

Agent in a Day

HANDS-ON WORKSHOP

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Agenda

Overview: What is an agent?

Copilot Chat and the Copilot Studio lite experience

Lab 1: Agents in Copilot Chat

Morning Break

Introduction to Copilot Studio

Planning & creating your agent

Lab 2: Agents in Copilot Studio + demo

Lunch

Authoring canvas, tools & agent flows

Lab 3: Tools in Copilot Studio + demo

Afternoon Break

Building autonomous agents

Crafting agent instructions

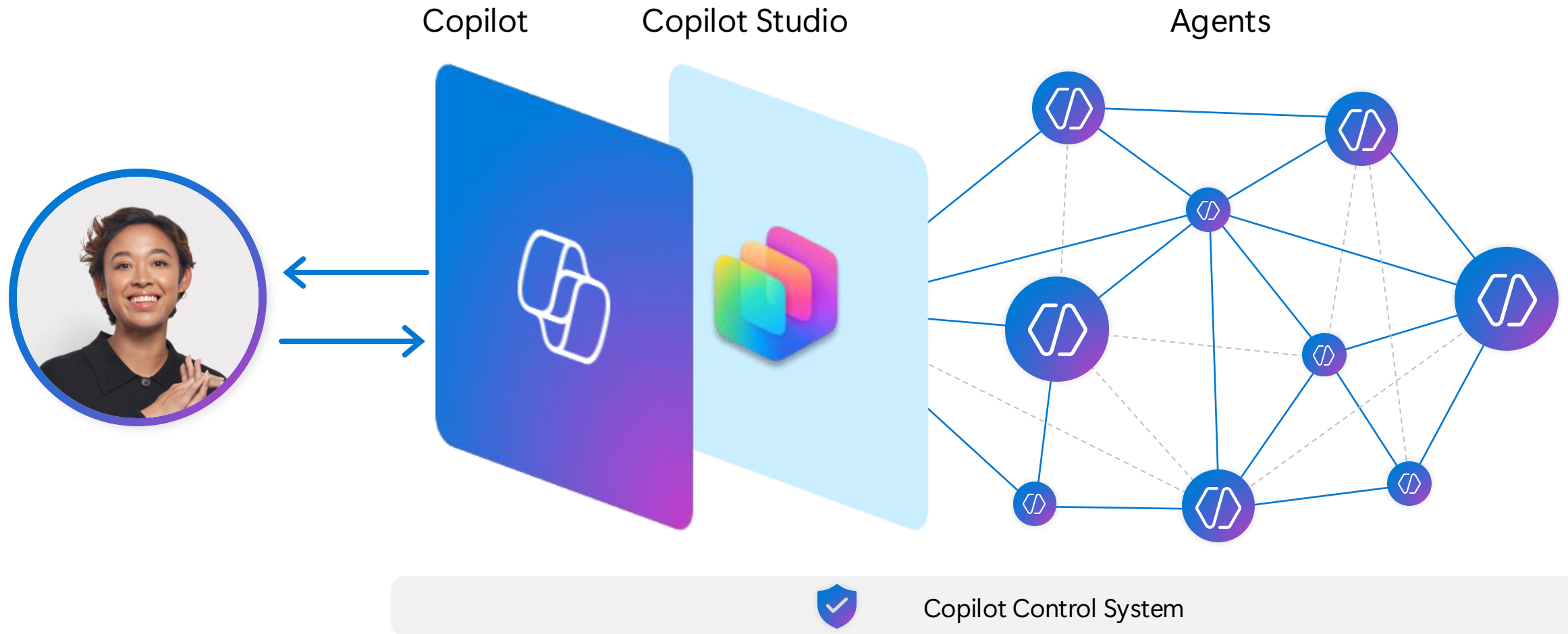
Lab 4: Autonomous agents in Copilot Studio + demo

Conclusion and Q&A

The background is a solid teal color. On the left, there is a vertical light blue bar. The text 'Copilot Chat and agents' is written in white, sans-serif font. The background is decorated with several geometric shapes: a large white rounded rectangle on the right, and several smaller rounded squares in teal and light gray, some of which are overlapping or partially cut off by the edges.

Copilot Chat and agents

Copilot is the UI for AI



Interface

Interface layer

What the user sees and types into

Copilot for M365

Chat, Teams, Outlook

Claude.ai

Web, desktop, mobile

ChatGPT

Browser, API apps

↕ prompt / response

Orchestration

Orchestration layer

Inference routing, grounding, retrieval, memory

Microsoft WorkIQ

Enterprise grounding

RAG / retrieval

Grounds answers in data

Copilot Studio

Agent logic, connectors

↕ grounded prompt / completion

Model

Model layer

The LLM doing the reasoning and generating output

GPT-4o

Claude Sonnet

Gemini

What is an agent?

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

Deploy to...



Microsoft 365 Copilot

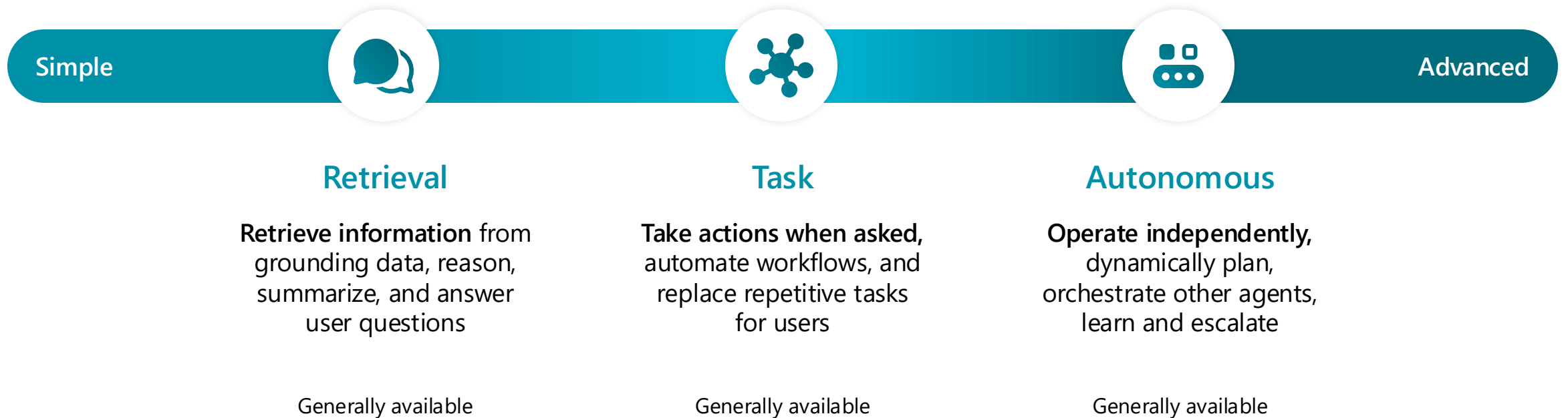


Your applications

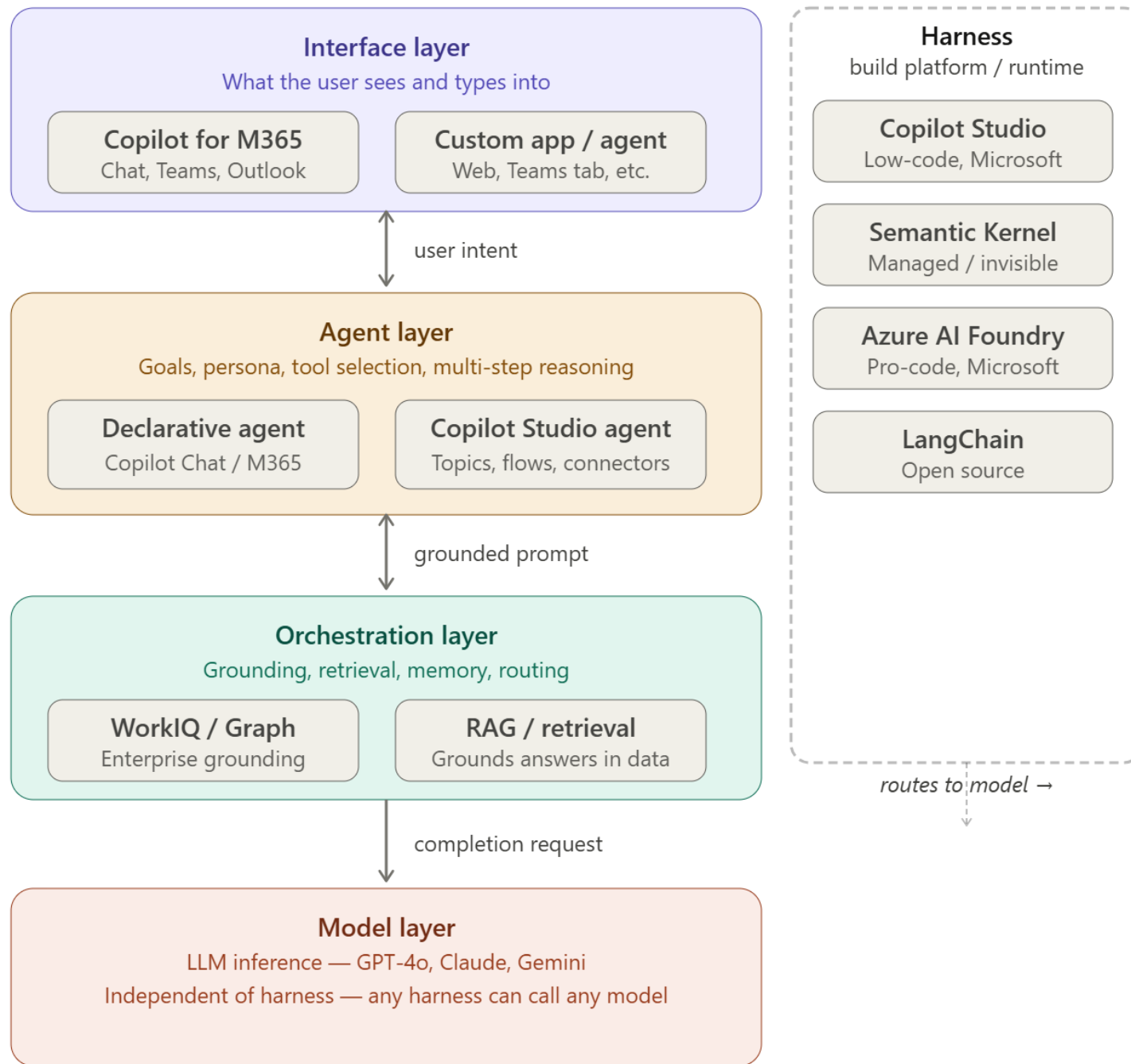


Your websites

Spectrum of agents



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



Explore a continuum of solutions

IT Helpdesk agent

How do I connect to the corporate network?



Device Refresh agent

Request a new laptop and send approvals via IT Service tool.



Lead Gen agent

The agent has identified and researched 15 new leads for you to review.



Simple



Advanced

Project Tracker agent

What is the status of phase 2 for project X and the remaining budget?



Budget Management agent

Review outstanding open PO's and begin financial planning.



Customer Support agent

The agent has identified new support issues and triaged to other agents.



Deploy & use agents in any system



Microsoft 365 Copilot

Add agents to give Copilot focused knowledge and new skills.



Your applications

Deploy agents to your website and other line of business applications.



Build and customize
your agents using
Copilot Studio



Dynamics 365

Build agents that integrate and improve business processes.



Power Platform

Extend Power Platform with agents that transform your apps and pages.

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

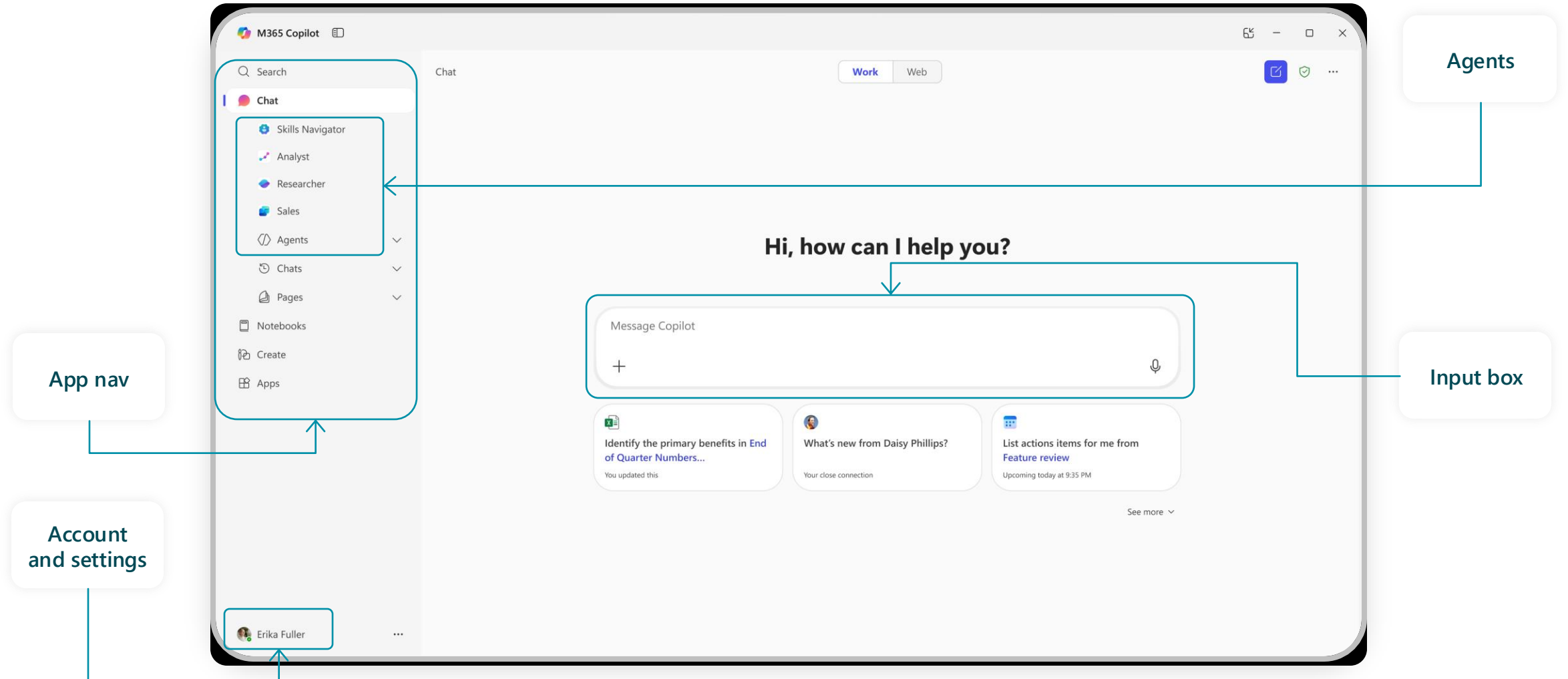
View core usage telemetry and track license utilization

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

Accessing agents in Copilot Chat



Examples of templates in the Copilot Studio lite experience

Get started quickly with agents by selecting pre-made templates and customizing them to fit your specific needs.

Agent Name		Description
	Writing Coach	Provides detailed feedback on writing. Helps change the tone of messages, translates text, and assists in writing tasks
	Idea Coach	Helps users brainstorm and organize ideas
	Prompt Coach	Assists users in creating effective well-structured prompts for Copilot
	Career Coach	Provides personalized career development suggestions including role understanding, skill gap analysis, learning opportunities, and career transition plans
	Learning Coach	Helps users understand complex topics by breaking them down into simple, intermediate, and advanced summaries. Provides guided practice and learning plans
	Meeting Coach	Helps meeting organizers create and ensure meetings are productive, engaging and well organized.
	Customer Insights Assistant	Designed to help your team get to know your customers by providing relevant information and insights.
	Interview Questions Assistant	Provides professional guidance in question generation tailored to specific job roles, or industries.
	Quiz Tutor	Creates interactive, fun, and engaging quizzes based on training documentation. It provides coaching on answers, praises correct answers, and offers explanations for incorrect ones.
	Scrum Assistant	Supports scrum team members in facilitating scrum ceremonies, backlog management, and continuous improvement.



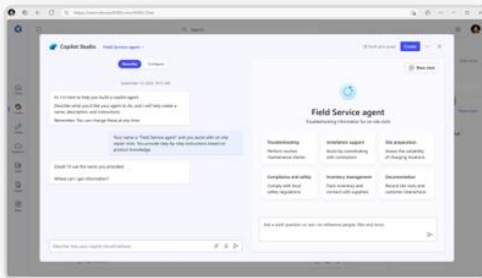
Building in the Copilot Studio lite version

A range of tools for agent creation

No code



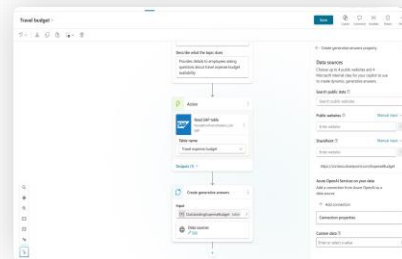
For End Users



Copilot Studio lite version



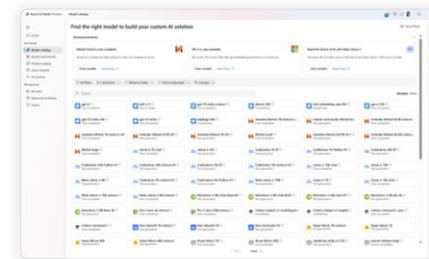
For Makers



Copilot Studio full version



For Developers



Visual Studio Code, Copilot Studio, Azure AI Foundry

Pro code

Examples of simple agents that can be created using Copilot Studio

These agents can be easily built using agent builder in Copilot Chat. Once shared, users with access can add the agent by selecting [Get Agents](#) in Copilot Chat.

Agent Name		Description
	Onboarding Buddy	Assists new hires with onboarding processes, provides training, answers questions, and sets up meetings
	Contract/Legal review	Automates review and analysis of legal documents, identifies key clauses and assesses compliance
	Research Assistant	Retrieves research materials from company databases, enhances productivity by providing relevant information
	Policy Search	Offers comprehensive policy lookup capabilities, answers inquiries about company policies

Onboarding Buddy



An Onboarding Buddy Agent is dedicated to ensuring new hires have a seamless and welcoming start. It can greet new team members, assist with technical issues, answer questions, provide essential company resources, and explain the company culture. Additionally, list mandatory training courses and guide new hires through HR processes.

Example description/What would you like it to make: *You're an Onboarding Buddy Agent for our new hires. You know everything about the onboarding process from the documents we've shared with you and are happy to help new team members get the information they need. You can assist with recommending resources, explaining company culture, listing mandatory training, and guiding them through their first few weeks. Your goal is to ensure new employees feel welcomed and supported as they integrate into the company*

Naming confirmation: *Onboarding Buddy*

To be emphasized/avoided: *Please be clear and concise and avoid long answers. Where possible, refer primarily to the knowledge shared with you. If you don't know the answer, please refer them to an HR manager*

How to communicate: *Friendly and professional*

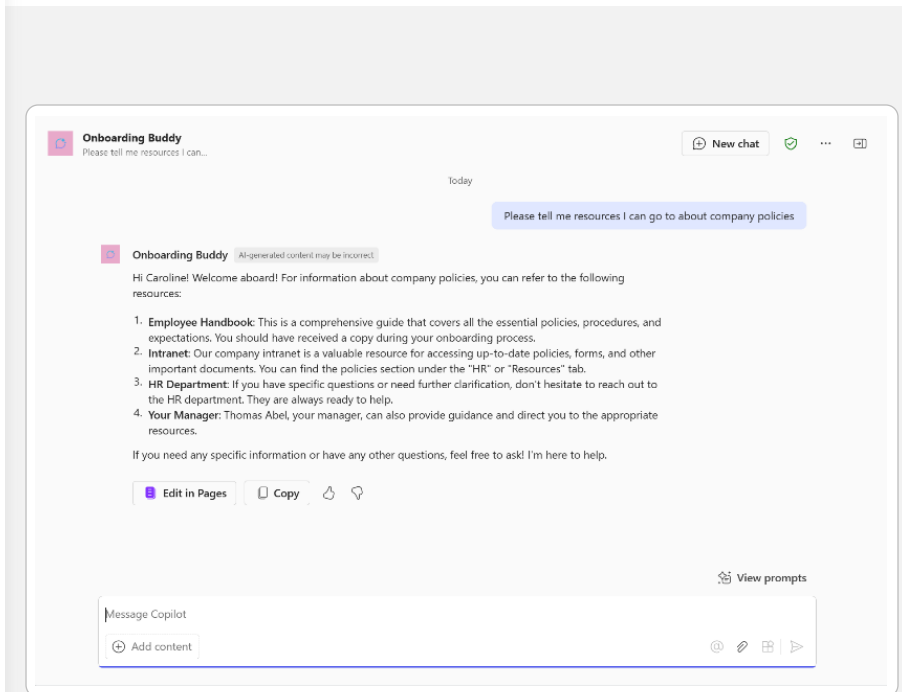
Move to configure

Starter prompts: *Leave as is*

Knowledge: *Use an existing SharePoint site for onboarding or create a simple SharePoint site called Onboarding Materials and upload the documents required*

Example questions to ask:

- *What mandatory training sessions do I need to complete in my first few weeks?*
- *How do I register for these training sessions?*
- *What resources are available to help get me started?*
- *Can you tell me more about the company culture and values?*
- *Who do I contact if I have technical issues?*
- *How do I submit my timesheet?*



Contract Review



The Contract Review Agent is designed to assist legal teams and contract managers by automating the review and analysis of legal documents. This agent can quickly identify key clauses, ensure compliance with legal standards, assess potential risks, explain specific clauses, and provide summaries of lengthy contracts, ensuring that nothing is overlooked.

Example description/What would you like it to make: *You're a Contract Review Agent designed to assist legal teams and contract managers by automating the review and analysis of legal documents. You know everything about the contract review process from the documents we've shared with you and are happy to help legal teams get the information they need. You can assist with tasks such as quickly identifying key clauses, ensuring compliance with legal standards, assessing potential risks, explaining specific clauses, and providing summaries of lengthy contracts. Your goal is to ensure that nothing is overlooked and that the contract review process is efficient and thorough*

Naming confirmation: *Contract Review*

To be emphasized/avoided: *Please be clear and concise and avoid long answers. Where possible, refer primarily to the knowledge shared with you. If you don't know the answer, please refer users to the Legal Team*

How to communicate: *Friendly and professional*

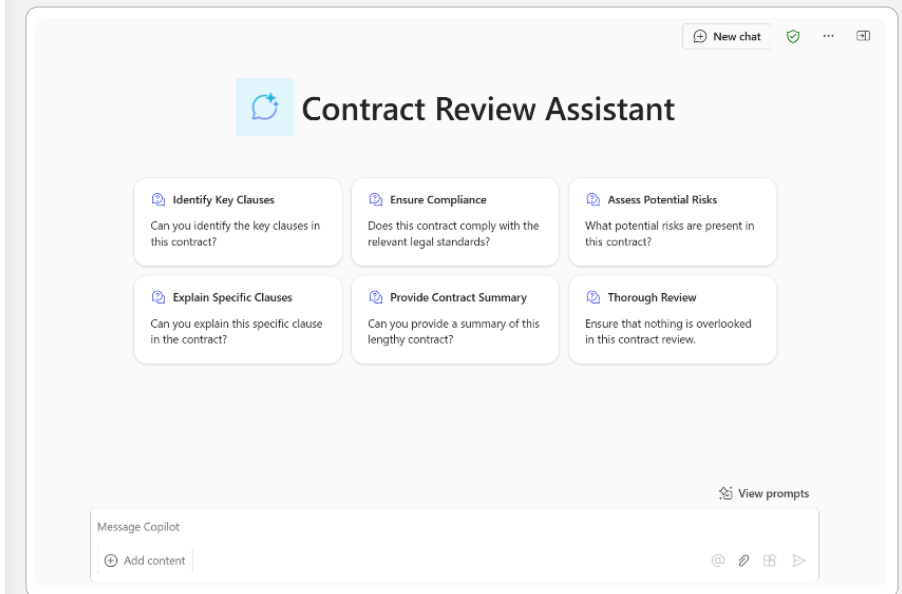
Move to configure

Starter prompts: *Leave as is*

Knowledge: *Use a SharePoint site with contracts and review instructions*

Example questions to ask:

- *Can you identify the key clauses in the XyZ solutions contract?*
- *Can you summarize the XyZ solutions contract?*
- *Does the XyZ contract comply with our legal standards and regulations?*



Research Assistant



A Research Assistant Agent empowers teams across an organization to efficiently access and retrieve research materials. This agent connects to a SharePoint link or company link that houses all research documents, enabling users to quickly find relevant information based on their specific topics of interest. This streamlined process enhances productivity and ensures that teams have the insights they need at their fingertips.

Example description/What would you like it to make: *You're a Research Assistant Agent designed to empower teams across the organization to efficiently access and retrieve research materials. You know everything about the research process from the documents we've shared with you and are happy to help team members get the information they need. You can assist with tasks such as connecting to a SharePoint link that houses all research documents, enabling users to quickly find relevant information based on their specific topics of interest. Your goal is to streamline the research process, enhance productivity, and ensure that teams have the insights they need at their fingertips*

Naming confirmation: Research Assistant

To be emphasized/avoided: *Please be clear and concise and avoid long answers. Where possible, refer primarily to the knowledge shared with you. If you don't know the answer, please refer users to the Research Team*

How to communicate: *Friendly and professional*

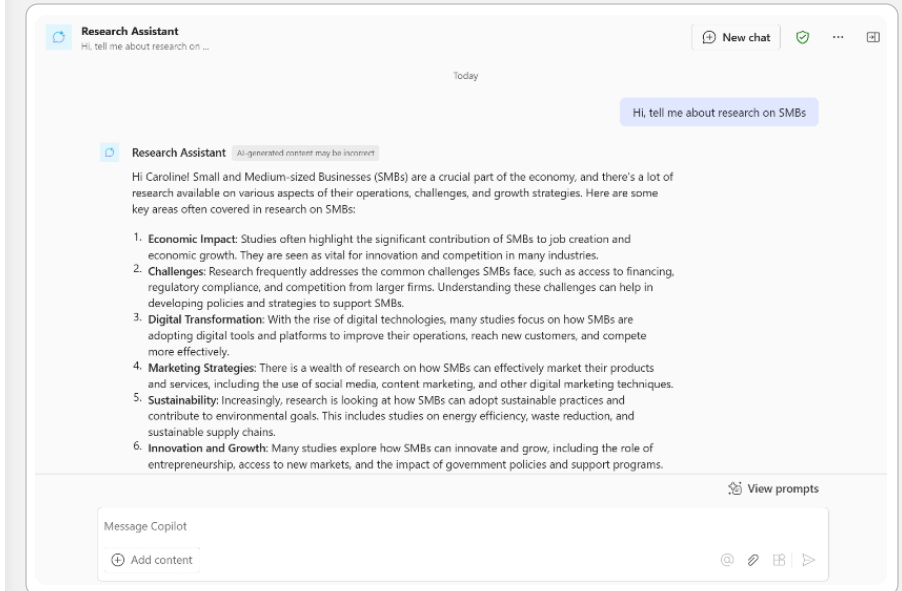
Move to configure

Starter prompts: *Leave as is*

Knowledge: *SharePoint site with relevant research information*

Example questions to ask:

- *Can you help me find research documents related to [specific topic]?*
- *Can you provide a summary of the latest research on [specific topic]?*
- *Are there any recent updates or new additions to our research documents?*
- *What research do we have that was conducting by [specific researcher]*



Policy Searcher



A Policy Search Agent offers comprehensive policy lookup capabilities, allowing users to inquire about various company policies such as time off, remote work, benefits, workplace conduct, health and safety, and other HR-related topics. This ensures employees have quick access to the information they need to stay informed and compliant.

Example description/What would you like it to make: *You're a Policy Search Agent designed to offer comprehensive policy lookup capabilities. You know everything about the company's policies from the documents we've shared with you and are happy to help employees get the information they need. You can assist with tasks such as inquiring about various company policies, including time off, remote work, benefits, workplace conduct, health and safety, and other HR-related topics. Your goal is to ensure employees have quick access to the information they need to stay informed and compliant*

Naming confirmation: *Policy Searcher*

To be emphasized/avoided: *Please be clear and concise and avoid long answers. Where possible, refer primarily to the knowledge shared with you. If you don't know the answer, please refer users to the HR Team*

How to communicate: *Friendly and professional*

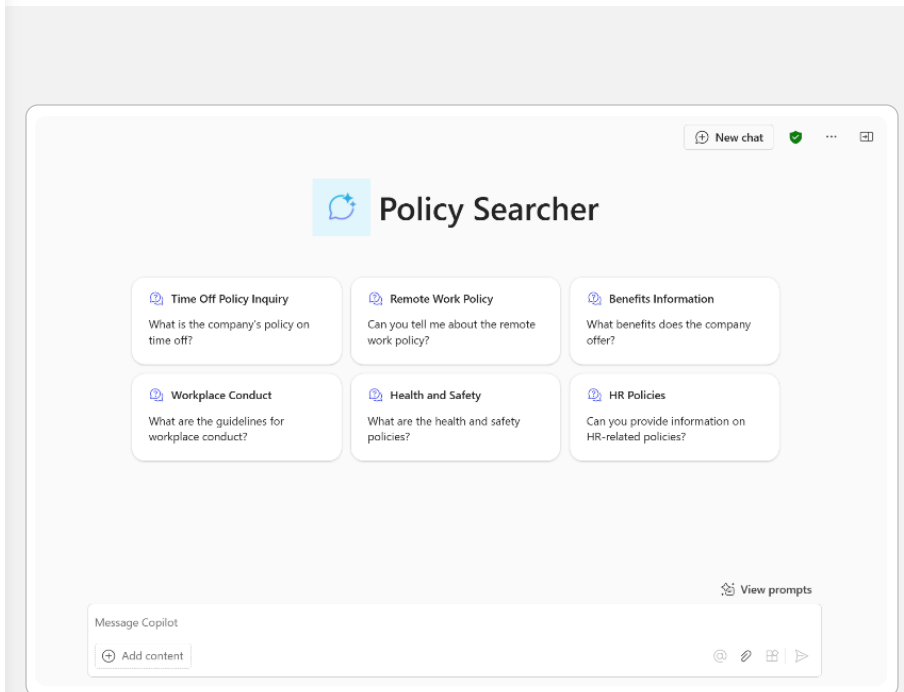
Move to configure

Starter prompts: *Leave as is*

Knowledge: *Use a SharePoint site that stores company policies*

Example questions to ask:

- *What is the company's policy on remote work?*
- *How many vacation days am I entitled to each year?*
- *Can you explain the company's health and safety guidelines?*
- *How do I request time off?*



Introducing Contoso Coffee



Welcome to Contoso Coffee! At Contoso Coffee, we are passionate about providing efficient, environmentally sustainable, and innovative coffee products, barista experiences, and services.



Customer support costs have continued to rise as the customer base has grown, and the company can no longer continue to expand the Customer Support team. You have been tasked with finding a solution using Copilot Studio.



Lab time!

Lab 01

Build agents in Copilot Chat

50 minutes

Setup your Copilot Studio environment & Log In



Login to your developer environment using your work/ school account or instructor provided logins



Go to <https://aka.ms/Agentinaday> to get started with the Labs on Microsoft Learn



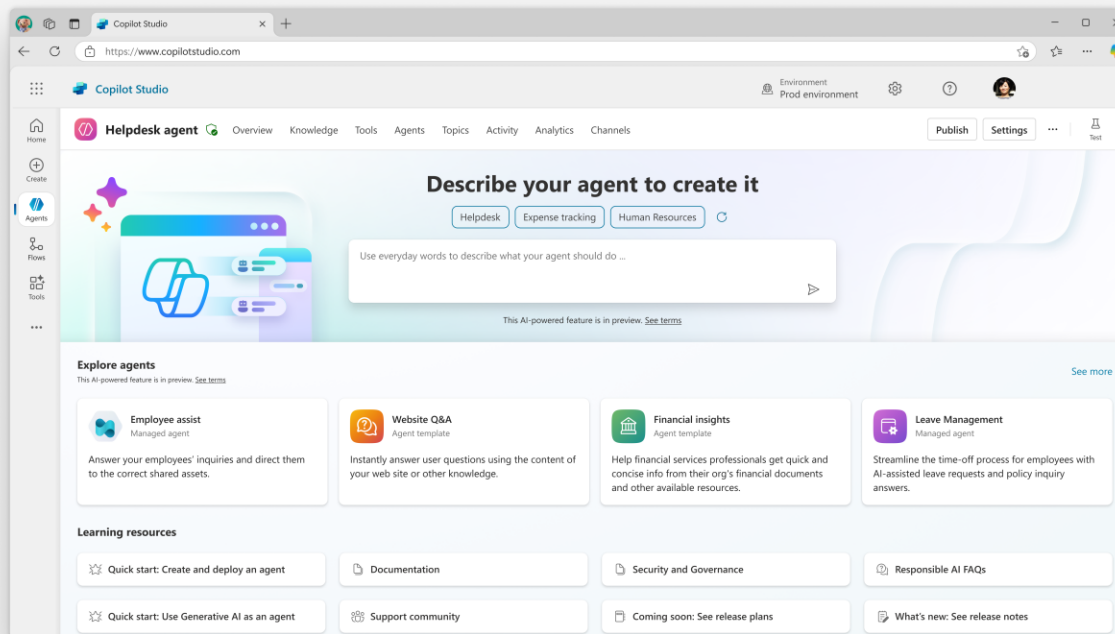
Download Student Files from <https://aka.ms/AgIADStudentFiles>

Copilot Studio



Copilot Studio

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



✓ 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



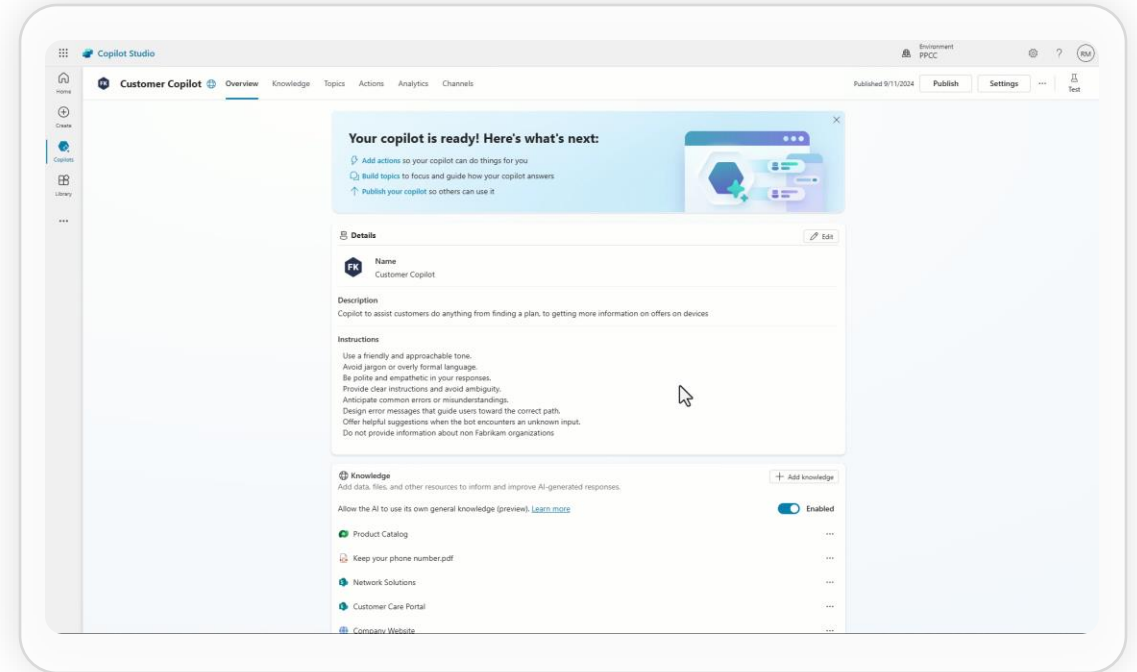
Customizable

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

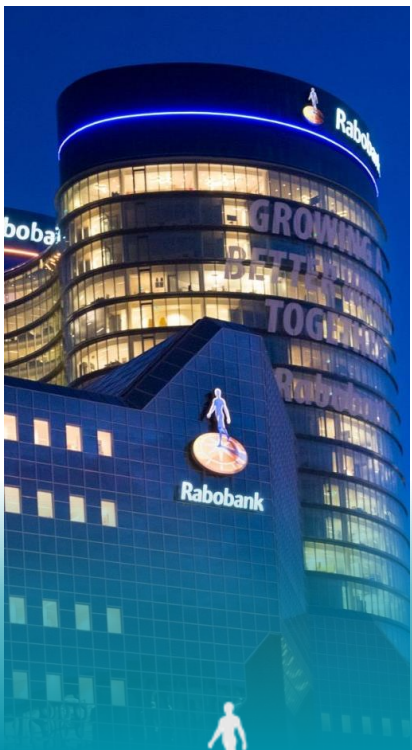
Search • Summarization • Generation

2025+

Customization • Collaboration • Automation

More than 230,000 customers across every industry have used Copilot Studio

to help improve performance and efficiency while reducing costs and risks



Rabobank

Offering conversational banking on telephony and digital channels



Reducing costs and workload by providing HR/IT support for employees



Holland America Line

Helping customers to find and book the perfect cruise



Creating customer-focused solutions as a Microsoft Partner



Helping customers find the right products and support

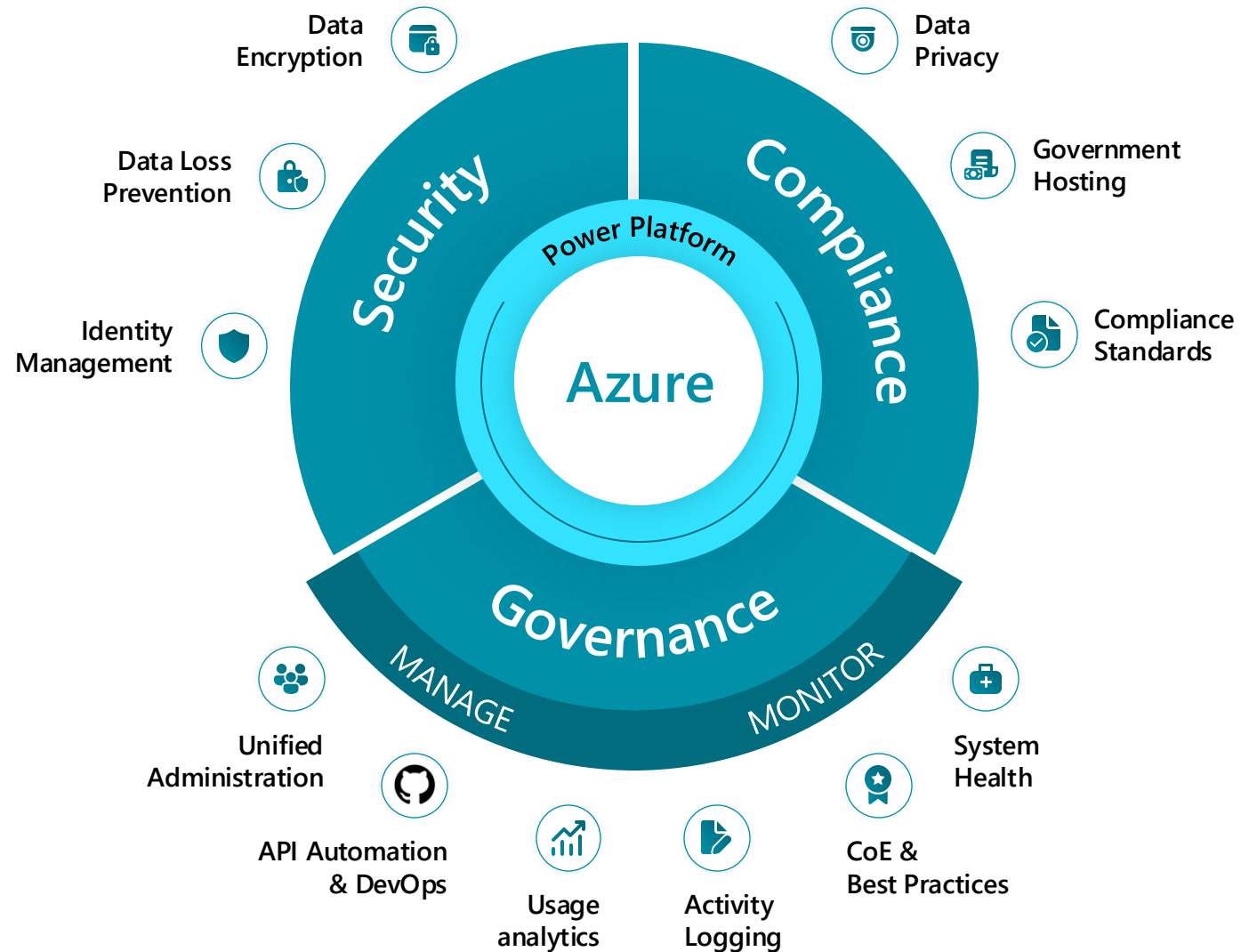


Providing customer service support for guests

Robust, secure and compliant hosting platform



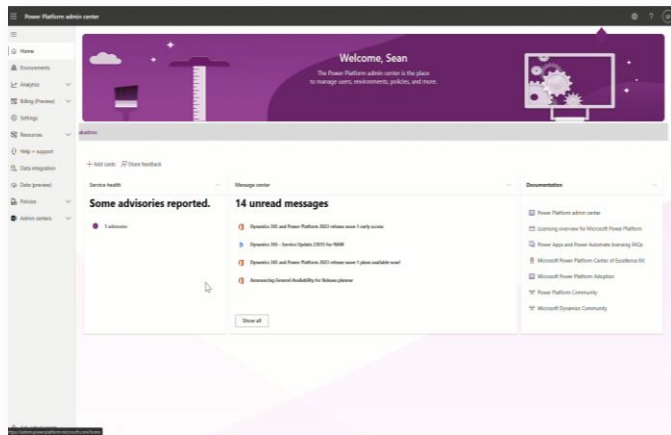
Compliance leadership
with standards and commitments including ISO 27001, FedRamp and EU model clauses



No standing access to data
transparent operational model and 99.9% financial-backed uptime guarantee

The right tools for your governance requirements

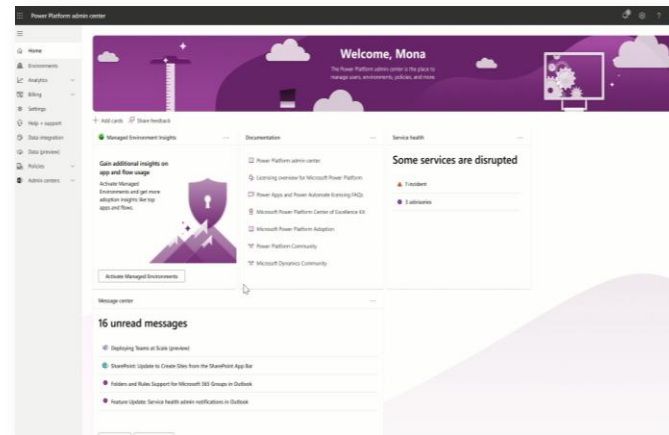
Power Platform Admin Center



Standard governance offering:

- Build guardrails around data, apps, and environments
- View analytics on low code assets across your organization

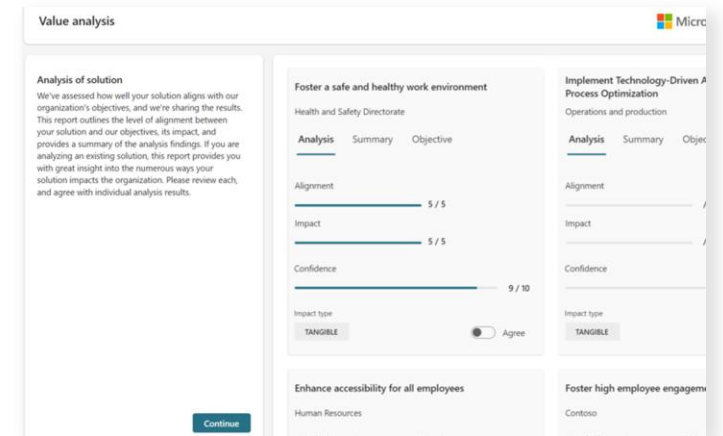
Managed Environments for Power Platform



Premium governance offering:

- Enable governance-at-scale without additional IT resources
- Proactively build and enforce best practices while gaining key insights and analytics

Center of Excellence Kit



Extensible governance add-on:

- Enhance your governance journey with powerful open-source tools
- Drive innovation and improvement faster

Center of Excellence

As organizations use Microsoft Power Platform to enable citizen developers across their organizations, they also seek capabilities to **govern and monitor usage**

The Microsoft Power Platform CoE Starter Kit is a collection of components and tools that are designed to **help organizations develop a strategy** for adopting and supporting Power Platform

CoE Starter Kit features for Copilot Studio

- ✓ Keep track of the number of conversations per agent over time, with daily aggregates
- ✓ Allocate a number of conversations per environment
- ✓ Receive capacity email alerts when environment add-ons get near or over their allocated number of conversations
- ✓ Get an overview dashboard of Copilot Studio usage in a tenant over time as well as an all-up conversation consumption versus allocation

Questions to discuss:

- Do you plan to use the Center of Excellence Starter Kit to monitor your agents in your tenant?
- Do you have specific governance requirements such as charge-back models?
- Do you allow users to create agents using Copilot Studio for Teams?
- Do you allow users to create Copilot Studio trials, or do you want them blocked?

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.**

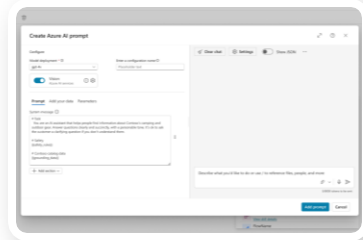
Customer Service Reduce call volume for quick resolutions  Request a refund Describe your issue Support tickets Centralized FAQs	Finance Save time by automating budget and expense approvals  Update tax information Submit expenses for approval Payroll Budget requests	HR Improve employee satisfaction and 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

A rich journey...

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

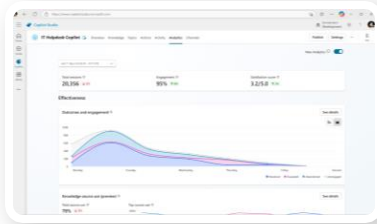
Integrate with AI services

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



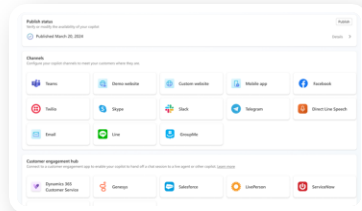
Monitor and improve

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



Publish to multiple channels

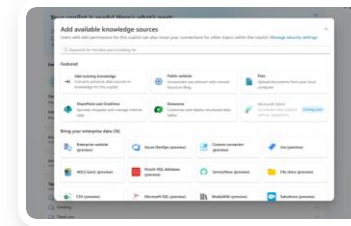
Publish in **20+ languages** and deploy to your channel of choice with a single click, including **Microsoft 365 Copilot**



Build & Publish

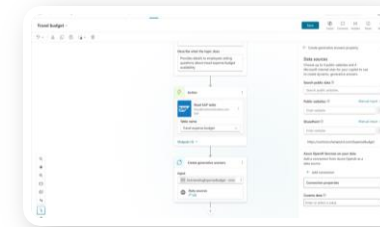
Chat over knowledge with gen AI

Get enterprise-specific answers using your files, websites, **Dataverse**, **third-party apps** and more



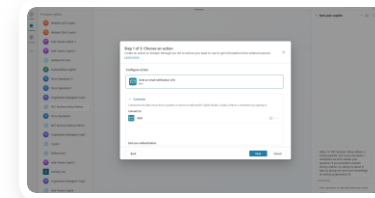
Create specific topics

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



Build actions

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



Copilot Studio

Analyze & Improve

Knowledge

Add your **public and enterprise data** sources using 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

Copilot connectors

Open web search (*public preview*)

Add knowledge

Add knowledge so your agent can provide more relevant information and insights. Once set up, other people with edit permissions for this agent can reuse these knowledge sources for additional topics. [Learn more about knowledge sources](#)


Upload file
Drag and drop or [select to browse](#). Files can be up to 512 MB, and can't be labeled Confidential or Highly Confidential or contain passwords.

★ Featured

🔗 Advanced

☰ See suggestions

 Public websites

 SharePoint

 OneDrive

 Azure AI Search

 Dataverse

 Dynamics 365

 Salesforce

 ServiceNow

 Azure SQL

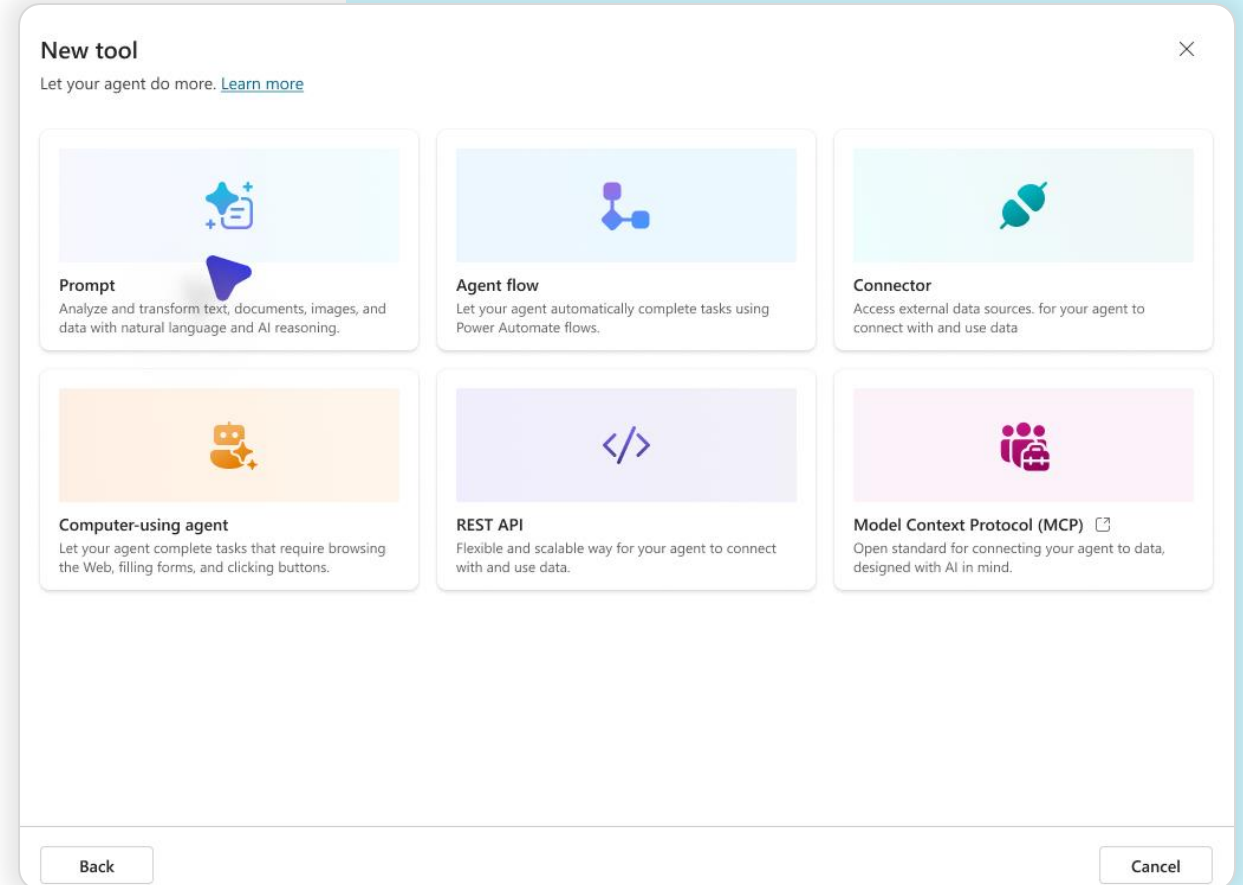
Cancel

Tools

Easily connect to your **key line of business systems**.

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

Prebuilt connectors	Choose from 1500+ prebuilt Power Platform connectors to popular data sources and apps
Custom connectors	Create a custom connector for any publicly available API
Agent flows	Enhance your agents with predefined logic that executes repetitive tasks quickly
Prompts	Provide custom instructions to the agent model (standard or deep reasoning)
Skills	Add a bot built using Azure Bot Framework as a skill
REST API	Connect with your external systems
Computer use ¹	Allow your agent to interact with websites and desktop apps
Model Context Protocol	Connect directly to existing knowledge servers and APIs for automatic updates to actions and knowledge
Code Interpreter ²	Enable your agent to write and run Python code to perform complex tasks
Document generation ³	Instruct your agent on how to generate a structured doc



¹ Frontier only
² Paid public preview
³ Private preview

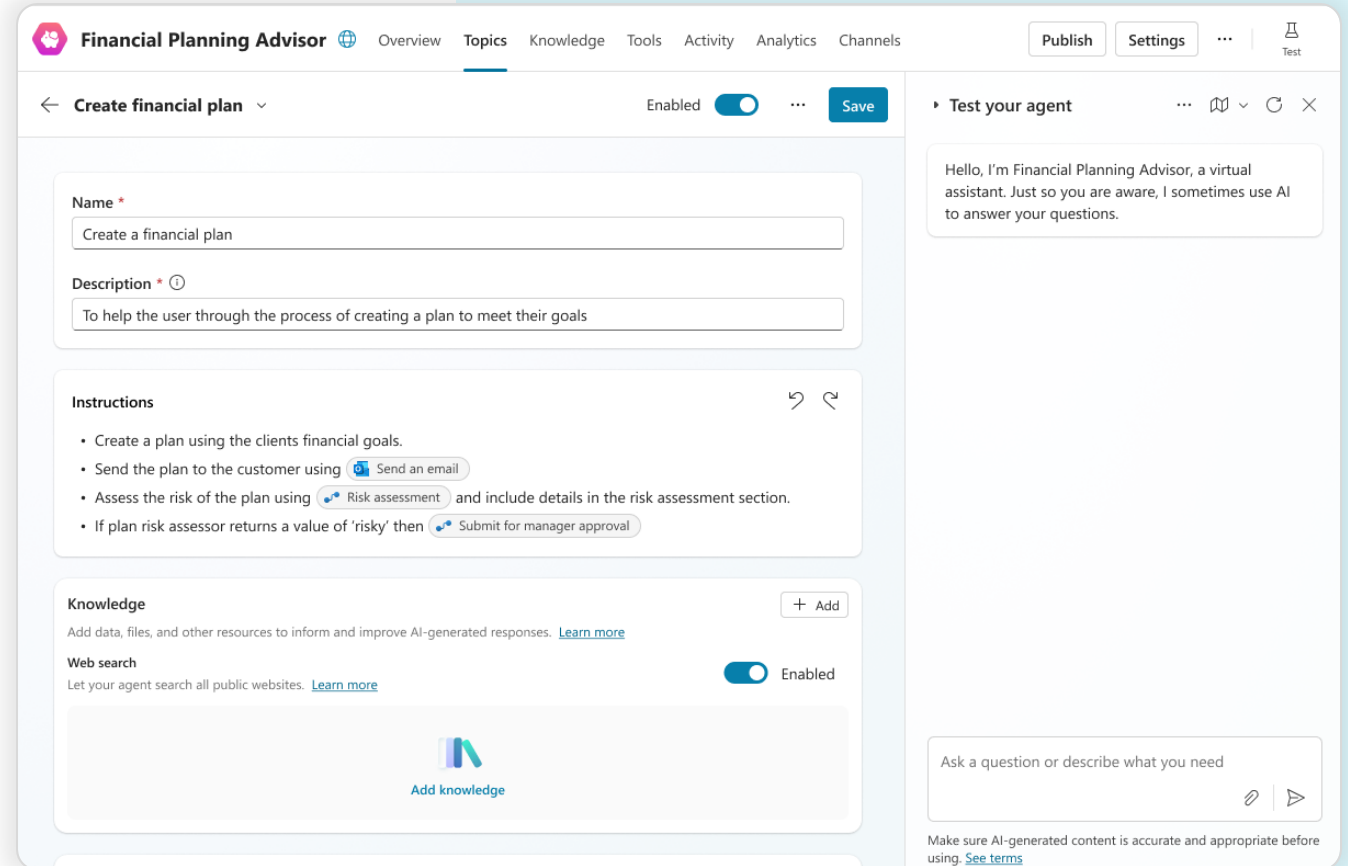
Orchestrator

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

Provide **instructions and human guard rails**, adapting them as needed.

Use autonomous triggers so your agent **can independently begin work** and **dynamically reason** over its capabilities without human intervention.

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



Easily optimize with data-driven insights

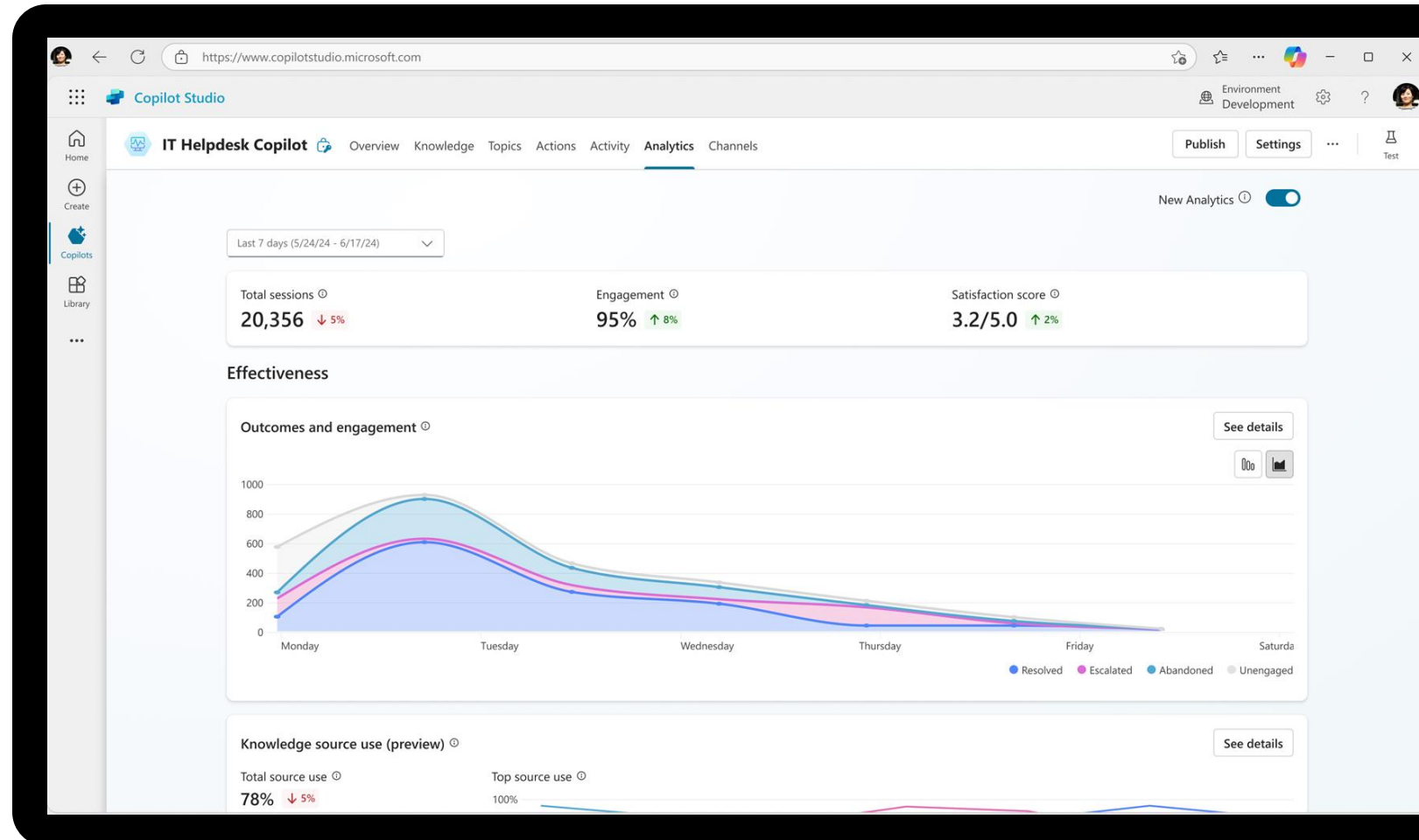
See which topics are having the greatest impact on **escalation, abandon** and **resolution rates**.

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

Get access to detailed **CSAT data, user feedback, knowledge sources used** and more.

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

Get an **ROI analysis** of your agents with Viva Insights

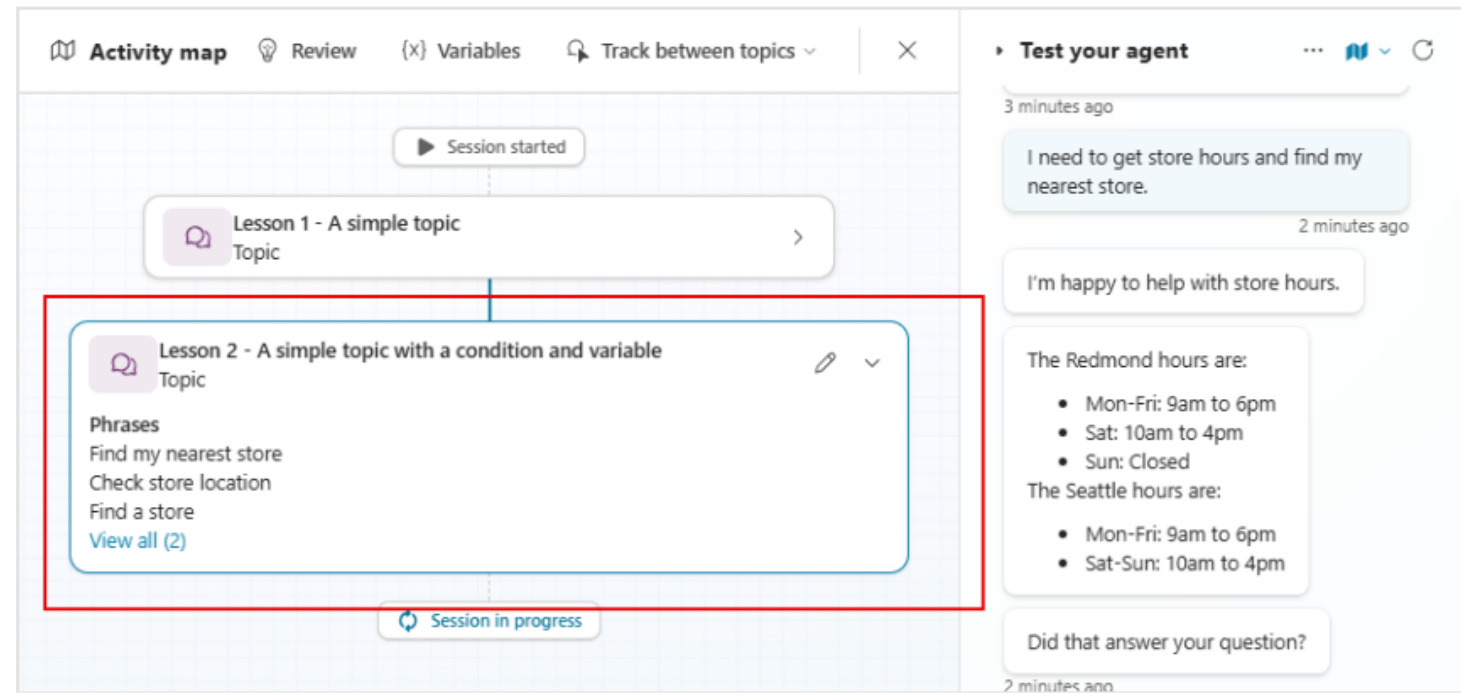


Generative Orchestration

Using generative AI to determine how your agent responds can make the conversation **more natural and fluid for the user**. Generative AI can also make it **possible for an agent to perform actions autonomously**.

When an agent is configured to use generative orchestration, it can select one or more actions or topics, or choose from its knowledge sources, to handle user queries (**including multi-intent queries**), or to autonomously respond to events. If multiple actions or topics are selected, the agent calls them in sequence, **automatically generating any questions to ask the user for missing information**.

Resulting in a more natural conversation experience, requiring **fewer custom topics**, and **reducing errors and hallucinations**.





Planning your agent



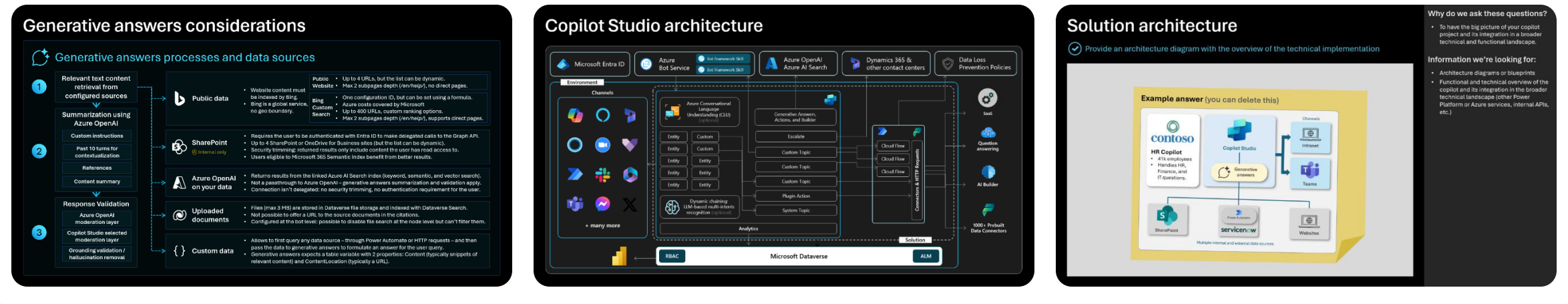
Copilot Studio Implementation Guide

SCAN ME



The Copilot Studio implementation guide provides a framework to do a 360-degree review of an agent project.

Through probing questions, it highlights potential risks and gaps, aims at aligning the project with the product roadmap, and shares guidance, best practices and reference architecture examples.



aka.ms/CopilotStudioImplementationGuide

Getting started right



Identify the right requirements



Start small and scale up

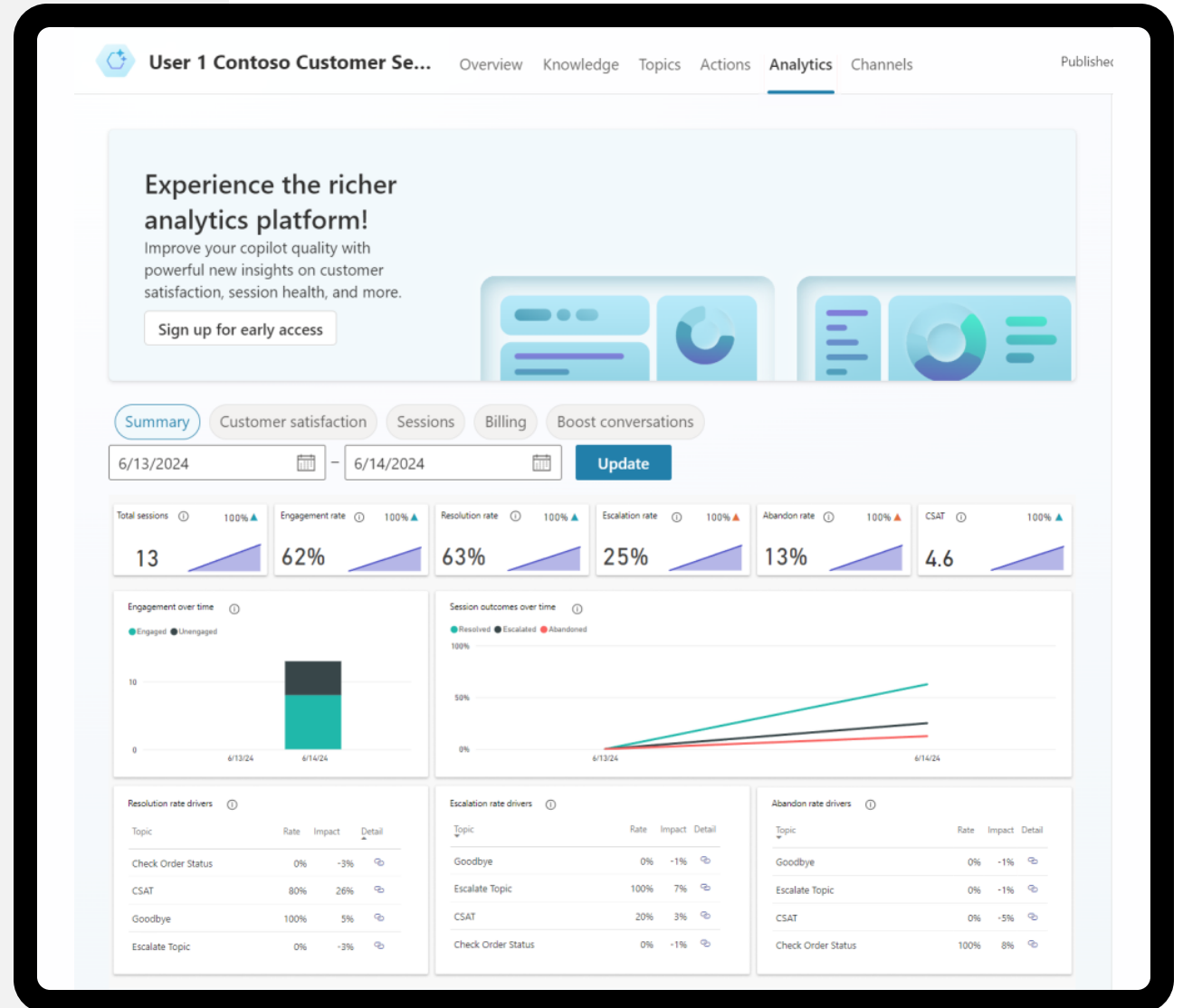


Track analytics for ongoing improvements



Utilize the Copilot Studio implementation guide:

aka.ms/CopilotStudioImplementationGuide



Where to start

Start with these customer-validated, function-specific, custom-built agents to unlock quick wins and drive high-impact transformation across your enterprise

Customer Service	Document Compliance Agent	Ensure documents follow policies in real-time to reduce risk and support audits
	CSAT Prediction Agent	Predict customer dissatisfaction early and recommend fixes to improve CSAT
Sales	Lead Prediction Agent	Score and prioritize leads using behavioral and CRM data to improve conversion
	Sales Research Agent	Analyze CRM and market trends to uncover competitive intelligence and seller-ready recommendations
Marketing	Marketing Research Agent	Analyze internal and external data to uncover trends and audience insights
	Compliance Check Agent	Scan content for brand/legal issues and flag risks before publishing
Finance	Invoice Exception Agent	Automatically flag and resolve invoice mismatches to improve accuracy and speed
	Finance Q&A Agent	Answer finance questions instantly and route complex issues to the right team
HR	Smart Onboarding Agent	Automate onboarding steps, document handling, and training setup for new hires
	Smart Learning Agent	Recommend training, track progress, and generate learner scorecards automatically
Legal	Automated Contract Review Agent	Detect contract risks and suggest changes to speed up legal review
	Case & Precedent Analysis Agent	Analyze large volumes of legal docs, identify relevant arguments, and generate tailored briefs
IT	IT Admin Agent	Automate IT ticket creation, triage, and follow-up for faster resolution
	IT Troubleshooting Agent	Scans end user devices for hardware, software, and network configuration issues

The background features a large teal shape on the left side, with several smaller, rounded diamond shapes in teal and light blue scattered across the white background. A vertical light blue bar is positioned on the far left edge.

Creating your agent

Generative AI in Copilot Studio

Powered by Azure

CONNECT AND EXTEND



M365 Copilot



Azure AI Foundry



Power Apps



Power Pages



Teams



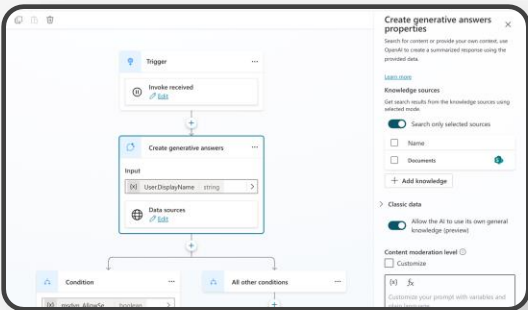
Dynamics 365



Generative Conversations

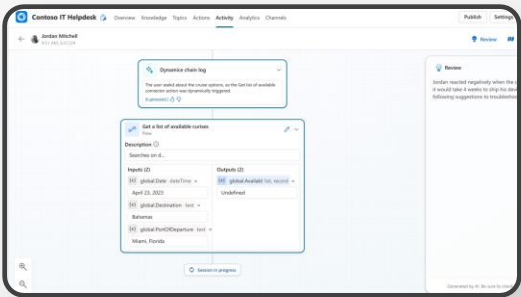
Generative Assistance

Generative Answers



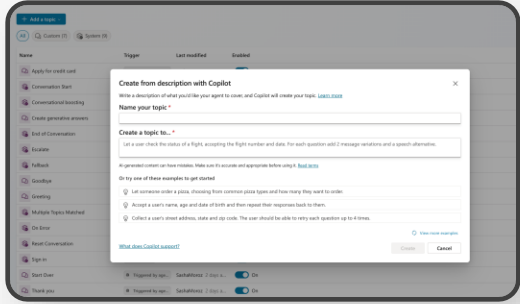
Copilot Studio boosts conversational coverage by dynamically generating multi-turn answers based off an organization's content in real-time in response to unanticipated questions.

Generative Actions



Copilot Studio generates dialog and takes action by dynamically chaining existing building blocks which can handle queries that were not anticipated or previously built.

Generative building



Assisted authoring to build, design and modify agents through natural language.

External

Internal

3P Search APIs

OneDrive URL

Documents

External URL

SharePoint URL

Tools

Power Platform Connectors

Topics

Skills

Agent Flows

Edit & Refine

Topics

Trigger Phrases

Entities

Variables

Adaptive Cards

Branching

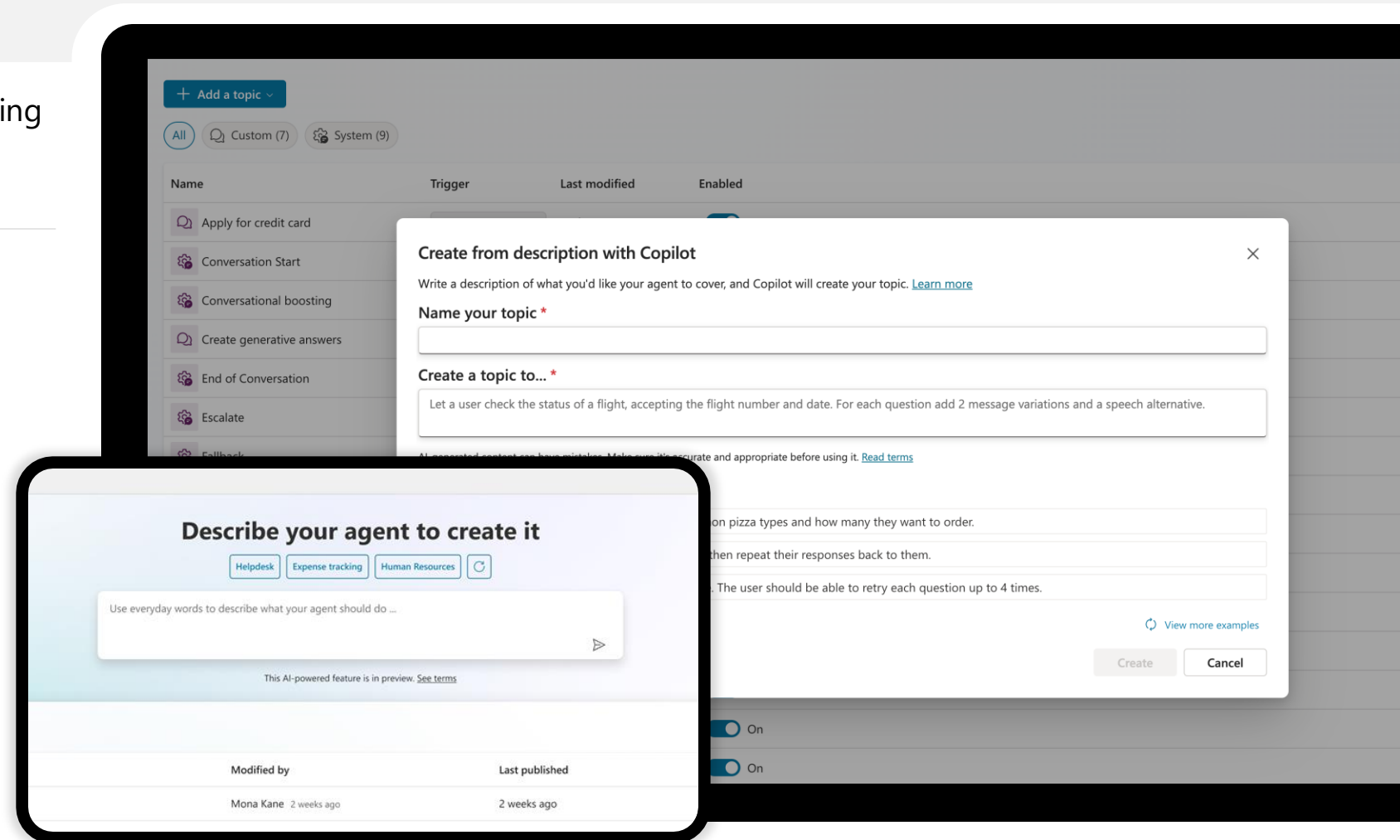
Generative building

Use AI assistance to build and modify agents - all through natural language

Build a complete custom agent by describing what you want your agent to do in natural language

Use the in-product embedded Copilot experience for:

- Topic creation
- Topic iteration
- Response generation
- Adaptive Card generation
- Topic improvement suggestions
- Suggested trigger phrases, topic names, topic descriptions
- Transcript generation
- Topic suggestions

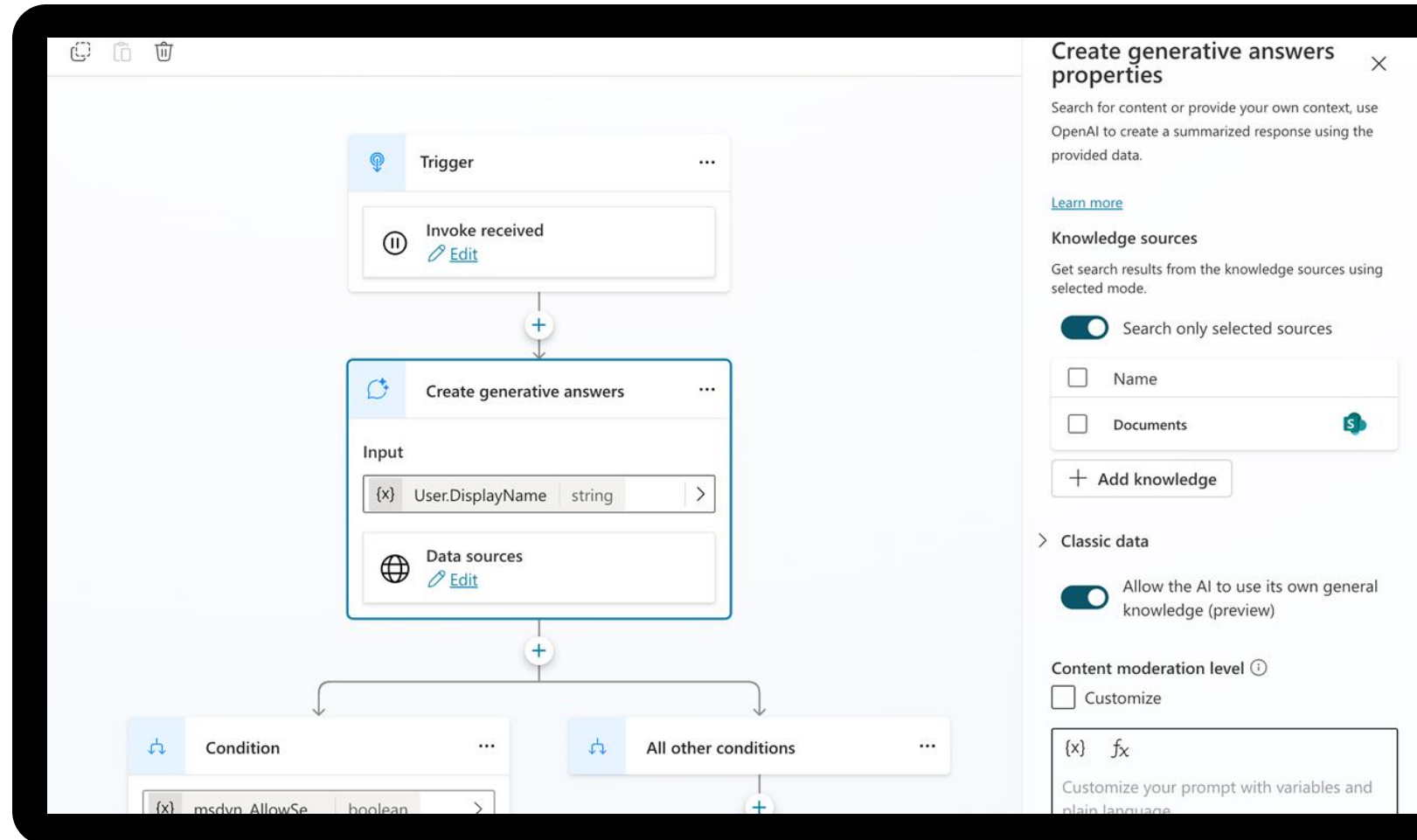


Generative answers

Enable multi-turn chat over your own internal and external knowledge sources and sites with generative answers

Agents can answer thousands of questions out of the box in seconds

You can even pull data from an API or other backend system and enable generative chat over it



Lab time!

Lab 02

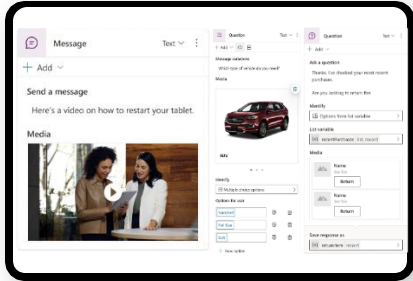
Build a conversational agent in Copilot Studio

50 minutes

The background is a solid teal color. On the left, there is a vertical light blue bar. The title 'Authoring Canvas and Tools' is written in white, sans-serif font. The background is decorated with several geometric shapes: a large white rounded rectangle on the right, and several smaller rounded squares in teal and light gray, some of which are overlapping or partially cut off by the edges.

Authoring Canvas and Tools

Copilot Studio authoring canvas



Rich Responses

New features including:



Adaptive Cards



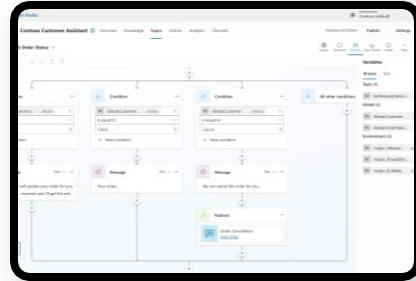
Images



Videos

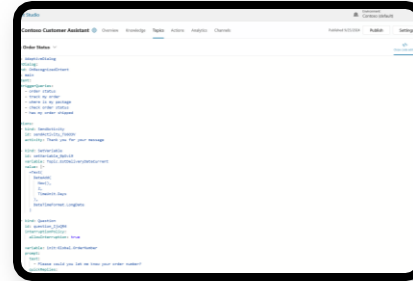


Quick Replies



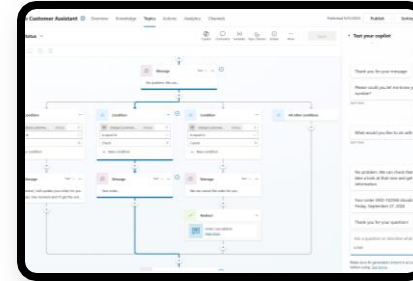
Power Fx-based variables system

- Power Fx integrated formula editor for variable management
- List/Record type support
- Condition nodes with Power Fx formula support
- Iterate over a List with new Loop nodes (coming soon)



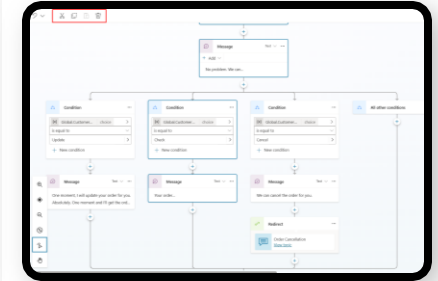
Code side-by-side

- Move between a visual editor and text editor
- Share and re-use topic logic between developers and agents



Event-driven & contextual triggering

- Trigger an event that can interrupt Dialogs if it detects a certain value has been received
- Add more nuanced responses to a message when the agent runs into an issue.
- Agents can stay within context when a user asks for additional help or more details



Productivity

- Cut, Copy, Paste
- Multi-node selection
- Enhanced topic navigation

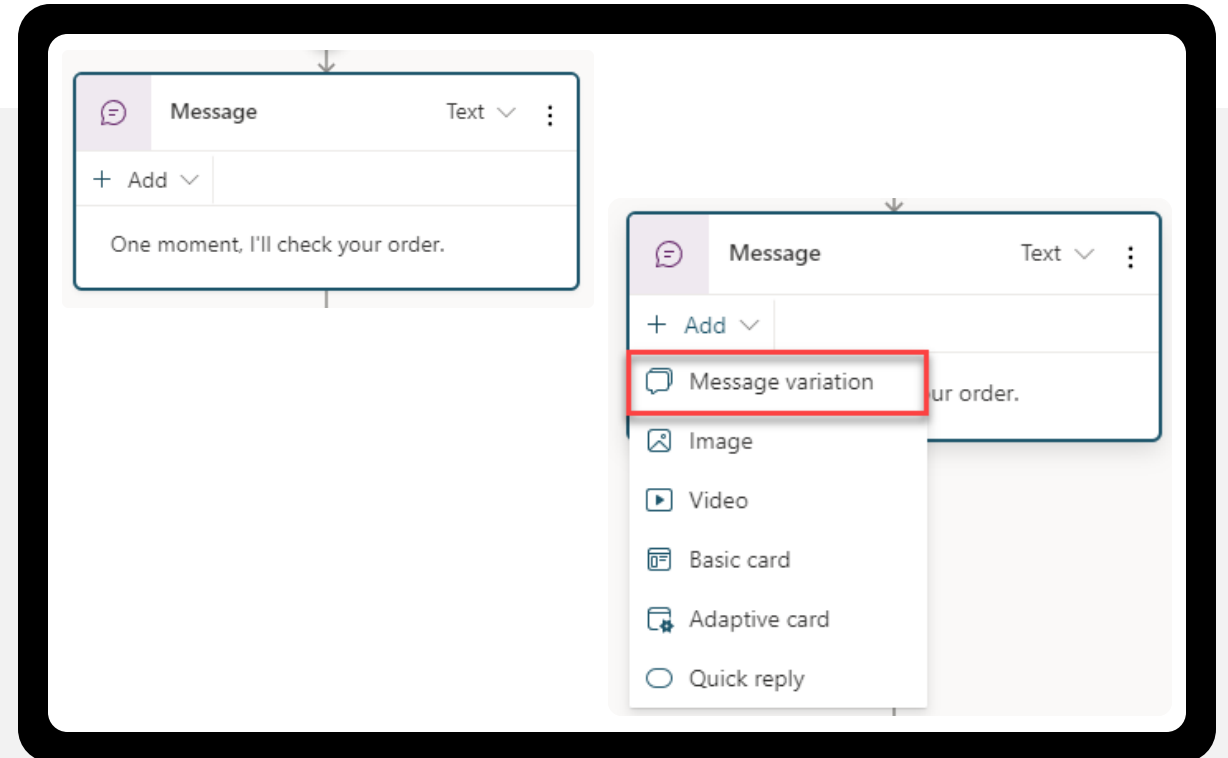
The Message Node



The Message Node is one of the most common nodes used when authoring agents



It allows you to display standard text, formatted text and dynamic data in the conversation



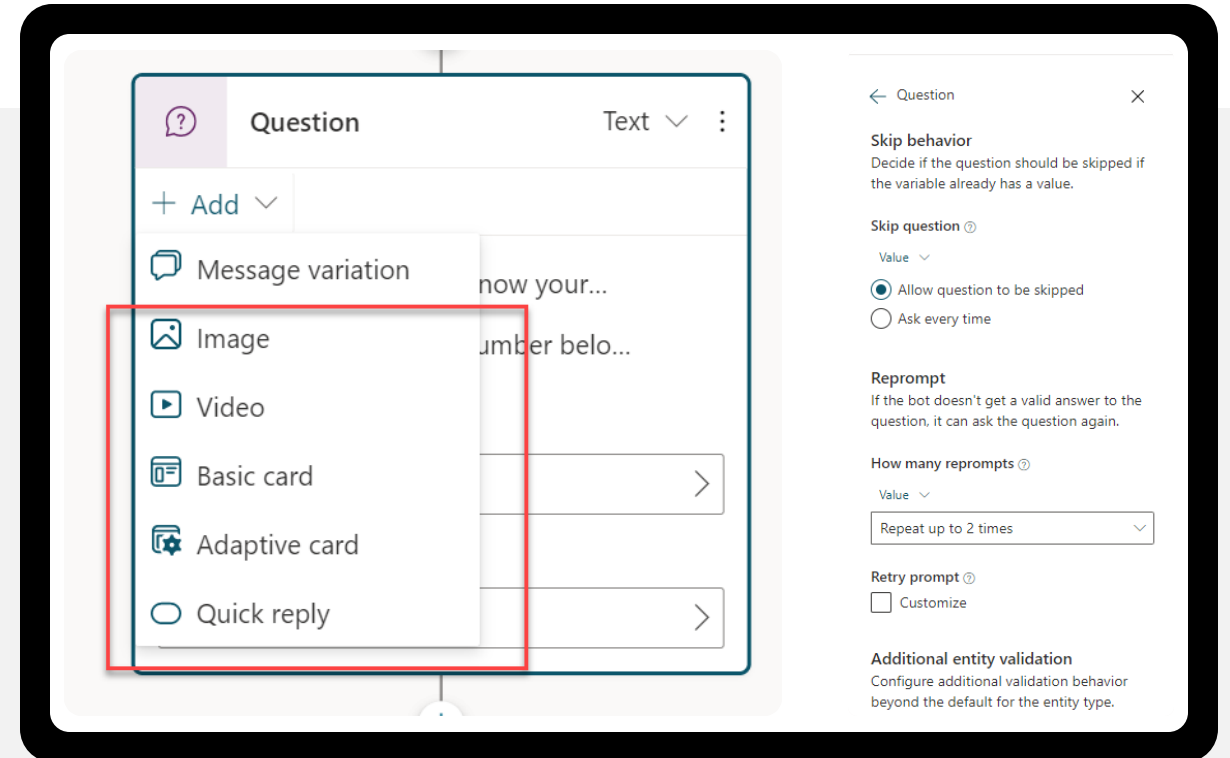
The Question Node



The Question Node is another of the most common nodes used when authoring agents



It provides capability to ask the user a question and store the data to be used and operated upon



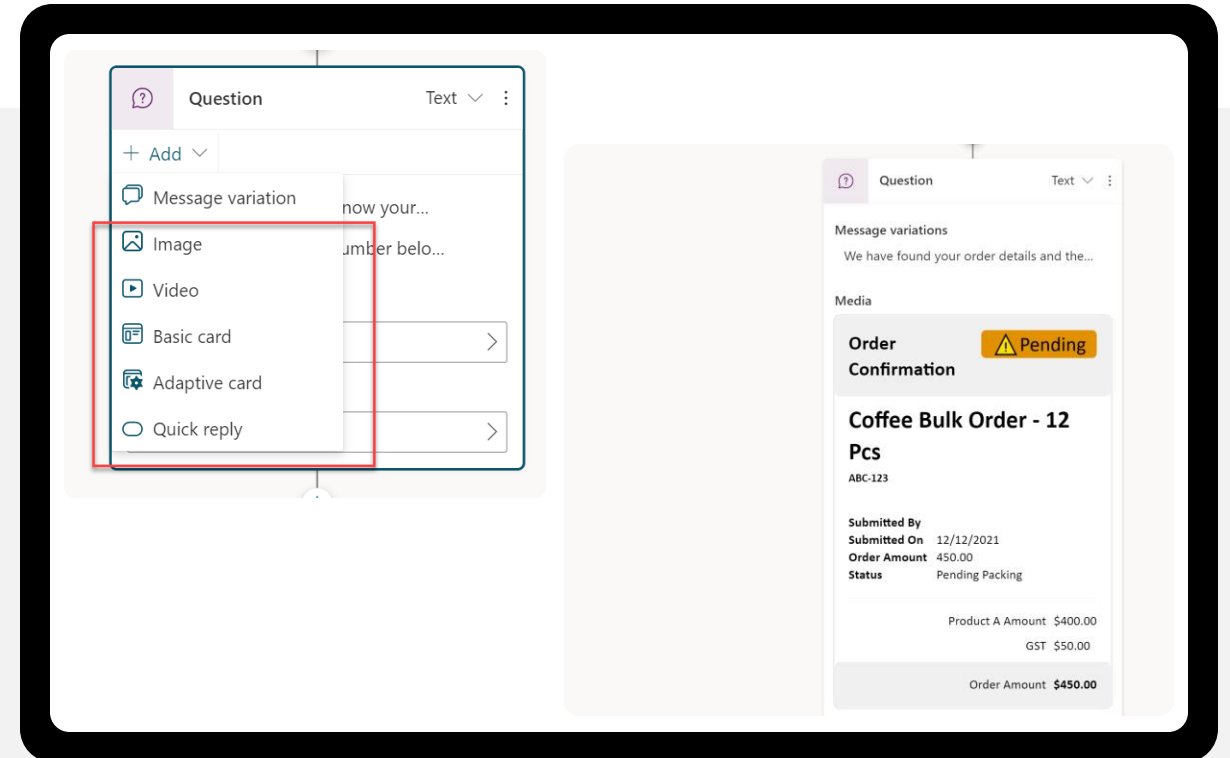
Rich text responses



Brand new rich text response options including image and adaptive card



Deliver enhanced experiences to customers and users which are more engaging and display data in more dynamic ways



Use variables to navigate customers to tailored content



Direct your customers to content you want them to see



Add variables to keep customer information for later in the conversation

The screenshot displays a conversational AI interface. On the left, a flowchart shows a sequence of nodes: a 'Phrases' node, followed by a 'Question' node, and then another 'Phrases' node. The 'Question' node is highlighted with a red box. Below the 'Question' node, the 'Save response as' section is also highlighted with a red box, showing a variable named '{x} Global.Customer...' with a 'choice' type. On the right, the 'Variable properties' panel is open, showing the 'Variable name' as 'Global. CustomerAction', the 'Type' as 'choice', and the 'Usage' section with 'Global (any topic can access)' selected. The 'Usage' section is also highlighted with a red box.

Phrases
please can I check my order
check order
confirm order status
update on order status
check when order is due

Question Text ▾
+ Add ▾
What would you like to do with your...
Identify
Order Action >
Select options for user
Save response as
{x} Global.Customer... choice >

Variable properties ✕
Variable name
Global. CustomerAction
Type
choice
Reference
Question
What would you like to do with your order?
Type (choice) derived from here.
Variable gets value from this node if empty
[View all references](#)
Usage
☐ Topic (limited scope)
☒ Global (any topic can access)
☐ Allow to carry between sessions
☐ External sources can set values

Entities and slot-filling capabilities



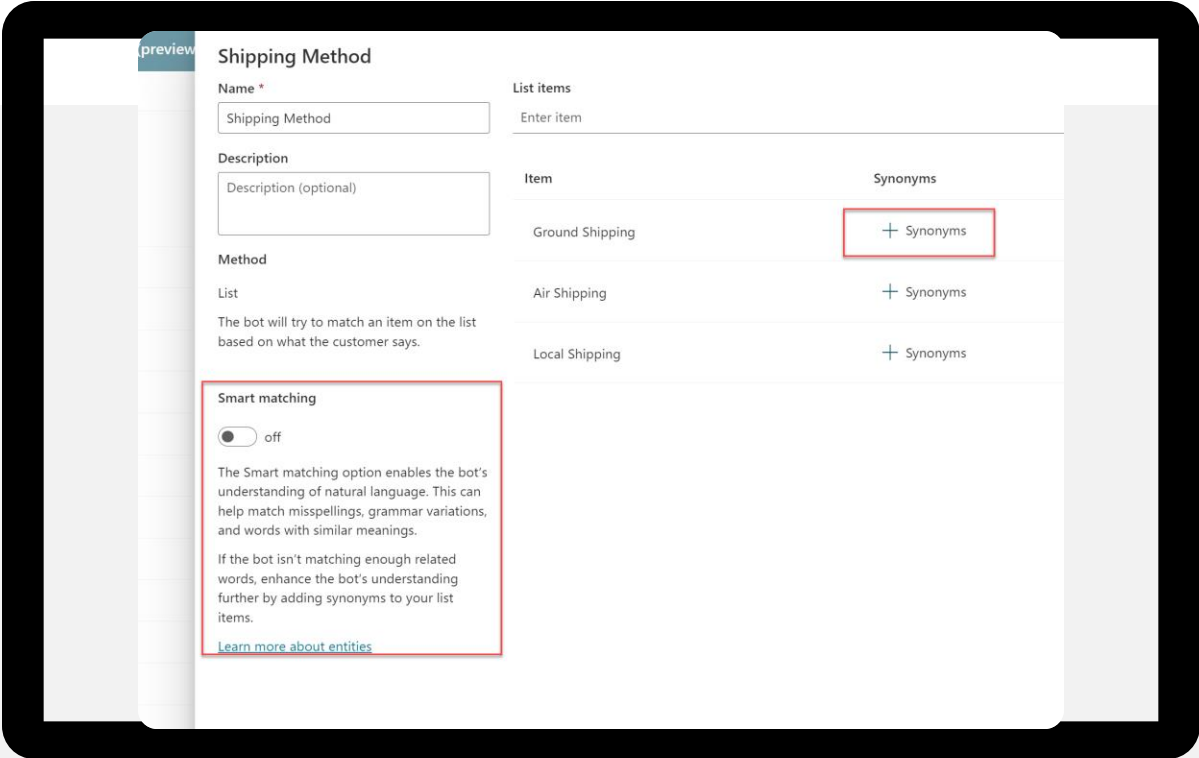
Agents can intelligently avoid repetitive conversations



Enhances your efficiency as a maker



Agents can guide you to making the best experience



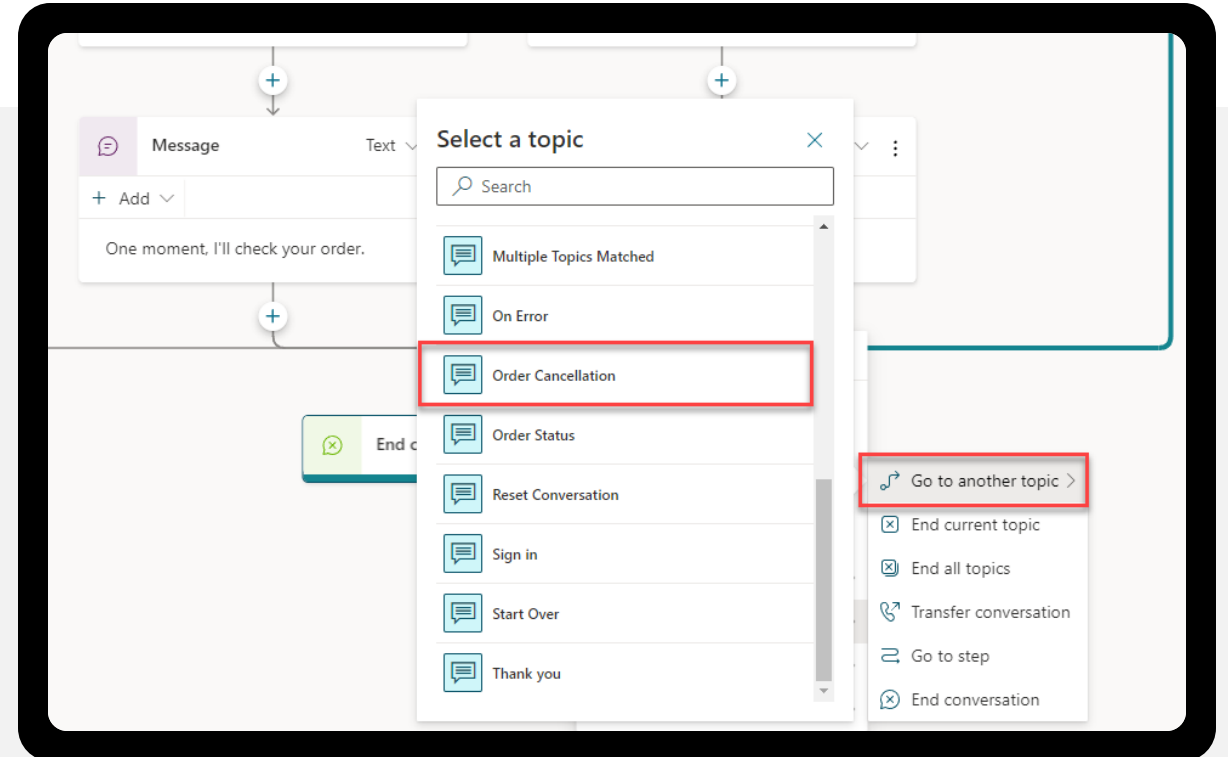
Topic management



Re-direct and connect customers to related topics

Use it when:

A conversation requires more than one topic, such as when you need to ask a clarifying question to determine which topic the user needs



Use enhanced speech authoring capabilities



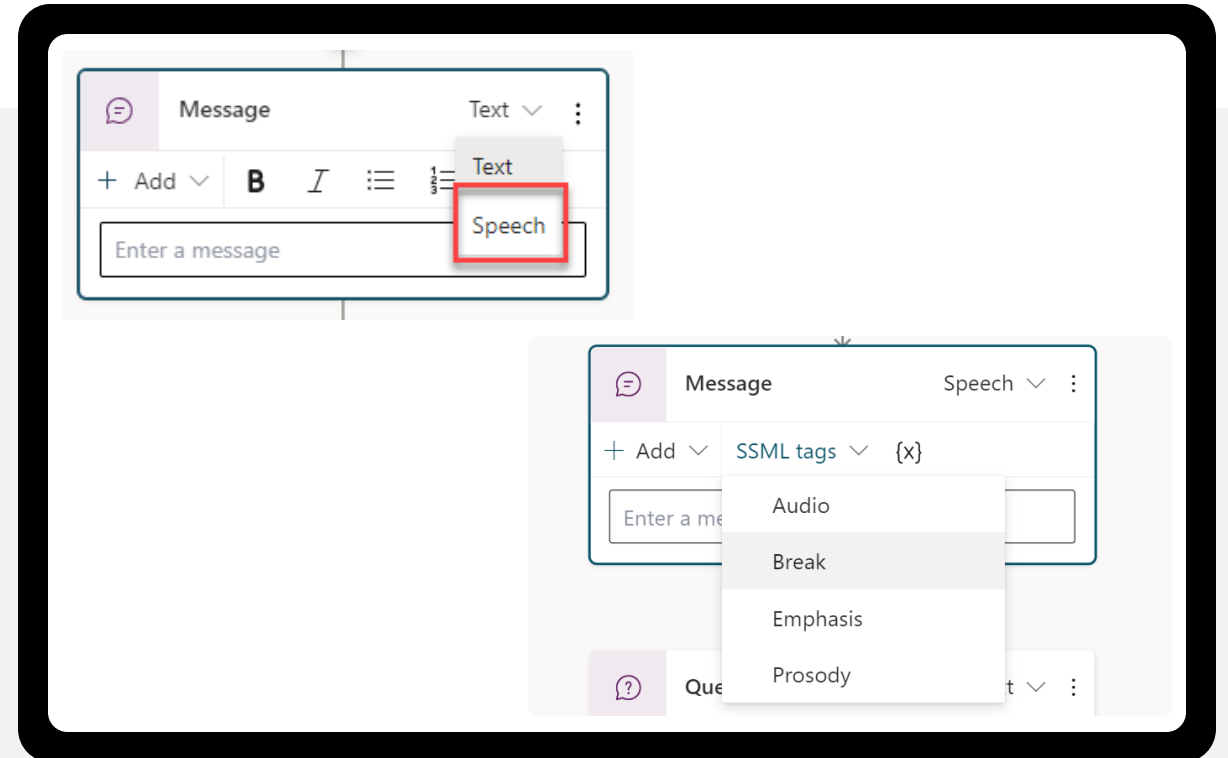
Directly add SSML overrides



Enhances speech enabled text agents



Tailor the best experience for your customers



Productivity and pro code options



Author agents faster with productivity options including copy and paste



Use the code view to quickly code message content

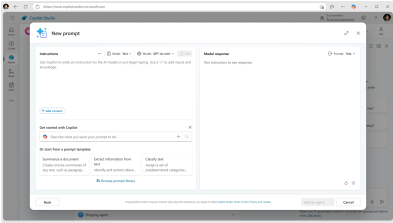


Modify anywhere dialog flow without disruption

Check Order Status ▾

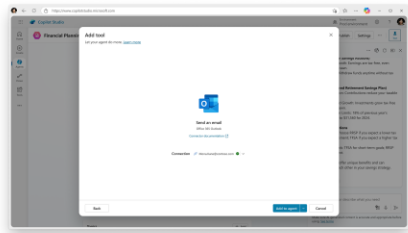
```
1 kind: AdaptiveDialog
2 beginDialog:
3   kind: OnRecognizedIntent
4   id: main
5   intent:
6     triggerQueries:
7       - order status
8       - track my order
9       - where is my package
10      - check order status
11      - has my order shipped
12
13 actions:
14   - kind: SendActivity
15     id: sendActivity_TU603V
16     activity: Thank you for your message
17
18   - kind: SetVariable
19     id: setVariable_0pSvi9
20     variable: Topic.EstDeliveryDateCurrent
21     value: |-
22       =Text(
23         DateAdd(
24           Now(),
25           2,
26           TimeUnit.Days
```


Popular agent tools



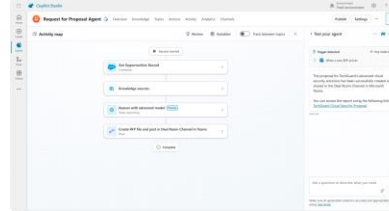
Prompts

Provide structured instructions to guide the LLM to perform specific tasks



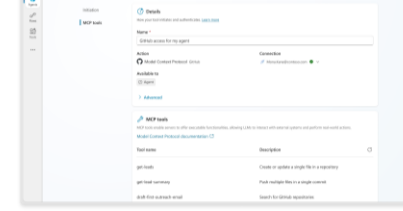
Connectors

Choose from 1500+ prebuilt Power Platform connectors to popular data sources and apps or create a custom connector for any publicly available API



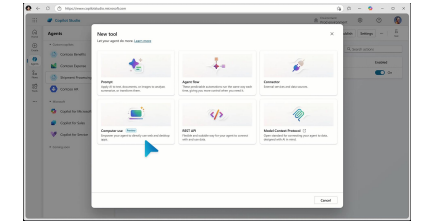
Deep reasoning

Instruct agents to perform complex reasoning tasks



Model Context Protocol

Connect directly to existing knowledge servers and APIs for automatic updates to actions and knowledge



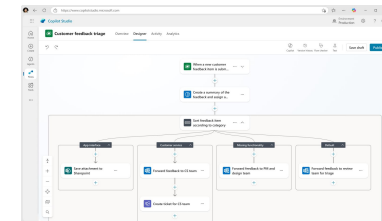
Computer Use¹

Enable your agents to interact with websites and desktop apps



Code interpreter²

Enable your agent to write and run Python code to perform complex tasks



Agent flows

Enhance your agents with predefined logic that executes repetitive tasks quickly

Skills

Add a bot built using Azure Bot Framework as a skill

REST API

Connect with your external systems

Document generation³

Instruct your agent on how to generate a structured doc

¹ Frontier only
² Paid public preview
³ Private preview

Prompts

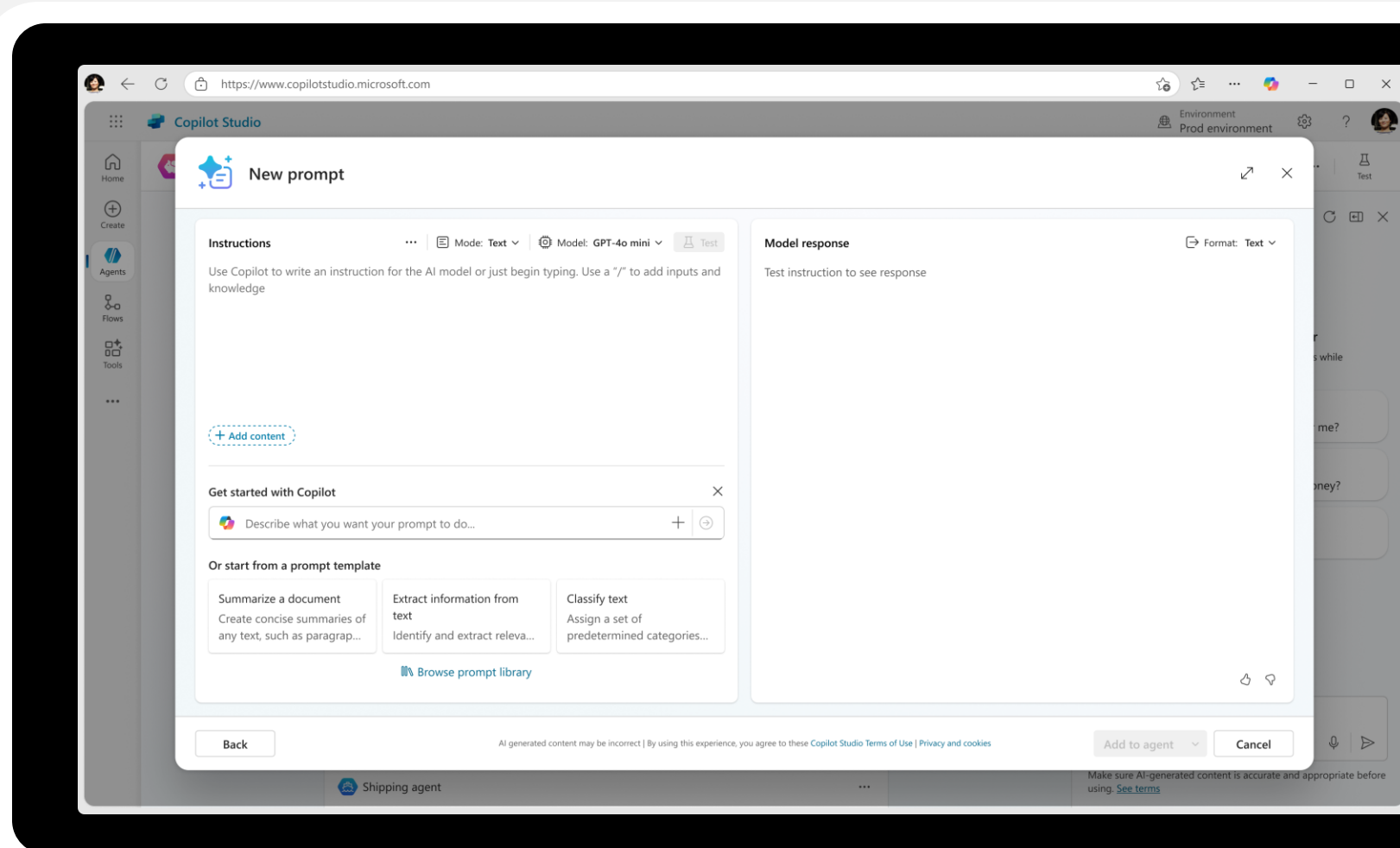
Provide structured instructions to guide the LLM to perform specific tasks

The Prompts tool allows makers to easily create **custom prompts** inside Copilot Studio, either at the app level or within an agent or topic.

Use out-of-the-box **templates** or write the prompt **from scratch**.

Add **deep reasoning** prompts to solve more complex business processes by integrating advanced models with your agents. *(Available in public preview).*

Ground models in your enterprise data and securely draw insights from internal resources.



Copilot connectors

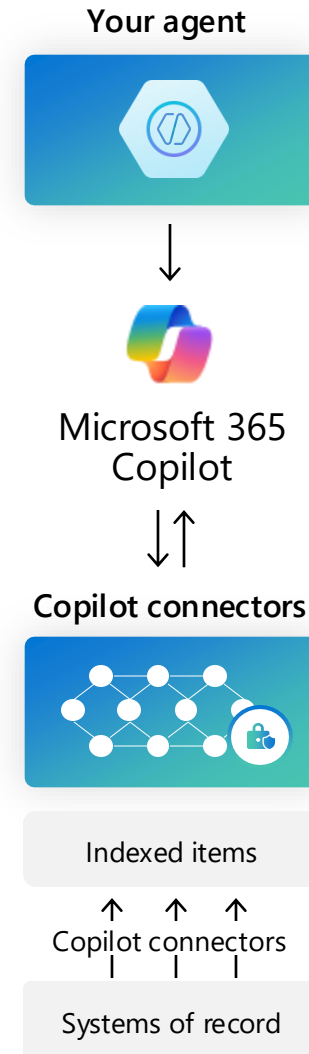
Add new knowledge to Microsoft 365 Copilot

Copilot connectors (formerly Graph connectors) make it easier to bring external knowledge into Microsoft 365 Copilot.

They enable Copilot to understand context and relationships in your data, delivering more relevant and secure responses.

Over 65 Microsoft built connectors are now generally available or in preview in the Microsoft 365 Admin Center, including Gong, PagerDuty, Unily, and more. Full list will be updated here for Build:

https://aka.ms/Copilot_connectors_learn



Simplify integration with AI

Model Context Protocol

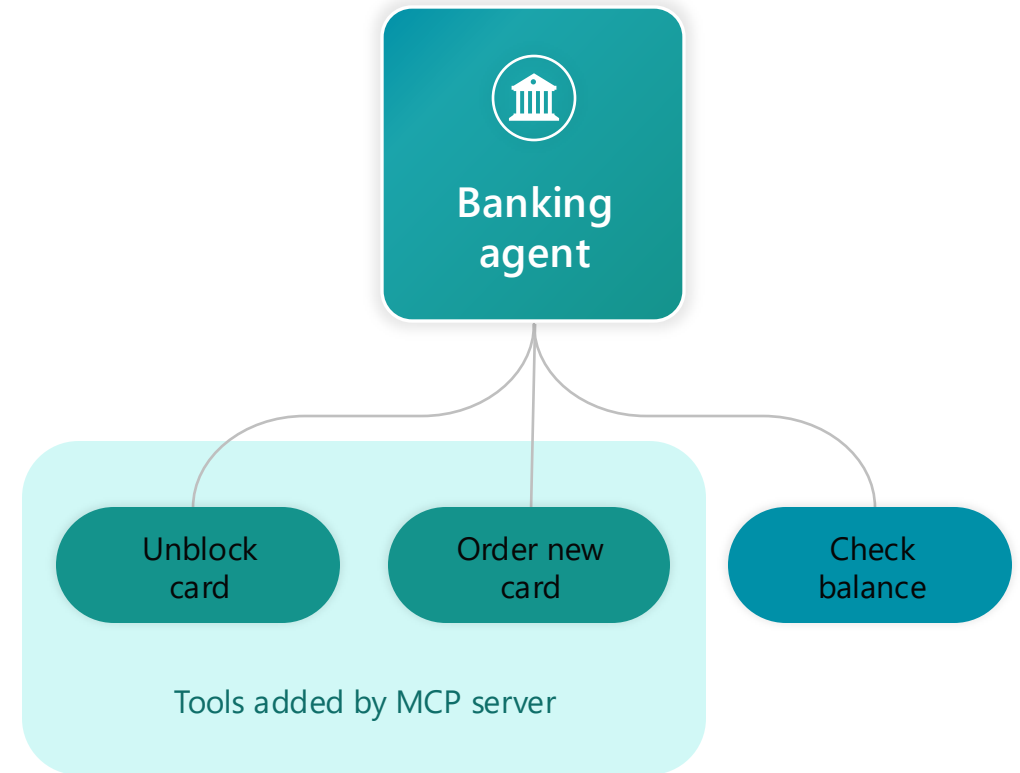
MCP Support, a standardized way to connect agents to your data and tools, is now Generally Available in Copilot Studio. It's like a USB-C port for your agents.

Connect your agents to MCP-enabled connectors, unlocking the latest actions and knowledge made available.

Apply enterprise security and controls to your connectors including data loss prevention, authentication, and virtual networks.

Access a marketplace of servers from the growing library of pre-built, MCP-enabled connectors showing list of tools available for your agents to use.

Gain enhanced analytics and tracing capabilities, offering better visibility into agent behavior and connector performance.





MCP servers for Dynamics 365

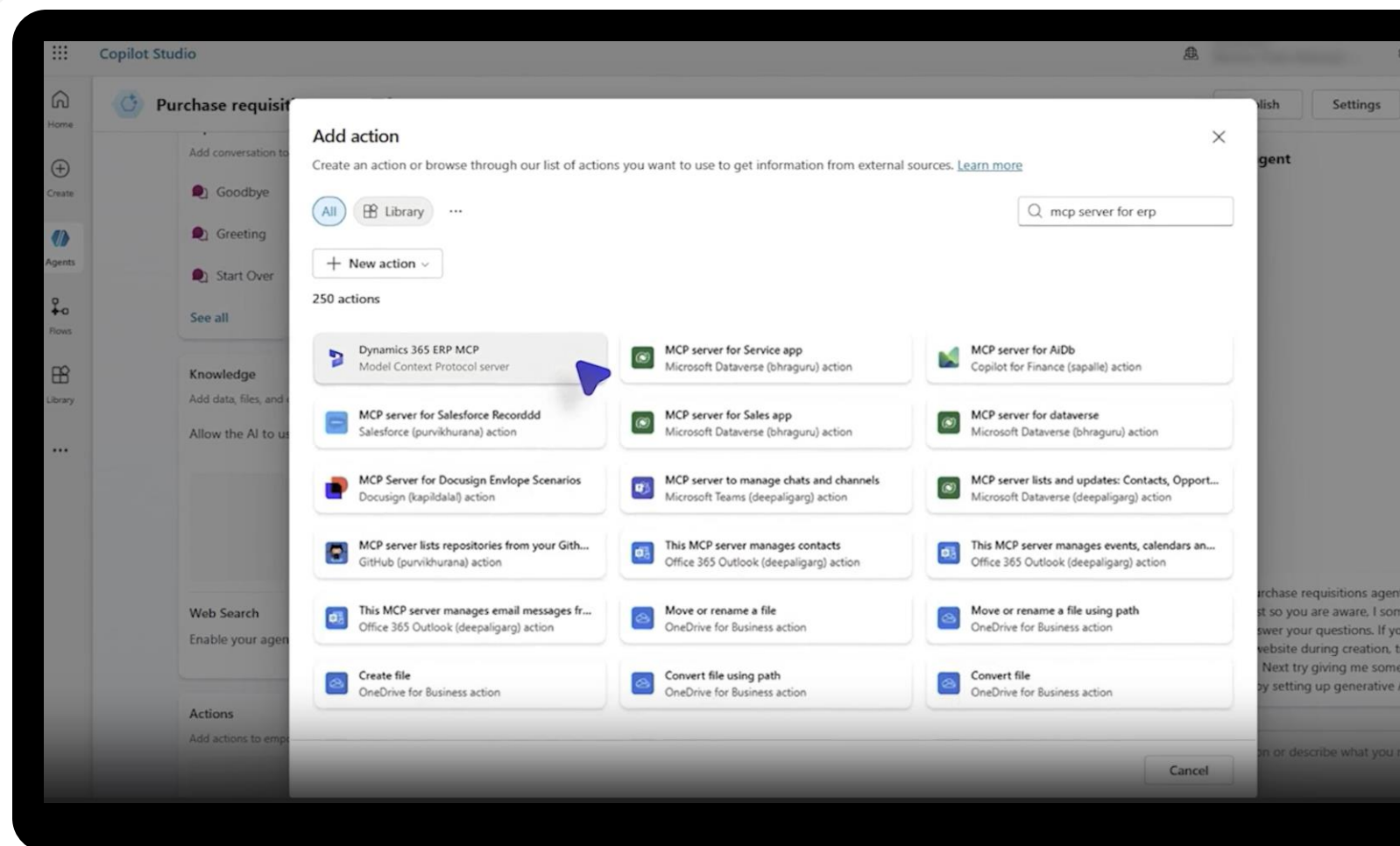
Accelerate your journey to the Frontier Firm with the most agent-ready business applications

Public preview

Enhance agent intelligence: Make agents more context aware with access to knowledge, actions and tools from D365 Business applications (ERP, Sales, Service and Business Central)

Faster time to value: Rapidly build MCP-compliant agents to execute processes autonomously with minimal API and integration efforts

Secure, consistent and reliable: Employ enterprise security and governance while making MCP servers available in Copilot Studio using the connector infrastructure.



Read the blog: aka.ms/BUILDMCP

Computer use tool

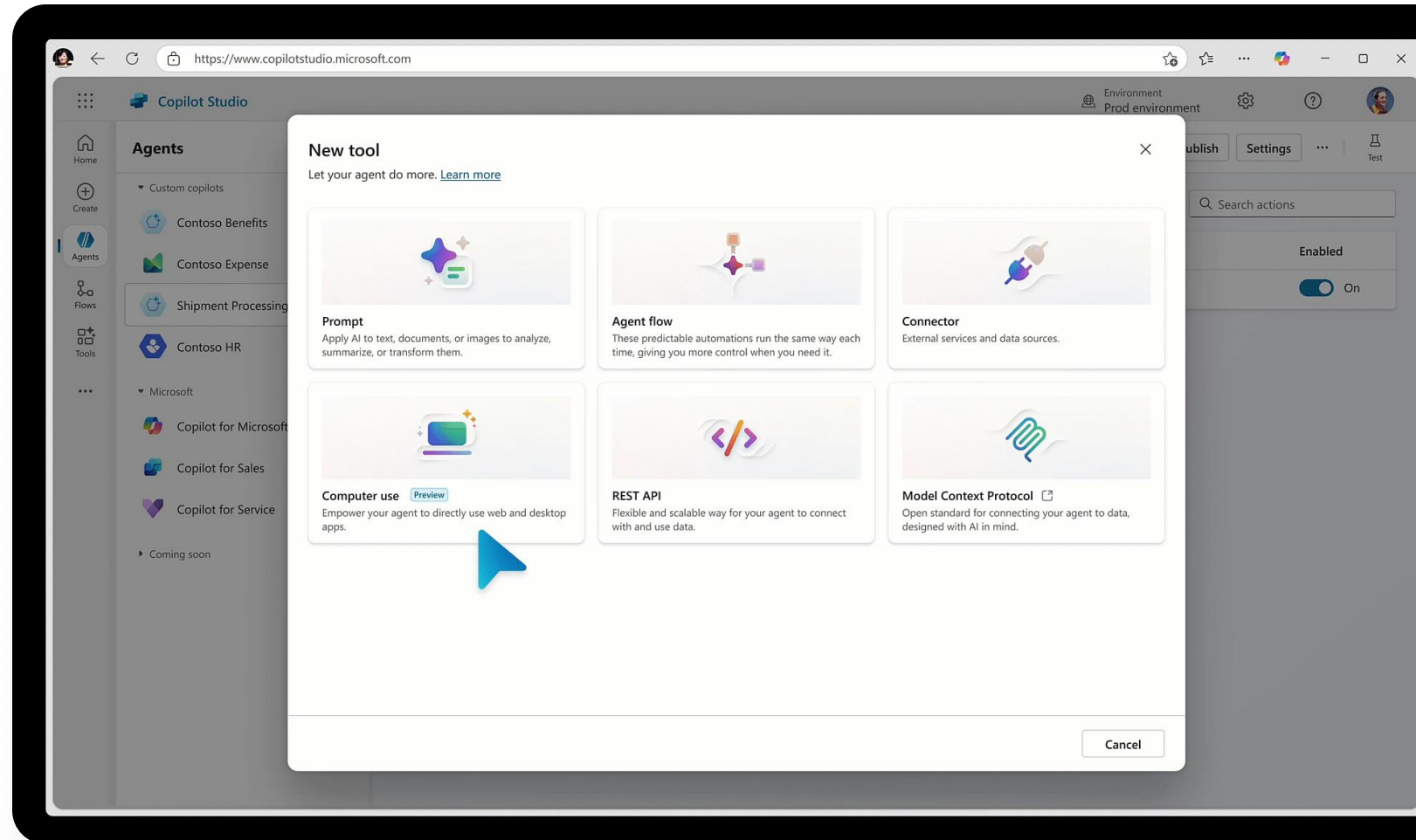
Enable your agents to interact with websites and desktop apps

Automate user interfaces with **AI vision and understanding** to transfer data, process documents, and conduct market research by reading, clicking buttons, selecting menus, and typing into fields on the screen.

Build **resilient UI automation** that does not break when words, buttons, windows, or layouts change.

Get **full visibility** with real-time testing and a history of computer use activity including captured screenshots and reasoning steps.

Deploy at **scale on virtual machines**, hosted by you, or by Microsoft to accelerate deployment, simplify management, and reduce costs.



Agent Flows

The background features a large teal shape on the left side. Scattered across the white background are several diamond-shaped elements: three in shades of blue and two in light grey. On the right, there are larger, rounded grey shapes, one of which partially overlaps a blue diamond.

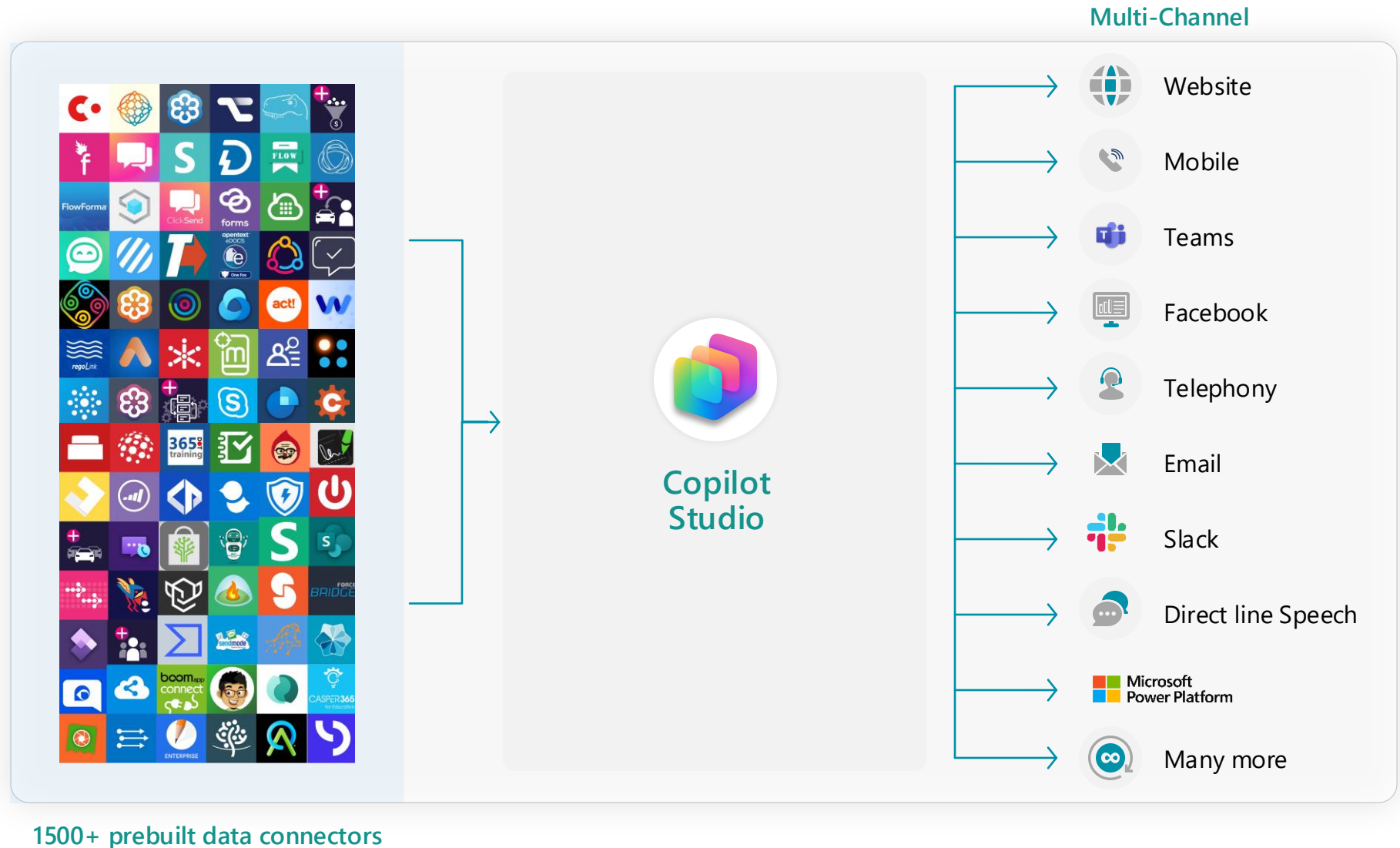
Agent flows and connectors

Use agent flows to build, edit, and extend automation with 1,500+ pre-built connectors or custom APIs

For a smooth user experience, agent flows triggered with your agent to execute quickly to minimize delays in response times

Agent flows from Copilot Studio have a 100-second limit to return results before timing out

Make HTTP requests directly from Copilot Studio to bypass agent flows and enhance efficiency



Agent flows

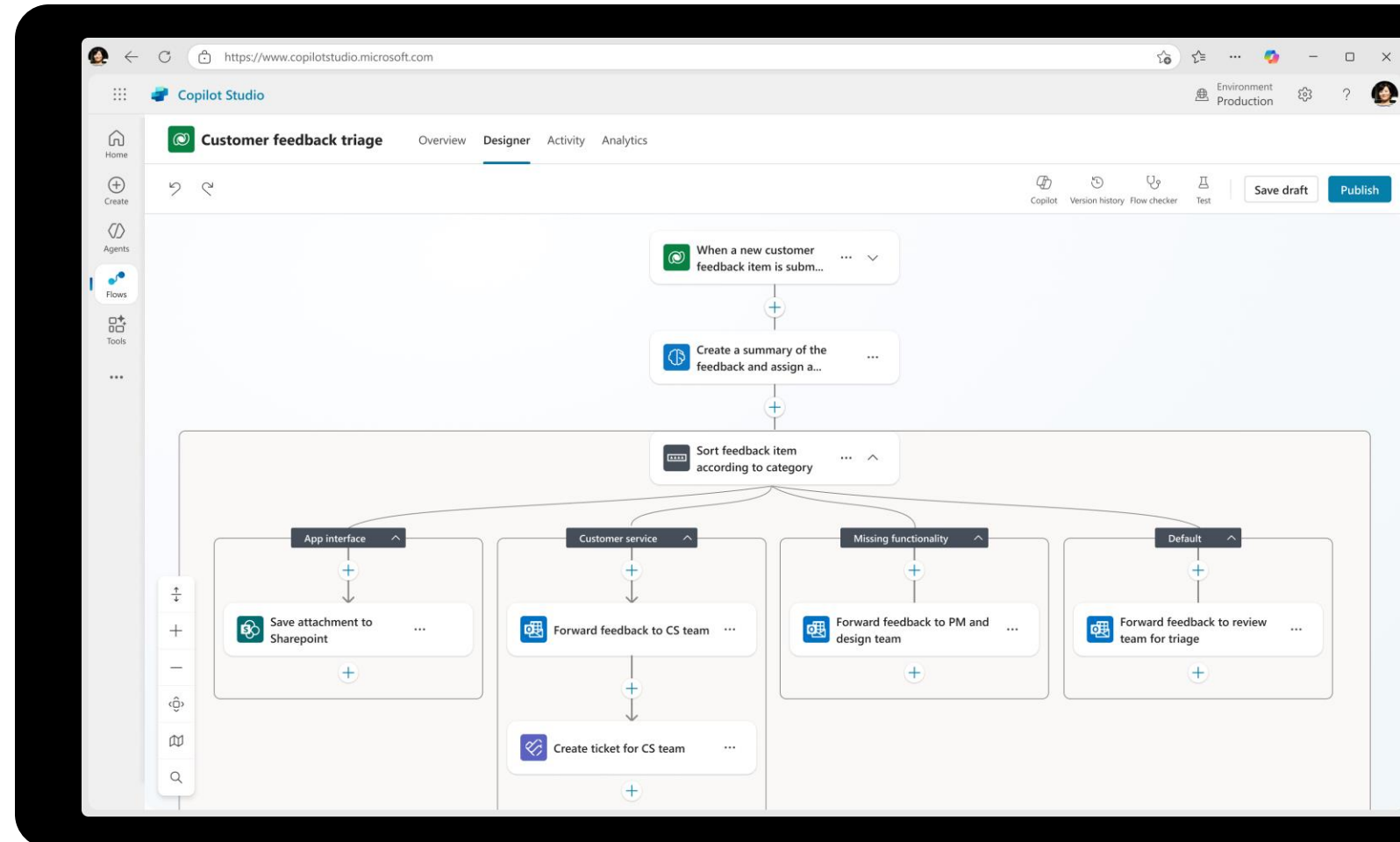
Accelerate your agents with fixed automation pathways

Enable your agents to **accomplish objectives faster** by equipping them with fixed automation pathways that don't rely on agent reasoning and orchestration at every step.

Agent flows **execute repetitive tasks** quickly by precisely following a predefined sequence of agent flow actions.

Enhance agent flows with targeted use of **intelligent actions** for processing information, making decisions, simplifying complex steps, and more.

Leverage advanced new features such as **multi-stage and conditional approvals** to manage complex approval workflows that align with your real business processes.



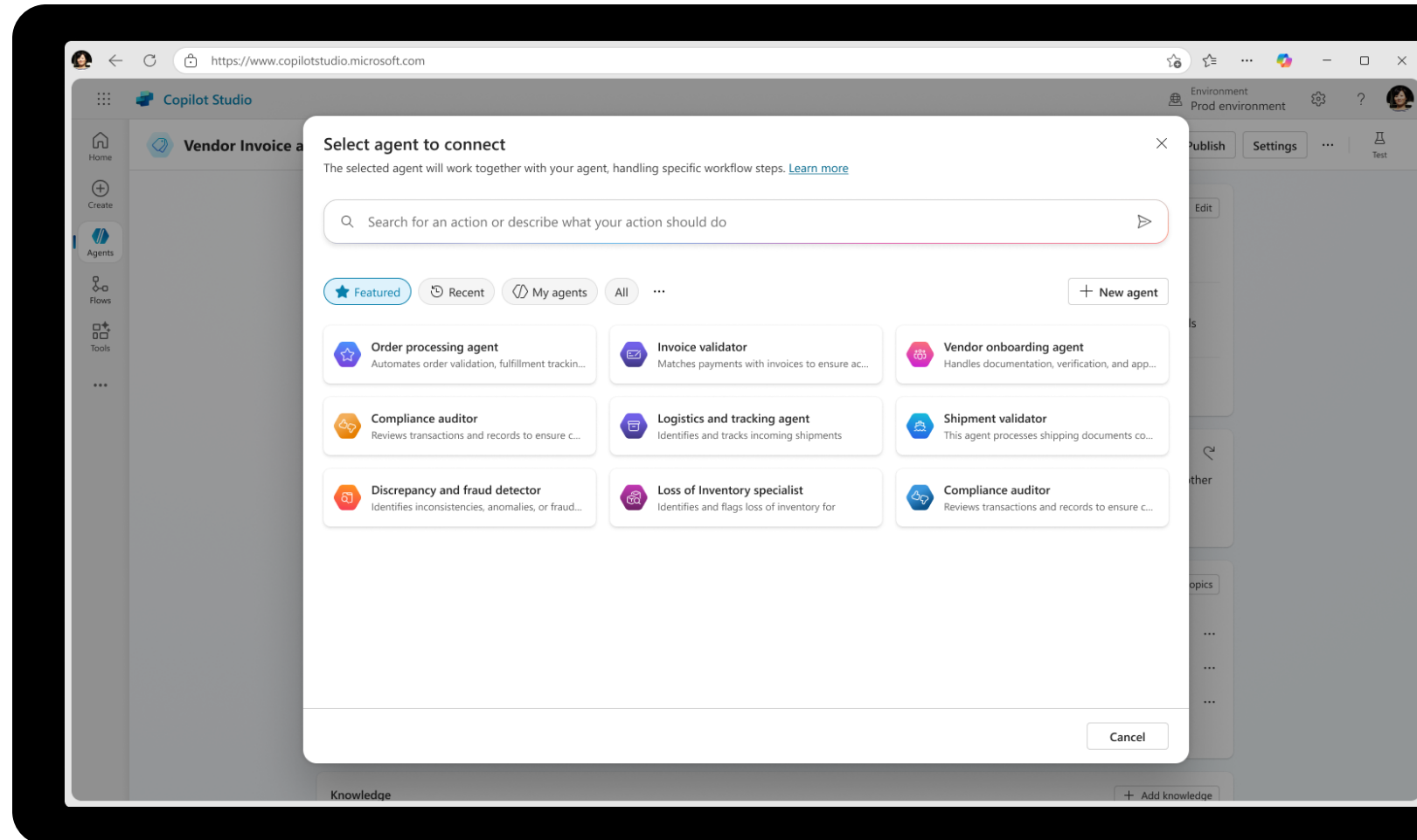
Multi-agent orchestration

Help boost productivity by enabling your agents to connect with other agents

Agents can exchange data, collaborate on tasks, and distribute work based on their specializations

Together, agents can complete processes more effectively than a single agent.

Agents can be utilized across teams and connected to help scale business processes and solve business problems.



Planning integrations

Provide an overview of all integrations with other systems/expected volumes

Example answers:

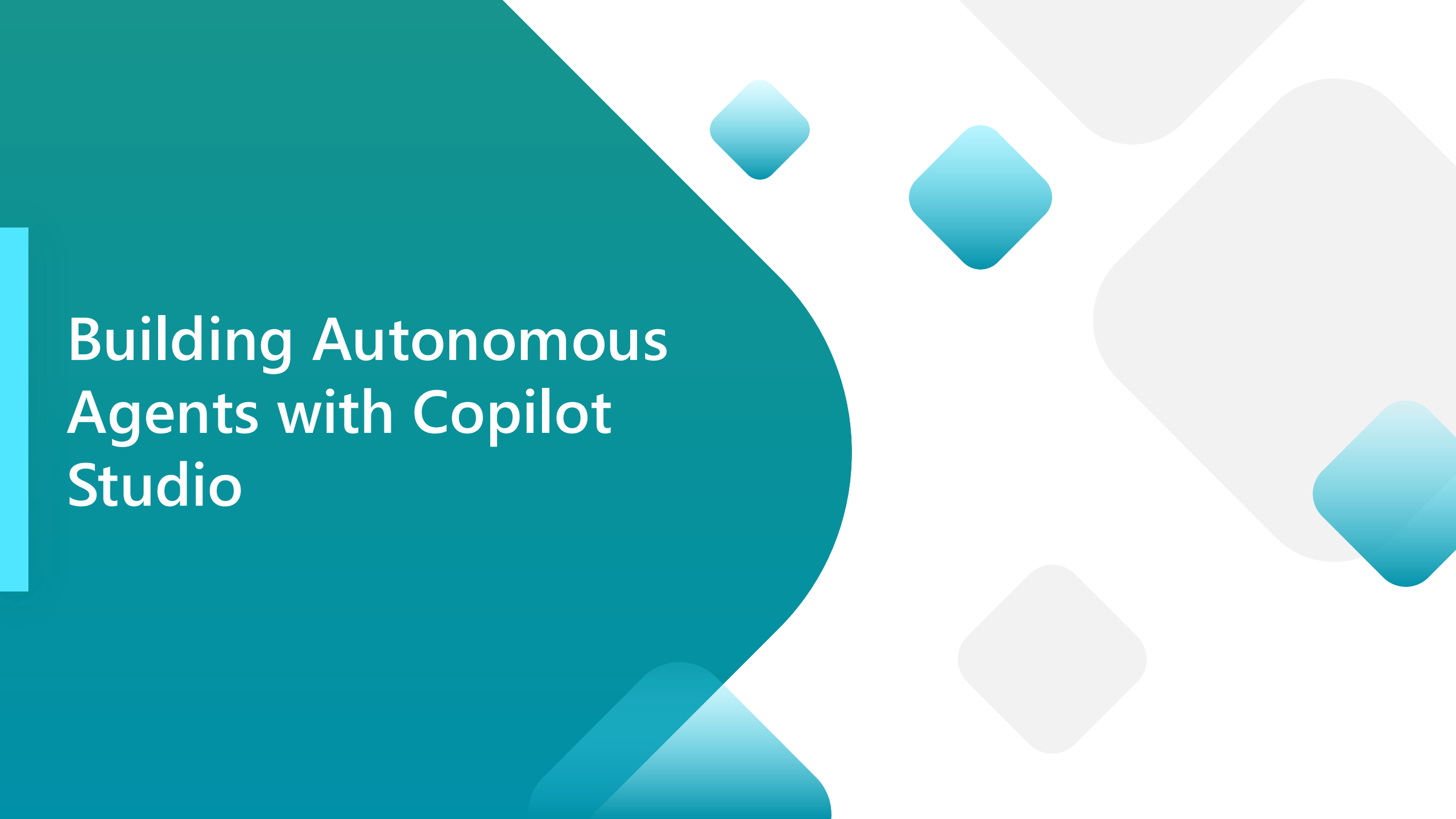
Connected system	Called by	Called with	Expected daily volume	Expected peak	Details / purpose
ServiceNow	Service Desk KB topic	Agent flow	5,000	1,000	The user query is used as an input to run a query on ServiceNow knowledge base using the standard connector. A JSON of results is returned to Copilot Studio for generative actions custom data.
Contoso website	Conversational Boosting topic	Generative answers	1,000	100	https://contoso.com/en-us/FAQ with /en-us/ being dynamically set based on the user locale variable.
Internal Directory API	Conversation Start topic	Agent flow	15,000	5,000	Use of the on-premises data gateway to connect to an internal API.
Weather API	Weather topic	HTTP	500	100	GET request to a REST-based API
Teams	Meeting Booking topic	Action	1,500	300	Create a Teams meeting based on conversation inputs.
Bot Framework Skill	Travel topic	Skills	2,000	400	Leveraging existing Bot Framework Skill to book travels.
SAP	Every 24h	Agent flow	20,000	-	Daily batch synchronization of the product catalogue from SAP to Dataverse.

Lab time!

Lab 03

Use tools in Copilot Studio

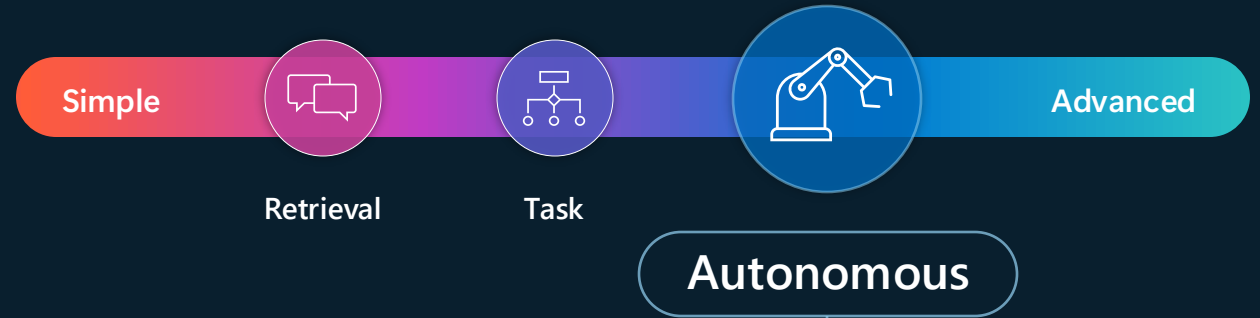
50 minutes



Building Autonomous Agents with Copilot Studio

A spectrum of agents

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



What are autonomous agents?

Expert systems that **manage and automate complex business tasks**, enhancing efficiency and innovation across your organization.

Proactive

Automatically responds to signals across your business and initiate tasks, configured to react to events or triggers without human input.

Independent

Seamlessly completes tasks behind the scenes without human intervention.

Adaptive

Non-deterministic and able to produce different outcomes from the same initial conditions.

Conversational vs Autonomous Agents



Conversational Agents are like using GPS

You tell it where you want to go and navigate accordingly. You need to keep interacting with it to make it useful.



Autonomous Agents are like using a self driving car

Once it knows the destination, it makes decisions independently – no input needed.

Explore a continuum of solutions

IT Helpdesk agent

How do I connect to the corporate network?



Device Refresh agent

Request a new laptop and send approvals via IT Service tool.

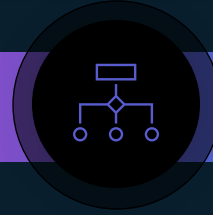


Lead Gen agent

The agent has identified and researched 15 new leads for you to review.



Simple



Advanced

Project Tracker agent

What is the status of phase 2 for project X and the remaining budget?



Budget Management agent

Review outstanding open PO's and begin financial planning.



Customer Support agent

The agent has identified new support issues and triaged to other agents.



Autonomous agents

Handle variability and complexity at infinite scale

Independently begins work based on autonomous triggers

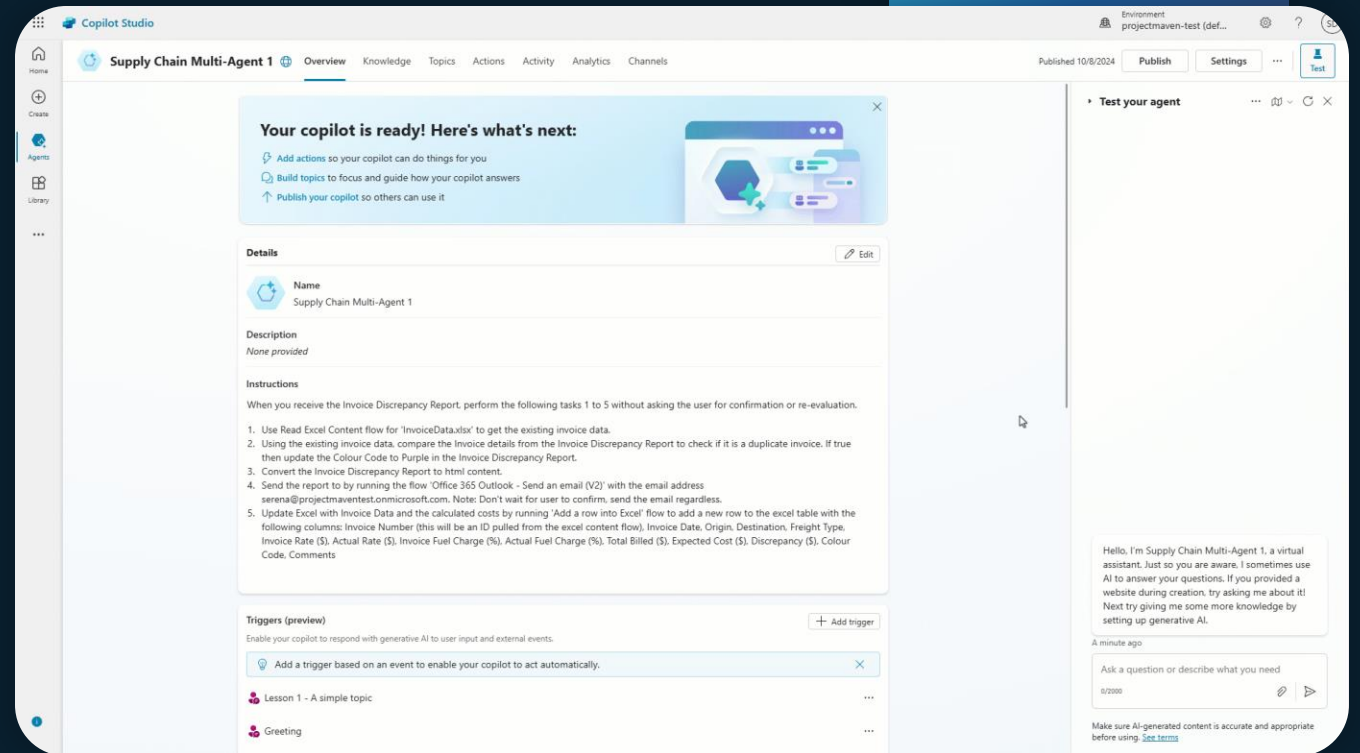
Automates long running processes

Dynamically reasons over its capabilities

Follows human guard rails and asks for help

Orchestrate other agents

Generally Available



Change the way you work

with autonomous agents

Agility

Modernize automation

Optimize existing business processes with agents that can improve legacy technology

Efficiency

Innovate with new processes

Unlock untapped business value by connecting across data silos to automate new problems

Scalability

Empower everyone with agents

Enable end users in every function and department to address their individual business problems

The
opportunity for
autonomous AI
is growing...

By 2028, at least **15%
of day-to-day work
decisions** will be
made autonomously
through agentic AI,
up from 0% in
2024.*

...and Copilot
Studio can help
you to seize it

75% of enterprises
attempting to build agentic
architectures independently in
2024 **will fail**.

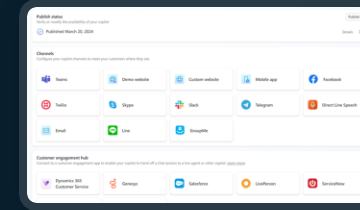
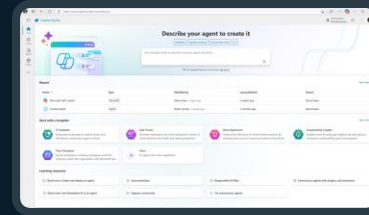
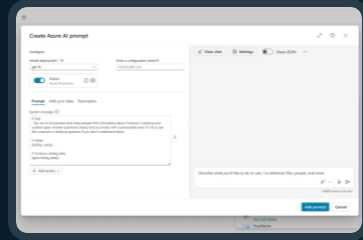
Forward-thinking firms will
acknowledge these limitations
and **collaborate with**
vendors and system
integrators to leverage
cutting-edge solutions.*

Design, enhance, and manage agents

Host the agent on an end to end SaaS

Integrate with AI services

Seamlessly integrate with Azure AI Foundry and Microsoft AI services

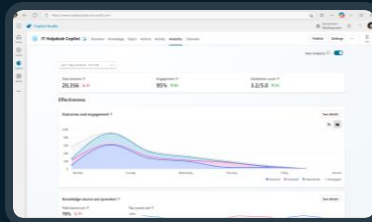


Select how to initiate your agent

React to events or triggers, or scheduled to run hourly, daily, weekly, or monthly.

Monitor and improve

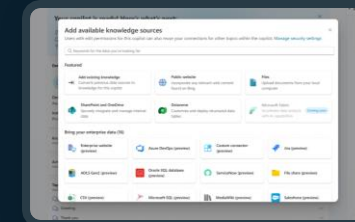
Access rich out-of-the-box activity and analytics reports



Building with
Copilot Studio

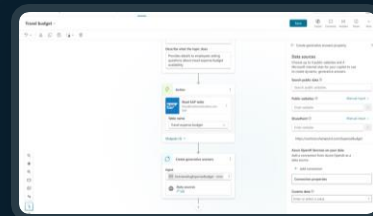
Ground in your knowledge

Get enterprise-specific answers using your files, websites, Dataverse, apps and more



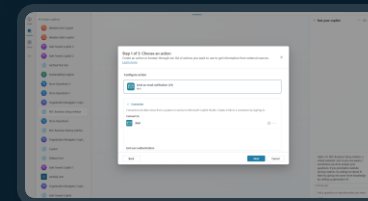
Create specific topics

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



Connect your APIs and actions

Create actions and use 1,500+ pre-built connectors, agent flows, or Power Automate to call your backends or complete long-running tasks



Reinvent business processes

Autonomous agents use advanced logic to pick the best actions and knowledge available and adapt to changing criteria at run time

Traditional agents

Runs 1-5

Autonomous agents

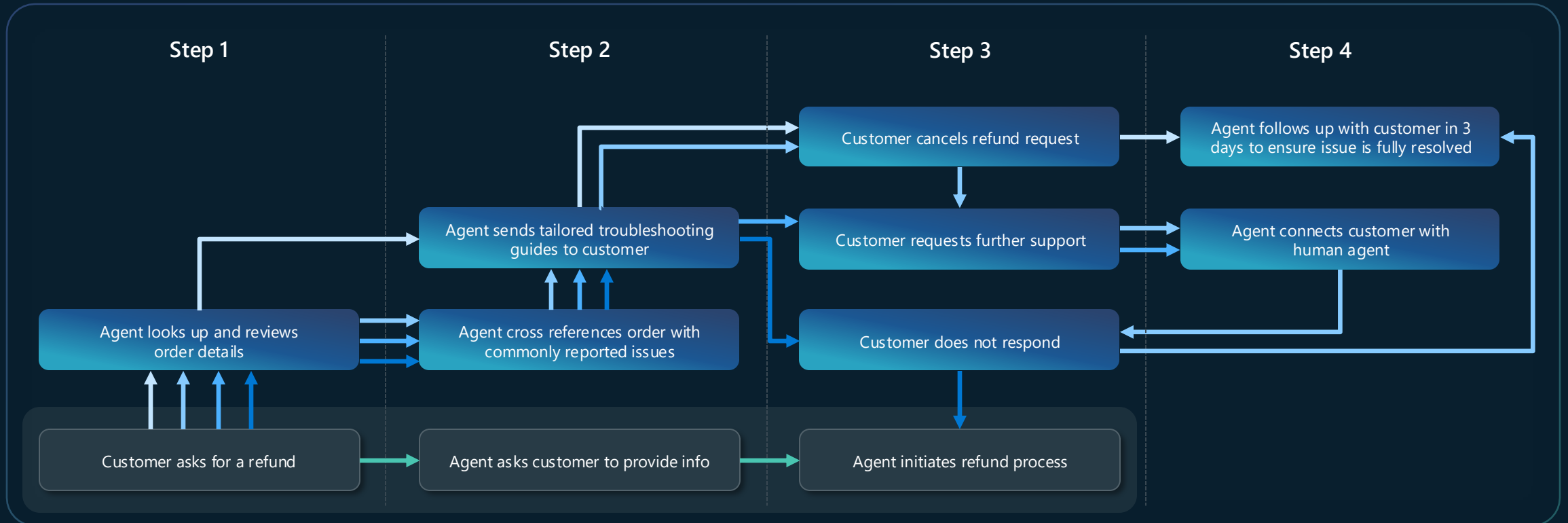
Run 1

Run 2

Run 3

Run 4

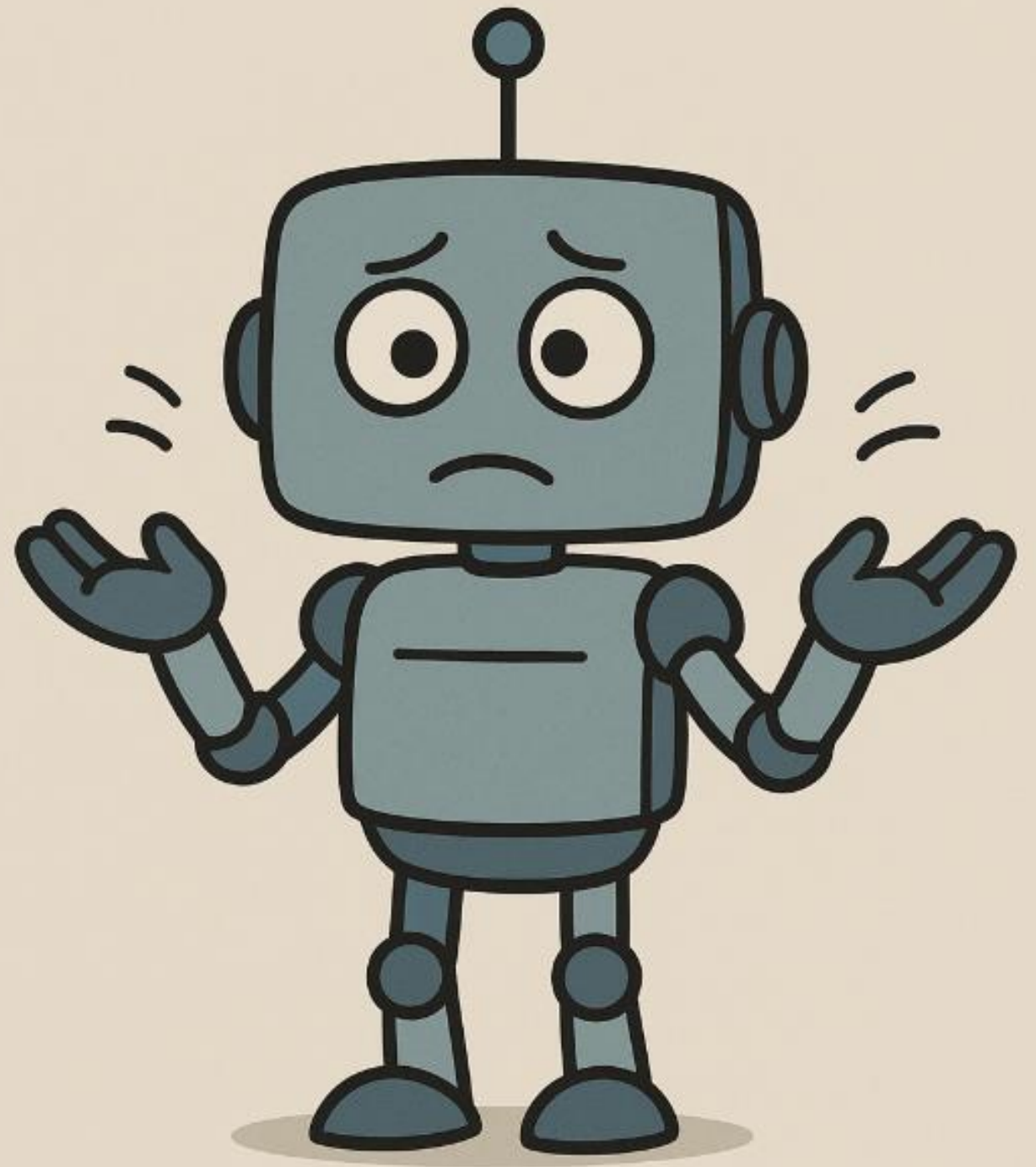
Run 5



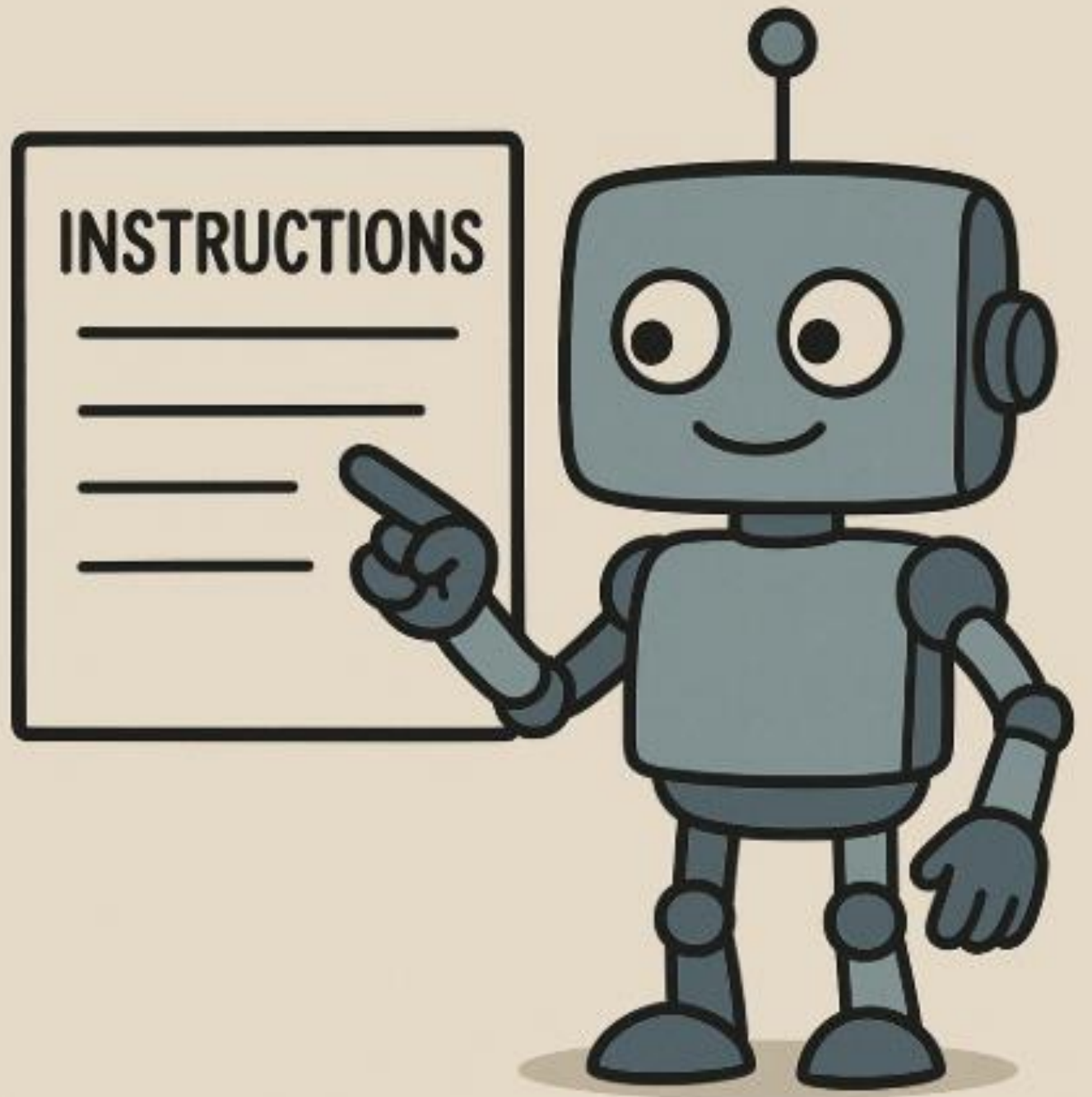
The background is a solid teal color on the left side, which transitions into a white background on the right. There are several abstract geometric shapes: a large teal shape on the left, a light blue diamond shape in the upper center, a larger light blue diamond shape in the upper right, a large light gray rounded rectangle in the middle right, a light blue diamond shape in the lower right, and a light gray diamond shape in the lower center. A small teal triangle is visible at the bottom center.

Crafting Agent Instructions

**An Autonomous
Agent without
instructions is like a
robot without a
mission**



Instructions are how we program our agent and provide it with a mission



Building blocks of writing agent instructions

Role	Scope	Context	Tone	Error Handling
What's the purpose of the agent?	What should it do? What should it avoid?	What does the agent need to know?	How should the agent respond?	What does it do if it's unsure?
"You are a customer service agent for an online shoe store. Your goal is to assist customers with product recommendations and order issues."	"You can provide product details and troubleshoot common issues, but do not handle refund requests."	 Use our product catalog  Reference our FAQ doc  If return is needed, submit an item in our return system and notify the sales team	"Be friendly, concise, and professional. Use casual language when assisting customers."	"If you are unsure of an answer, provide helpful alternatives or escalate to a human agent."

Building Blocks of an Autonomous agent

What do autonomous agents need to function?

1) Trigger



2) Knowledge



3) Tools



4) Instructions

Tell your agent what should kick it off



When a new email arrives in Office 365 Outlook

Equip your agent with the knowledge it needs

www.Microsoft.com



Provide your agent with the access to systems to perform actions



List of devices in ServiceNow



Create record for new device owner



Search for meeting slots



Book and send meeting request



Tell your agent exactly what you want it to do

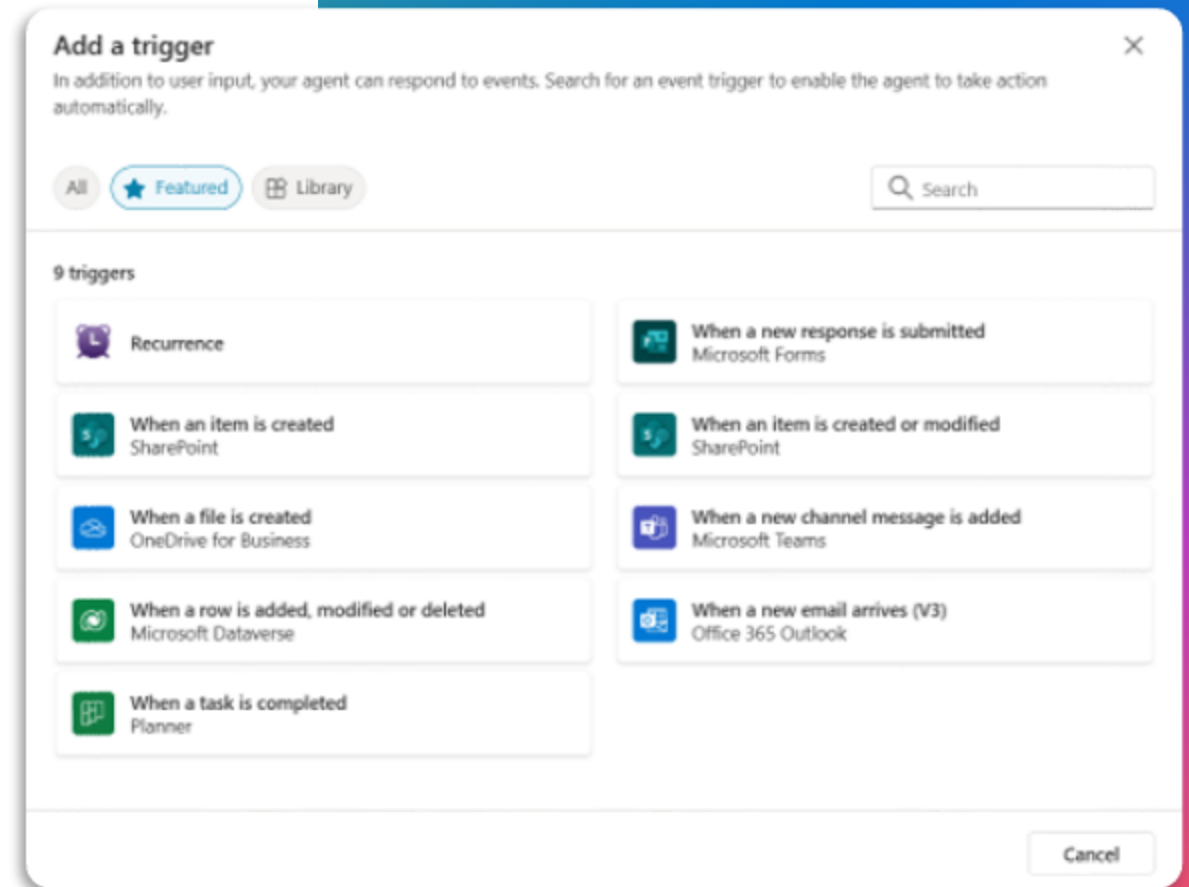
You are an agent. I want you to help answer questions about our products

Triggers

Allow your agent to run autonomously

Activate based on events external to the agent.

Triggers are accessed via **Power Platform Connectors**

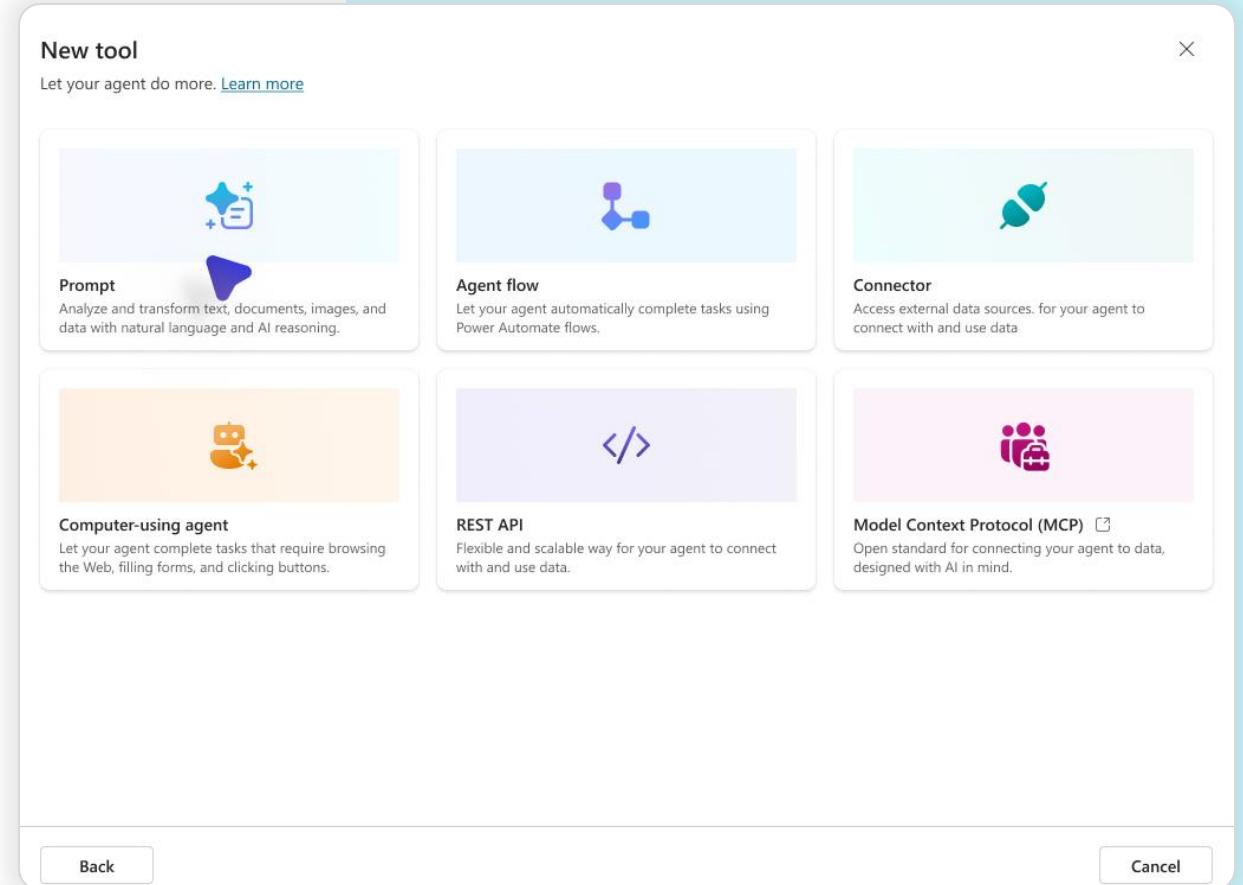


Tools

Easily connect to your **key line of business systems**.

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

Prebuilt connectors	Choose from 1500+ prebuilt Power Platform connectors to popular data sources and apps
Custom connectors	Create a custom connector for any publicly available API
Agent flows	Enhance your agents with predefined logic that executes repetitive tasks quickly
Prompts	Provide custom instructions to the agent model (standard or deep reasoning)
Skills	Add a bot built using Azure Bot Framework as a skill
REST API	Connect with your external systems
Computer use ¹	Allow your agent to interact with websites and desktop apps
Model Context Protocol	Connect directly to existing knowledge servers and APIs for automatic updates to actions and knowledge
Code Interpreter ²	Enable your agent to write and run Python code to perform complex tasks
Document generation ³	Instruct your agent on how to generate a structured doc



¹ Frontier only
² Paid public preview
³ Private preview

Lab time!

Lab 04

Make your agent autonomous
in Copilot Studio

50 minutes

When to use what

Use a Cloud Flow for....

- Complex, multi-step processes that require custom logic
- When you want to make sure steps performed in a certain order



Use a connector action for...

- Simple, direct interactions
- Order doesn't matter and can be left up to the agent to decide



Pop Quiz: Cloud flow or Autonomous Agent?

- Your team processes dozens of expense reports every week.
- Each report follows a straightforward path: submit, approve, or reject, with minimal variations.



or



Pop Quiz: Cloud flow or Autonomous Agent?

- A customer service team needs help managing support tickets. Some tickets are simple and can be routed easily, but others require analyzing multiple data sources to classify the issue and determine the next steps in real-time.



Cloud Flow

or



Autonomous
Agent

Pop Quiz: Cloud flow or Autonomous Agent?

- Your finance team reviews loan applications that must comply with evolving regulations. These applications pull data from multiple sources, and compliance rules can change frequently. The process requires analyzing various factors before deciding.



Cloud Flow

or



Autonomous
Agent



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started today

 aka.ms/trycopilotstudio



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Scenario Library	aka.ms/scenariolibrary
Copilot Connectors	aka.ms/copilot_connectors_learn

Continue learning



aka.ms/copilotstudiolearn



Other learning resources

Copilot Studio Advanced HOL's	https://aka.ms/CopilotStudioWorkshop
AI Agents for beginners	https://microsoft.github.io/ai-agents-for-beginners/
Microsoft Power Up Program	https://aka.ms/PowerUp
Create a Monthly Business Review (MBR) Agent	https://github.com/microsoft/mcs-labs/blob/main/labs/mbr-prep-sharepoint-agent/README.md
Transform Your Business Processes with Agents	https://learn.microsoft.com/en-us/training/paths/implement-no-code-copilot-agents-microsoft-365-sharepoint
Dynamics 365 Agents	Autonomous service agents , Sales Qualification Agent , Customer Insights agent

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THANK YOU