lists, and develop plans for events)		●		●
	Copilot Actions			In preview	
Copilot Control System	Pre-built M365 agents (Interpreter, Facilitator, Project Manager, Employee Self-Service Agent) ⁴			In preview	
	Enterprise Data Protection (EDP)	●	●		
	IT management controls	●	●		
	Agent management	●	●		
	SharePoint Advanced Management		●		
	Copilot Analytics to measure usage and adoption ⁵		●		
	Pre-built reports and advanced analytics to measure ROI		●		

1. Limits apply. 2. Learn about the full capabilities of Copilot Studio: aka.ms/CopilotStudioCapabilities 3. SharePoint promo offer: 10K SharePoint agent queries per month for organizations with 50 or more M365 Copilot licenses through June 30, 2025, paid for on a consumption basis thereafter.

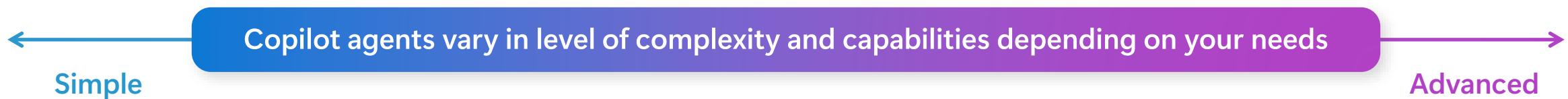
4. Employee Self-Service agent also available in preview for Copilot Chat customers on a consumption basis 5. Basic reporting in Microsoft Admin Center available for Copilot Chat

Microsoft 365 Copilot Agents



What are Copilot agents?

Agents expand Copilot's knowledge and skills or can operate autonomously to complete tasks or automate processes



Retrieval

Retrieve information from grounding data, reason, summarize, and answer user questions



Task

Take actions when asked, automate workflows, and replace repetitive tasks for users



Autonomous

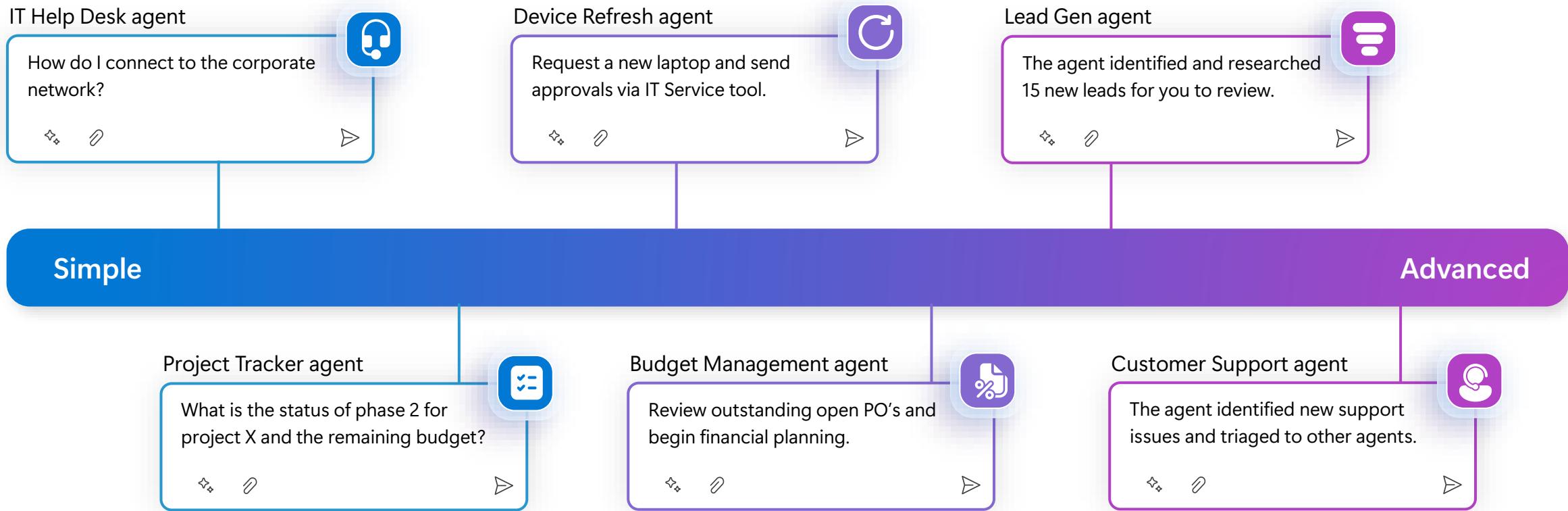
Operate independently, dynamically plan, orchestrate other agents, learn, and escalate

Generally available

Generally available

Generally available

Explore a continuum of solutions



Reimagine business processes with Agents – Use cases



Agents

Integrated into the chat experience
and paid for on a consumption basis

- 🌐 Free agents operate using public websites, uploaded files, or predefined instructions
- ⌚ Paid agents operate using organizational or third-party work data¹
- ✍️ Create both in Copilot Studio

Free agent use cases

Streamline web-based queries

Gather specific data, like social media or stock insights, on a regular basis

Automate document reviews

Quickly summarize internal contracts, legal docs, resumes, etc.

Personalized coaching

Get help and advice with writing, ideas, prompts, your career, and more

Paid agent use cases

Address company policy questions

Answer employee questions about time off, remote work, benefits, etc.

Enable customer self-service

Create autonomous chatbots to resolve customer issues and Help Desk tickets

Collect real-time status updates

Automatically get real-time updates about internal budgets, projects, etc.

New out-of-the-box agents

Agents in Microsoft 365

SharePoint
agents

Sales
Agent

Employee
Self-Service
Agent

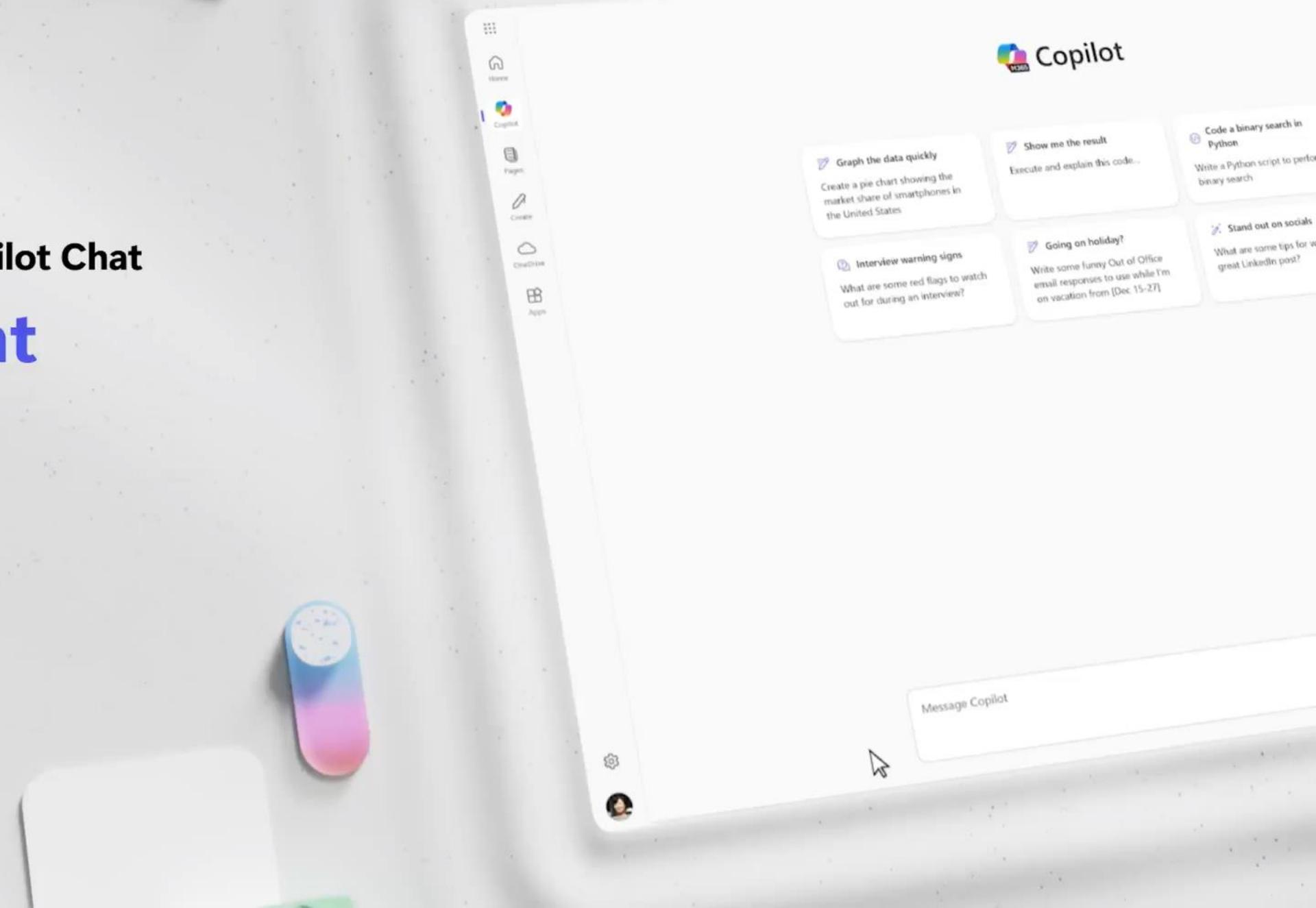
Facilitator

Interpreter

Project
Manager

Microsoft 365 Copilot Chat

Sales agent



Agents run on a secure and trusted platform



Data security

Leverage label inheritance and data loss prevention policies

Intelligent grounding respects your permissions and security controls

Comprehensive visibility into user, data, and agent risks



Access & cost controls

Control agent availability and access

Control who can create and sharing of agents

Track and manage agent costs and operational insights



Measurement & Reporting

View core usage telemetry and track license utilization

Track improvements in user productivity and compare impact across groups

Analyze Copilot & agents impact to business outcomes

Agent interactions stay in the Microsoft 365 and Azure Service Boundary and your Microsoft 365 security, governance, compliance, and privacy policies apply

Control agent access



IT admins can go to Integrated apps section, use Copilot extensibility control all users, no users, specific groups/users to access agents.

The screenshot shows the Microsoft 365 Admin Center interface. On the left, there's a navigation sidebar for 'Contoso Electronics' with various admin links like Home, Users, Teams & groups, Roles, Resources, Marketplace, Billing, Copilot, Settings, Domains, Search & intelligence, Org settings, Microsoft 365 Backup, and Integrated apps (which is currently selected). The main content area is titled 'Integrated apps' and describes how to discover, purchase, acquire, manage, and deploy Microsoft 365 Apps developed by Microsoft partners. It lists several available apps such as 1-on-1 Hub, 1-to-1 Worldvds Communicator, 1&1 Business Phone, 123 Timer and Clock by BlueSky, 15Five, 1Page, 1st Reporting, and 22Miles, along with their descriptions and host products (Teams, Outlook, etc.). To the right, there's a 'Customize default settings' panel with sections for 'Setup who should be able to install apps by default' (with options for 'All new and incoming Teams apps with capabilities extended to Outlook, Microsoft 365 and Microsoft Copilot' and 'All apps published in the past that your organization has not taken any action on. (Note that individually edited apps will honour their edited state over this setting)'), 'Exceptions' (with options for 'Let users access Microsoft apps in your tenant' and 'Let users access third-party apps in your tenant'), 'Custom apps' (with an option to 'Let users install available custom apps by default'), and 'Enable extensions for Copilot to the following users' (with radio button options for 'All users', 'No users', and 'Specific users/groups'). A search bar at the bottom allows users to 'Search for users or groups to add'.

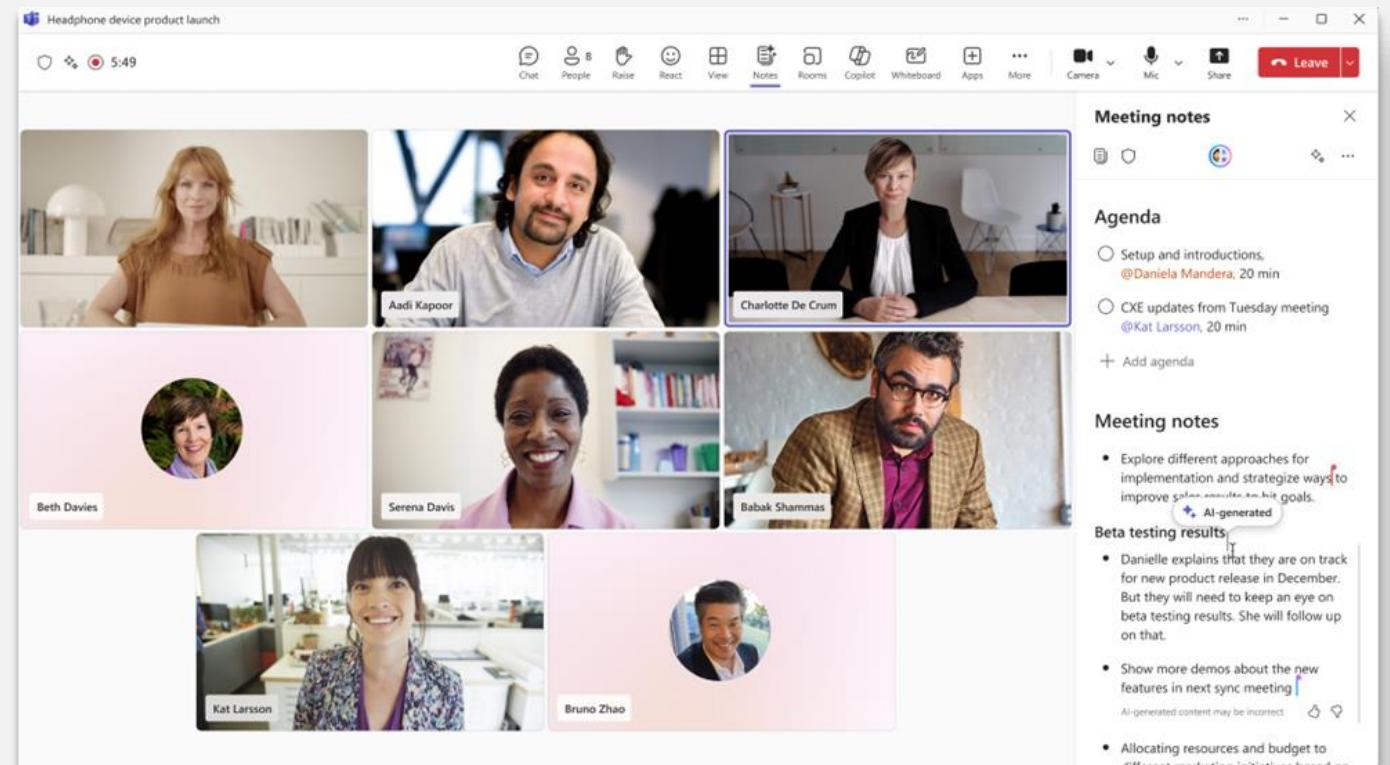
Microsoft 365 Admin Center

Copilot Studio and Agents

Facilitator

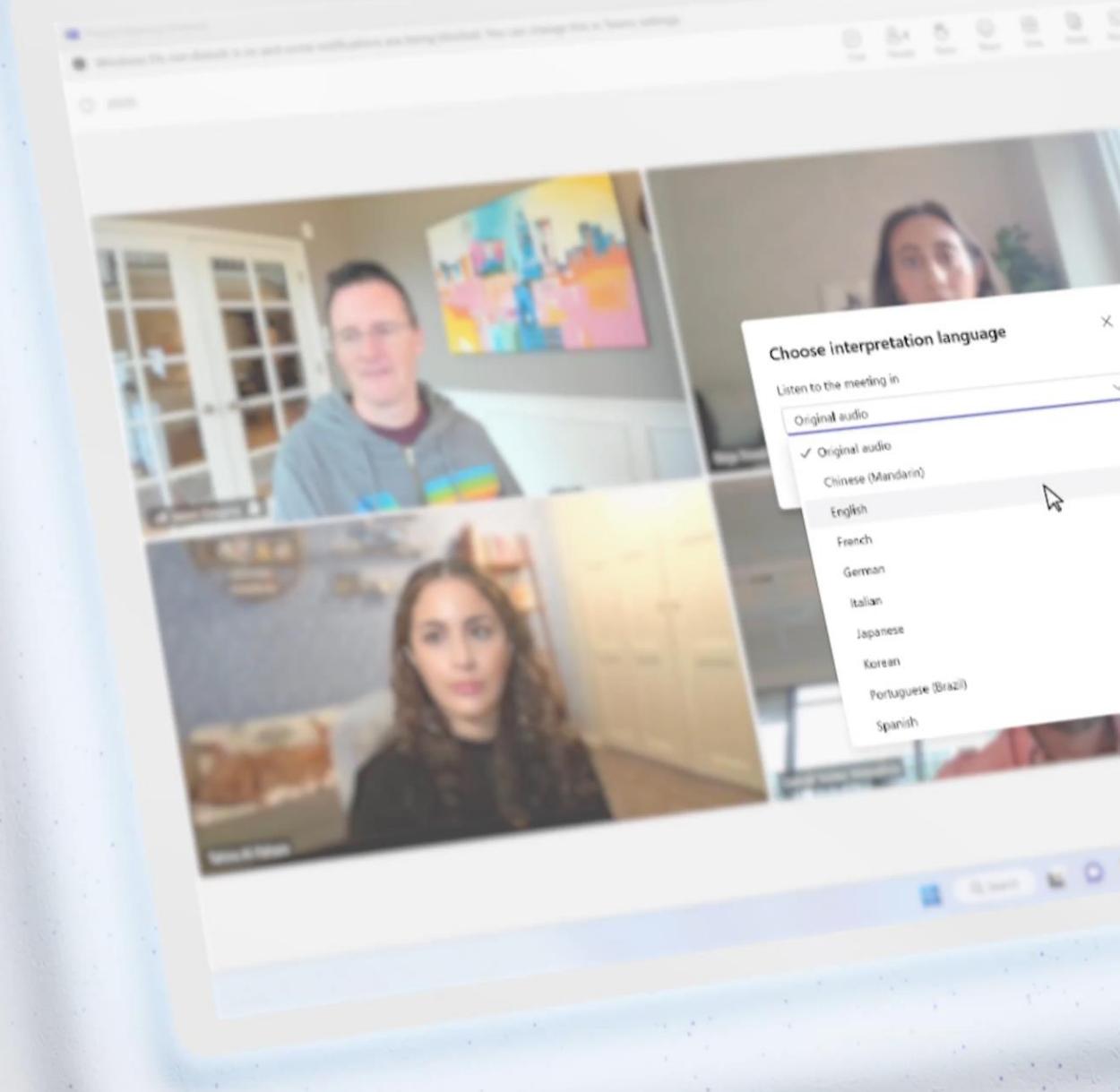
Facilitator starts taking real-time notes during Teams meetings, allowing everyone to co-author and collaborate seamlessly.

Facilitator also generates an up-to-date summary of important information in Teams chats including key decisions, action items, and open questions to resolve.



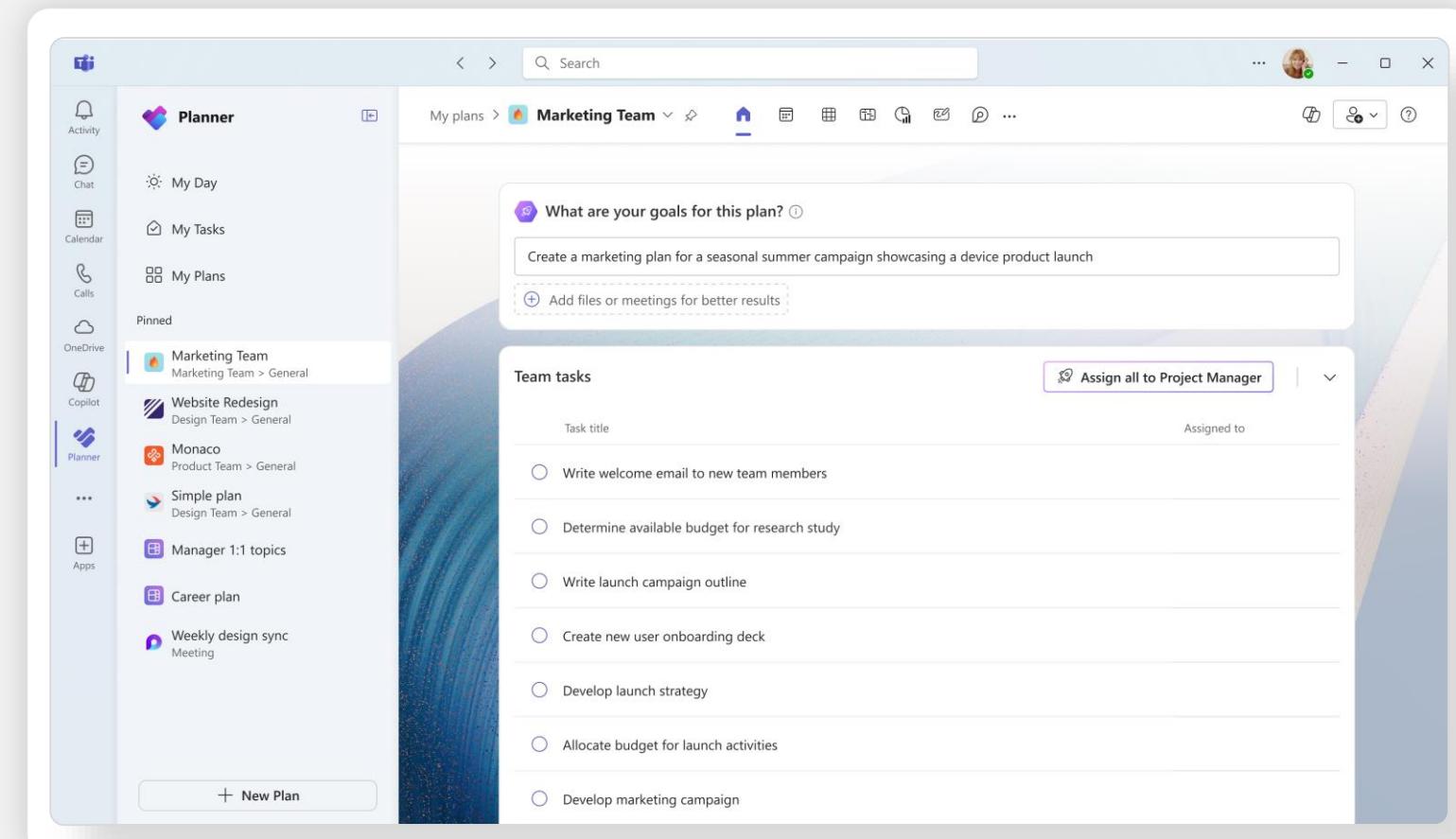
Available in public preview

Microsoft 365 Copilot Interpreter agent



Project Manager

Easily create new plans by inputting goals and generating tasks; assign tasks to the agent to complete with progress tracking.



Available in public preview in North America

Microsoft 365 Copilot

Employee Self-Service agent

The screenshot shows the Microsoft 365 Copilot interface. At the top right, there is a search bar with the placeholder "Search" and a "New chat" button. Below the search bar, the "Employee Self-Service" logo is displayed, followed by a "Preview" button. The main area contains several cards representing different service requests:

- Check time off balance**: "How many vacation days do I have left this year?"
- Ask about policies**: "Tell me more about remote work"
- Access company resources**: "How do I get company resources on my personal device?"
- Discover training opportunities**: "Help me find resources to grow new skills"
- How many vacation days do I have left this year?** (This card is highlighted with a blue border.)

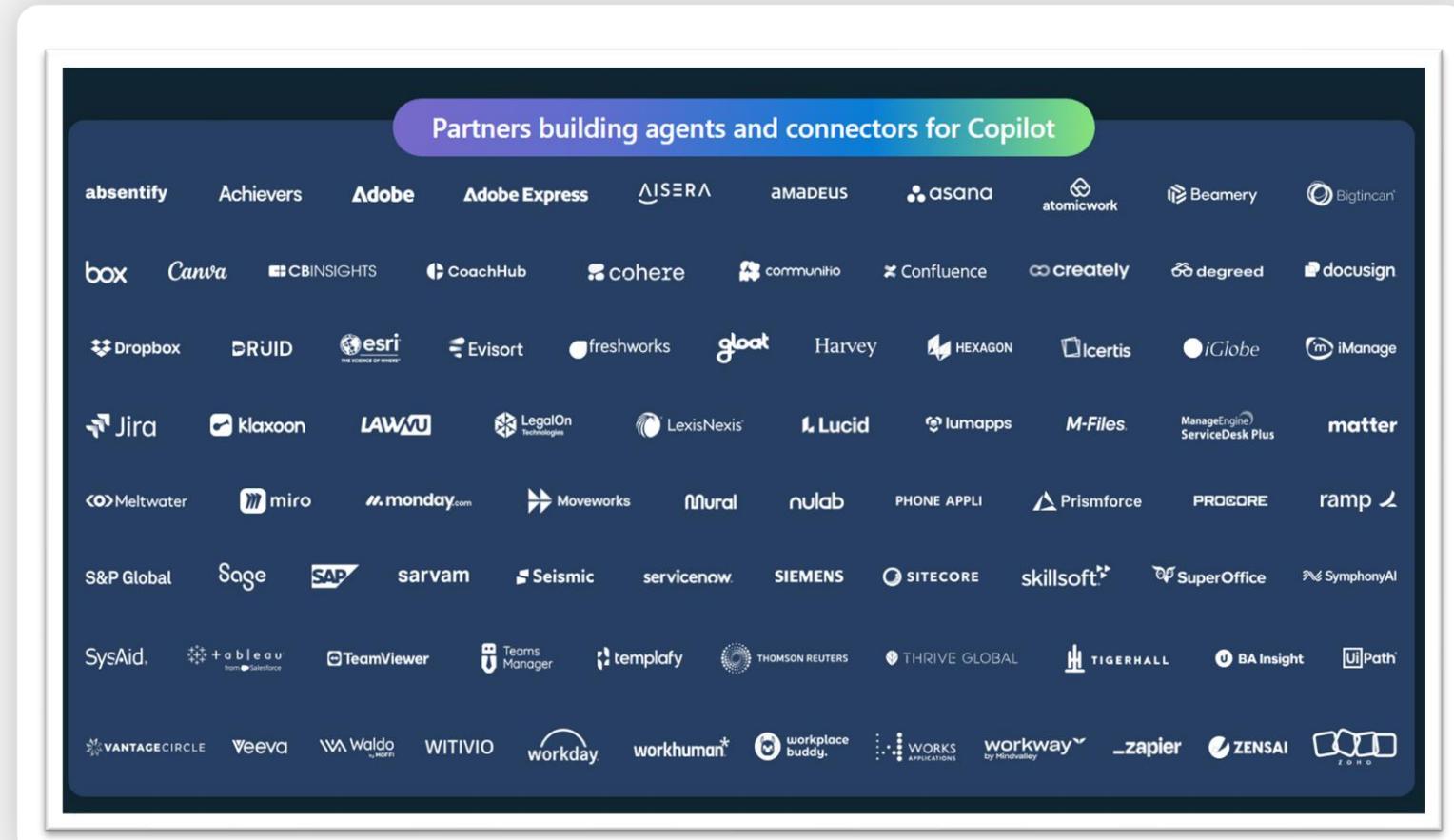
At the bottom of the interface, there is a note: "Learn more about the sources, accuracy of responses, and how your data is used." A blue line is drawn across the bottom of the interface.

Copilot Studio and Agents

Third-party agents and connectors

New Graph connectors, including CB Insights, S&P Global, Veeva and more, will be available in a growing catalog of pre-built connectors to expand the knowledge available to ground Copilot and agents responses in more of your enterprise data.

New agents for Adobe, ServiceNow, and SAP help automate and expedite business processes.



Microsoft 365 Copilot

Third-party agents

The screenshot shows the Microsoft 365 Copilot interface. On the left, there's a sidebar with icons for Activity, Chat, Calls, OneDrive, Calendar, Copilot (which is selected), and Apps. The main area displays a summary from the Copilot agent "Summarize Shauna Cardoza's Talent". It includes a list of items:

- SCHEDULE A FOLLOW-UP CLIENT FEEDBACK SESSION
- Workday 1: 1:1 Notes on Shauna Cardoza

Below this is a button to "Create new page" and a "Copy" button. To the right, a message from the Workday agent suggests topics for a career conversation based on the summary:

Based on this summary, suggest conversation to

Workday AI-generated content may be incorrect
Here's suggested topics for a career conversation based on the summary of Shauna Cardoza's Talent Highlight and notes document.

- Shauna's feedback on the project Nebula and how the learnings from phase 1 could be used in the phases of the project
- Review the progress on the project plan for phases 2 and 3
- Discuss the presentation at the conference (Meridian 2024) and remind Shauna to update the goal
- Discuss outcomes of a client feedback session
- Based on feedback Shauna has received, recommend a new development item:
 - Completing a course [Advanced Business Writing](#). (A few of Shauna's coworkers have already co

At the bottom, there's a message box for "Chatting with Workday" and a "Message Workday" button.

Unlock more value with SharePoint Agents



Unlock more value from your SharePoint content



Ready-made or make your own

Use the ready-made agent or create a custom agent with specific SharePoint content



Easy to share

Just like other Microsoft 365 apps, share the link via email or Teams chat



Increase collaboration

Add to a Microsoft Teams chat and @mention the agent for instant interaction



Extensible

Launch Microsoft Copilot Studio directly from SharePoint for deeper customizations



Secure

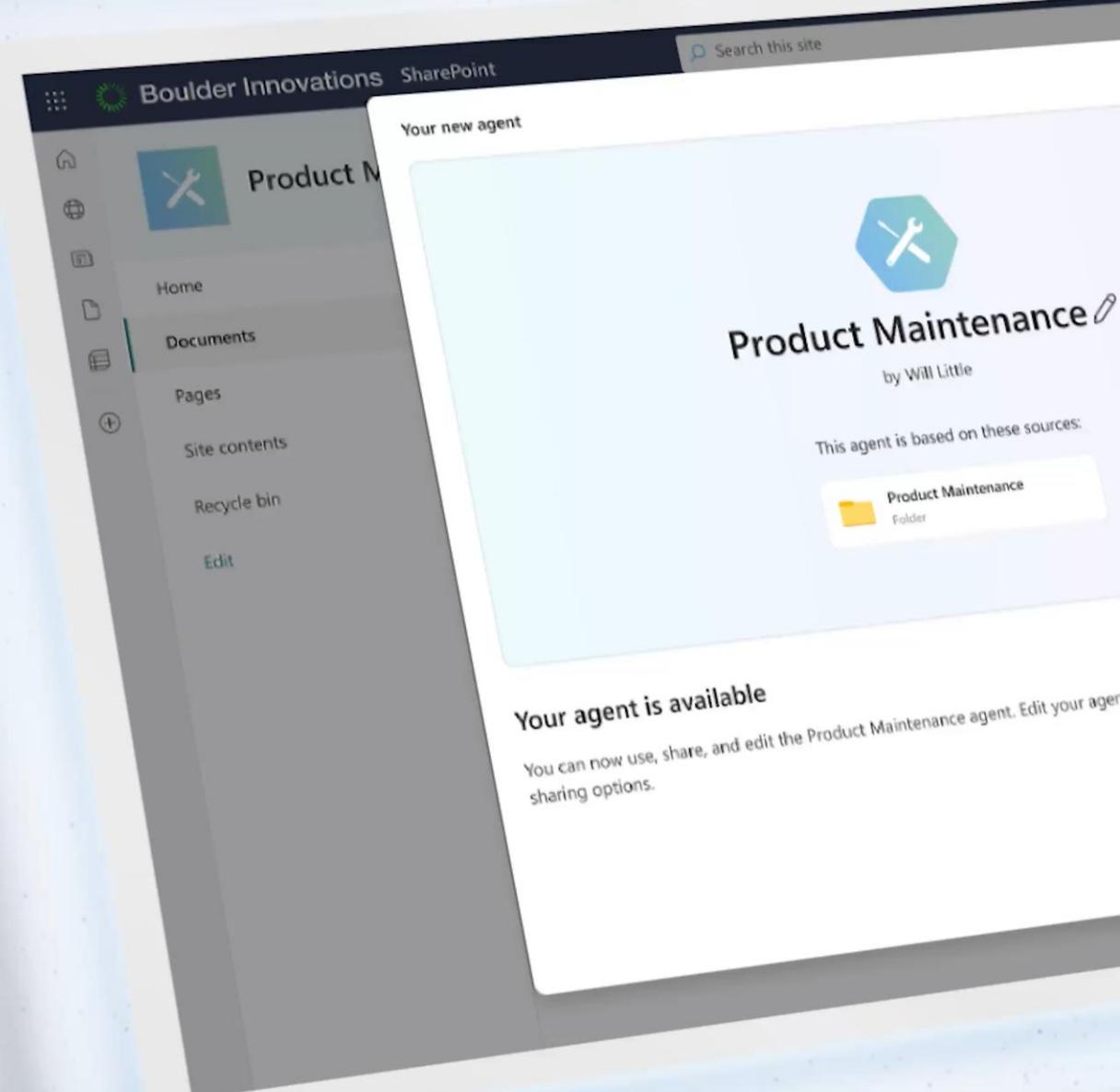
Defaults to your existing SharePoint permissions and sensitivity settings

The screenshot shows a SharePoint site titled "Boulder Innovations SharePoint" with a "Product Maintenance" page. The left navigation bar includes links for Home, Documents (which is selected), Pages, Site contents, and Edit. The top ribbon has tabs for Home, Documents, Pages, Site contents, and Edit. The right side of the ribbon shows user information: Confidential \ Internal only, Not following, English, and a gear icon. Below the ribbon is a search bar with the placeholder "Search this site". The main content area is titled "Documents" and displays a grid of files. The columns are Name, Modified, and Modified By. The files listed are:

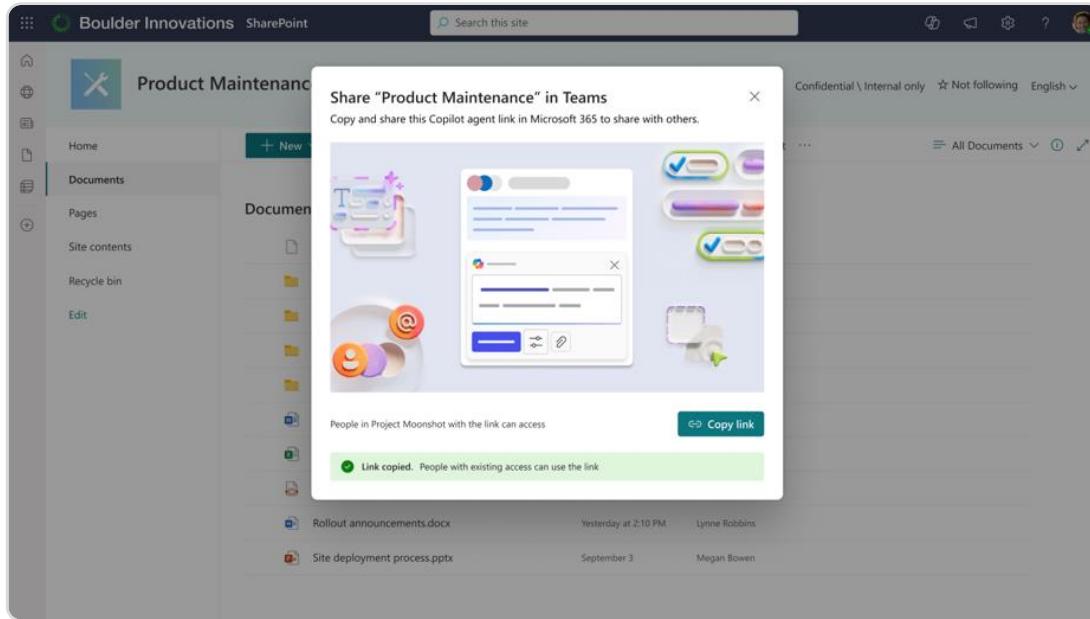
Name	Modified	Modified By
Current Deployments	Monday at 3:31 PM	Mona Kane
Parts & Inventory	Monday at 3:31 PM	Mona Kane
Product Failure Reports	Monday at 4:30 PM	Kat Larson
Service Manuals & Documentation	Wednesday at 8:30 PM	Kat Larson
City ordinances checklist.docx	July 27	Lee Gu
PSE regional cost analysis.xlsx	Yesterday at 1:40 PM	Adele Vance
RMC 21.40.030 - EV Charging Stations.pdf	August 20	Pradeep Gupta
Rollout announcements.docx	Yesterday at 2:10 PM	Lynne Robbins
Site deployment process.pptx	September 3	Megan Bowen

Microsoft 365 Copilot

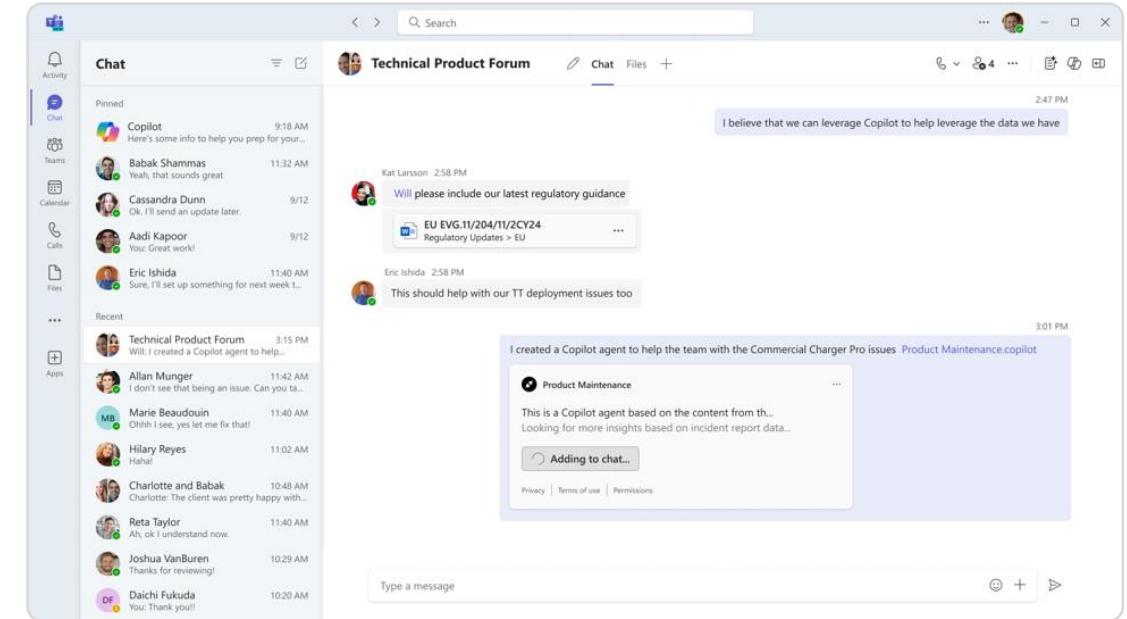
SharePoint agents



Share your agent via a link or add to a Teams chat



Just like other Microsoft 365 apps, create a link to share via email or Teams chat



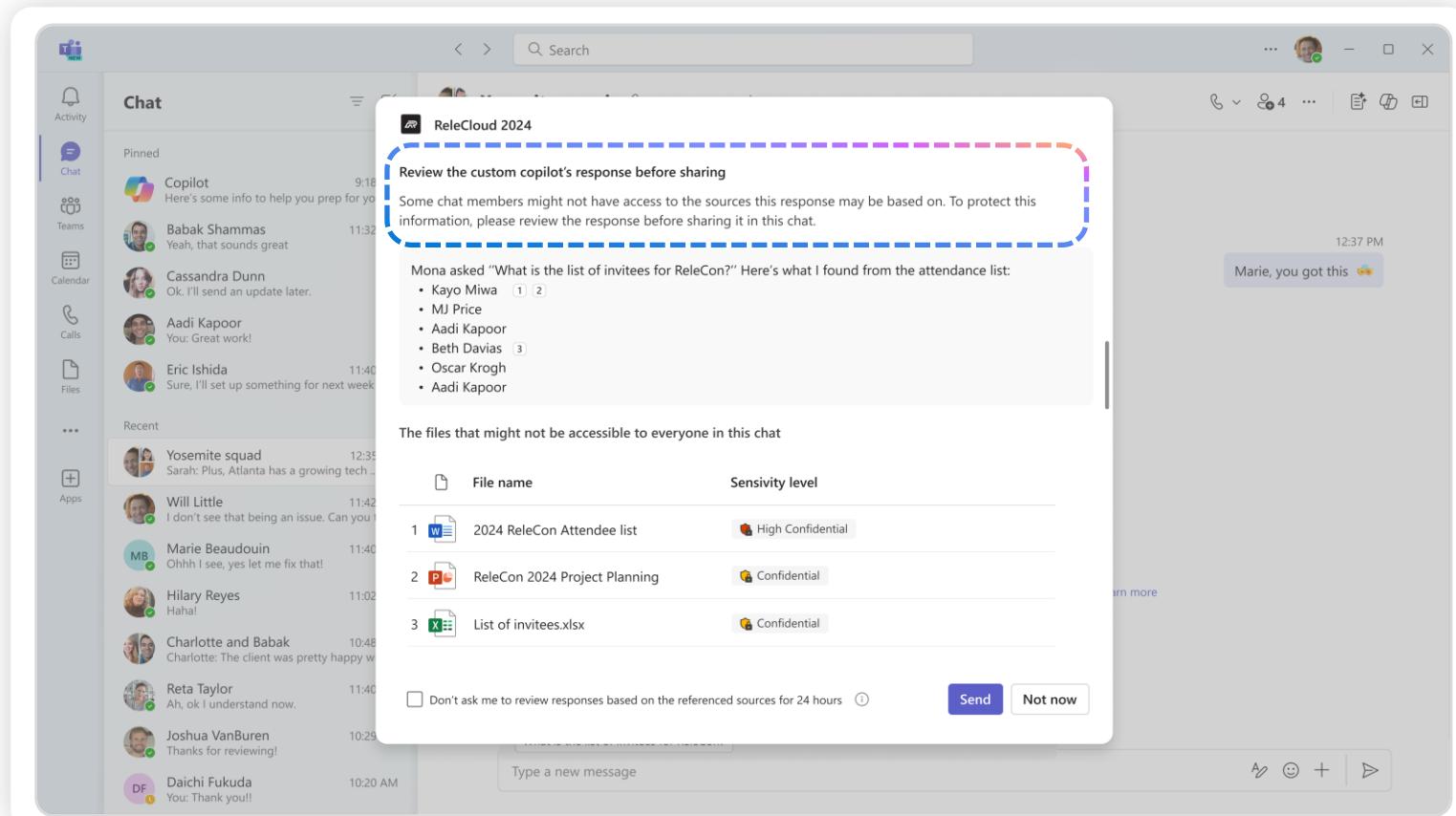
Add the agent to a Teams chat and @mention to facilitate direct collaboration and knowledge sharing

Promote knowledge sharing without oversharing

Users only have access to the content they are authorized to view or edit.

The agent responds with the permissions of the requestor.

The agent will notify the requestor if some of the users in the chat do not have access to the knowledge sources in the response. The requestor can decide whether the response should be shared.





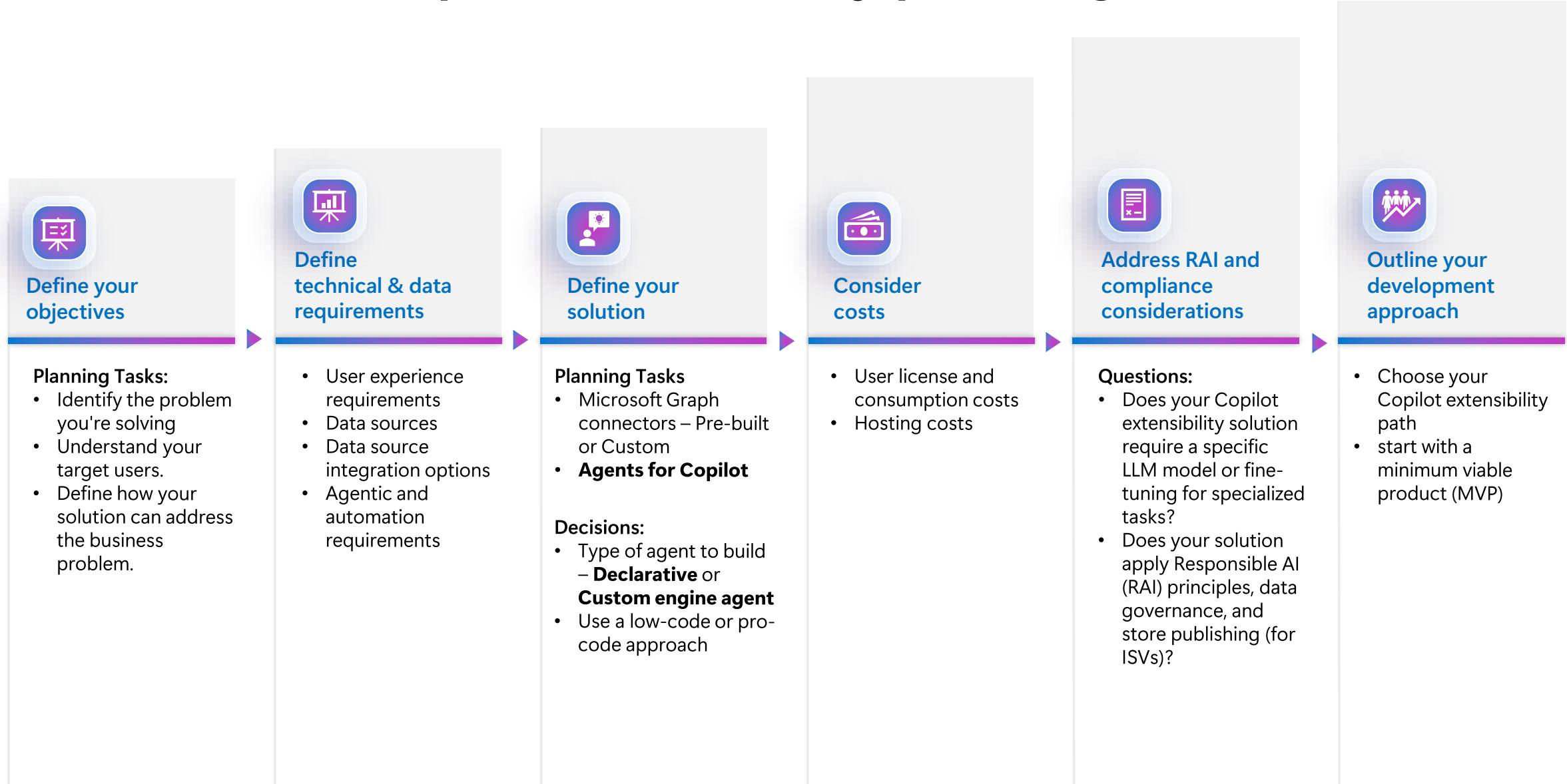
Module 2

Extend Microsoft 365 Copilot with agents

Extensibility planning and approach



Microsoft 365 Copilot extensibility planning



Define your Objectives

Define the purpose and scope of what you plan to build

Objective

- Identify the problem you're solving
- Understand your target users
- Define how your solution can address the business problem.

Users Persona

- Consider what you know about your target users, and how you can help them with their productivity needs
- Identify the user persona or personas you're targeting

Example questions

- Will the number of potential users impact design choices, such as consumption costs?
- Do your users have Copilot licenses? If not, what are the adoption or licensing costs?
- What do your users need Copilot to do?

Choosing Copilot extensibility approach



Business need

Improve decision-making, summarizations, or recommendations

Integrate organizational knowledge from databases, documents, or APIs

Reduce manual tasks by building automated flows



Copilot extensibility approach

Enhance Copilot's reasoning abilities.

Enable Copilot to access and use external data.

Create automated workflows to streamline repetitive tasks.

Define technical and data requirements

Determine the requirements that your extensibility solution needs to meet.

User Experience requirements

Copilot, Word, Excel, PowerPoint, Teams), or third-party apps or websites?

Data Sources

- Does Copilot or your solution require internal or external data, such as documents, applications, APIs, or databases?
- For example, do you need to:
 - Integrate external data into Microsoft 365 apps for contextually relevant responses?
 - Interact with real-time data for business workflows?
 - Interact with other applications to retrieve or update data, run commands, or trigger workflows?

Data source integration options

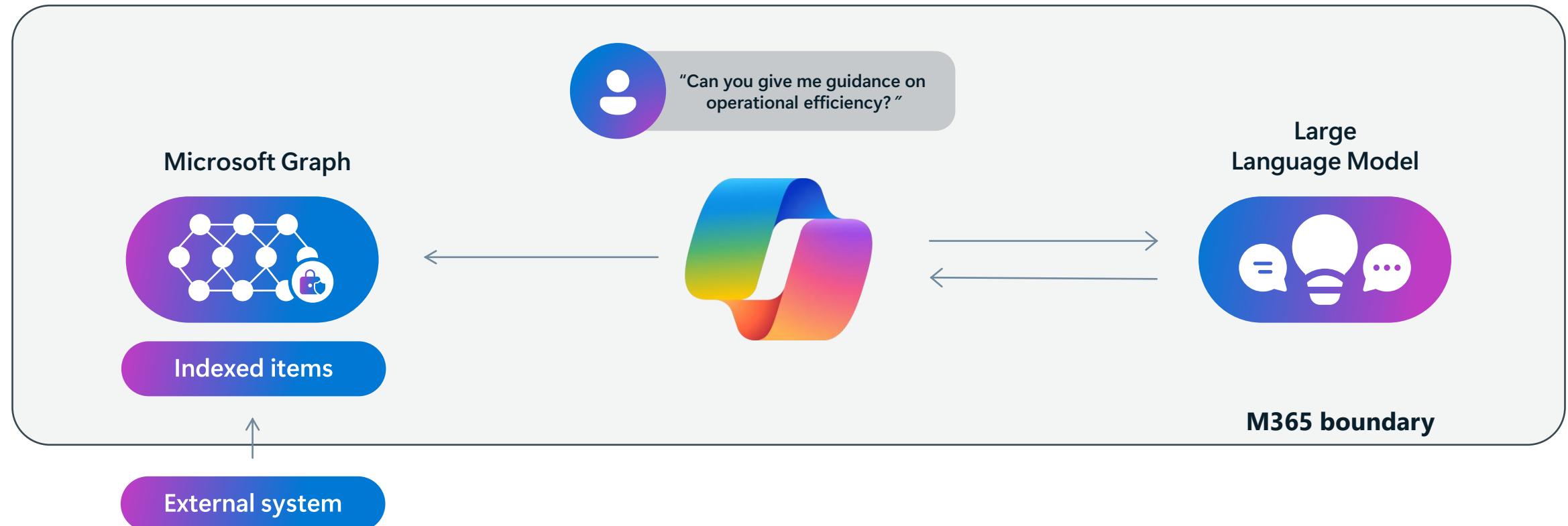
- For each data source, identify whether a Microsoft Graph connector, Power Platform **plugin**, or REST API is available.
- If an existing data source integration isn't available, decide whether to build a **Microsoft Graph connector** or an **API** to enable the integration?

Example questions

- Where will your users interact with Copilot within the context of Microsoft 365 apps (Copilot, Word, Excel, PowerPoint, Teams), or third-party apps or websites?
- Do you need to integrate external data, real-time data or other applications?
- Is a Graph connector, plugin or REST API available for data sources?

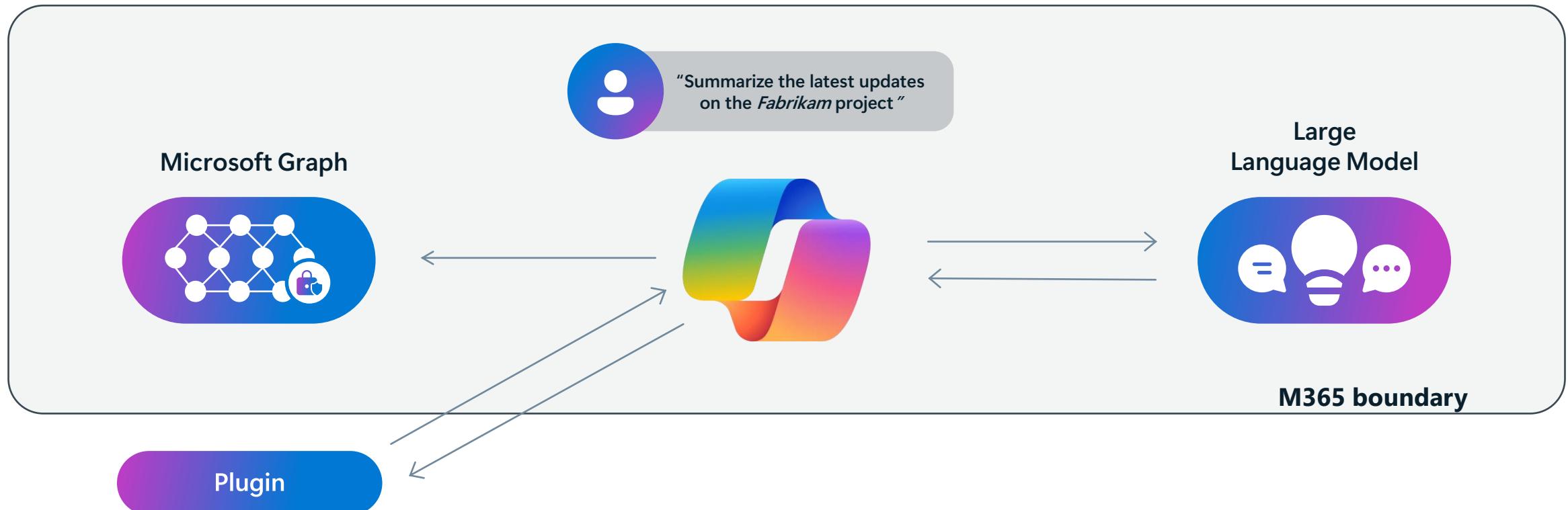
What is a Graph Connector?

- Microsoft Graph APIs to index items from other systems. Data that is unstructured, infrequently updated
- Good Examples: Document repositories, Knowledge Bases, Websites, Content management systems

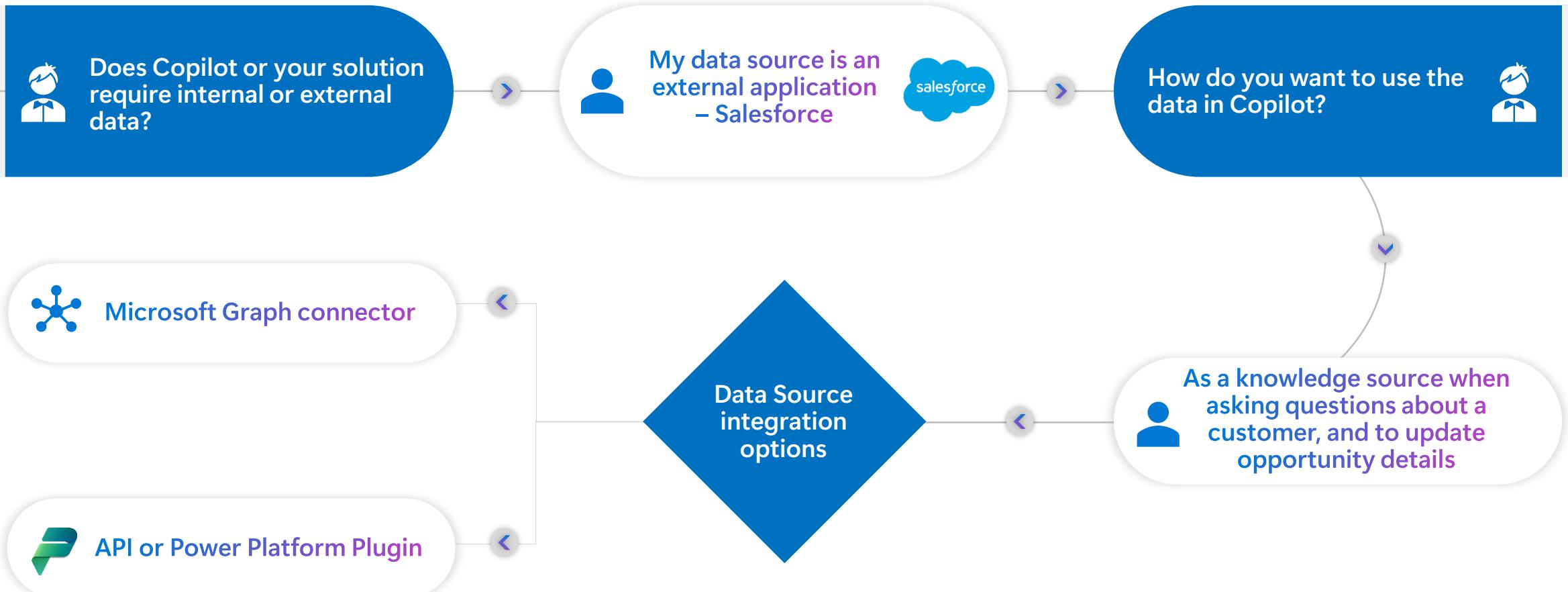


What is a plugin?

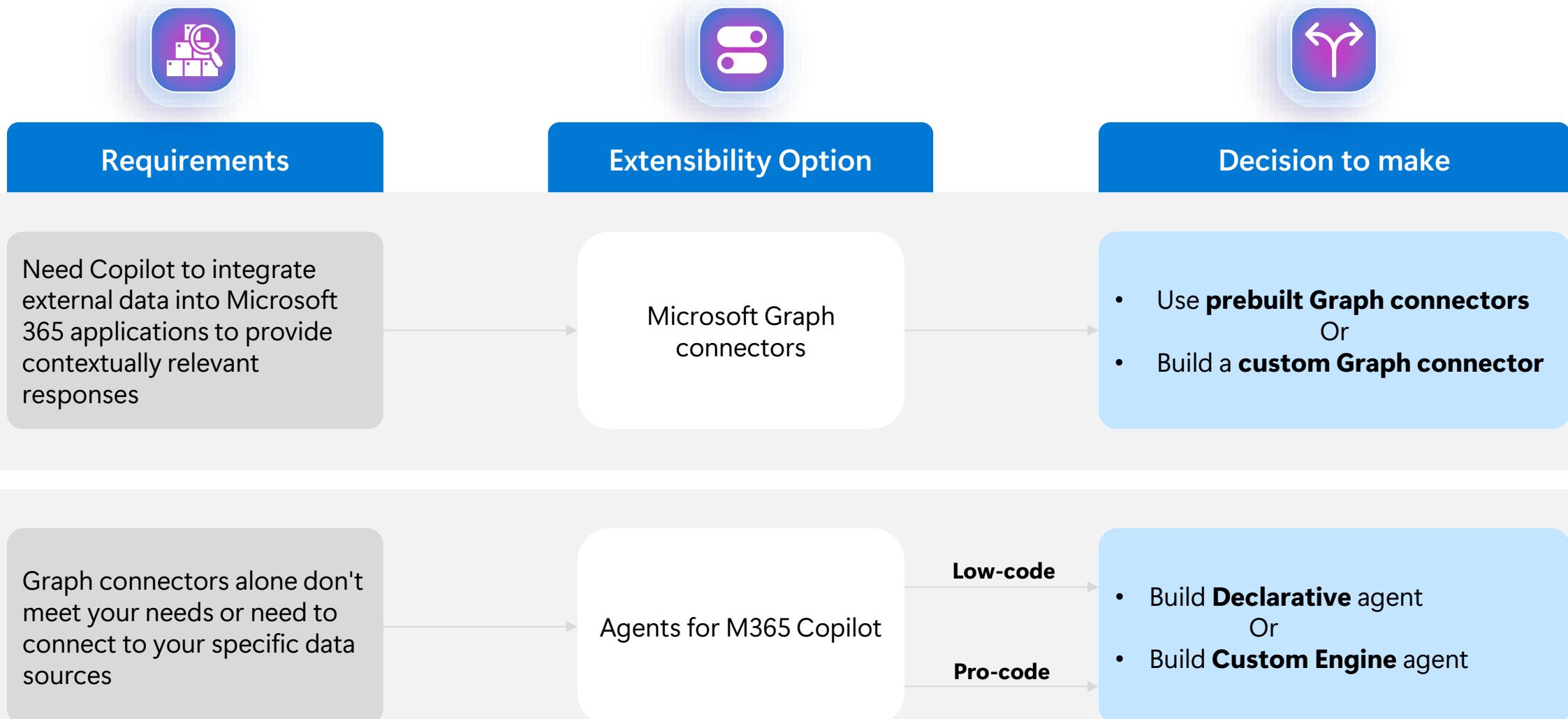
- Plugins valuable for data that is: real-time, relational, read and write actions, have an API
- Good examples: CRM, ERP, Supply Chain HR, Accounting, Transactional systems



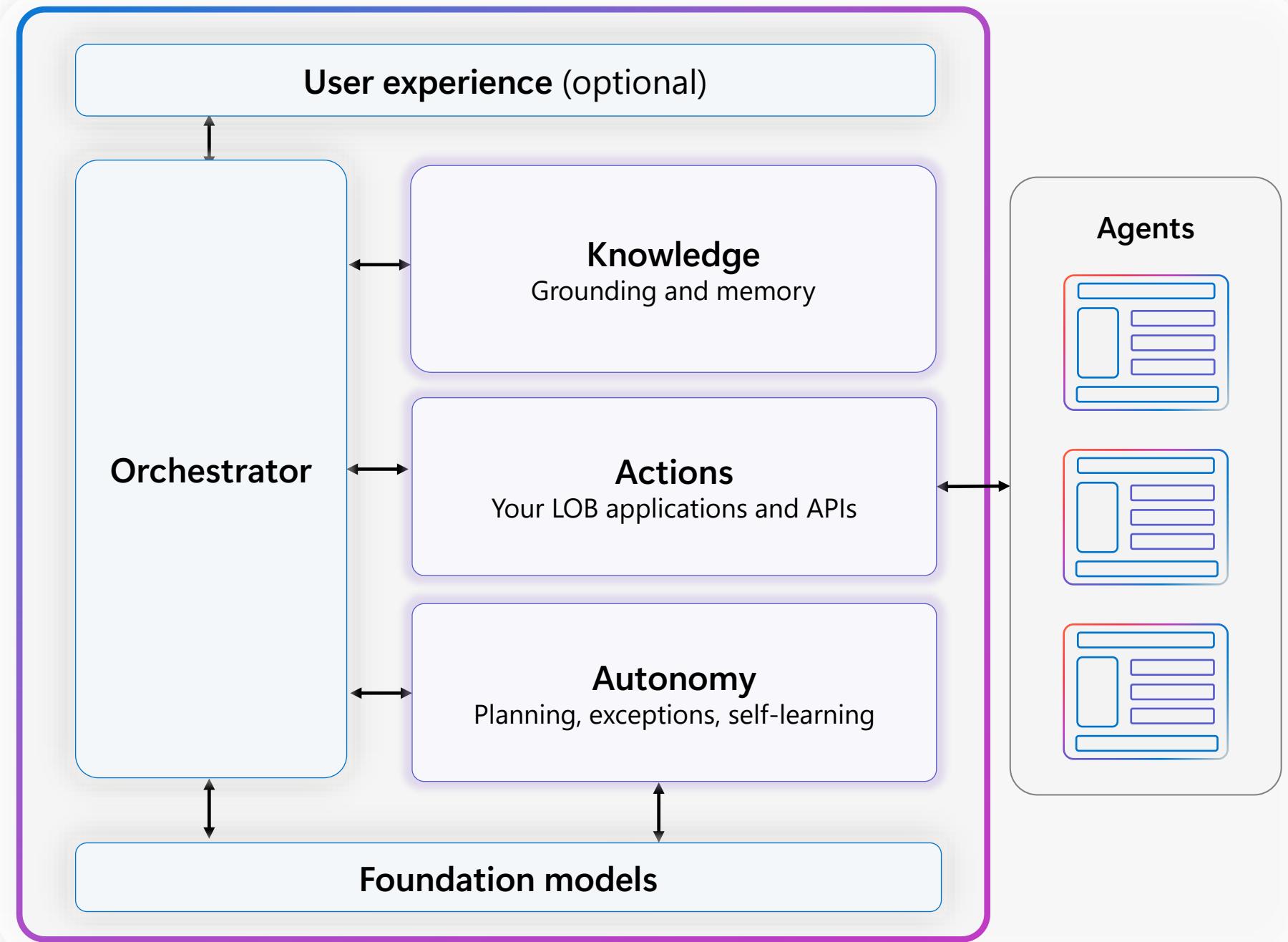
Data Source integration - Example



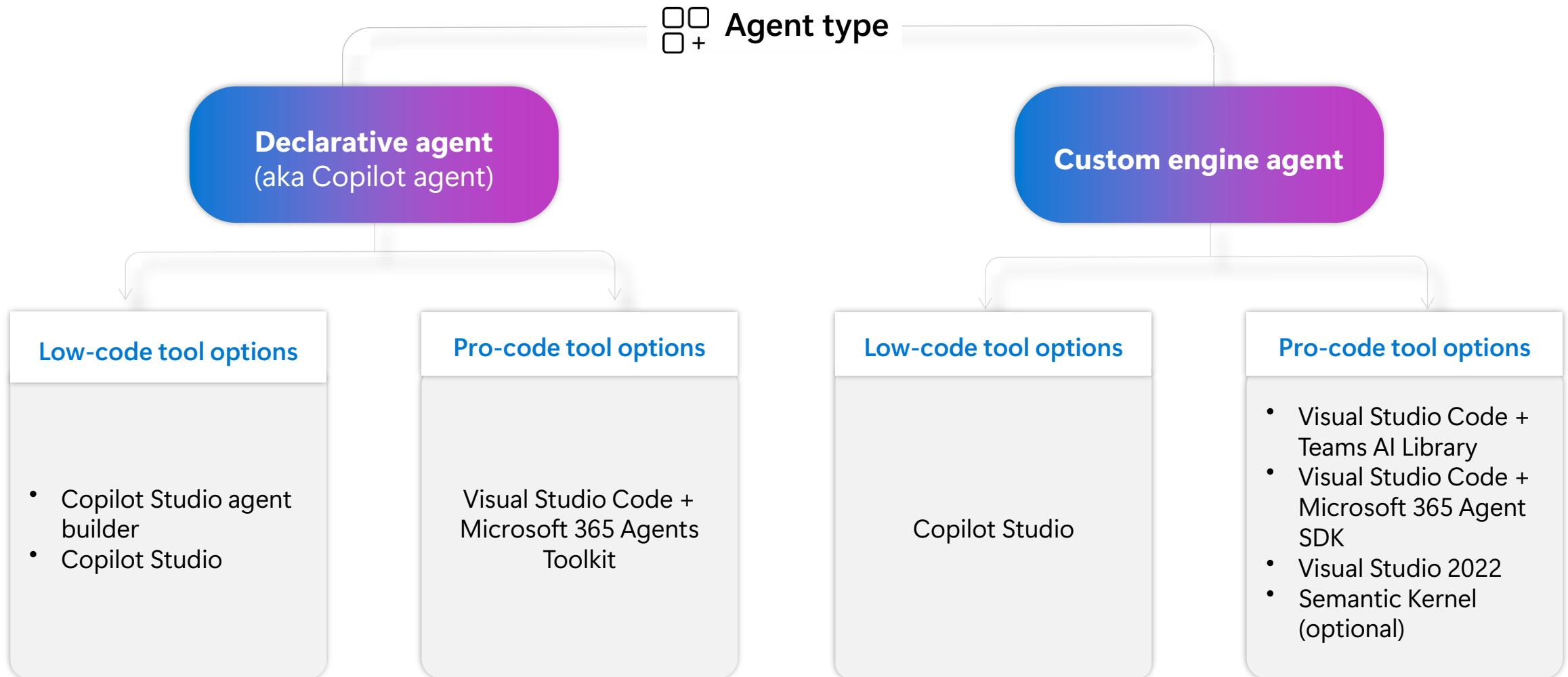
Define your solution- Choose your extensibility option



Agent anatomy



Microsoft 365 Extensibility - Agent Types and approaches



Building declarative agents for Microsoft 365 Copilot



Declarative agents for Microsoft 365 Copilot

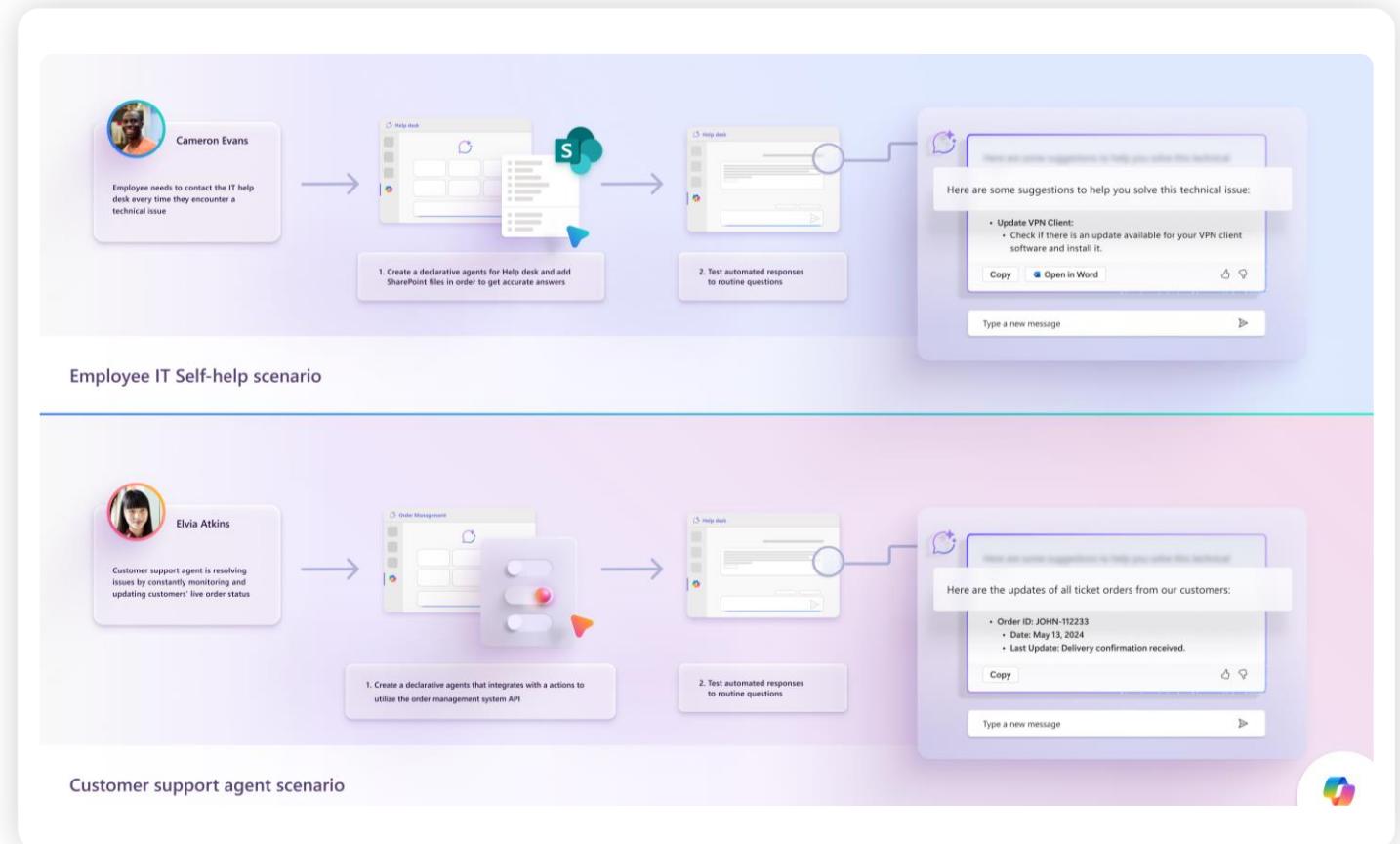
Customize Microsoft 365 Copilot to help you meet the unique business needs of your users

You provide the instructions, actions, and knowledge to tailor Copilot for your business scenarios

Run on the same orchestrator, foundation models, and trusted AI services that power Microsoft 365 Copilot

Benefits

- Familiar UI
- Enhanced enterprise knowledge
- Seamless integration with plugins
- Prioritized security, privacy, and compliance



Declarative agent experience in Microsoft 365 Copilot

1 Open Copilot and select your declarative agents

2 Take a look at the conversation starters

3 Ask declarative agents what it can do

4 Chat with your declarative agents by asking related questions to its purpose

1 Microsoft 365 Copilot interface showing various declarative agents like Product support, Catch up, Break the ice!, etc.

2 Microsoft 365 Copilot interface showing conversation starters like Get calendar info, Prep for that meeting, Get the gist, etc.

3 Microsoft 365 Copilot interface showing a detailed list of tasks for the Product support agent, such as setting up Cortico Electronics products, troubleshooting issues, offering repair information, generating creative content, and more.

4 Microsoft 365 Copilot interface showing a detailed response to the question "Tell me about the Mark8", providing specifications like Takeoff Weight, Dimensions Folded, Max Ascent Speed, Max Descent Speed, Max Horizontal Speed, Max Takeoff Altitude, Max Flight Time, Max Hovering Time, and Max Flight Distance.

Extend Microsoft 365 Copilot

Copilot Studio agent builder allows you to build an agent directly in Copilot Chat and SharePoint

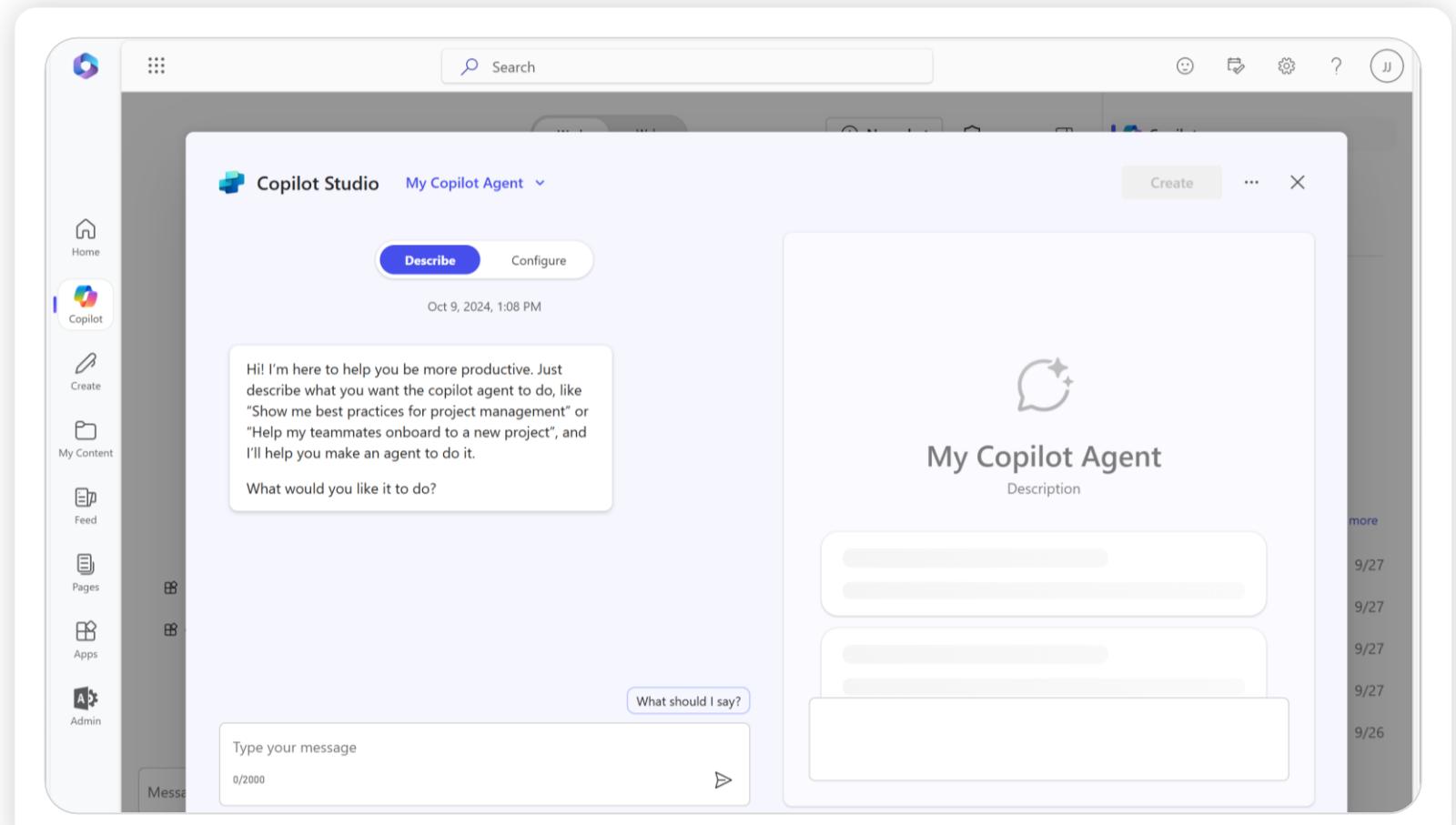
Empower end users to **build knowledge-only agents** using natural language

Get started quickly with **agents pre-built for you** in Copilot Chat

Take your agent a step further by **adding actions** in the full Copilot Studio experience

Seamlessly **share your agent** across your organization with shareable links

Ensure compliance with **centralized management** tools



Microsoft 365 Copilot Chat

Agent builder in Copilot Chat

The screenshot shows a Microsoft Edge browser window with the URL <https://www.microsoft365.com/M365/Chat>. The page title is "Copilot Studio" and the subtitle is "Field Service agent". A "Describe" button is visible. The date and time are September 13, 2024, 10:12 AM. The conversation starts with the AI saying:

Hi, I'm here to help you build an agent.
Describe what you'd like your agent to do, and I will help create a name, description, and instructions.
Remember: You can change these at any time.

Your name is "Field Service agent" and you assist with on-site repair visits. You provide step-by-step instructions based on product knowledge.

Great! I'll use the name you provided.
Where can I get information?

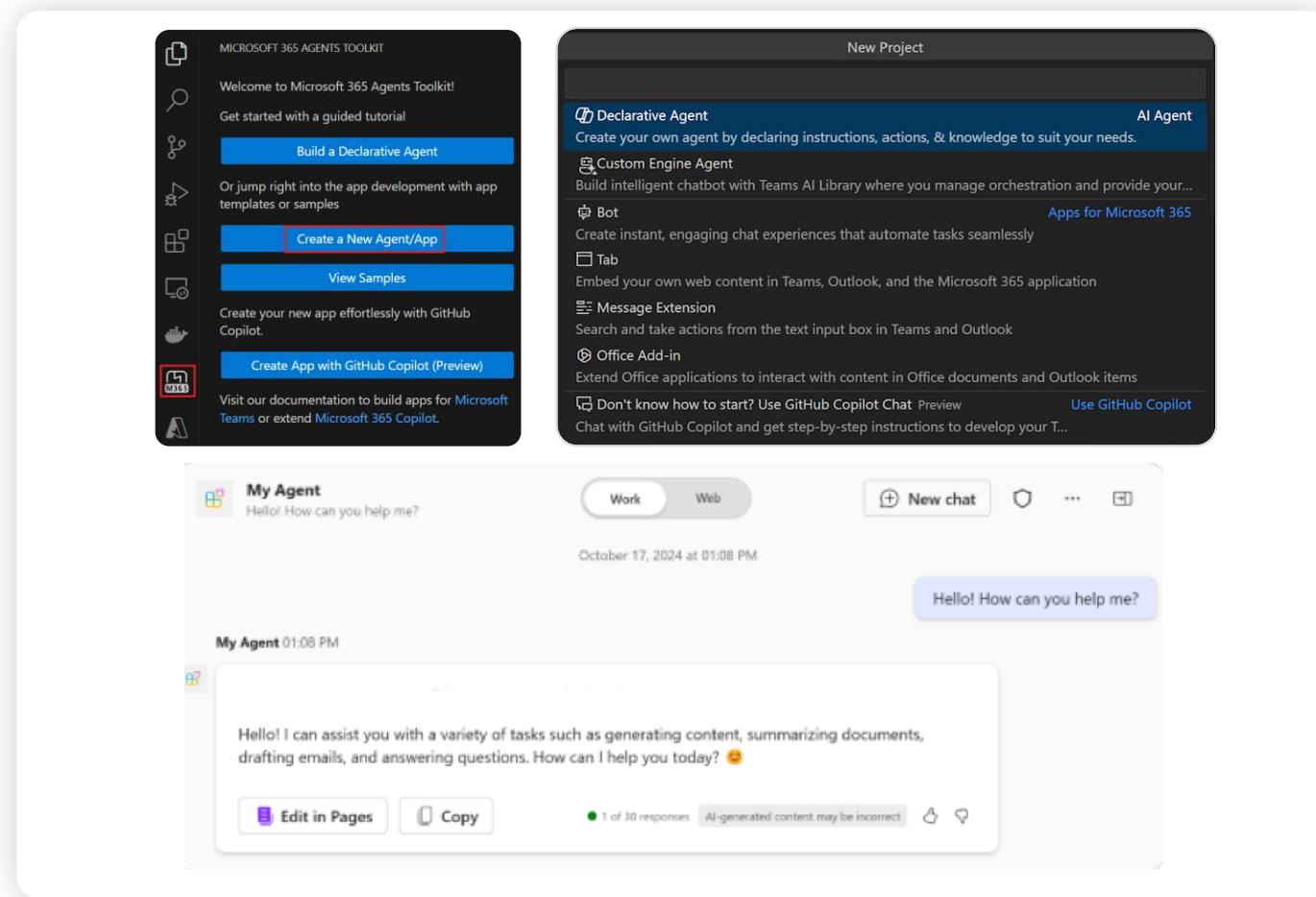
boulderinnovations.sharepoint.com/sites/productinformation

Great! Do you have any instructions for how your copilot should assist, for example a specific tone?

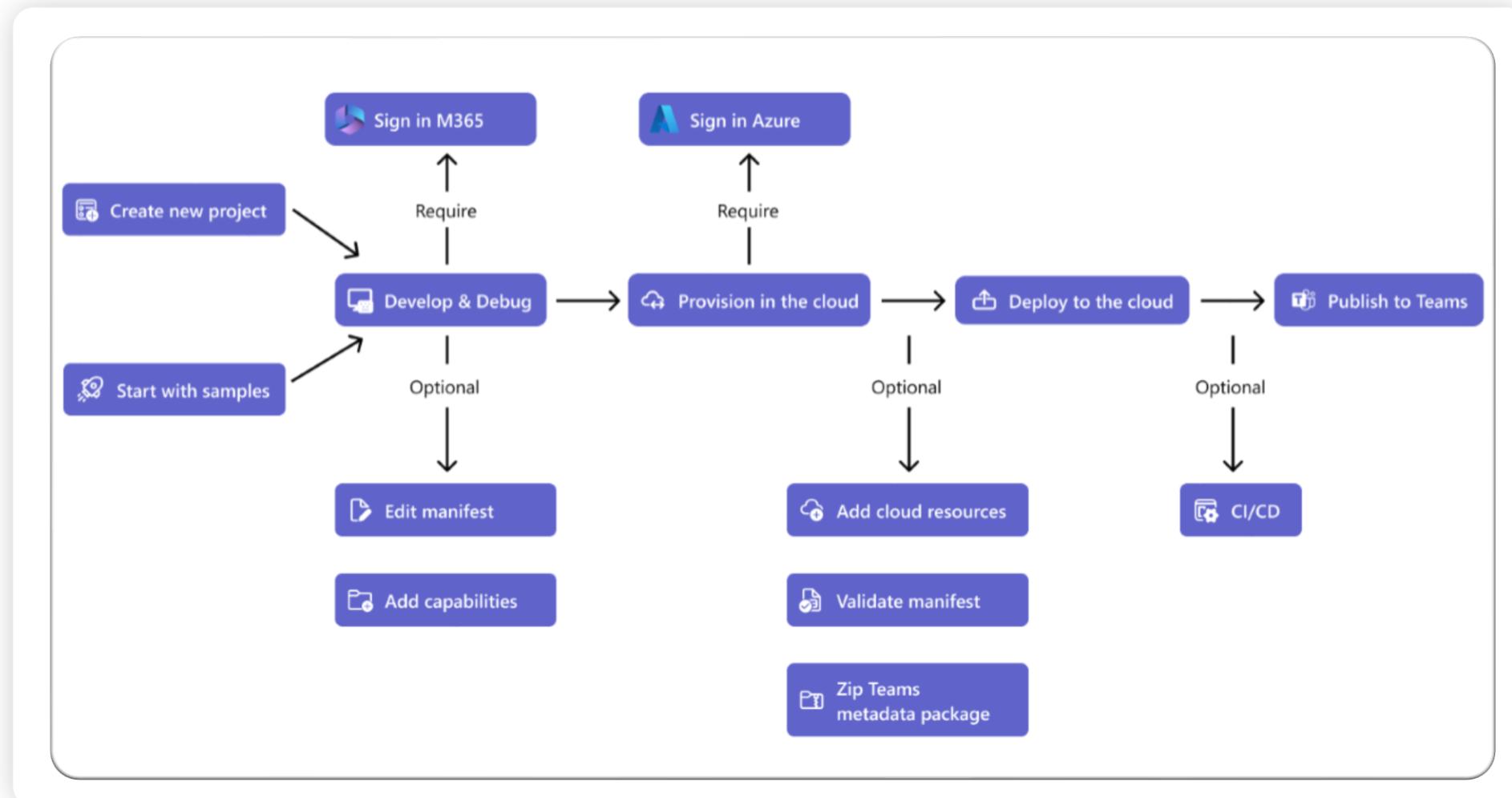
Describe how your agent should behave

The sidebar on the left includes icons for Home, Copilot (selected), Pages, Create, OneDrive, and Apps. The bottom right corner shows a cursor icon.

Create declarative agents using Microsoft 365 Agents Toolkit



Microsoft 365 Agents Toolkit Overview



Build custom agents with Copilot Studio - Overview



Agent tooling

Copilot Studio +
Visual Studio Code / GitHub,
all powered by Azure AI Foundry



Copilot Studio

Low-code managed environment for
AI business process automation



Visual Studio / GitHub

Pro-code environment for commercial
AI solutions



Azure AI Foundry

Comprehensive platform of capabilities, models, and tools to design,
customize agents, and manage AI applications and agents



Microsoft Fabric

Complete data platform to accelerate AI innovation



Copilot Studio

Copilot Studio is a low code tool for building agents and extending Microsoft 365 Copilot

The screenshot shows the Copilot Studio web interface. At the top, there's a search bar with placeholder text "Describe your agent to create it" and a button "Create". Below the search bar, there's a section titled "Recent" with a table showing two projects: "Microsoft 365 Copilot" (Type: Microsoft) and "Contoso Bank" (Type: Agent). The "Contoso Bank" project was modified by Pedro Armijo 2 months ago and published 2 months ago, owned by Mona Kane. There are "See more" buttons for both sections. Below the recent projects, there's a section titled "Start with a template" featuring six templates: IT Helpdesk, Safe Travels, Store Operations, Sustainability Insights, Team Navigator, and Voice. Each template has a small icon and a brief description. At the bottom, there's a "Learning resources" section with links to "Quick start: Create and deploy an agent", "Documentation", "Responsible AI FAQs", "Extend your agents with plugins and extensions", "Quick start: Use Generative AI in an agent", "Support community", and "Try autonomous agents".

Meet your users where they already are

Access everything in one place

Automate your workflows

Integrate with your external apps

Connect to your data in Microsoft 365

Explore agents prebuilt for you

Choose from a variety of agents that are ready to deploy or customize further to fit your business needs

Copilot Studio



Safe travels



Team navigator



Self-help



IT helpdesk



Case management



Leave management



Awards & recognition



Weather



Wellness check



Benefits



Inclusivity



Financial insights



Citizen services



Sustainability insights

+ more coming soon

Copilot Chat



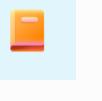
Idea Coach



Prompt Coach



Career Coach



Learning Coach

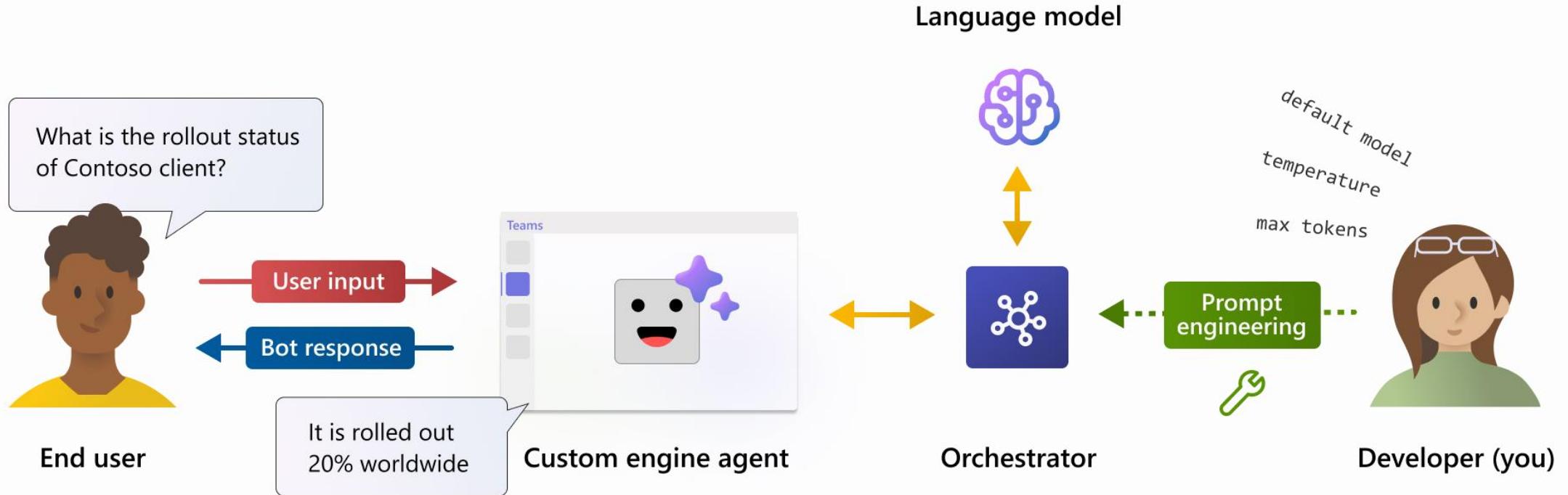


Writing Coach

+ more coming soon

* Some listed options may only be available in preview

Custom engine agents for Microsoft 365



Build Custom engine agents

Full-custom option
Teams AI library and Microsoft 365 Agents Toolkit

Low code option
Microsoft Copilot Studio

Use VS Code and Teams AI library for building custom engine agents

Truly conversational Teams apps built with purpose too leverage apps skills



Teams-centric interface to LLMs



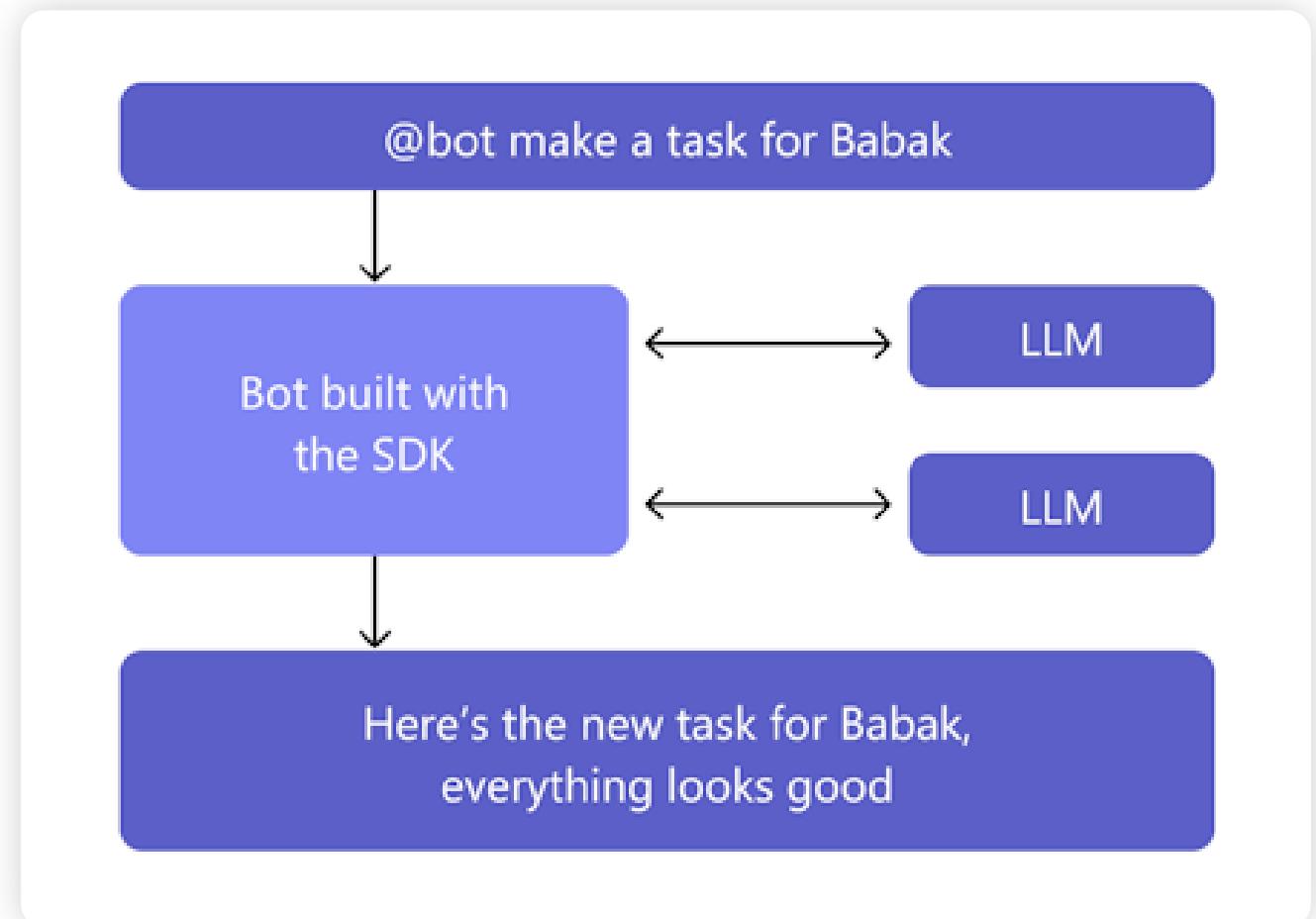
Built-in natural language processing, akin to ChatGPT, with **prompt engineering** and **moderation**



Planning engine that guides conversation to extract **intents** and maps to app actions



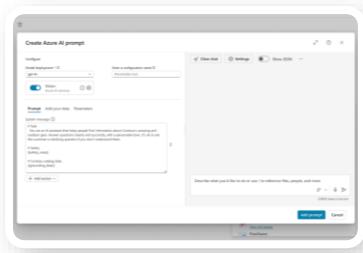
LLM modularity-developers can use any LLM they choose



Use Microsoft Copilot Studio to build custom agents

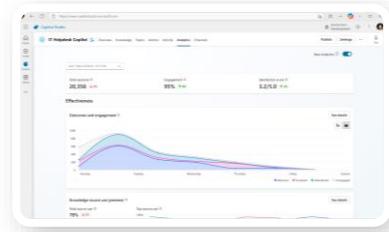
Integrate with AI services

Integrate with Azure AI Studio, Azure Cog Services, Bot Framework and other Microsoft conversational services



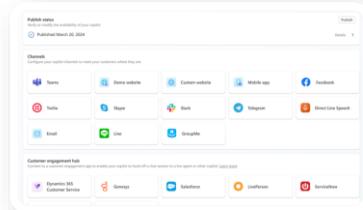
Monitor and improve

Access rich out-of-the-box insights and analytics

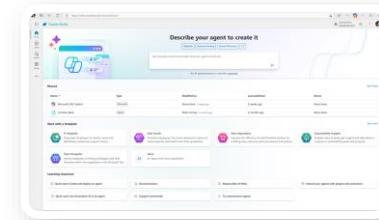


Publish to multiple channels

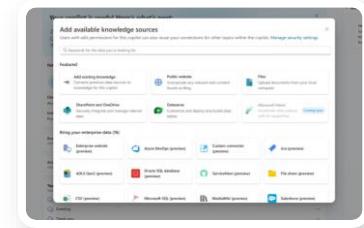
Publish in 20+ languages and deploy to your channel of choice with a single click, including Microsoft 365 Copilot



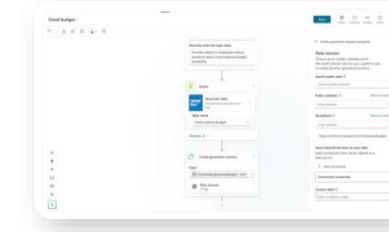
Design, enhance, and manage agents
Build an agent and go live quickly, all from one easy-to-use, E2E SaaS product



Build & Publish



Chat over knowledge with gen AI
Get enterprise-specific answers using your files, websites, Dataverse, third-party apps and more

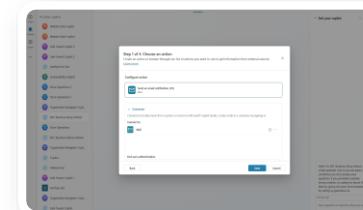


Create specific topics

Supplement gen AI responses with **specific, curated topics** for when you want more control

Copilot Studio

Analyze & Improve



Build actions

Create actions and use **pre-built connectors** or Power Automate to call your backends and APIs or complete long-running tasks

Why organizations are using Copilot Studio



Time to market

with a managed SaaS service and no infra to deploy



ROI

with rapid prototyping, deployment and cost savings



Enterprise Knowledge

with easy access and control of multiple knowledge sources



Connectors

with 1,400 connectors to external applications and systems



Security & Governance

State of the art observability, governance, and control for agents.

More on Copilot Studio implementation guidance coming up on Day 2

Copilot Studio

Autonomous Agent

The screenshot shows the Copilot Studio web application. At the top, the URL https://www.copilotstudio.microsoft.com is visible. The main header is "Copilot Studio". Below it, a navigation bar includes "Home", "Create", "Agents" (which is the active tab, indicated by a blue underline), and "Library". On the left, a sidebar lists "Agents" and "...".

The main content area is titled "Engagement Management Agent" with a sub-header "Overview". A sub-navigation bar below the main header includes "Overview", "Knowledge", "Topics", "Actions", "Activity", "Analytics", and "C".

A prominent message reads: "Your agent is ready! Here's what's next:" followed by three steps:

- Add triggers & capabilities so your agent can do things for you
- Build topics to focus and guide how your agent answers
- Publish your agent so others can use it

Below this, the "Details" section shows the agent's name: "Engagement Management agent".

The "Description" section states: "You are an agent that helps to evaluate and staff incoming engagement requests from McKinsey".

The "Instructions" section contains five numbered steps:

- Analyze the incoming email you received and extract the following information a. client's name, engagement scope, industry, start date, company name.
- Check Engagement Info a. Use Check engagement info action to verify that all necessary information is provided in the request. b. If all the necessary is not provided in the request, send email to the client to request all the information and STOP further execution.
- Get Industry Taxonomy a. Use the Get Industry Taxonomy action to get the taxonomies and the client and engagement under the correct industry sector.
- Get Engagement Team Details a. Use the Get Engagement Team Details action to get information about the team that handles new engagements. This includes information about the Internal Engagement Director.
- Retrieve Partner Information and Assign engagement a. Use Get Partner Information action to get partner details. b. Assign suitable partner based on their role specialization and location. c. Use

Agent Governance - Overview



Copilot Control System



Enterprise Data Protection

Data is encrypted, isolated, and security enforced at each step

Label inheritance and data loss prevention policies are persistent

Responsible AI approach protects against AI risks like prompt injection



Access Controls

Control who can create, share and use agents

Set policies and information labels to discover, classify, and protect sensitive data

Manage users and monitor Copilot agent usage



Agent Governance

Track and manage agents from creation to end of life at scale

Set policies on resource usage, access and publishing

Ability to audit events and get operational & application insights

Agent building alignment guidance – Build vs Buy



Copilot Studio is also available as a consumptive service

Copilot Studio became a pay-go service

Full feature parity across message pack and metered offering

Burn rate parity across message pack and metered offering

Leverage your existing Azure commitments (MACC) with the Pay-as-you go meter

New!

Message packs

- ✓ Tenant-wide message packs
- ✓ 25,000 messages/month
- ✓ \$200 per pack/month

Pay-as-you-go

- ✓ New PAYG meter
- ✓ \$0.01/message
- ✓ Can decrement MACC

AI Alignment Guide – Build vs Buy

I want a generative AI solution				
I want out-of-the-box solutions that work with my existing data estate for my employees		I want to build a solution with custom data and UI, and deploy internally or externally		
	I want insights and actions for specific roles that integrate with existing system	I want insights and actions on M365 data and plugins	I want to customize agents with natural languages and use a generative orchestrator	I want full control, choice of model, and customize with code
	 			
Licensing	Per User	Per User*	PAYG or Capacity Pack	Azure Services Meters
Persona	Line-of-Business Owner	Knowledge Worker	Power User	Developer
Out-of-box Value	★★★	★★★	★★	★
Customization	★	★	★★	★★★



Integrate with Fabric + Purview



* Microsoft 365 Copilot Chat advanced Agent Capabilities requires Copilot Studio Messages

Get started today

 Learn more



Learn more

Website

aka.ms/copilotstudio

Blog

aka.ms/copilotstudio-blog

Demo

aka.ms/copilotstudiodemo

Product documentation

aka.ms/copilotstudiodocs

Learning resources

aka.ms/copilotstudiolearn

Community page

aka.ms/copilotstudiocommunity

Implementation guide

aka.ms/copilotstudioimplement

Looking for an in-depth Copilot Studio implementation guide?

Walk through in-depth guidance, best practices, and reference architectures

- An overview of the project
- Architecture overview
- Language
- AI functionalities
- Integrations & channels
- Security, monitoring & governance specifications
- Application lifecycle management
- Analytics & KPIs
- Gaps & top requests
- Dynamics 365 Omnichannel (optional)

Engagement and outcomes

How do you track engagement rates & session outcomes?

Example answer (you can delete this)

- Every conversation path, including Generative Answers ones, end with the End of Conversation topic.
- End of Conversation topic is customized to make the resolution validation as simple as possible for the end-user.
- Conversation outcomes are also set at specific node levels (in the YAML).

Why do we ask these questions?

- Tracking conversation engagement and outcomes is crucial to measure the copilot performance metrics and spot areas for improvements in the analytics dashboard.
- A conversation with a Copilot Studio copilot can generate one or multiple sessions.
- A conversation can have multiple sessions when a user has new questions after an initial conversation completed (1).
- Sessions are either Unengaged or Engaged. Unengaged sessions always have an outcome of None.
- A session is engaged (1) by either triggering a custom topic or the Escalate topic.
- Engaged sessions outcome can be either:
 - ✓ Abandoned
 - ✓ Resolved
 - ✓ Escalated
- It's important to end conversation with the End of Conversation topic (2) so that the end-user can confirm their issue was resolved or not (and potentially escalate).
- The Confirmed Success topic displays a CSAT survey (3) to capture a 0-5 score.
- A 'conversationOutcome' can also be set at the node level in the code editor view.

Useful resources:

- Key concepts – Analytics
- Measuring copilot engagement
- Measuring copilot outcomes

 [Learn more](#)

Hands-on Labs





Showcasing AI Potential with Agentic AI

⌚ Day 1 (5 hours)



Module 1: Innovate with Microsoft 365 Copilot and agents

- M365 Copilot and agents
- How Copilot works
- Semantic index for Copilot
- M365 Copilot Chat
- Agents Use cases
- New agents in Microsoft 365
- Unlock more value with SharePoint agents

Module 2: Extend Microsoft 365 Copilot with Agents

- Microsoft 365 Extensibility Planning and approach
- Declarative agents and agent tooling
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- Build declarative agents with Microsoft 365 Agents Toolkit
- Build custom agents with Copilot Studio
- Autonomous agents overview
- Agent Governance - Overview
- Gen-AI decision guide – when to build, buy or extend

⌚ 2 hours



Hands-on Labs

- Explore Copilot Studio Agent Builder
- Build HR Assistant Agent with Copilot Studio
- Incorporate actions in HR Agent
- Enable Autonomous Capabilities in Microsoft Copilot Studio for HR Activities

⌚ 3 hours



Deal-Ready Assessment

Objective: Evaluate participants' ability to identify customer needs, effectively demonstrate AI value propositions, and articulate business benefits of Copilot and Agentic AI solutions in an industry scenario.

Live- Instructor led

On demand



Hands-on Lab



Please note that the labs are only open to a limited number of Microsoft partner participants and are offered on a **first-come-first-served basis**.

Step 1 : Click on **Launch** in the event curriculum to launch your labs

Date/Time (PDT)	Title	Track	ICS Training Bag
On-Demand	Spektra Hands-on lab: Agentic AI Accelerator AMER (PDT)	AMER (PDT)	Launch

Step 2 : Join the Live session for Lab Support and Q&A Session

Lab Support and Q&A Lab Support and Q&A **31** **Sign Up** ▲

Abstract: We invite you to join this session to begin your labs. The Trainer will provide you with instructions, demonstrate live scenarios and respond to your questions.

Sign-up and launch Hands-on Labs

Note: Please register and launch the lab only when the hands-on lab session is about to begin (not at the start of the day)



- Click the link to complete your registration -
<https://bit.ly/3Hfoc0>



- Enter the Email id and **Activation code** (based on your time zone).

IST	AI2084IST
BST	AI2084BST
PDT	AI2084PDT



- Select the preferred language, accept the **Usage policy** and select **Submit** to complete registration.



- Once registration is completed, click on **Launch Lab** to activate the workshop.

Register Now

Email*

Activation Code*

Choose one lab based on your preferred language. Selection is final; other labs will be locked.*

Azure Agentic AI Accelerator Workshop - English
 Azure Agentic AI Accelerator Workshop - Spanish
 Azure Agentic AI Accelerator Workshop - Japanese
 Azure Agentic AI Accelerator Workshop - Korean
 Azure Agentic AI Accelerator Workshop - Simplified Chinese
 Azure Agentic AI Accelerator Workshop - Traditional Chinese
 Azure Agentic AI Accelerator Workshop - Portuguese

Microsoft or training providers may use your contact information to provide updates and special offers about Microsoft Azure and other Microsoft products and services. You can unsubscribe at any time. To learn more, you can read the [Privacy Policy](#)

Please click on the 'Launch Lab' button to activate your lab environment.

FAQs - Lab Experience

Lab Guide (First Tab)

Provides step-by-step instructions for performing the lab exercises.

The screenshot shows the 'Guide' tab selected. It displays the 'Azure Agentic AI Workshop Overview' which describes the workshop series. Below it, the 'Objectives' section lists several learning goals:

- Learn to design and deploy AI agents with Microsoft Copilot Studio and Azure AI services.
- Gain hands-on experience in multi-agent orchestration using the Azure AI Agent Service SDK and Semantic Kernel.
- Build custom Retrieval-Augmented Generation (RAG) applications with Azure AI Foundry and integrate Semantic Kernel plugins.
- Evaluate, fine-tune, and deploy AI models using Prompt Flow for real-world use cases.
- Construct intelligent escalation systems using conversational interfaces, event-driven architecture, and AI-powered workflows.

Environment (Second Tab)

Lists the credentials required to access the environment and the lab

The screenshot shows the 'Environment' tab selected. It contains a table of 'Auth Fields' with two entries: 'Username' (odl_user_1734975@msa) and 'Password' (xtnt26BED*9K), both highlighted with a red box. Below the table, it says 'Resource Group : lab-vm' and lists two items: 'Deployment ID' (1734975) and 'Labvm Admin Username' (demouser).

Auth Fields	Value	Action
Username	odl_user_1734975@msa	copy
Password	xtnt26BED*9K	copy

Resources (Third Tab)

Allows you to manage resources (e.g., Start, Restart, or Stop VMs.)

The screenshot shows the 'Resources' tab selected. It displays a table of 'Virtual Machines' with one entry: 'labvm-1734975' which is 'VM running'. The 'Actions' column for this row is also highlighted with a red box.

Name	Status	Actions
labvm-1734975	VM running	Start Stop Restart Delete

FAQs – Lab Experience

Help (Fourth Tab)

Help section to troubleshoot basic or known issues related to the workshop

The screenshot shows the 'Help' tab selected in a browser interface. The main content area is titled 'Troubleshooting known issue'. It lists a common issue 'Unable to copy paste' with a 'Recommended quick fix' that involves clicking on an SSL certificate symbol, opening a pop-up, and changing a clipboard dropdown to allow access. Below this, it says 'Once clipboard access is enabled, you can use the following shortcuts to paste inside the VM based on the VM OS:'. A table at the bottom provides these shortcuts:

Attendee OS	VM OS	Copy Shortcut	Paste Shortcut
Windows	Windows	Ctrl + C	Ctrl + V

VM native Clipboard

Enable clipboard which helps to copy paste the values from Lab Guide to VM

The screenshot shows the 'VM Native Clipboard' toggle switch being turned on. The main content area is titled 'Troubleshooting known issue'. It lists a common issue 'Unable to copy paste' with a 'Recommended quick fix' that involves clicking on an SSL certificate symbol, opening a pop-up, and changing a clipboard dropdown to allow access. Below this, it says 'Once clipboard access is enabled, you can use the following shortcuts to paste inside the VM based on the VM OS:'. A table at the bottom provides these shortcuts:

Attendee OS	VM OS	Copy Shortcut	Paste Shortcut
Windows	Windows	Ctrl + C	Ctrl + V

Access Lab Now – Alternate method

Access the lab in-case of accidental closure of the browser tab

The screenshot shows the 'Access Lab Now' alternate method page. It includes a title 'On Demand Lab: GitHub Copilot Innovation Workshop', instructions to use the provided details for future lab access, and a table for license information. At the bottom, there is a large blue button labeled 'Access Lab Now'.

On Demand Lab: GitHub Copilot Innovation Workshop

Please use the below details for future use in your labs:

JumpVM-RG-1487427 :

Name	Value
vm Admin Password	[REDACTED]
windows VM DNS Name	[REDACTED]
gitHub User Email	[REDACTED]
gitHub User Password	[REDACTED]

Please use the below Licenses details if required during the lab:

Licenses Type	Licenses
GCW - GitHub UserName	[REDACTED]
GCW - GitHub Password	[REDACTED]

Access Lab Now

If you have any questions, please contact us at cloudlabs-support@spektrasyystems.com

This email is sent by Spektra Systems LLC, on behalf of Microsoft.
You are receiving this message as you have registered for On Demand Lab at <https://experience.cloudlabs.ai>.

Troubleshooting common issues

Get guidance to troubleshoot some of the most common errors you may face while performing your labs.

<https://docs.cloudlabs.ai/troubleshooting/Overview>

The screenshot shows a web page titled "Overview" under the "Common Troubleshooting" section. The page includes a sidebar with navigation links for Introduction, Learner, Instructor, Admin, Lab Requester, MCT Pass Program, and Common Troubleshooting (which is currently selected). The main content area displays a table of common issues and their corresponding guides. At the bottom, there are navigation links for "Previous" and "Next".

Common Troubleshooting

Overview

Common Issues	Guide
Troubleshooting Checklist	Start Here
Fix "Websocket connection blocked" to access HTTPS over RDP	Start Here
Copy & Paste functionality not working in lab environment	Start Here
Unable to launch Cloud Shell	Start Here
Add Safe Sender	Start Here
Login with Azure AD - Consent Experience	Start Here

Previous [« Getting Started](#)

Next [RDP: Known Functionality Issues »](#)

Showcasing AI Potential with Agentic AI

⌚ Day 1 (5 hours)



⌚ 2 hours

Module 1: Innovate with Microsoft 365 Copilot and agents

- M365 Copilot and agents
- How Copilot works
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- Agent Governance - Overview
- Gen-AI decision guide – when to build, buy or extend



⌚ 3 hours

Hands-on Labs

- Explore Copilot Studio Agent Builder
- Build HR Assistant Agent with Copilot Studio
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Deal-Ready Assessment

Objective: Evaluate participants' ability to identify customer needs, effectively demonstrate AI value propositions, and articulate business benefits of Copilot and Agentic AI solutions in an industry scenario.

Live- Instructor led

On demand



Showcasing AI Potential with Agentic AI

⌚ 45 mins

Deal-Ready Assessment

Objective

Evaluate participants' ability to identify customer needs, effectively demonstrate AI value propositions, and articulate business benefits of Copilot and Agentic AI solutions in an industry scenario.

Assessment Components:

This assessment will consist of **two parts**:

- **Part A:** Customer scenario with business background and challenges, requirements and customer objections
- **Part B:** 20 Scenario based Knowledge Assessment (Multiple-choice/Matching/Short-answer) questions

Success criteria

Participants demonstrate their readiness, to leverage Copilot solutions in presales scenarios effectively, passing the assessment with a minimum score of 70%.



Customer Overview

Customer Overview is a comprehensive report detailing historical sales data, current market trends, and future projections for a specific customer segment. It includes a detailed analysis of product performance, customer satisfaction levels, and potential growth opportunities. The report is designed to provide stakeholders with a clear understanding of the customer's needs and the company's strategic position.

How to take
Deal-ready assessment



Register on LevelUp
skillupwithlevelup.com



Use Access code – **OKDV-KHFL**



Take the Deal-ready assessment



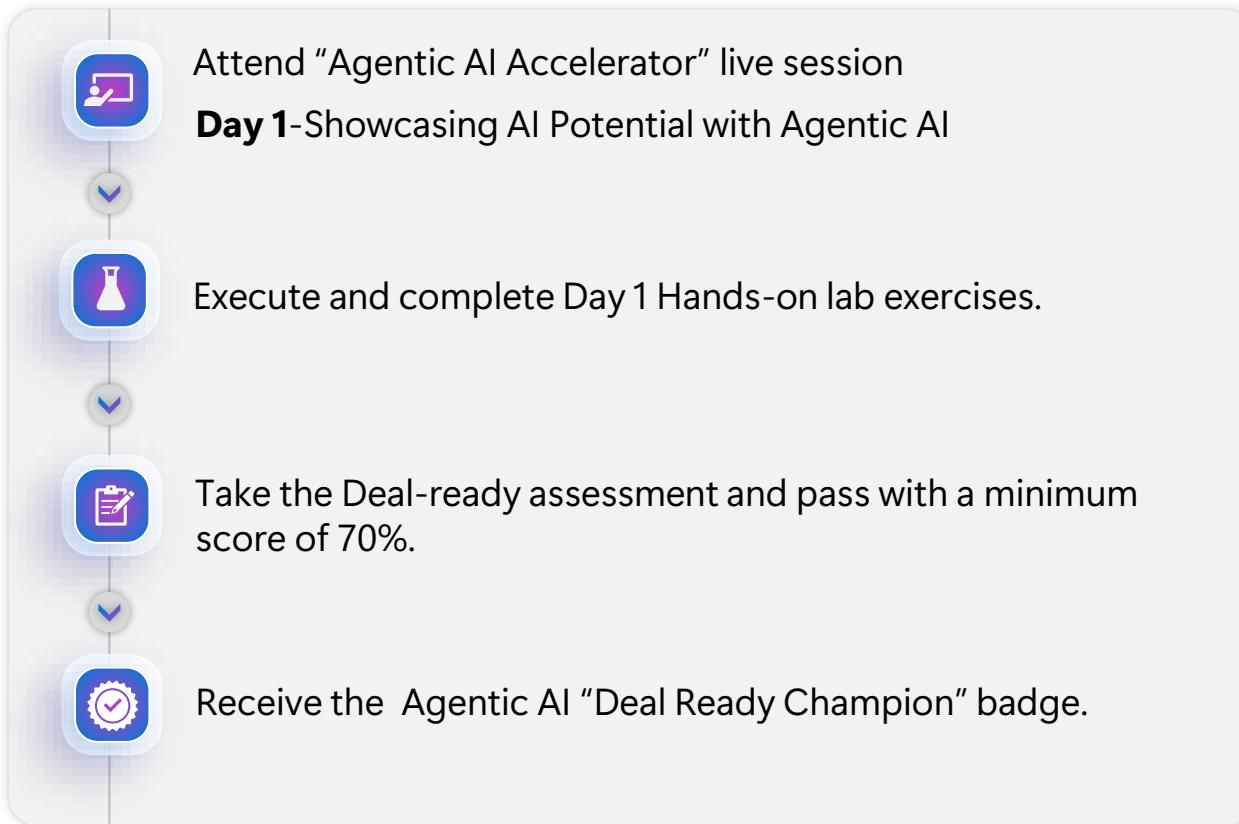
Receive the Agentic AI Deal-ready completion badge*

*badges will be awarded if the qualification criteria is met



Get Agentic AI “Deal Ready Champion” badge

Badge Qualification criteria



Receive the Agentic AI “Deal Ready Champion” badge by **30th June 2025**

Continue your deal-ready learning journey ...



Microsoft Partner Project Ready

**Build and extend AI-powered
agents with Copilot Studio**

Duration: 3 Days (4hrs/day)



Microsoft Partner Project Ready

**Build and Extend your own agents
using pro-code capabilities**

Duration: 3 days (4hrs/day)



Explore and Register on LevelUp at
skillupwithlevelup.com

Coming up tomorrow...

Day 1

Showcasing AI Potential with Agentic AI

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Hands-on Labs

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- Incorporate actions in HR Agent
- Enable Autonomous Capabilities in Microsoft Copilot Studio for HR Activities

Day 2

Architecting Success with Multi-Agent AI Systems

Module 3: Customize Agents with Gen AI in Copilot Studio

- Customizing your agents – Orchestrator, UI, Knowledge, Actions, Autonomy
- Copilot Studio implementation guidance for architects
- Generative AI in Copilot Studio
- Copilot Studio + Power Platform
- Building voice-enabled agents
- AI Foundry integration
- Developing agents using Microsoft 365 Agents SDK

Module 4: Innovate with Azure AI Platform

- How language models work
- AI Foundry and SDK introduction
- AI Foundry Model Catalog
- Azure AI Services
- Azure OpenAI Service and model guidance
- Models-as-a-Service
- Azure AI Foundry Agent Service
- Safeguard with Trustworthy AI

Hands-on Labs

- Setup AI Project and perform Chat Completion from VS Code
- Build a simple AI Agent
- Develop a multi-agent system

Day 3

Multi-Agent AI: Advanced Agent Dev in Azure AI Foundry

Module 5: Customize, orchestrate and experiment with Azure AI Foundry

- Retrieval Augmented Generation (RAG)
- Customizing models – Fine tuning, distillation
- Responses API (preview)
- Azure AI Foundry Agent Service - Orchestrate and debug AI workflows

Module 6: Build your own multi agents with Semantic Kernel or AutoGen

- Multi-agent applications
- Understanding Semantic Kernel
- Understanding AutoGen Agents Framework
- Multi-Agent Collaboration & Orchestration with AutoGen / Semantic Kernel

Hands-on Labs

- Set Up Azure AI Foundry SDK and Provision Resources
- Build a Retrieval-Augmented Generation(RAG) Pipeline
- Evaluate and Optimize RAG Performance
- Semantic Kernel Fundamentals
- Semantic Kernel Plugins

Day 4

Enterprise Grade: Optimization and production at scale

Module 7: Enterprise grade production at scale

- Scaling challenges and agent controls
- Manage AI performance in production
- Observability Tools
- Enabling Enterprise governance and management
- Enterprise grade security and data protection
- Monitoring and observability

Module 8: Advanced AI risk evaluation and mitigation

- Identifying risks
- Azure AI Content Safety
- Evaluation and GenAIops
- Identity and access management
- Network Security for AI apps
- Continuous security for AI

Hands-on Labs

- Understanding the Lifecycle of Flow Development
- Building and Customizing Prompt Flows
- Evaluation Flow Setup
- Fine-Tuning Prompts for Optimal Performance
- Implementing Chat Flow and Tool Integration
- Ensuring Responsible AI Practices with Content Safety



Thank You