

Copilot Studio Overview

Agenda

- 01 Introduction
- 02 Capabilities
 - 2.1 Design
 - 2.2 Enhance
 - 2.3 Manage
- 03 Licensing
- 04 Use cases
- 05 Getting started

What is an agent?

Agents are AI assistants that can help **optimize business processes** and **enhance productivity** using large language models and generative AI.

Publish to...

Your applications

Deploy agents to your website and other line of business applications



Microsoft 365 Copilot

Add agents that give Copilot focused knowledge and new skills



Power Platform

Extend Power Platform with agents that transform your low code solutions.



Dynamics 365

Build agents that integrate and improve business processes

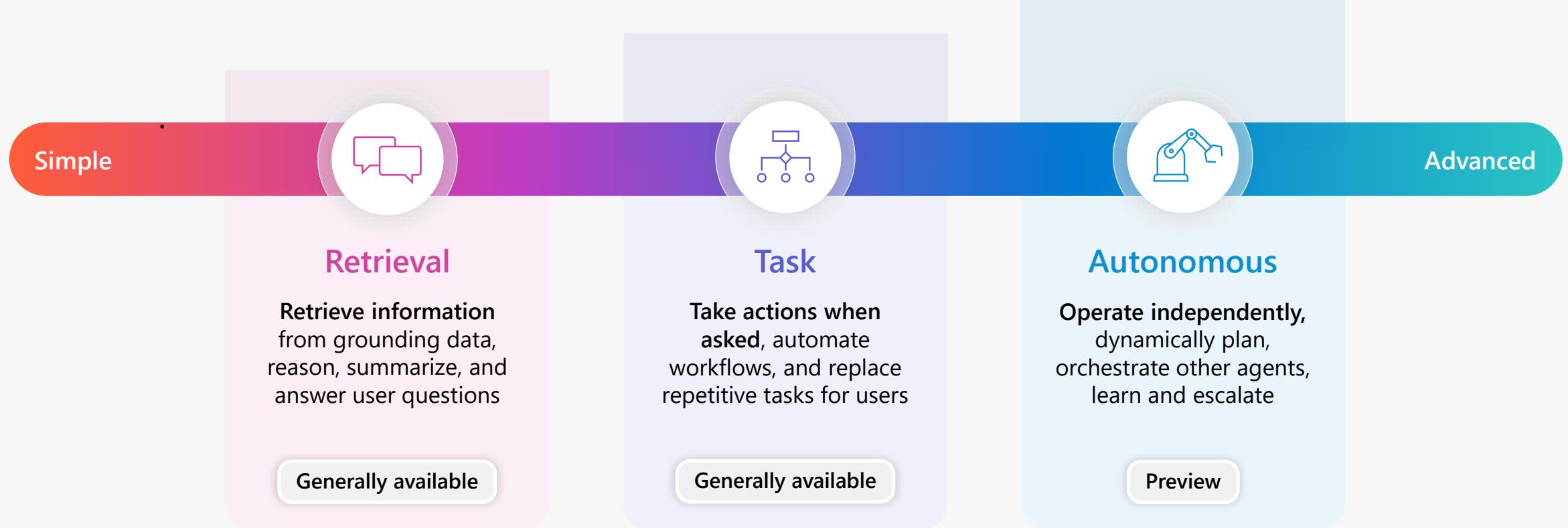


Dynamics 365
Sales

Dynamics 365
Finance

Dynamics 365
Customer Service

Spectrum of agents



← Agents vary in levels of complexity and capabilities depending on your need →



Copilot Studio

Copilot Studio is a platform to build agents that **extend Microsoft 365 Copilot** or **operate standalone**.

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 two items: "Microsoft 365 Copilot" (Type: Microsoft) and "Contoso Bank" (Type: Agent). There are "See more" buttons for both sections. Below the recent section is a "Start with a template" section featuring six cards: "IT Helpdesk", "Safe Travels", "Store Operations", "Sustainability Insights", "Team Navigator", and "Voice". At the bottom of the interface are several "Learning resources" cards: "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

Create chat experiences that are...



Intelligent

Remember and understand user context and intent



Secure

Maintain industry standards for governance, security and lifecycle management



Automated

Dynamically complete tasks and automate workflows



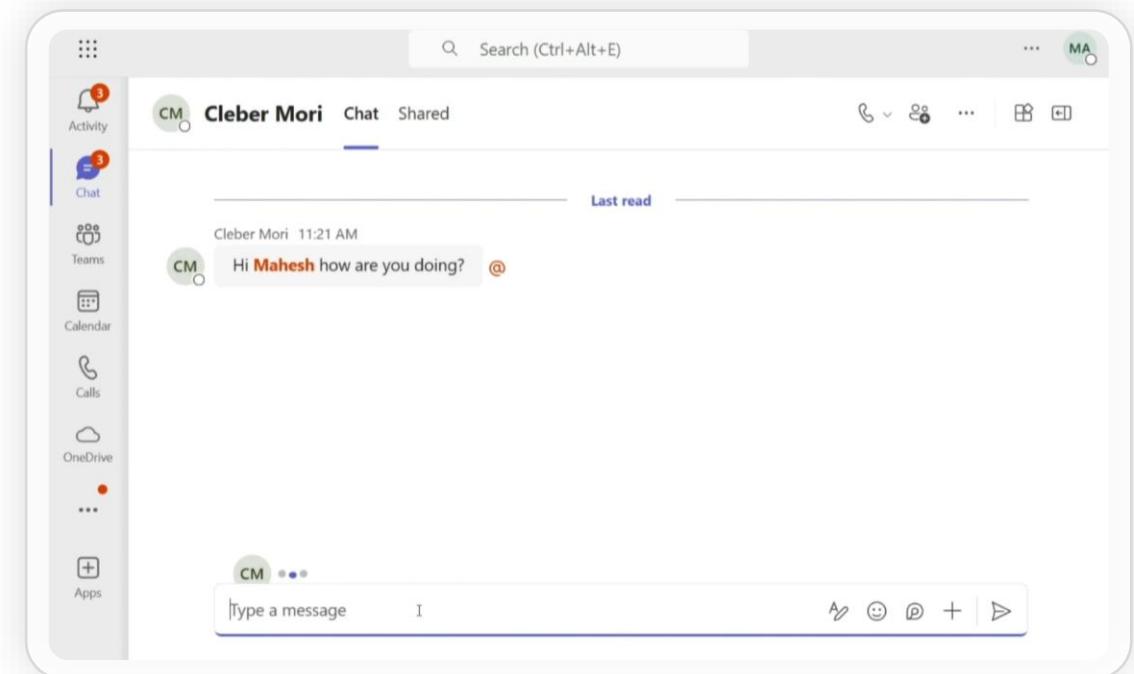
Customizable

Connect to your data and legacy systems, extend across Microsoft's ecosystem and more



Collaborative

Interact with agents as if they were another member of the team



Evolution

2023

Search • Summarization • Generation

2024+

Customization • Collaboration • Automation



Copilot Studio

Design

Enhance

Manage

Design



Build the way you want

Users of all skill levels can create and test together

Preview

Templates

Start with a template

- IT Helpdesk: Empowers employees to resolve issues and effortlessly create/view support tickets.
- Safe Travels: Provides employees, the travel assistance in terms of travel inquiries and health and safety guidelines.
- Team Navigator: Assists employees in finding colleagues and their hierarchy within the organization with Microsoft Teams.
- Voice: An agent with voice capabilities.

Learning resources

- Quick start: Create and deploy an agent
- Documentation
- Quick start: Use Generative AI in an agent
- Support community

Get started quickly

Choose from a diverse set of pre-built scenarios across popular industries and functions.

Preview

Natural language

Describe your agent to create it

Use everyday words to describe what your agent should do ...

This AI-powered feature is in preview. See terms

Modified by Last published

Mona Kane 2 weeks ago 2 weeks ago

Build conversationally

Build agents by engaging in a conversational, natural, human-like experience.

Preview

Visual canvas

Expense Budget Assistant

Travel budget

Describe what the topic does

Provides details to employees about spending on their travel budget availability

Action: Read SAP table

Input: OutboundExpenseBudget table

Output: Create generative answers

Data source: SharePoint

Search and select items

Public website: Manual input

SharePoint: Manual input

Custom data: Manual input

Create generative answers

Input: OutboundExpenseBudget table

Output: Create generative answers

Asset Quality Service as your API

Add connection

Connection properties

Navigate a modern UX

Design your conversation by following the low code graphical interface.

Code

```
1 #!/bin/bash -e
2 begin_conversation
3 kind: Onboarding
4 id: onboarding_welcome
5 condition: false
6 message:
7   - text: "Welcome to Genesee."
8   - kind: Condition
9     id: onboarding_welcome
10    condition:
11      - id: check_if_already_onboarded
12        type: system.Activity.Channel = Channels.Telephone
13      - kind: CanCallDialog
14        id: canCallDialog_G122
15        message:
16          - text: "Hello, how can I help you?"
17          - kind: Condition
18            id: check_if_already_onboarded
19            condition:
20              - id: check_if_already_onboarded
21                type: system.Activity.Channel = Channels.Telephone
22                message:
23                  - text: "Hello, good morning."
24                  - kind: Condition
25                    id: check_if_already_onboarded
26                    condition:
27                      - id: check_if_already_onboarded
28                        type: system.Activity.Channel = Channels.Telephone
29                        message:
30                          - text: "Hello and good morning to you."
31                          - kind: Condition
32                            id: check_if_already_onboarded
33                            condition:
34                              - id: check_if_already_onboarded
35                                type: system.Activity.Channel = Channels.Telephone
36                                message:
37                                  - text: "Hello, can you help me?"
38                                  - kind: Condition
39                                    id: check_if_already_onboarded
40                                    condition:
41                                      - id: check_if_already_onboarded
42                                        type: system.Activity.Channel = Channels.Telephone
43                                        message:
44                                          - text: "Hello friend."
45                                          - kind: Condition
46                                            id: check_if_already_onboarded
47                                            condition:
```

Switch to YAML

Share and re-use topic logic between developers and agents in a side-by-side view.

Customize your agent

Easily tailor your agent's building blocks to meet your unique business needs in a comprehensive, end-to-end studio

Building blocks



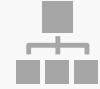
Knowledge

Existing enterprise data in or outside of M365 that your agent can query



Actions

Tasks and processes your agent can perform across LOB services/apps



Logic

Defined conversation paths for your agent to follow when triggered



Channels

Where and how your end users engage with your agent

Knowledge

Add your **public and enterprise data** sources using agent connectors.

Your agent will be able to **dynamically generate multi-turn answers** in real time using your enterprise data.

Allows you to create an **immediately useful** agent.

Supported data sources include:

Public websites

SharePoint / OneDrive

DataVerse

Microsoft Fabric (coming soon)

File uploads

Microsoft Graph

Add available knowledge sources (Powered by Copilot connectors) X

Users with edit permissions for this copilot can also reuse your connections for other topics within the copilot. [Manage security settings](#)

Keywords for the data you're looking for

Featured

Add existing knowledge
→ Converts previous data sources to knowledge for this copilot

Public website
Incorporate any relevant web content found on Bing

Files
Upload documents from your local computer

SharePoint and OneDrive
Securely integrate and manage internal data

Dataaverse
Customize and deploy structured data tables

Microsoft Fabric
Accelerate data analysis with AI capabilities

Bring your enterprise data (16)

Enterprise website (preview)

Azure DevOps (preview)

Custom connector (preview)

Jira (preview)

ADLS Gen2 (preview)

Oracle SQL database (preview)

ServiceNow (preview)

File share (preview)

CSV (preview)

Microsoft SQL (preview)

MediaWiki (preview)

Salesforce (preview)

Confluence (preview)

Azure SQL (preview)

Zendesk (preview)

Power Platform connector

Actions

Easily connect to your key line of business systems.

Enable your agent to automate your business processes and complete tasks.

Types of actions:

Prebuilt connectors

Choose from 1400+ prebuilt Power Platform connectors to popular data sources and apps

Custom connectors

Create a custom connector for any publicly available API

Flows

Bring in automated workflows built using Power Automate

Prompts

Provide custom instructions to the GPT model using AI Builder

Skills

Add a bot built using Azure Bot Framework as a skill

Step 1 of 3: Choose an action

Create an action or browse through our list of actions you want to use to get information from external sources.

[Learn more](#)

Discover an action

Search for flows, skill actions, and commonly used connector actions



Search

11 actions found



Connectors



Custom Connectors



Flows



Skills



Dataverse



Untitled

Get information about industries, solutions, services and cont...



Run a flow built with Power Automate for desktop

Desktop flows



Delete a row

Excel Online (Business)



Run script

Excel Online (Business)



Get a row

Excel Online (Business)



Run script from SharePoint library

Excel Online (Business)

Cancel



1400+

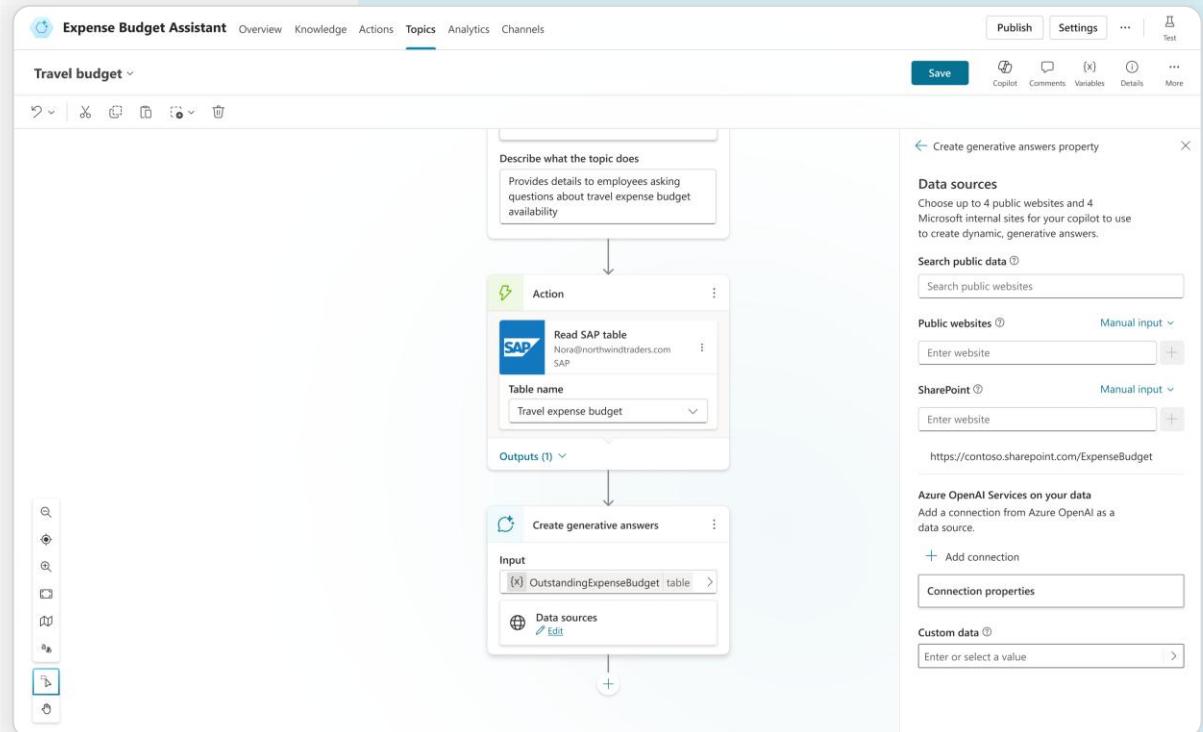
Logic

Have **complete control over critical scenarios** by designing specific step-by-step topics.

Enable your agent to **automatically select the most appropriate action or topic** to respond to a user using generative AI.

Easily mix and manage both **generative and custom dialog** in one system.

Connect to your contact center so your agent can escalate and hand off the conversation with full context to a live human agent.



Channels

Publish and deploy to your channels of choice with a single click.

Add your agent to a custom app built with Power Apps or a custom website built with Power Pages.

You can access even more channels through ISVs, including:



WeChat



WhatsApp
through Twilio



Google's Business
Messages



Apple Messages
for Business



Azure
Communication
Services



TeleSign



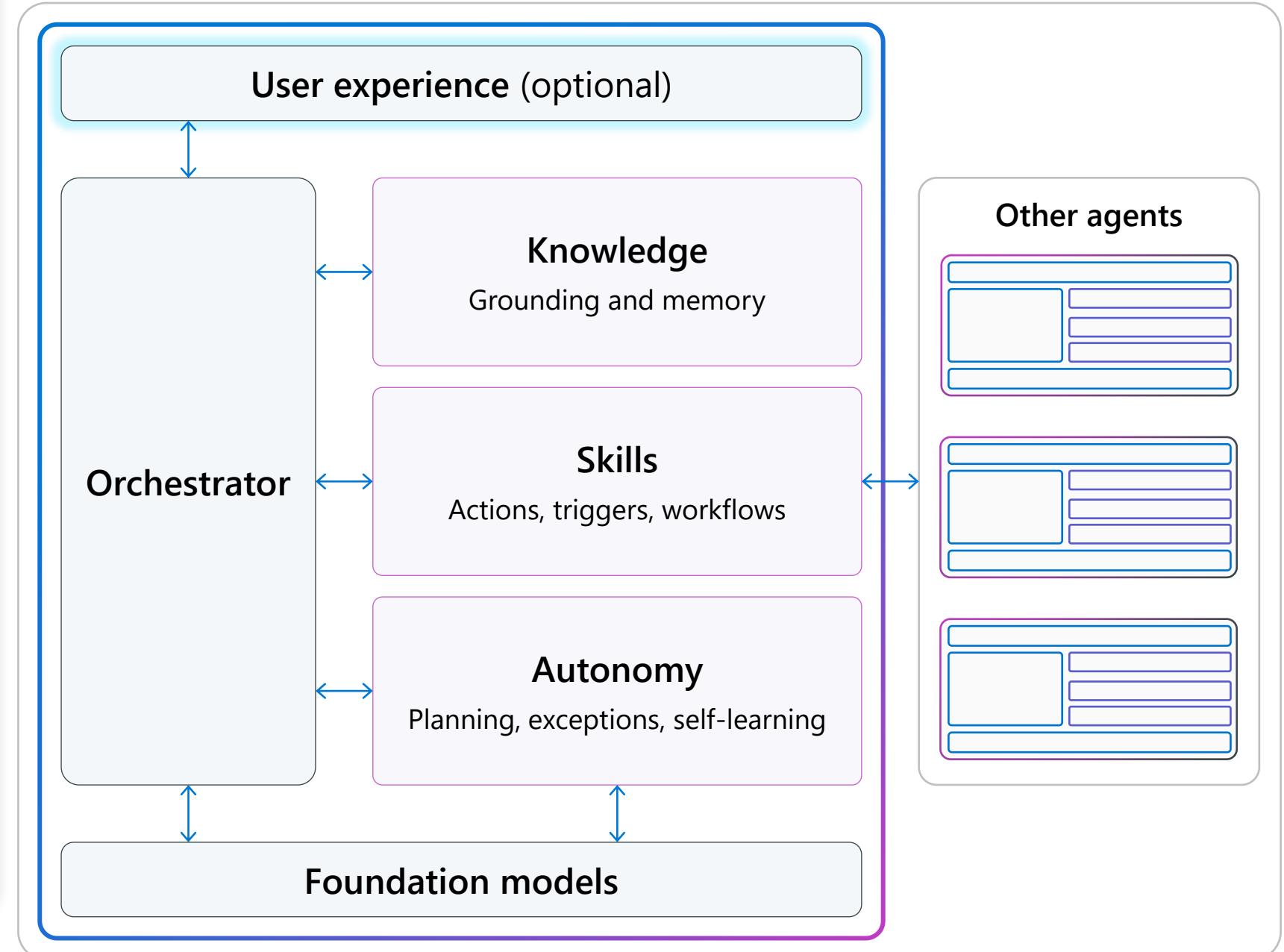
Custom

The screenshot shows the Microsoft Copilot interface for the "Expense Budget Assistant". The top navigation bar includes "Overview", "Knowledge", "Actions", "Topics", "Analytics", and "Channels", with "Channels" being the active tab. A message at the top states, "Your copilot was published at 9:42 AM on 3/36/2024! Your users will see the new content soon." The "Publish status" section shows the copilot was published on March 20, 2024. The "Channels" section lists various communication platforms. The "Customer engagement hub" section lists several customer service platforms.

| Channel | Customer Engagement Hub |
|--------------------|-------------------------------|
| Teams | Dynamics 365 Customer Service |
| Demo website | Genesys |
| Custom website | Salesforce |
| Mobile app | LivePerson |
| Facebook | ServiceNow |
| Twilio | ZenDesk |
| Skype | Customer engagement hub |
| Slack | |
| Telegram | |
| Direct Line Speech | |
| Email | |
| Line | |
| GroupMe | |

Anatomy of an agent

AI assistants designed to automate and execute business processes, working with or for a human.



Enhance



Enhance with advanced capabilities

Customize your agent with pro developer tools

Integrate with Azure AI Studio, Azure Cognitive Services, Bot Framework and a variety of other Microsoft conversational services.

Analyze your agent's performance

Access built-in conversational analytics that automatically track critical KPIs.

Continuously improve the conversation

AI-driven features will help you to fine-tune your agent over time by providing suggestions on how to optimize your conversations.

Build Agents with a comprehensive AI toolchain

Low-code with a managed stack



Microsoft Copilot Studio

- Managed genAI models and orchestration you can configure with visual tools
- Add knowledge and actions with 1500+ Copilot connectors to your business systems and Microsoft data
- Deploy your copilots anywhere, including as Copilot extensions
- SaaS-based infrastructure managed by Microsoft

Pro-code with full flexibility & control



Azure AI Foundry Portal

- Full catalog of GenAI APIs and models you can customize with visual and code-first tooling
- Add knowledge, enable RAG over your secure data, and add actions with custom functions
- Deploy to Azure web apps or as containerized models
- PaaS with full developer control over infrastructure

Copilot Studio or building your own custom agent

Low code / no code agent is the right choice for you, if you want to...

Building a custom agent is right for you, if...

- **Integrate with Microsoft ecosystem:** Enhance user experience and reach millions.
- **Leverage Copilot orchestrator:** Improve service capabilities.
- **Build AI solutions:** Boost employee productivity.
- **Utilize Microsoft Graph:** Personalize user experiences.
- **Use RAG data sources:** Employ Graph Connector, SharePoint, or Dataverse.

You're a proficient developer and want to build:

- **Custom end-to-end solutions:** Full control on branding, language models, orchestration, and regulation compliance.

Or, if you're building products like:

- **E-commerce chatbot** to enhance customer service.
- **Healthcare assistant** to schedule appointments.
- **AI in gaming** to create immersive experiences.

Easily optimize with data-driven insights

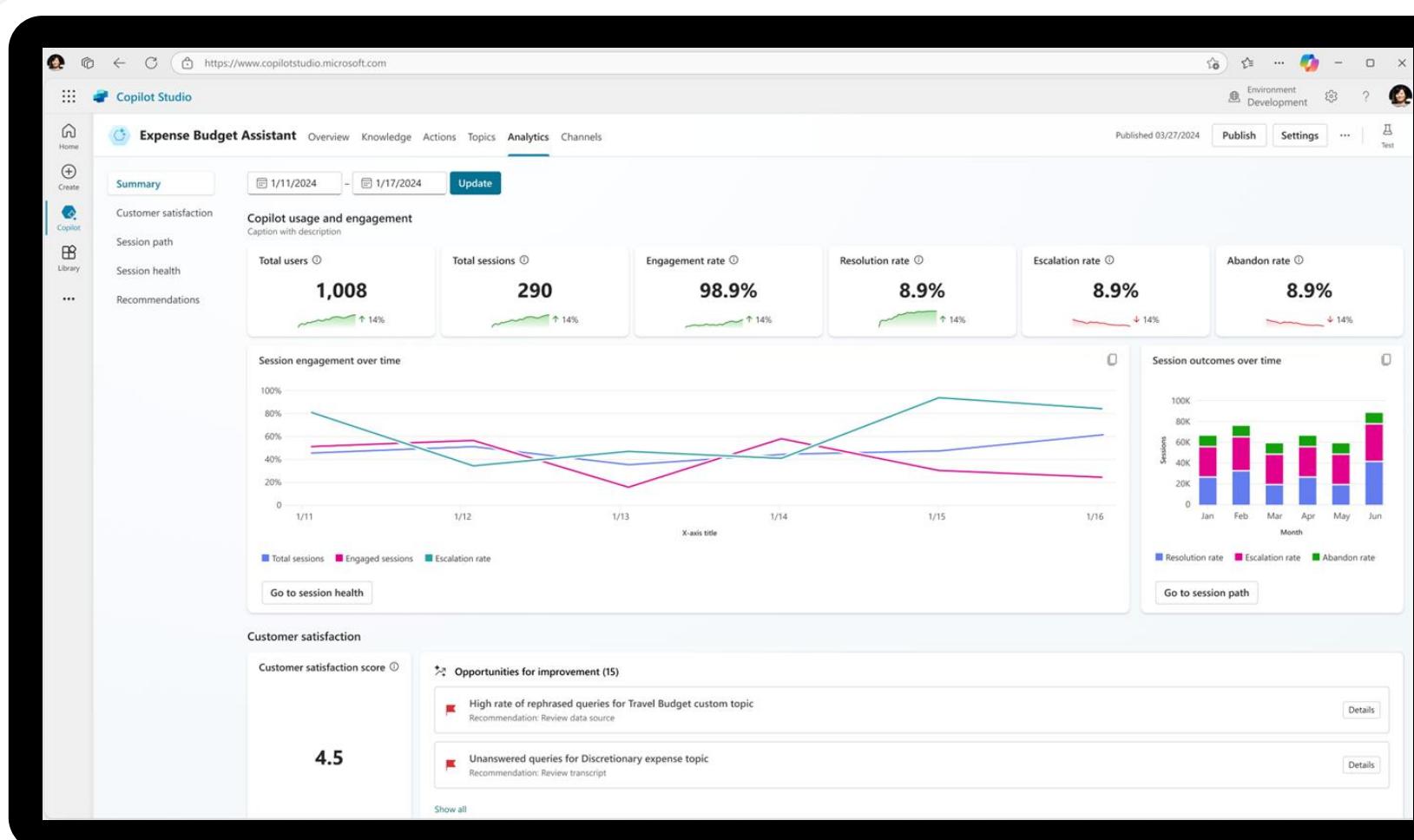
Preview

See which topics are having the greatest impact on **escalation, abandon** and **resolution rates**.

Quickly gain a sense of the **most common questions** your users are asking your agent.

Get access to detailed **CSAT data, session transcripts, content moderation insights** and more.

Identify where your agent **didn't successfully return an answer** so you can fill in the gaps.



Manage

Manage securely across channels

Get the benefits of a global SaaS platform

Eliminate infrastructure concerns, scale securely, and simplify management and governance with unified controls.

Ensure your agent is compliant

Meet the necessary regulatory standards for your area or industry like HIPAA, HITRUST, FedRAMP, PCI, SOC, ISO and more.

Safeguard your data

Deploy and scale with confidence using data encryption, data loss prevention policies, GDPR and privacy standards, and more.

Use AI responsibly

All generative AI features are aligned to Microsoft's responsible AI principles.

Copilot Studio

Authentication setups



Authentication setup & GenAI follow-up considerations

Anonymous / No Authentication

Authentication

Verify a user's identity during a conversation. The copilot receives secure access to the user's data and is able to take actions on their behalf, resulting in a more personalized experience.

[Learn more](#)

Choose an option

No authentication

Publicly available in any channel

Basic copilot setup with no authentication action or authentication variables.

Authenticate with Microsoft

Entra ID authentication in Teams and Power Apps

Only Teams and Power Apps channels are available; all other channels will be disabled. [Learn more](#)

Authenticate manually

[Get started with manual authentication](#)

No Sign-in Required

The Copilot in Demo Website, Published Production Website or any channels e/g; Facebook is fully anonymous.

Can be Disabled via DLP

Only for Teams & Power Apps / Authenticate with Microsoft

Authentication

Verify a user's identity during a conversation. The copilot receives secure access to the user's data and is able to take actions on their behalf, resulting in a more personalized experience.

[Learn more](#)

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Authenticate manually

[Get started with manual authentication](#)

Automatic Setup of Entra ID Authentication

Copilots to be used as Standalone Teams Applications or embedded in Teams Sites, Or embedded in Power Apps. Entra ID required.

Custom Authentication / Manual

Authenticate manually

Set up authentication for any channel

Supports Microsoft Entra ID or any OAuth2 identity provider. Available in any channel. [Learn more](#)

Require users to sign in

Redirect URL

`https://token.botframework.com/auth/web/redirect`

[Copy](#)

Service provider *

Azure Active Directory v2

Client ID *

`7673559c-7f73-44d5-89f6-41f0fd5711c0`

AAD v2, Generic Oauth 2 or AAD

Allows for custom publish locations such as Internal websites requiring authentication e.g; Entra ID Auth. App Registration and Secrets required.

App Registration Required

Configuring Single Sign-On (SSO) for Web

Consider the following scenario: The copilot is hosted on the **corporate intranet** or in an **app that the user is already signed in to**.

There are four main steps to configuring SSO for Copilot Studio:

- Create an app registration in Microsoft Entra ID for your custom canvas.
- Define a custom scope for your copilot.
- Configure authentication in Copilot Studio to enable SSO.
- Configure your custom canvas HTML code to enable SSO.

Important:

SSO is currently not supported when a copilot has been either:

- Published to a SharePoint site as an iframe (use SPFx instead)
- Published to a Power Pages portal



```
<!DOCTYPE html>
<html>
<head>
    <title>Contoso Sample Web Chat</title>
    <script src="https://cdn.botframework.com/botframework-webchat/latest/webchat.js"></script>
    <script type="text/javascript" src="https://alcdn.msauth.net/lib/1.2.0/js/msal.js"></script>
    <script src="https://unpkg.com/azure/storage-blob@10.3.0/browser/azure-storage.blob.min.js"
        integrity="sha384-fsfhtLyVQo3L3Bh73qgQoRR328xEeXnRGdoi53kjoluectCfAHFfavrBBN2Nkbdf"
        crossorigin="anonymous"></script>
    <script type="text/javascript">
        if (typeof Msal === 'undefined') document.write(unescape("%3Cscript src='https://alcdn.msfta
    </script>

    <style>
        html, body {
            height: 100%;
        }

        body {
            margin: 0;
        }

        h1 {
            font-size: 16px;
            font-family: Segoe UI;
            line-height: 20px;
            color: whitesmoke;
            display: table-cell;
            padding: 13px 0px 0px 20px;
        }

        #heading {
            background-color: black;
            height: 50px;
        }
    </style>
```

Copilot Studio is also available as a consumptive service

Copilot Studio became a pay-go service on December 1

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

Quotas & limits

| Capability | Limits | Mitigation options |
|-------------------------------------|---|-------------------------------------|
| Copilot Studio | | |
| • Requests per Minute (RPM) | 8,000 per environment | Support request |
| • OpenAI Capacity | Undocumented (OpenAIRateLimitReached) | Support request |
| Power Automate cloud flows | | |
| • Power Platform requests | 250,000 / 24h | Power Automate per-process licenses |
| • Execution timeout | 100s | None – redesign |
| Connectors and HTTP requests | | |
| • Standard connectors | Check documentation for each connector | Depends on connectors |
| • Custom connectors | 500 requests per minute | Support request |
| • HTTP requests | Same as RPM | Support request |
| • Execution timeout | 100s | None – redesign |
| Bot Framework Skills | | |
| • Azure infra limits | Check Azure documentation | Azure infra upscaling |

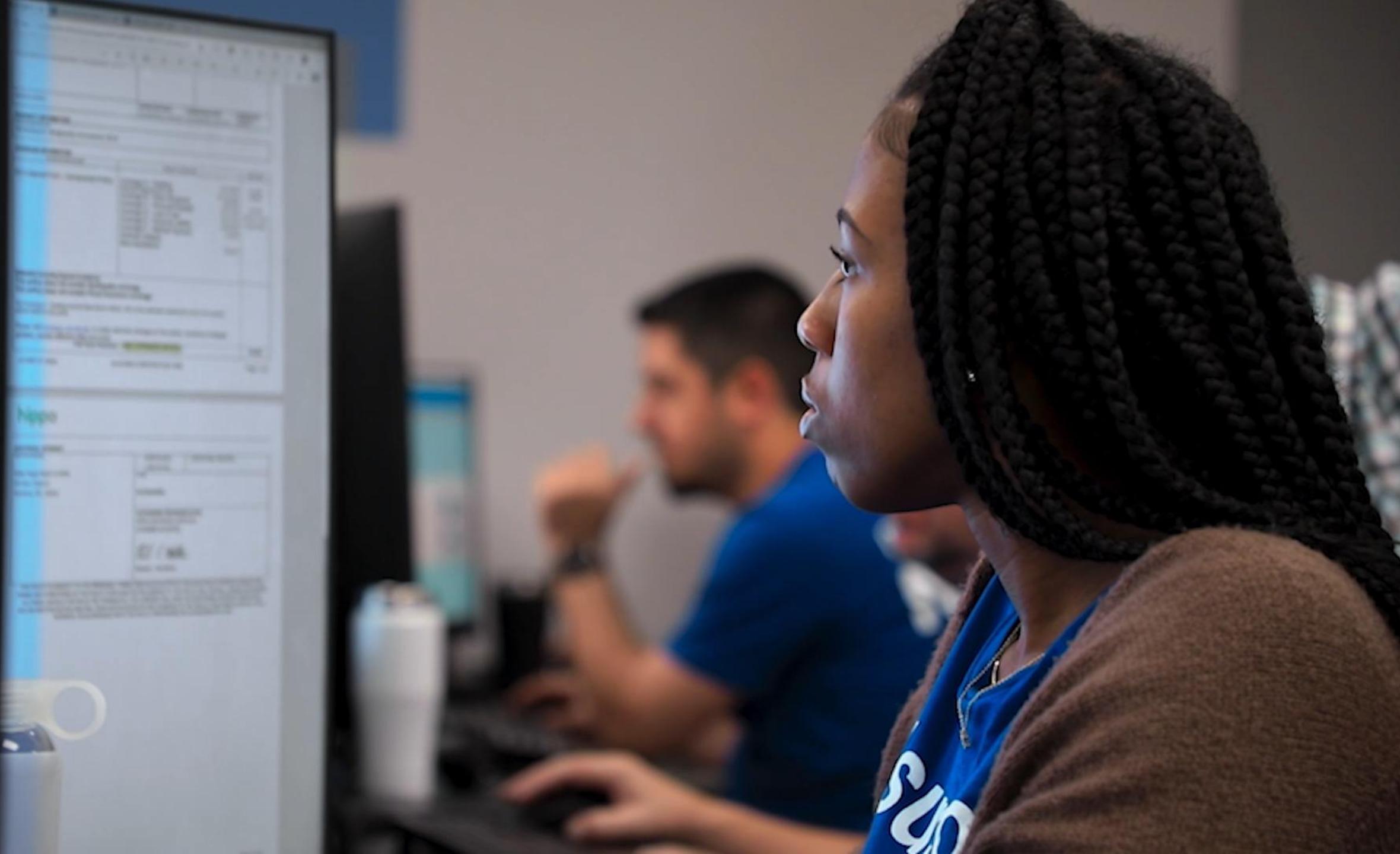
Reference

Billing rates and management

<https://learn.microsoft.com/en-us/microsoft-copilot-studio/requirements-messages-management>

[Rate limits for agents](#)

[Pricing plans](#)



Build agents that work for you...

in your industry...

| | | | |
|--|-----------------|-------------------------------|--|
|  Travel and Transport | Manage bookings | Change my trip dates |  |
|  Professional Services | Lead generation | Get a quote |  |
|  Government | Public programs | Get childcare assistance |  |
|  Retail | Manage orders | I want to make an exchange |  |
|  Healthcare | Claims | Submit health insurance claim |  |
|  Financial Services | Manage accounts | Report lost card |  |
|  Education | Admissions | How to get financial aid? |  |
|  Manufacturing | Supply | Check stock |  |

...and department.

| | |
|---|---|
| Customer Service | |
| Reduce call volume for quick resolutions | |
|  Request a refund |  Describe your issue |
|  Support tickets |  Centralized FAQs |
| Finance | |
| Save time by automating budget and expense approvals | |
|  Update tax information |  Submit expenses for approval |
|  Payroll |  Budget requests |
| HR | |
| Improve employee satisfaction and retention | |
|  Sign up for healthcare plan |  Book time off |
|  Benefits |  Leave and absence |
| IT | |
| Optimize employee troubleshooting | |
|  Reset my password |  Refresh my laptop |
|  Support services |  Equipment requests |
| Operations | |
| Improve efficiency by digitizing paper processes | |
|  Find case file |  Check order delivery times |
|  Find documents |  Manage inventory |
| Sales and Marketing | |
| Increase up-sell and conversion opportunities | |
|  You're eligible for a free upgrade! |  Update your email preferences |
|  Upselling |  Email |



Examples of agent templates in Copilot Studio

Copilot Studio is a great way to build powerful, custom agents to improve business processes. The pre-built agents in Copilot Studio are a great way to get started as they are preconfigured to speed the process of building more complex agents. For more information on how to get started with a pre-built agent see [here](#).

| Agent Name | Description |
|--|--|
|  <u>Store Operations</u> | The <i>Store Operations Copilot</i> agent improves the efficiency of retail frontline workers by enabling easy access to store procedures and policies |
|  <u>Sustainability Insights</u> | The <i>Sustainability Insights Copilot</i> agent enables users to easily get insights and data about their company's sustainability goals and progress |
|  <u>Awards and Recognition</u> | <i>Awards and Recognition</i> is designed to streamline the process of nominating and recognizing your employees for their contributions and achievements |
|  <u>IT Helpdesk</u> | <i>IT Helpdesk</i> uses your organization's knowledge base to enhance operational efficiency, improve employee satisfaction, and optimize resource utilization in helpdesk scenarios |
|  <u>Weather</u> | The <i>Weather</i> copilot is the go-to assistant for getting weather forecasts embedded in Teams or a website. Users can ask about the weather anywhere in the world to get current conditions and future forecasts |