



Contact Us

- Custom training plans - AI and Power Platform capability building shaped to your teams.
- Proof of concept projects - time-boxed experiments that prove or kill an idea before you commit.
- Joining the Accelerator - no cohorts, no intake windows; start at any pillar, any time.

<https://futureability.com/contact>



Want to learn more?

Agent in a Day

A hands-on workshop to get your team building intelligent agents on Microsoft Power Platform in Copilot Studio. **From zero to a working agent in hours.**

Register for events at <https://futureability.com/events>



Accelerator



Your instant AI innovation office.

Advisory & Governance

IA Committee, decision logs
& market updates

Value Pipeline

Score & prioritise
opportunities intentionally

Rapid Execution

6 Proofs of Concept included
over 12-month period

<https://futureability.com/contact> for more Info

Agent in a Day

HANDS-ON WORKSHOP

Welcome 😊 Starting soon!
Please complete our short survey:



Who's in the room?





Hello! Instructor introduction

Instructor: Ricky Taneja

Microsoft Certified - Power Platform Developer, Functional Consultant and Solutions Architect



*Power Platform Consultant & Trainer
FutureAbility
Microsoft Power Platform Partner.*



Microsoft Power Platform

The world's most complete set of integrated, low-code development tools



Power Apps
for
web and mobile
application
development



Power Automate
for
process
or workflow
automation



Copilot Studio
for
transformational
gen-AI infused
copilot solutions



Power Pages
for
building secure,
data-centric
business websites



Power BI
for
data exploration,
analytics and
reporting



**Data
connectors**



AI Builder



**Microsoft
Dataverse**



**Managed
Environments**

Hello! Instructor introduction

Instructor: Ricky Taneja

Microsoft Certified - Power Platform Developer, Functional Consultant and Solutions Architect



*AI & Automation Specialist
FutureAbility
Microsoft Power Platform Partner.*



Treasury



CLAYTON UTZ



Customer Service



Hello! Instructor introduction



The Team

Tony Brooks

Jedd Damo



Introductions



Who are you?

Why are you here?

Your investment today

1. This is technology – expect bumps and issues (some things new)
2. Stay focused... learning needs investment - close your email
3. Questions – there is N.S.T.A.A.S.Q. – in chat is fine
4. Let's test our reactions...



Leave





Agenda

9:00 - 9:40 Introductions, Welcome and lab requirements

9:40 - 10:15 What is an Agent & Copilot Chat Agent

10:15 - 11:00 Lab 1 Agents in Copilot Lite (Support Room Open)

10:50 - 11:00 *10 min Morning Break*

11:00 - 12:10 Copilot Studio, Implementation guide & Lab 2 Setup

12:10 - 12:30 Lab 2 Agents in Copilot Studio

12:30 - 1:30 *Lunch Break*

1:30 - 2:00 Agent Enablement Session with Tony

2:15 - 3:00 Lab 2(continued..) CUA Demo + MCP

3:00 - 3:45 CUA Demo + MCP

3:45 - 4:00 Key Takeaways + Workshop Close

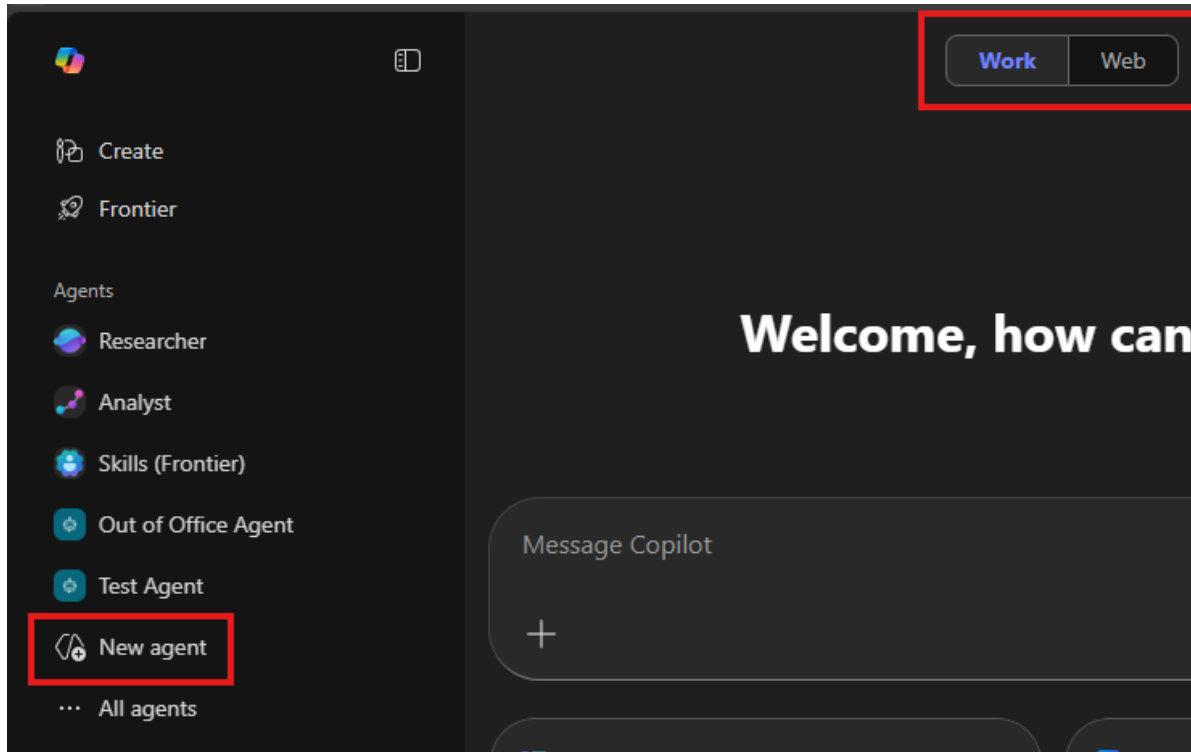
4:00 - 4:45 Support Rooms Open



Your environment for the labs – you need 2 things

M365 Copilot License

<https://office.com/>



Power Platform Environment

<https://copilotstudio.microsoft.com/>

1. Developer Dataverse Environment
 - NOT Default
 - NOT Sandbox
 - NOT Trial
2. Free Developer Plan (Power Apps)
 - Work or School account
 - Provisions a Developer environment (above)

If not any of the above, get an environment from us.

Lab setup

Do you need an environment?

Drop “Me 😊” in the chat...

The background features a large teal shape on the left side, with several smaller teal and light blue diamond shapes scattered across the white background. On the right, there are large, light gray rounded rectangular shapes, some of which are partially obscured by the teal shapes.

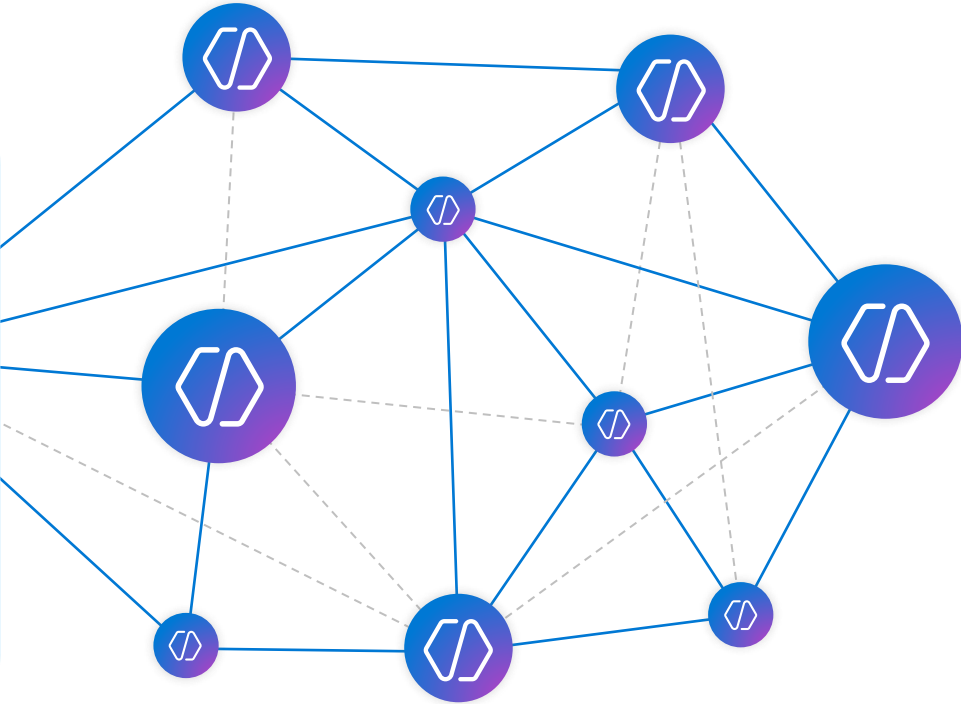
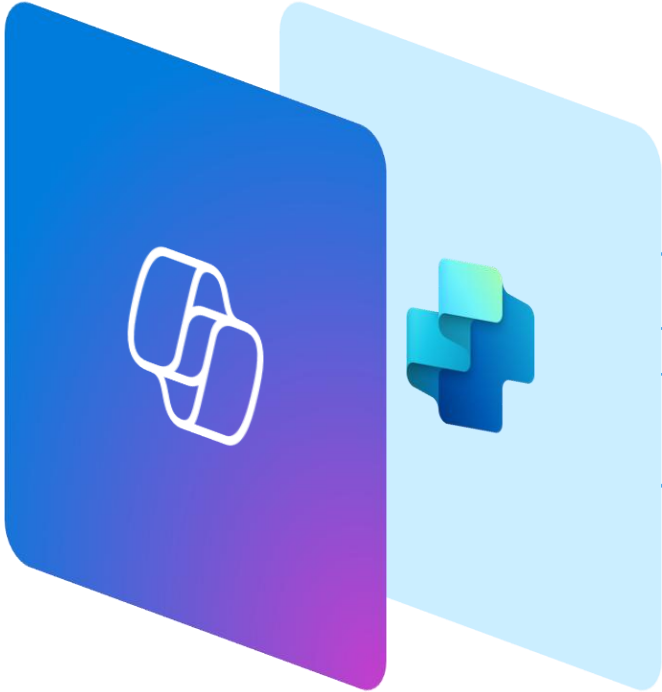
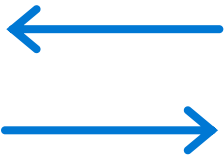
Copilot Chat and Agents

Copilot is the UI for AI

Copilot

Copilot Studio

Agents



Copilot Control System

Copilot is the UI for AI

Copilot Studio





Microsoft Power Platform

The world's most complete set of integrated, low-code development tools



Power Apps

for
web and mobile
application
development



Power Automate

for
process
or workflow
automation



Copilot Studio

for
transformational
gen-AI infused
copilot solutions



Power Pages

for
building secure,
data-centric
business websites



Power BI

for
data exploration,
analytics and
reporting



**Data
connectors**



AI Builder



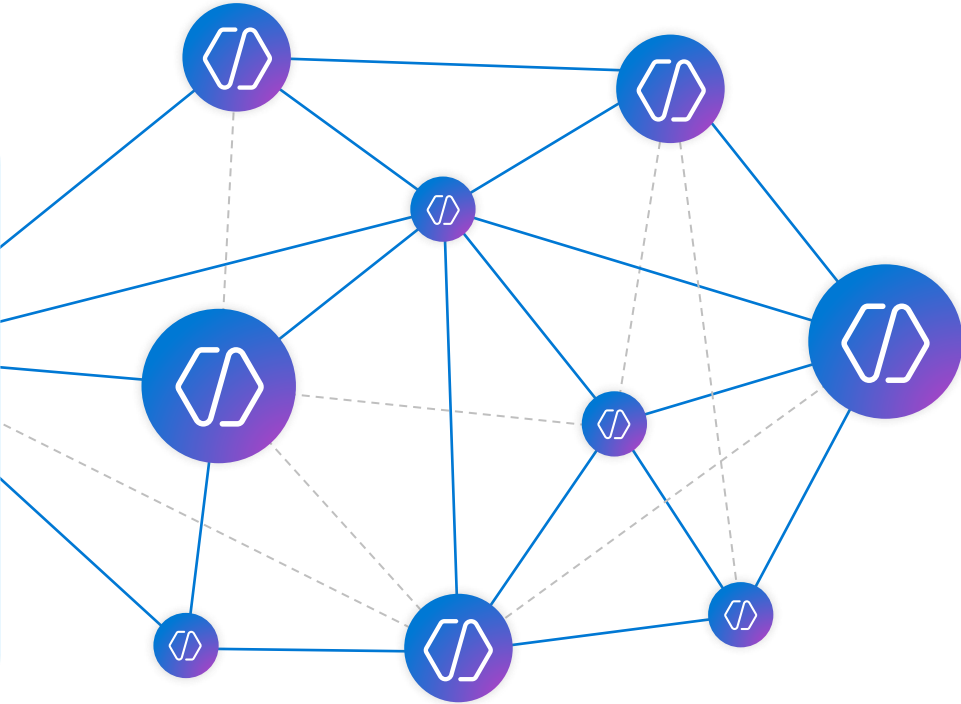
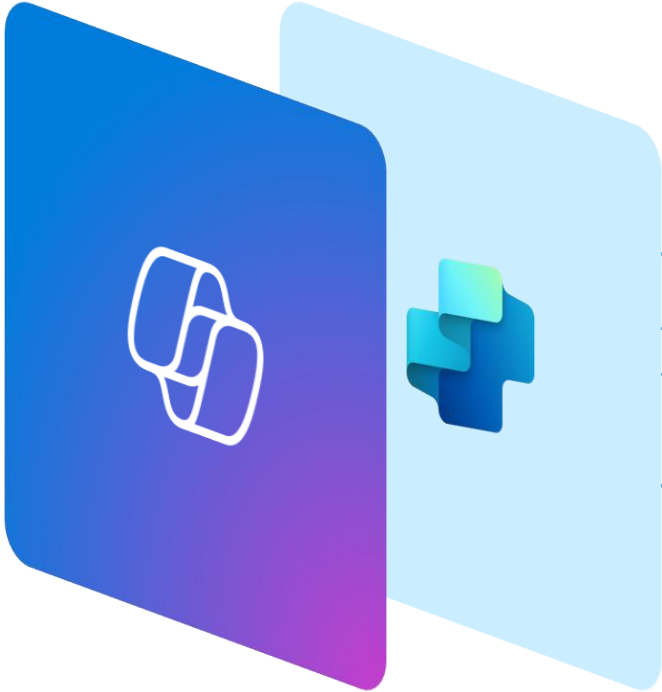
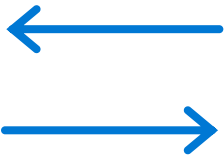
**Microsoft
Dataverse**

Copilot is the UI for AI

Copilot

Copilot Studio

Agents



Copilot Control System

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

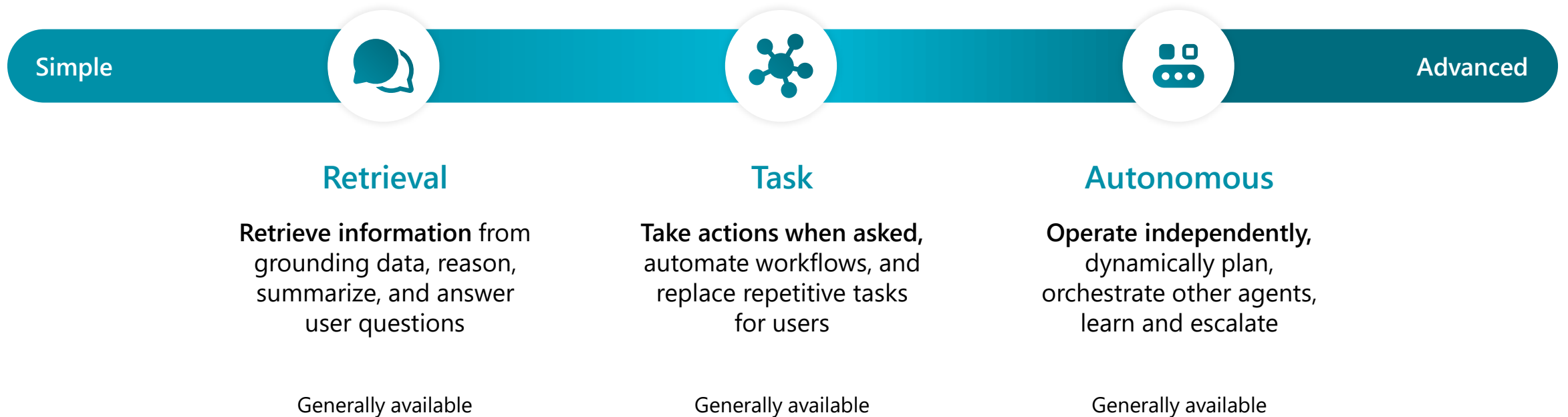


Your applications



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

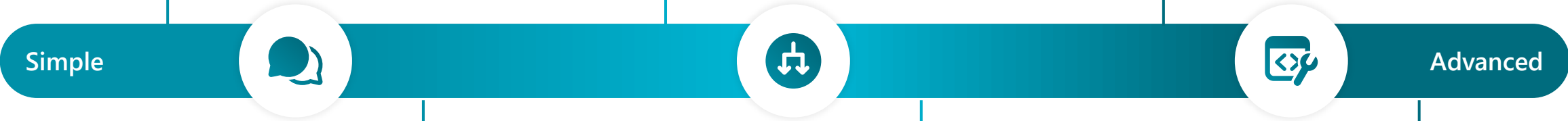
Request a new laptop and send approvals via IT Service tool.

☆ 📎 ➤

Lead Gen agent

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

☆ 📎 ➤



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.

☆ 📎 ➤

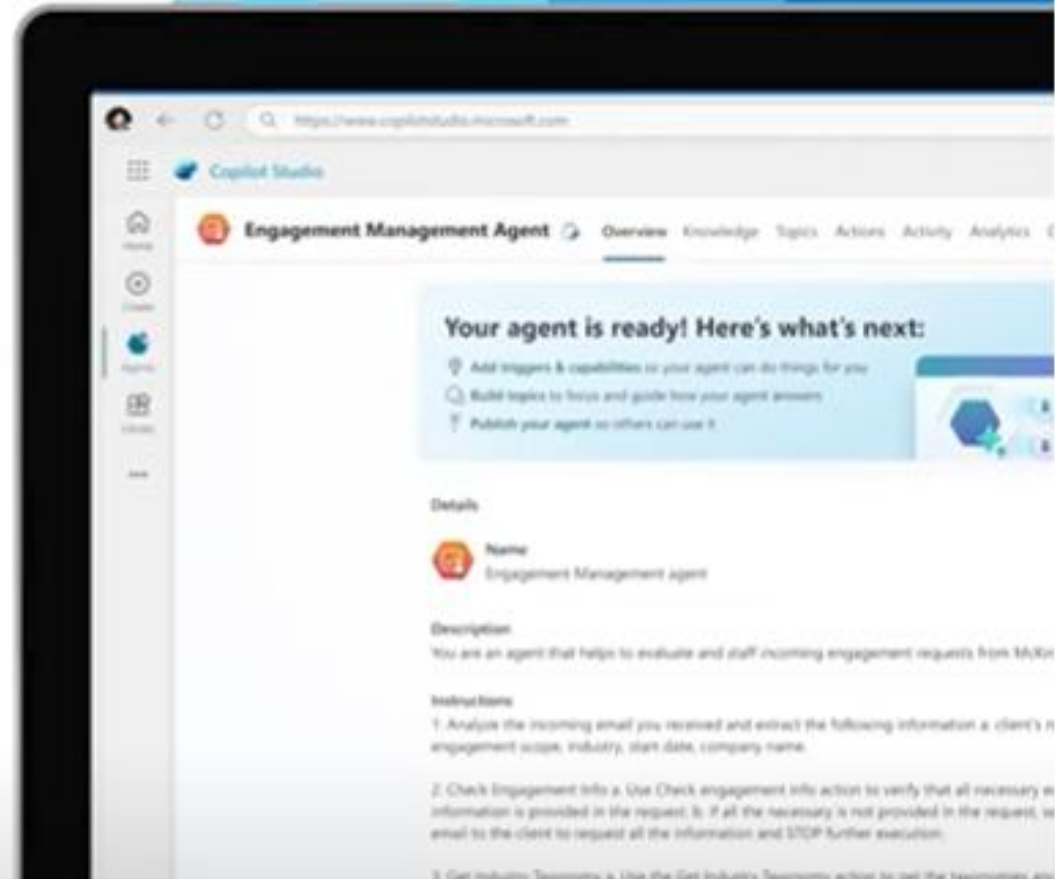
Customer Support agent

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

☆ 📎 ➤

Copilot Studio

Autonomous Agent



*This video is a bit out of date
Actions are now Tools
BizChat is now Copilot Chat*



0:01 / 3:35

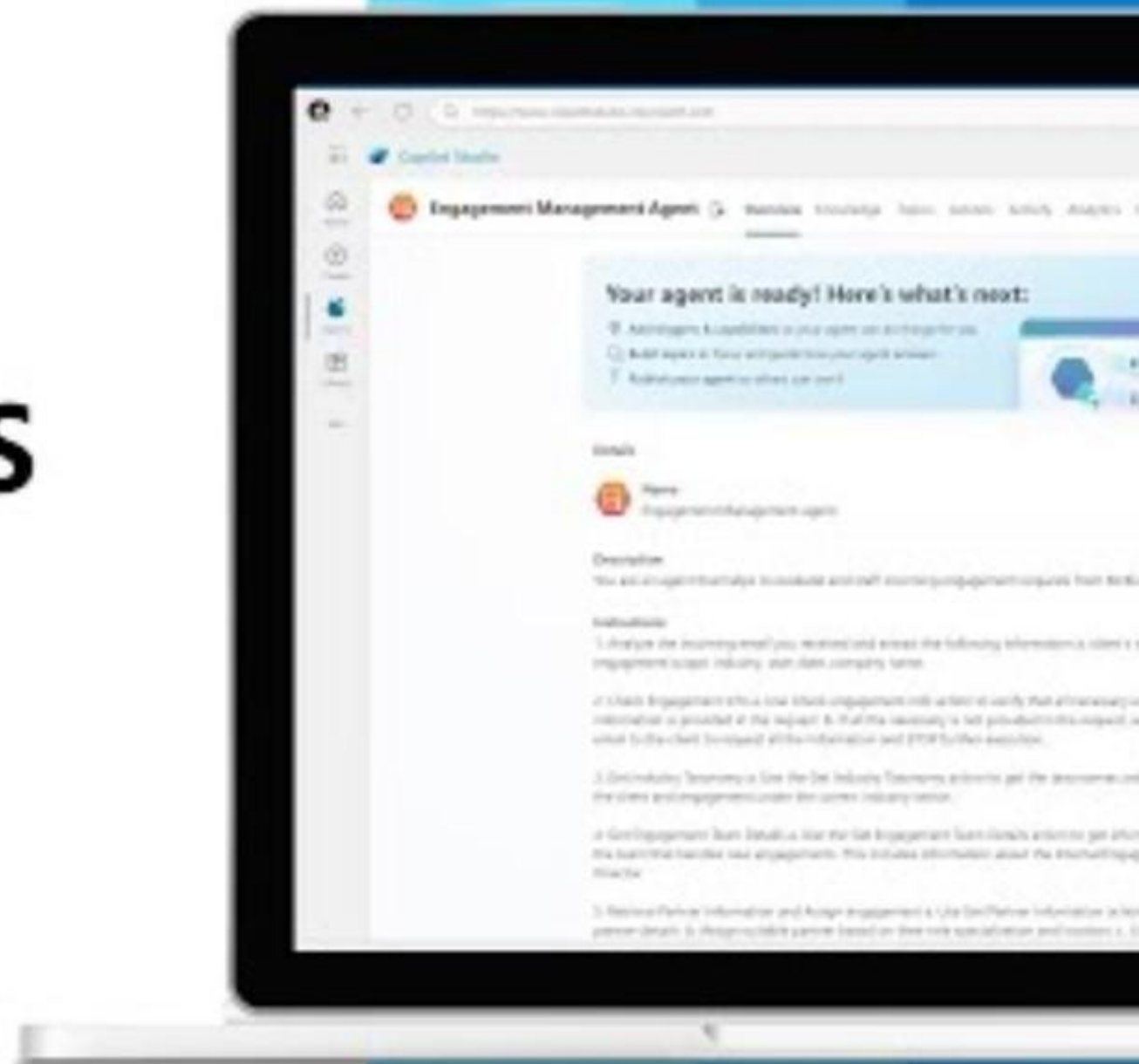


Copilot Studio

Autonomous Agent



Microsoft



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.



Dynamics 365

Build agents that integrate and improve business processes.



Power Platform

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



Build and customize

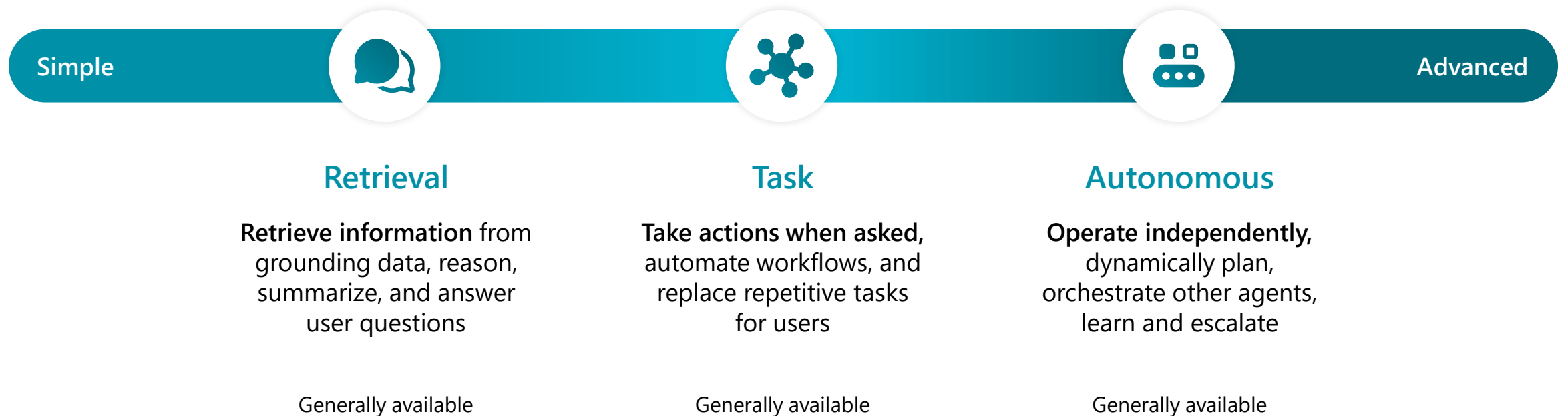
your agents using
Copilot Studio

Where to start – screenshot this – write ideas down!

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

Tools for creating agents – “Copilot Studio Lite”



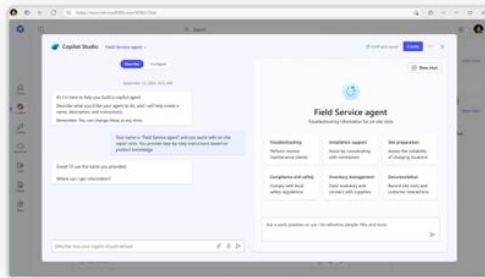
← Agents vary in levels of complexity and capabilities depending on your need →

A range of tools for agent creation

No code



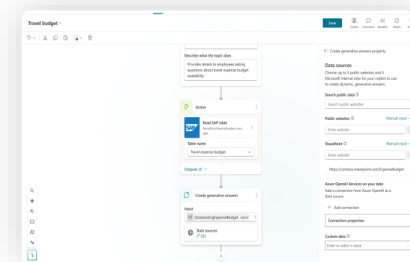
For End Users



Copilot Studio – Lite
(Retrieval agents)



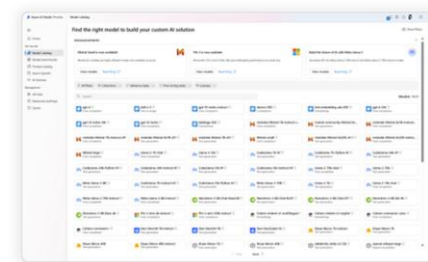
For Makers



Copilot Studio



For Developers

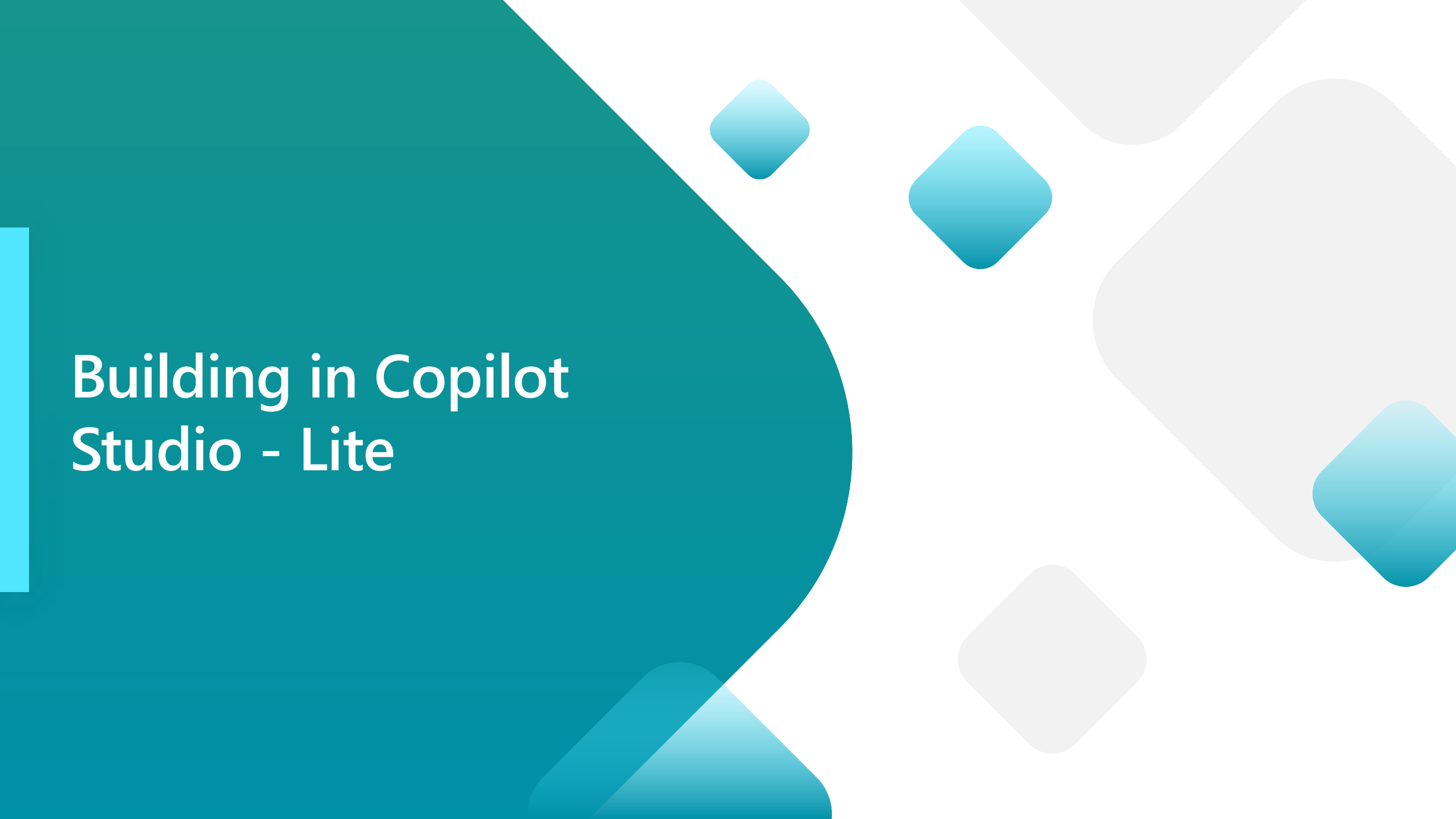


Visual Studio Code, Copilot
Studio, Azure AI Foundry

Copilot Studio: Lite vs. Full Experience

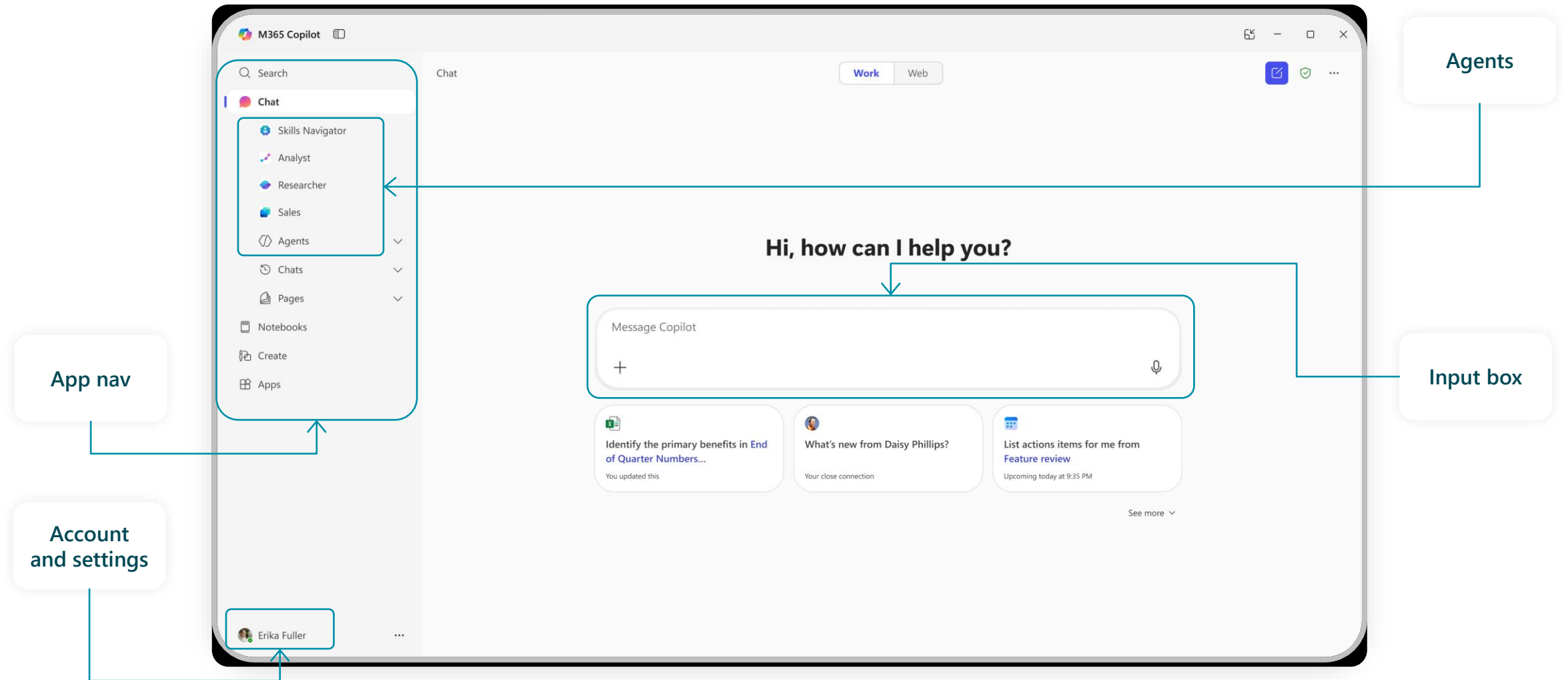


	Copilot Studio <u>Lite</u> Experience	Copilot Studio <u>Full</u> Experience
Platform	Microsoft 365	Power Platform
Storage	Cosmos DB (MS managed)	Dataverse (customer managed)
Administration UI	MAC (M365 Admin Center)	PPAC (Power Platform Admin Center)
Connectors	Microsoft Graph	Power Platform connectors + Graph
Autonomy (triggers, tools)	None	Power Automate cloud flows
ALM (agent lifecycle mgmt)	None	Power Platform Pipelines
Analytics and telemetry	MAC + Purview	PPAC + Purview
DLP	None	Power Platform data policies
Licensing	M365 Copilot or Copilot Credits	M365 Copilot or Copilot Credits
Pay-as-you-go billing	Managed in MAC	Managed in PPAC



Building in Copilot Studio - Lite

Accessing agents in Copilot Chat



Copilot Chat Tour

Copilot Chat Tour

Environment emails will be sent now
Stay focused – we will give you time.

Examples of templates in Copilot Chat

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.

Examples of agents that can be created using agent builder

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*

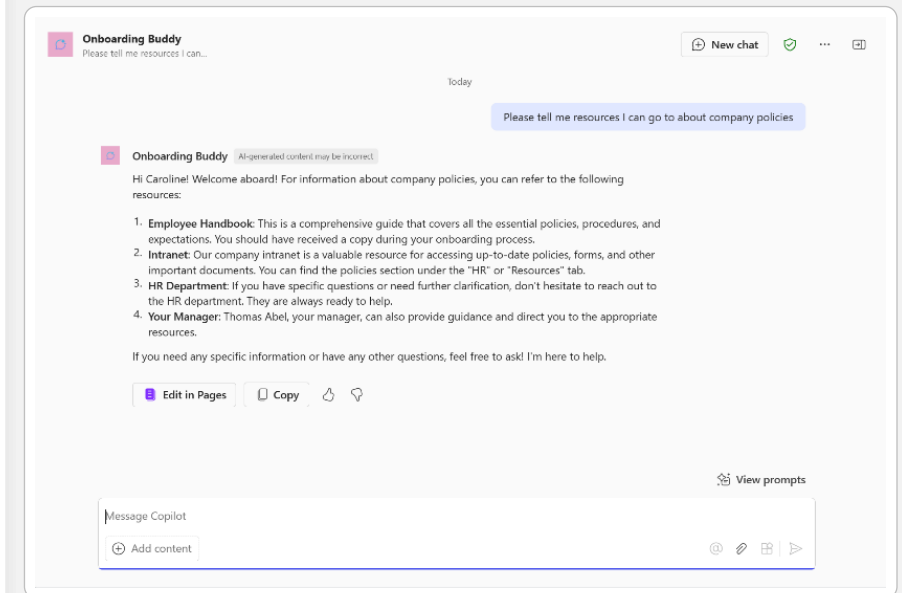
Move to configure

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*

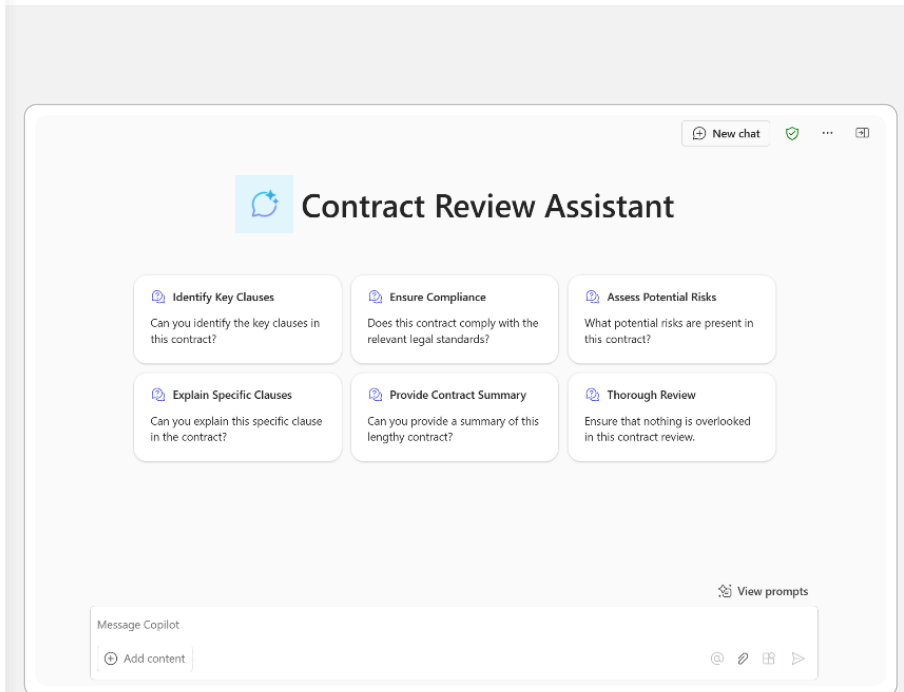
Move to configure

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*

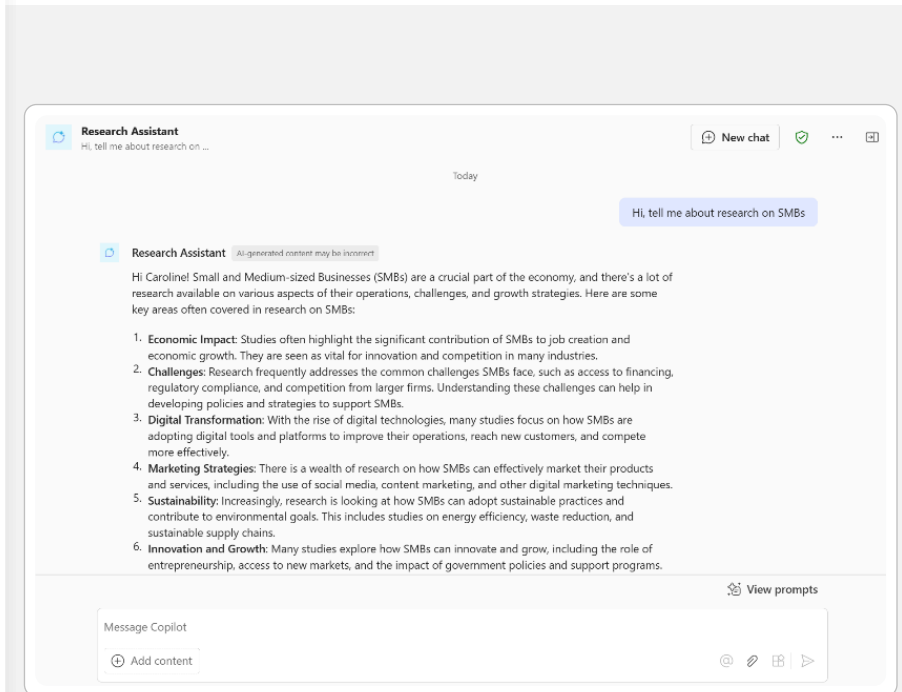
Move to configure

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*

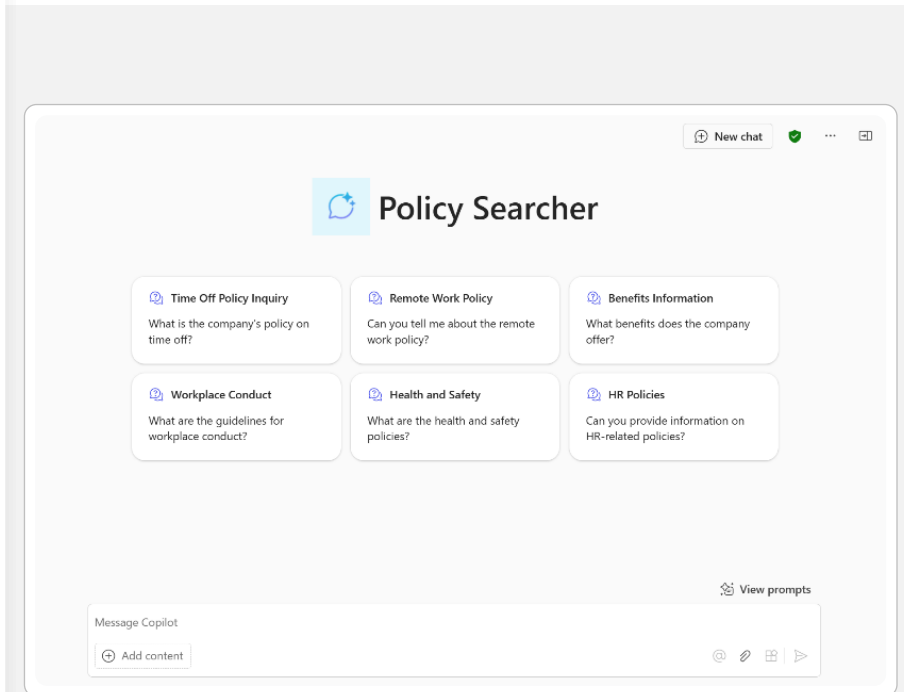
Move to configure

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?*





AgentIAD-Package.zip



AglAD Attendee Content



AglAD Lab Docs.zip



AglAD Student Files.zip



AglAD Lab Docs.zip



AglAD Student Files.zip



AglAD Student Files

Before we break...

- Get StudentFiles & Unzip them
 - <https://aka.ms/AglADStudentFiles>
- Bookmark Lab Exercise URL
- Environment from us? Log in now.

Support rooms open

Lab time!

Lab 01 ~45 mins

[Build agents in Copilot Chat](#)



Build agents in Copilot Chat - Online workshop

43 min • Module • 6 Units

Summary text goes here.

**JUST THIS MODULE
ALL UNITS**

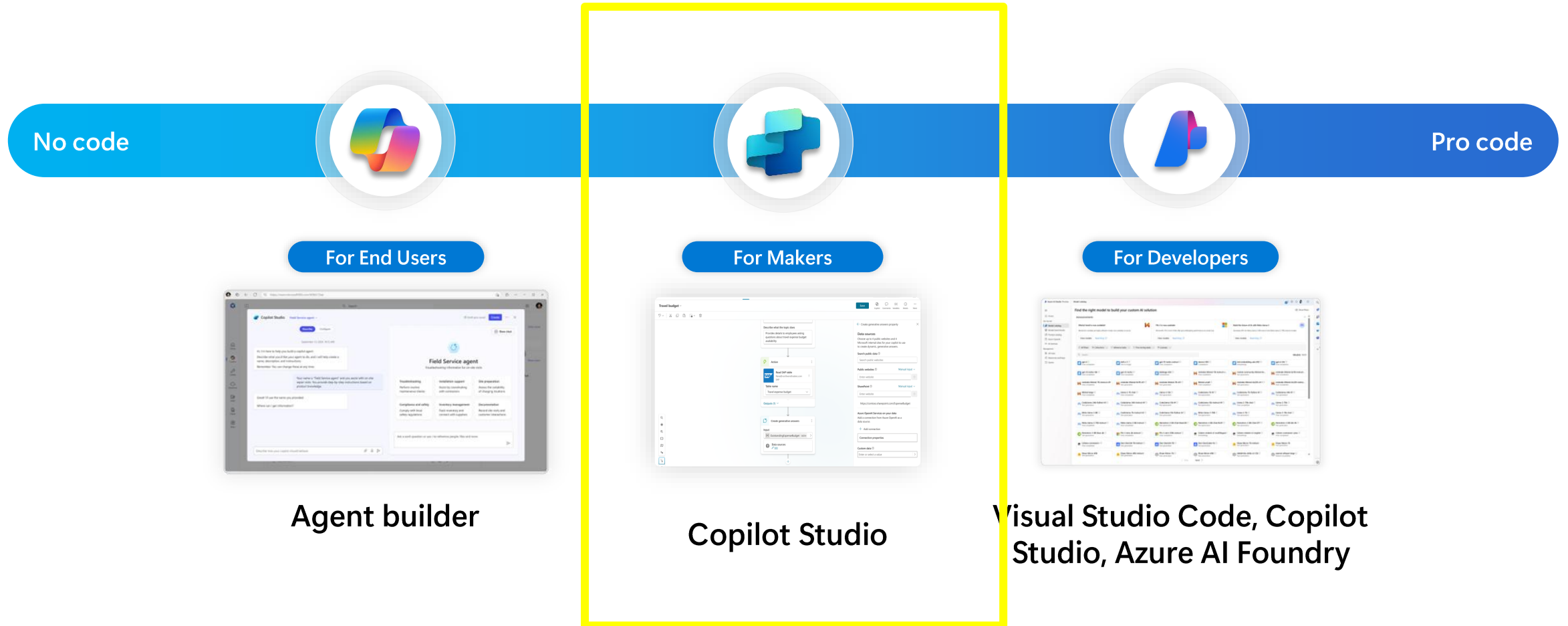
Start >

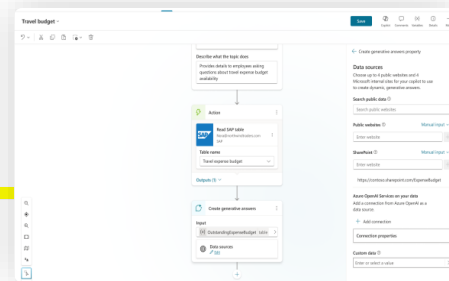
Missing a PDF?
<https://aka.ms/AgIADStudentFiles>

Break time!

~10 mins

A range of tools for agent creation





Simple



Retrieval

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

Generally available



Task

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

Generally available



Autonomous

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

Generally available

Advanced

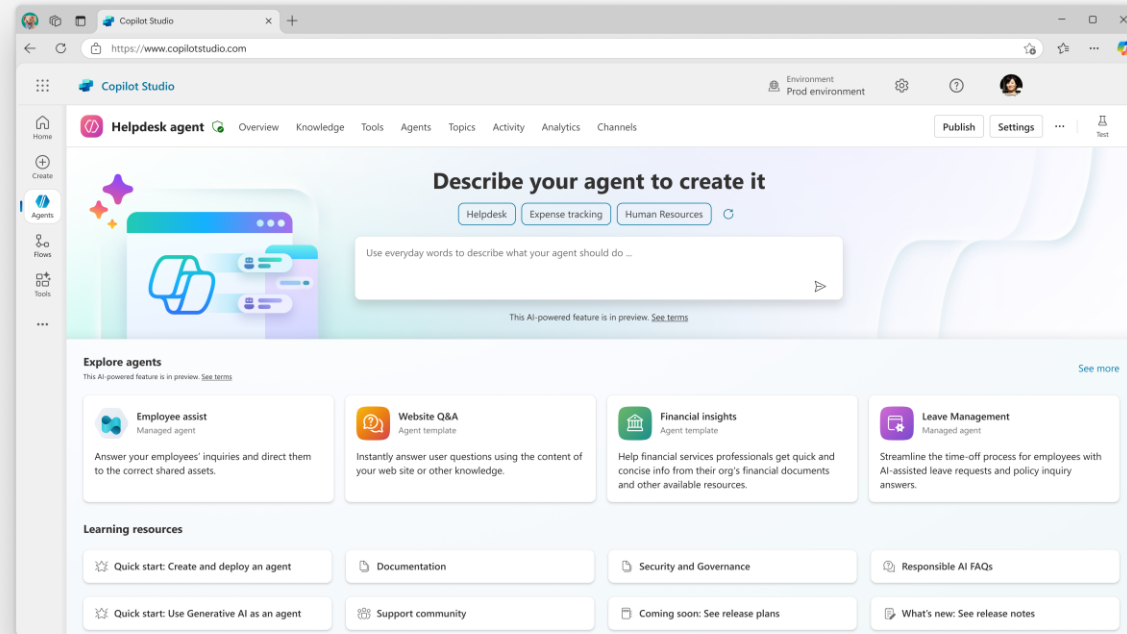
Copilot Studio

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

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

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



What makes an **agent**?

Building blocks



Knowledge

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



Tools

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



Instructions

Tell the agent what it is,
its tasks and the things it
has available to do them



Triggers

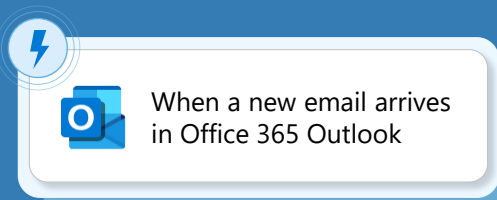
Initiate the work by a
system event happening
or on a schedule

Building Blocks of an agent

What do autonomous agents need to function?

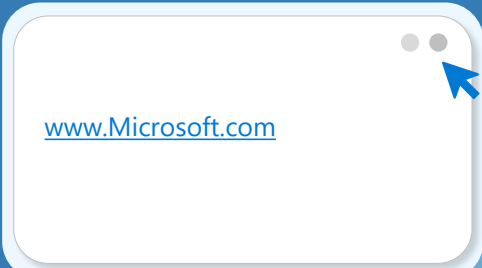
1) Trigger

Tell your agent what should kick it off



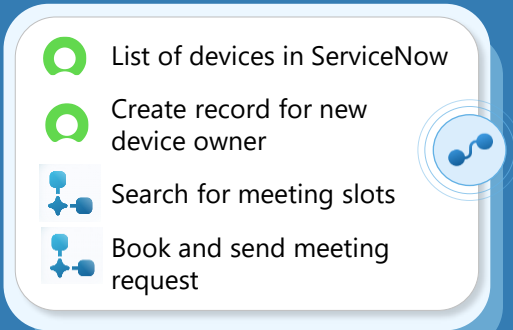
2) Knowledge

Equip your agent with the knowledge it needs



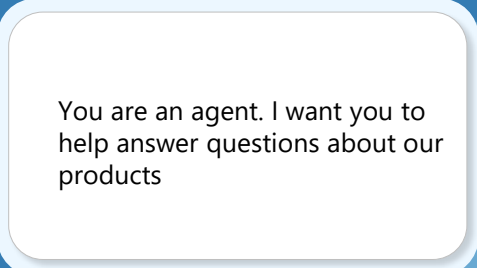
3) Tools

Provide your agent with the access to systems to perform actions



4) Instructions

Tell your agent exactly what you want it to do



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](#)

Search for a knowledge source



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

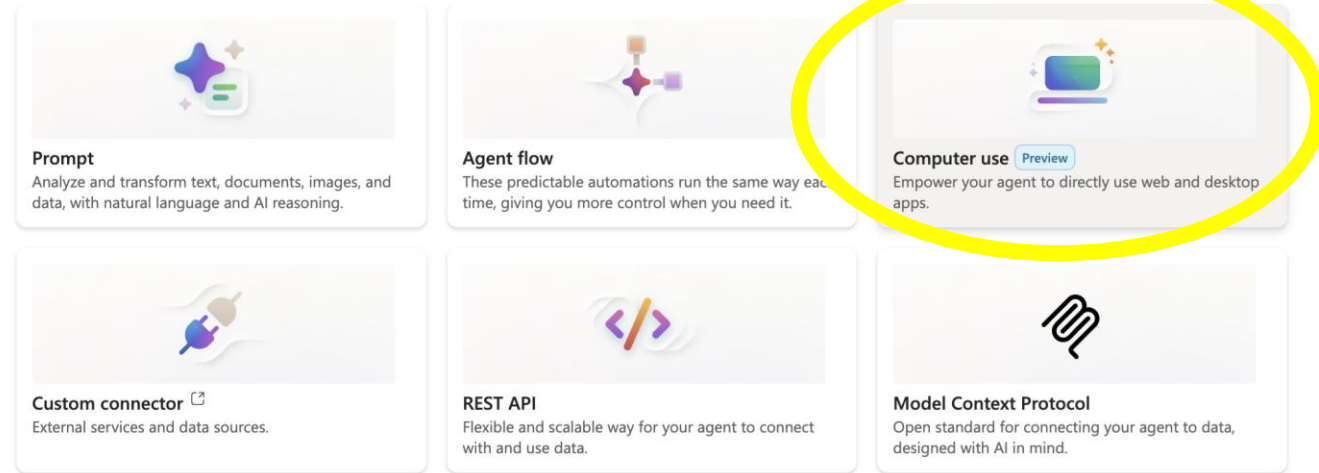
Easily connect to your **key line of business systems**.

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

Add tool

Let your agent do more. [Learn more](#)



¹ Frontier only
² Paid public preview
³ Private preview

Computer Use – in preview, available soon



New computer use Preview



Empower your agent to directly use web and desktop apps. [Learn more](#)

Instructions

Describe what you want the computer use to do

-
1. Go to <https://computerusedemos.blob.core.windows.net/web/Adventure/index.html>.
 2. Submit a new entry for each of the following items:
 - Rear Derailleur, RD-4821, 50, 42.75, Tailspin Toys
 - Pedal Set, PD-1738, 80, 19.99, Northwind Traders
 - Brake Lever, BL-2975, 35, 14.50, Trey Research
 - Chainring Bolt Set, CB-6640, 100, 5.25, VanArsdel, Ltd.
 - Bottom Bracket, BB-9320, 60, 24.90, Tailwind Traders

392/8000

Or start with prompt template

Invoice processing

Extracts invoice data from a PDF and enters it into a web form.

Data entry

Submits multiple products into an inventory form.

Data extraction

Looks up specific information on a website.

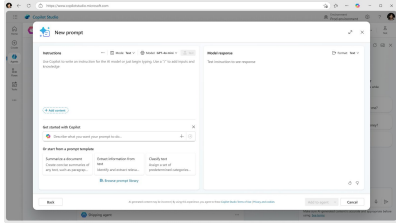
☒ Use hosted browser ⓘ

Back

Add and configure

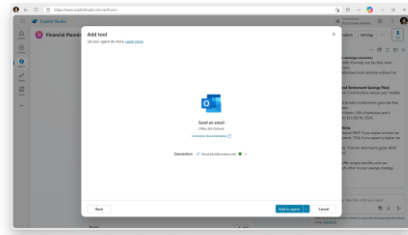
Cancel

One of many popular, powerful agent tools



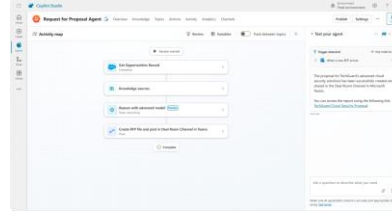
Prompts

Provide structured instructions to guide the LLM to perform specific tasks



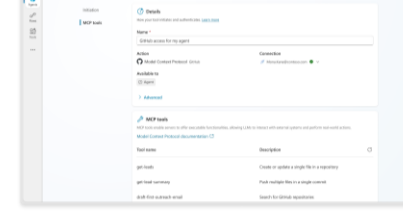
Connectors

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



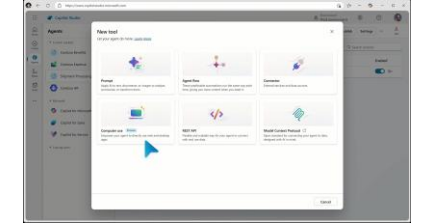
Deep reasoning

Instruct agents to perform complex reasoning tasks



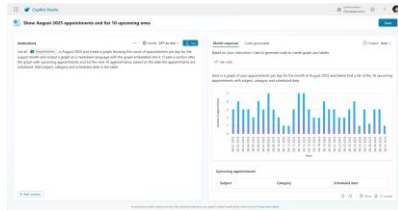
Model Context Protocol

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



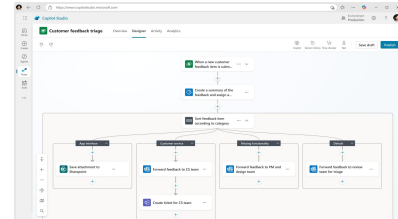
Computer Use¹

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 generation²

Instruct your agent on how to generate a structured doc

¹ Public preview
² Private preview

Prompts

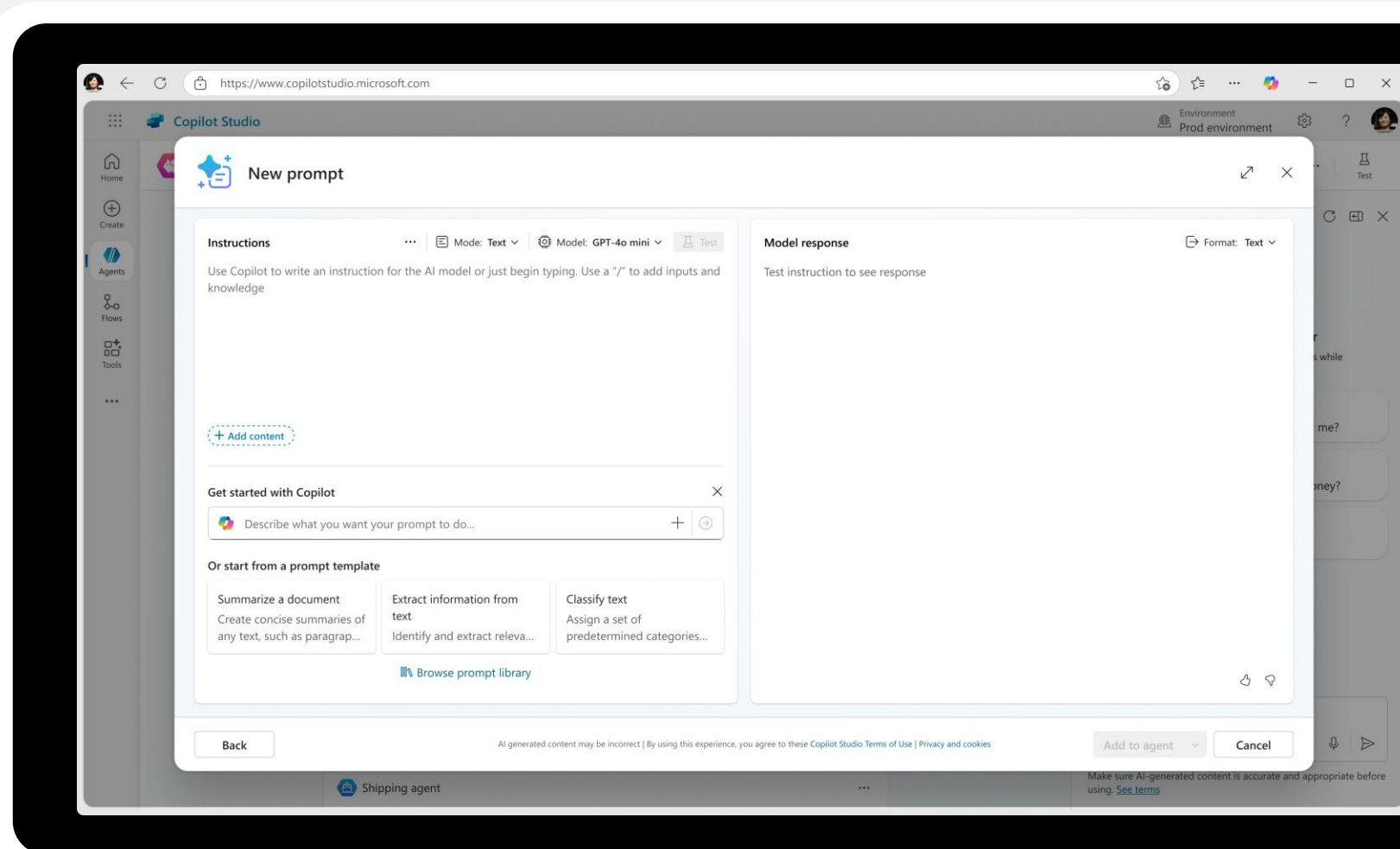
Provide structured instructions to guide the LLM to perform specific tasks

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

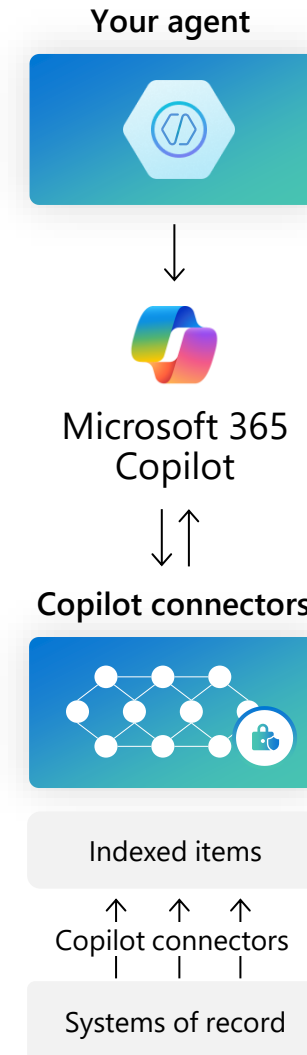
Add new knowledge to Microsoft 365 Copilot

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



Agent flows

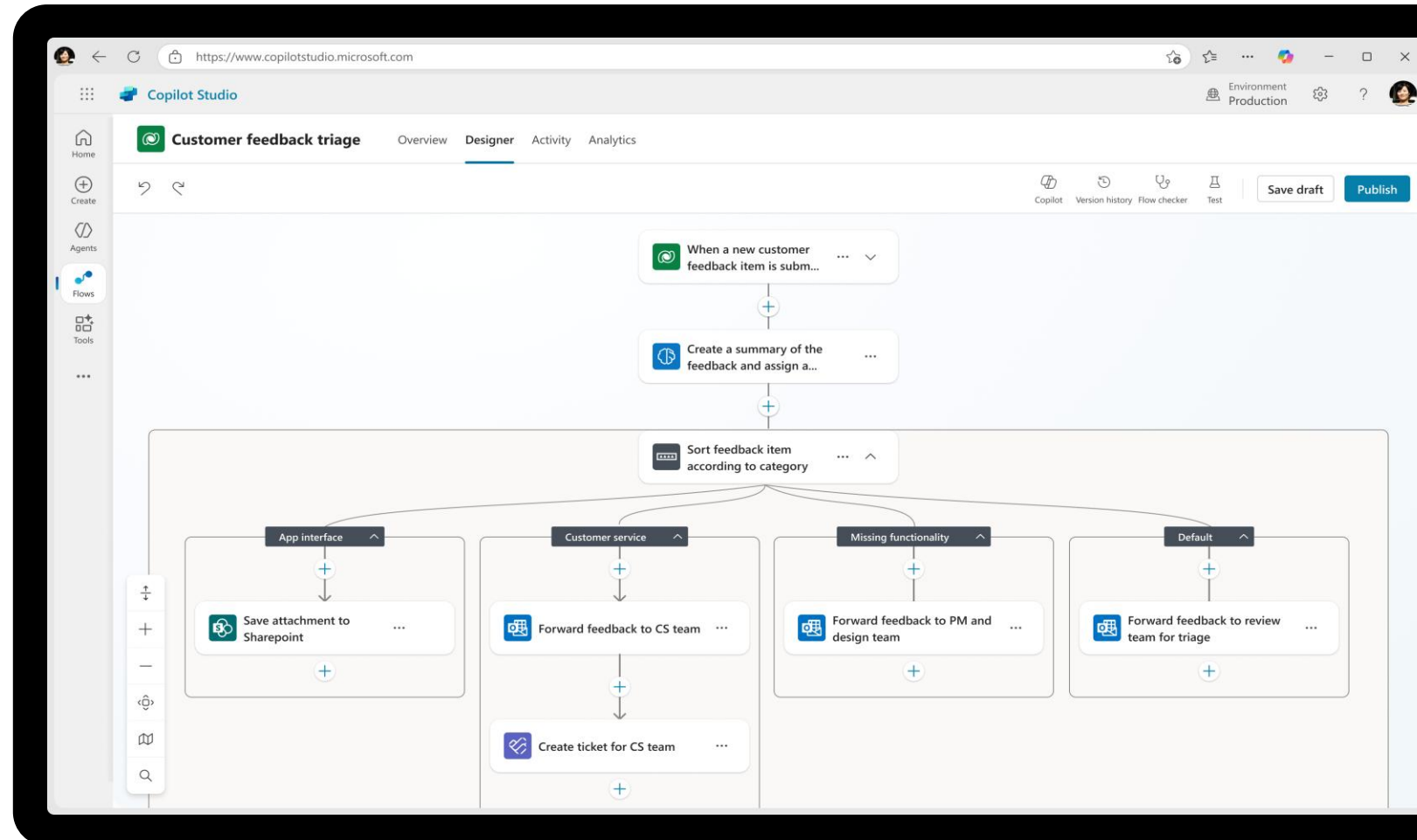
Accelerate your agents with fixed automation pathways

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.



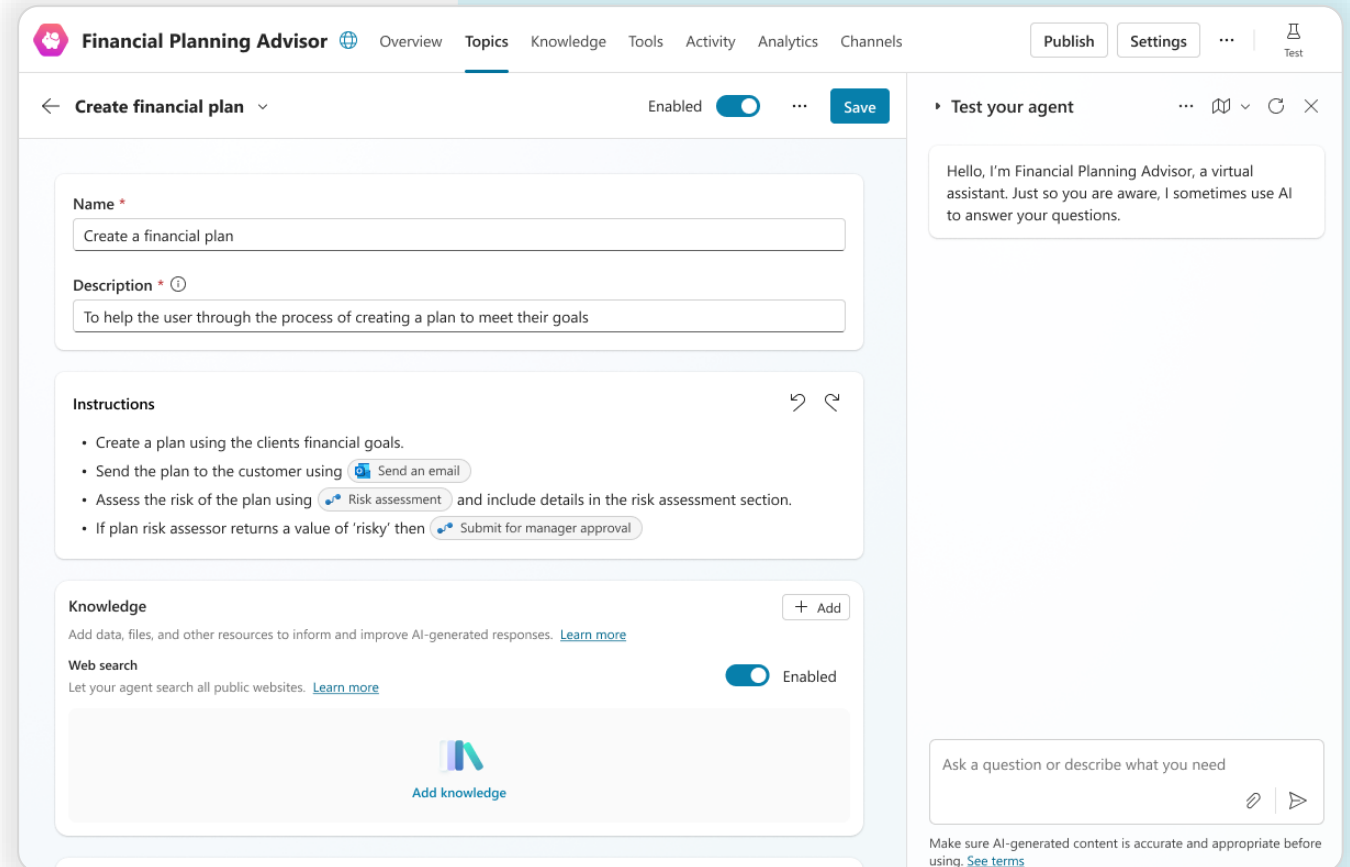
Orchestrator

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.



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**.

The screenshot displays a conversational AI interface with two main panels. The left panel, titled 'Activity map', shows a flowchart of the agent's session. It starts with 'Session started', followed by 'Lesson 1 - A simple topic Topic', and then 'Lesson 2 - A simple topic with a condition and variable Topic'. Lesson 2 is highlighted with a red box and lists several phrases: 'Find my nearest store', 'Check store location', 'Find a store', and 'View all (2)'. The right panel, titled 'Test your agent', shows a chat history. It includes a user query: 'I need to get store hours and find my nearest store.' (3 minutes ago), followed by the agent's response: 'I'm happy to help with store hours.' (2 minutes ago). The agent's response includes the store hours for Redmond and Seattle. The chat history also shows a follow-up question: 'Did that answer your question?' (2 minutes ago).

Activity map | Review | Variables | Track between topics

Session started

Lesson 1 - A simple topic Topic

Lesson 2 - A simple topic with a condition and variable Topic

Phrases

- Find my nearest store
- Check store location
- Find a store
- View all (2)

Session in progress

Test your agent

3 minutes ago

I need to get store hours and find my nearest store.

2 minutes ago

I'm happy to help with store hours.

The Redmond hours are:

- Mon-Fri: 9am to 6pm
- Sat: 10am to 4pm
- Sun: Closed

The Seattle hours are:

- Mon-Fri: 9am to 6pm
- Sat-Sun: 10am to 4pm

Did that answer your question?

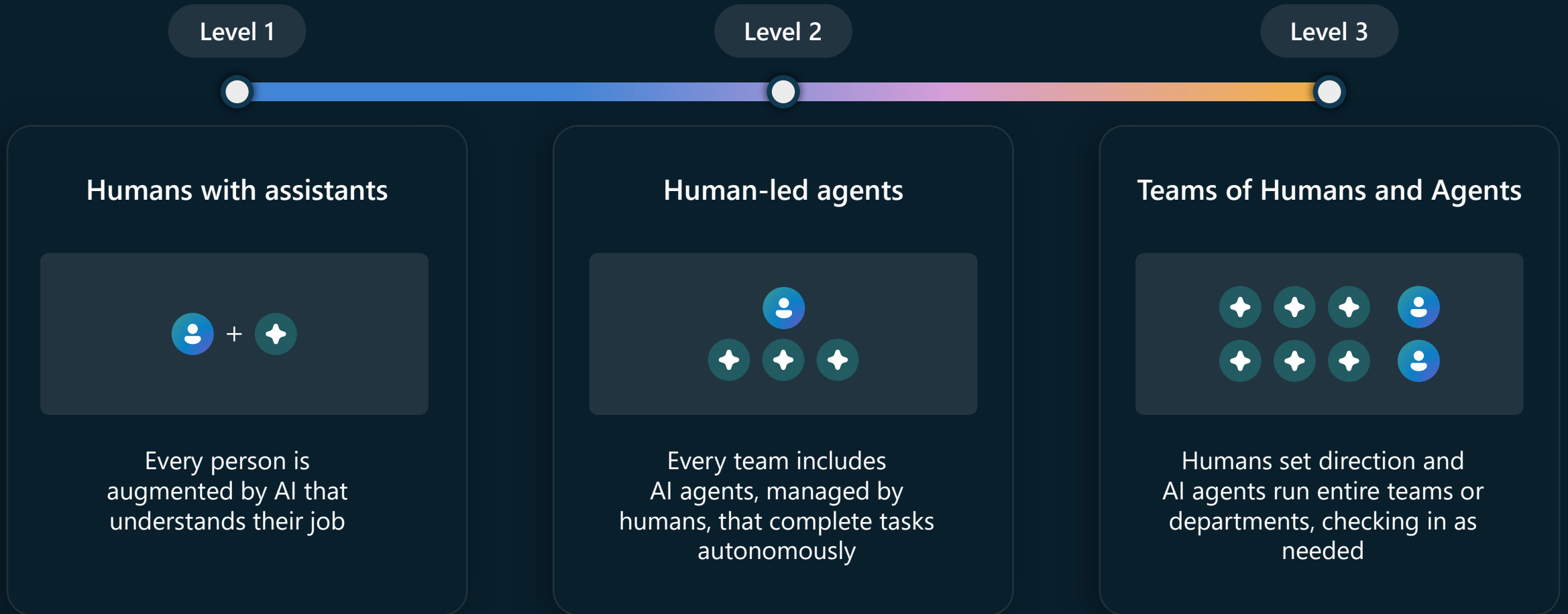
2 minutes ago

AI-first organizations

think in

orders of magnitude

Levels of AI transformation



1.5x

Level 1

Humans with assistants

3x

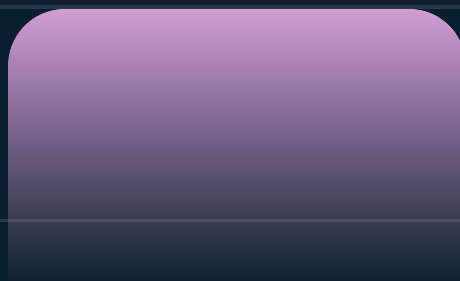
Level 2

Human-led agents

10x

Level 3

Teams of Humans and Agents

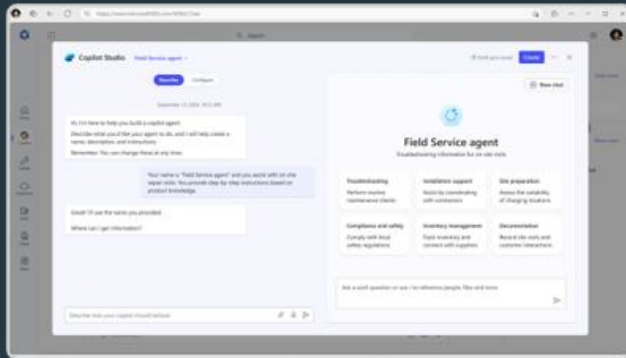


A range of tools for agent creation

No code



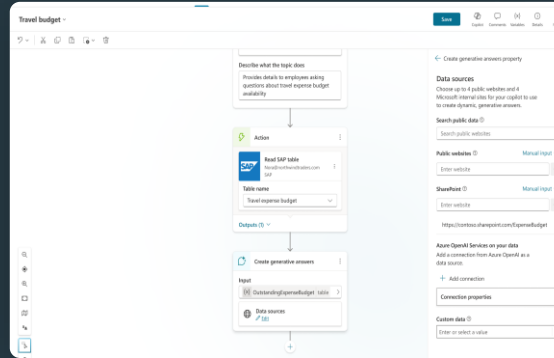
For end users



Agent builder



For makers

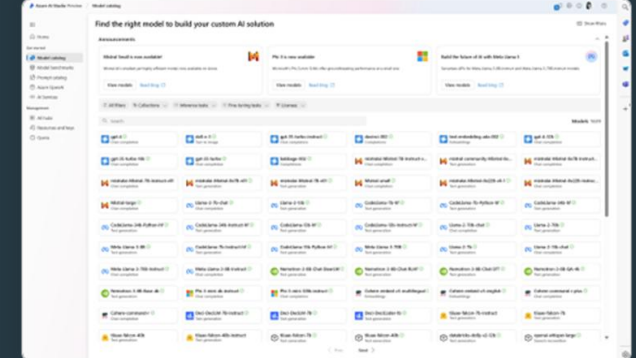


Copilot Studio



Pro code

For developers



Copilot Studio, Azure AI
Foundry, M365 Agents SDK

Data protection, agent sharing & usage limits, and reporting & cost management

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.*

* Gartner® 2025 Top Strategic Technology Trends E-Book, Gene Alvarez and Tom Coshov, 2024, [emt.gartnerweb.com/ngw/globalassets/en/information-technology/documents/trends/2025-top-tech-trends-ebook.pdf](https://www.emt.gartnerweb.com/ngw/globalassets/en/information-technology/documents/trends/2025-top-tech-trends-ebook.pdf). GARTNER is a registered trademark and service mark of Gartner, 2nc. and/or its affiliates in the U.S. and internationally and is used herein with permission. All rights reserved.



People

+

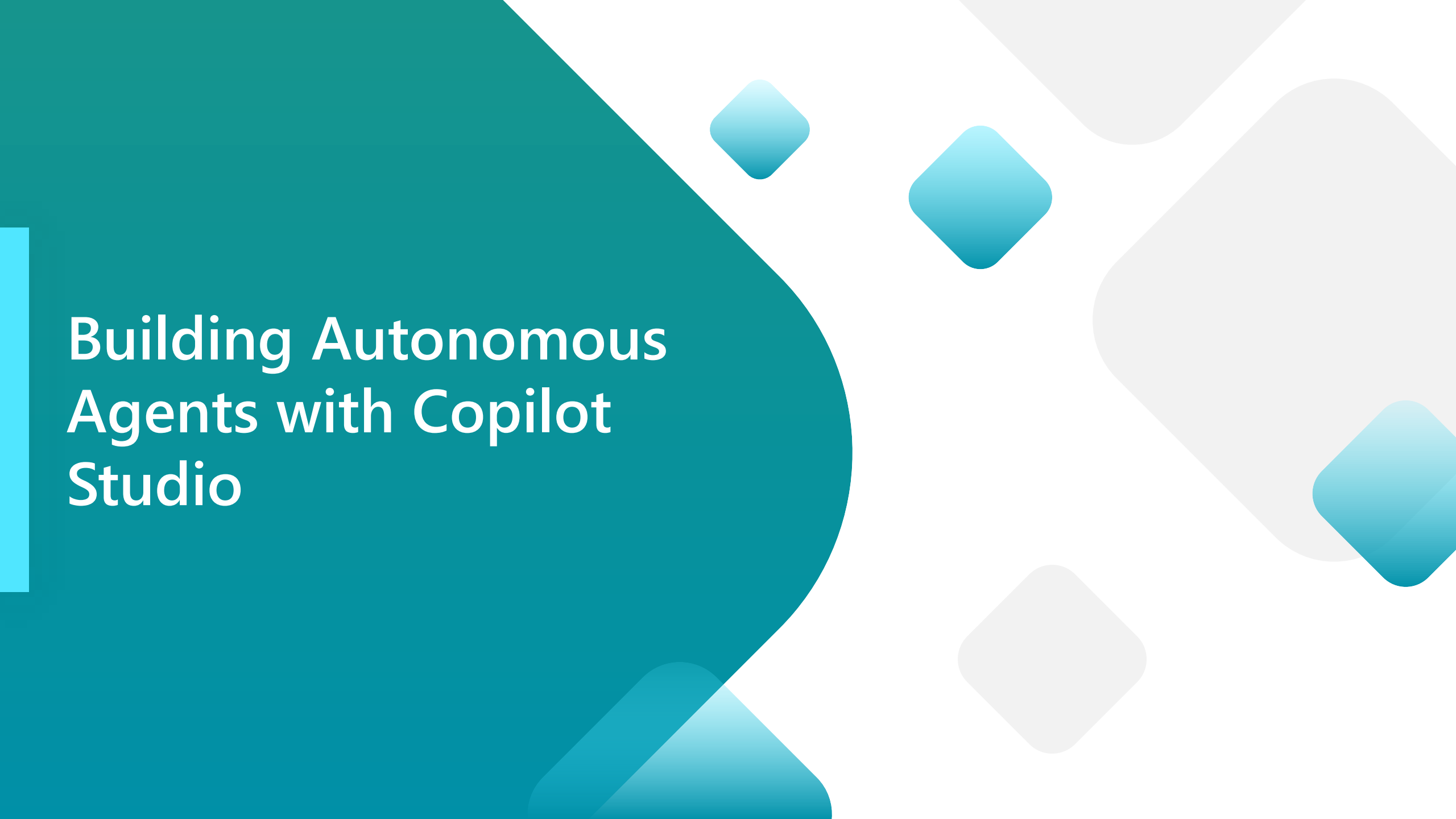


Copilot

+



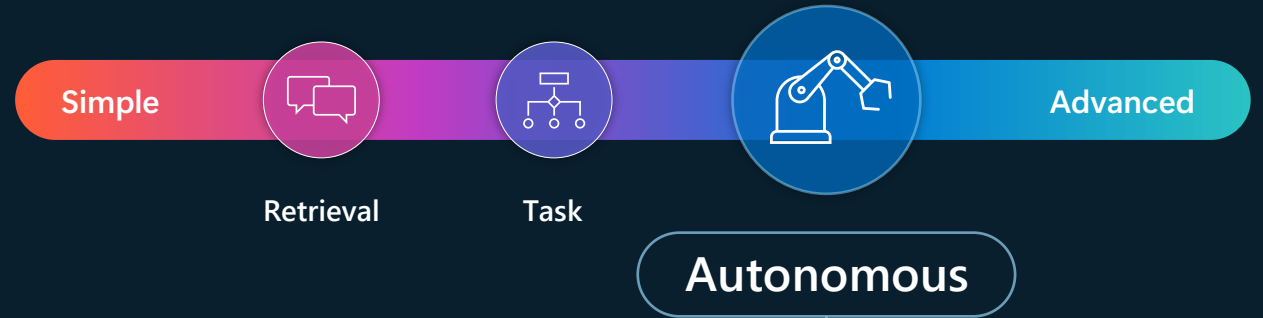
Agents

The background is a solid teal color. On the left, there is a vertical light blue bar. The title text is in white, bold, sans-serif font. There are several light blue diamond shapes of varying sizes scattered across the background, some overlapping the teal area and others on the white background.

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.



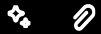
Autonomous Agents are like using a self driving car

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.

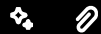


Simple



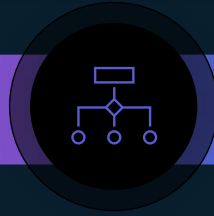
Project Tracker agent

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.



Advanced

Autonomous agents

Handle variability and complexity at infinite scale

Independently begins work based on autonomous triggers

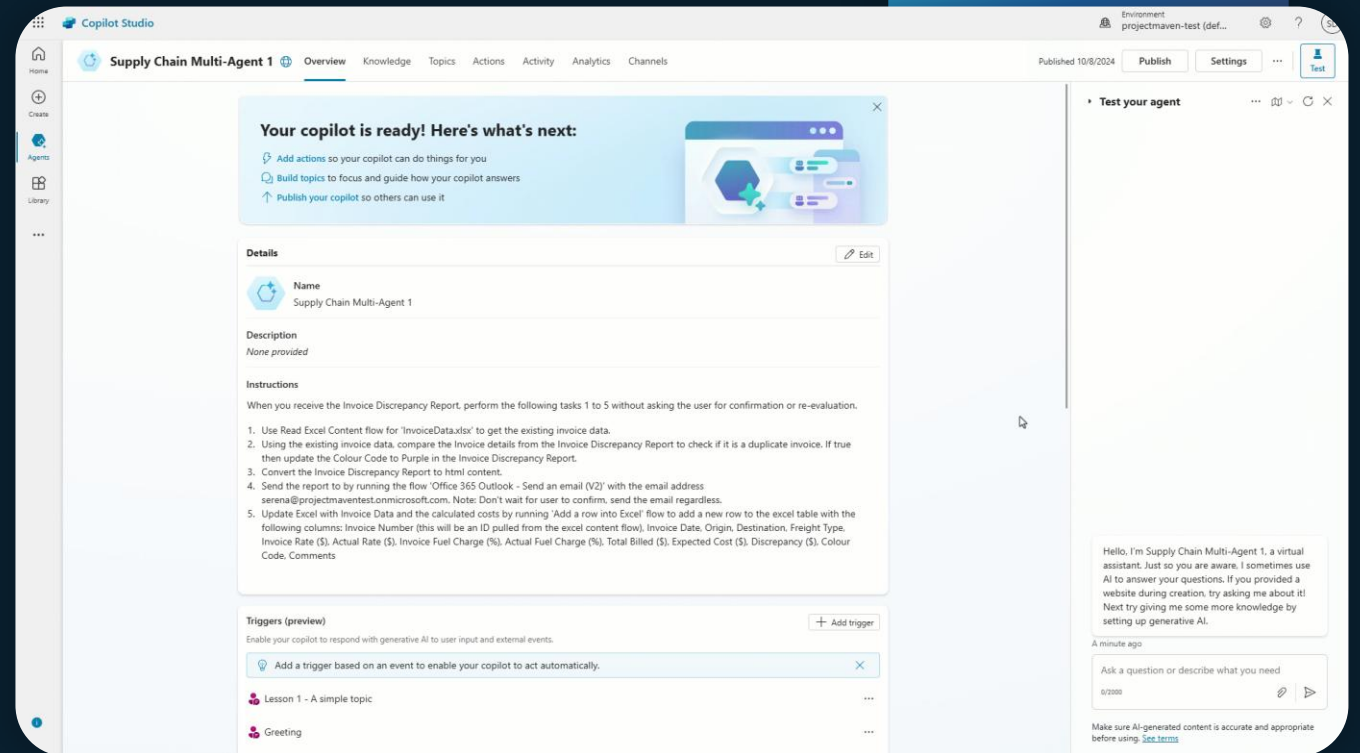
Automates long running processes

Dynamically reasons over its capabilities

Follows human guard rails and asks for help

Orchestrate other agents

Generally Available



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

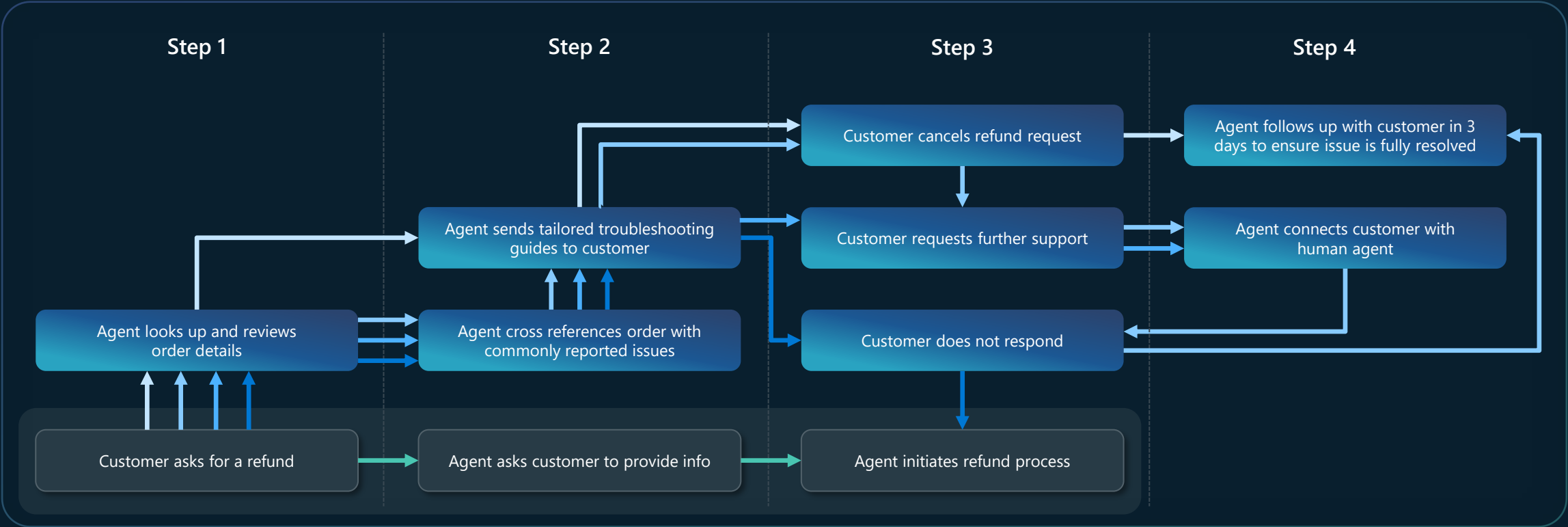
Run 1

Run 2

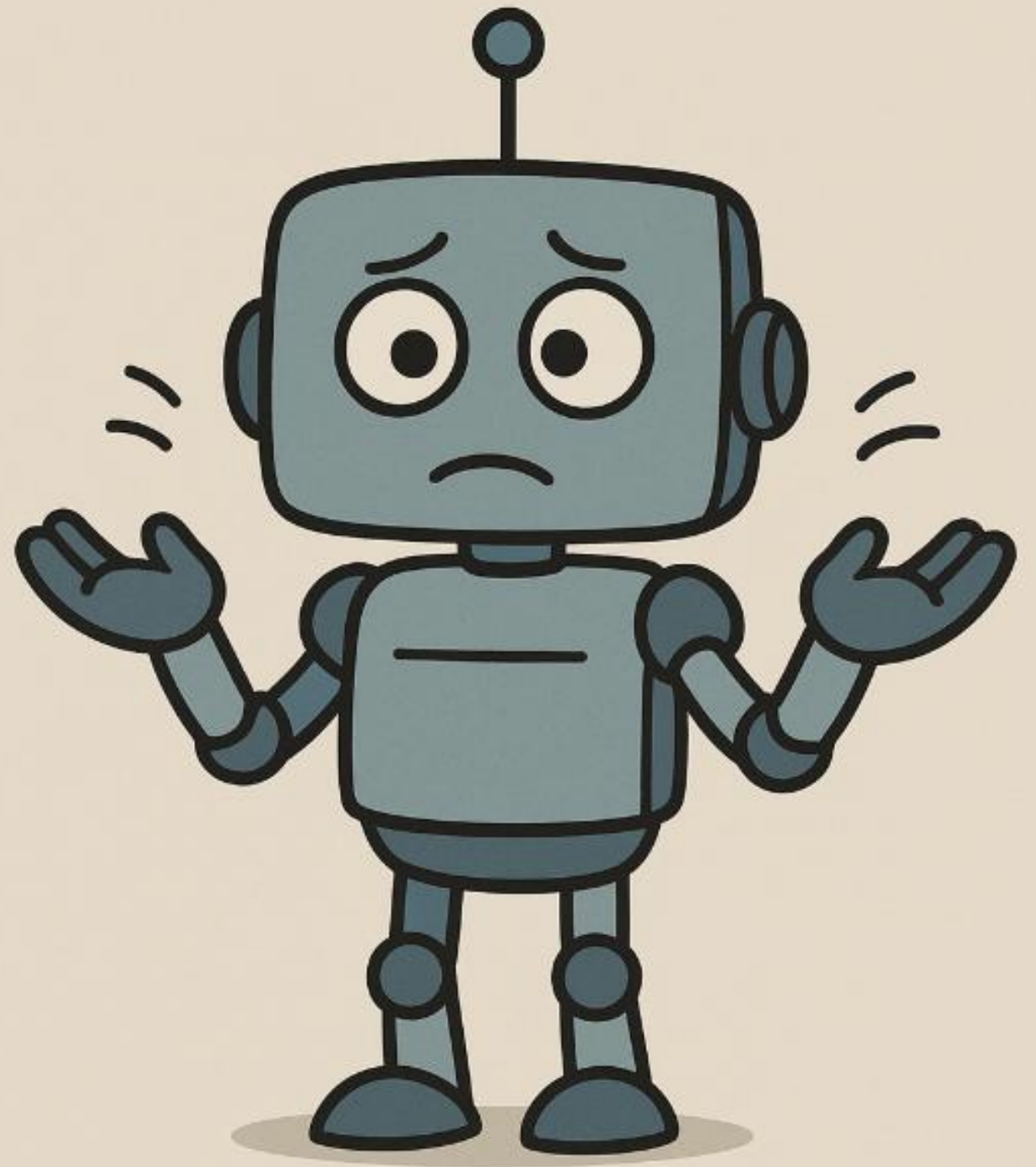
Run 3

Run 4

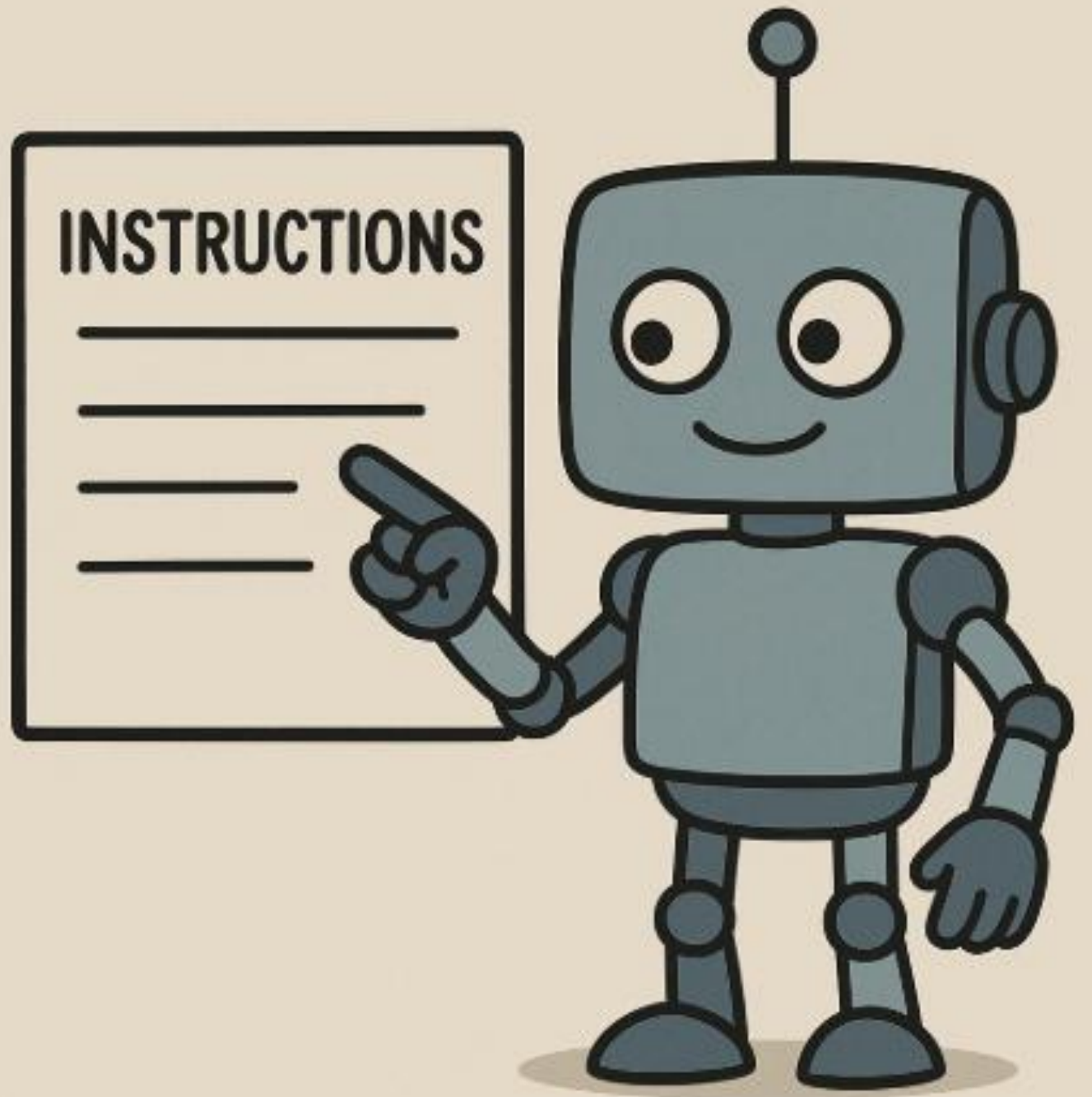
Run 5



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

Copilot Studio Tour

Setup #1 of 3

- Everyone to do this ~10 mins
- Import solution

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.



Setup #2 of 3

- Imported solution – green bar (tick!)
- Publish all customisations

Setup #3

- Imported solution – green bar (tick!)
- Publish all customisations – green bar (tick!)
- Create at least 3 records in the apps (tick!)

You're ready to rock!

Lab time!

At your own pace

~30 Mins



Build a conversational agent in Copilot Studio - Online workshop

800 XP

55 min • Module • 7 Units

In this module, you build a conversational agent in Microsoft Copilot Studio, starting with the importing an agent solution, building an agent using natural language, and preparing the agent with knowledge sources to ground its answers in real-world data.

Overview ▾



Use tools in Copilot Studio - Online workshop

700 XP

48 min • Module • 6 Units

In this module, you extend your agent's capabilities in Microsoft Copilot Studio by giving it access to tools, learn the difference between the different tools, build a custom prompt, and execute an order cancellation using an agent flow.

Overview ▾



Make your agent autonomous in Copilot Studio - Online workshop

600 XP

33 min • Module • 5 Units

In this module, you extend your agent's capabilities in Microsoft Copilot Studio by giving it access to autonomous triggers, customize the agent's triggers to perform conditionally when specific conditions are met, learn how to test and validate your trigger's behavior, monitor the agent's activity, and publish changes to the agent.

Overview ▾



Lunch break!

~60 Mins

Lab time!

At your own pace

~60 Mins



Build a conversational agent in Copilot Studio - Online workshop

800 XP

55 min • Module • 7 Units

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Overview ▾



Copilot Studio (New vs Old UI)

Decision Framework

Choose the right experience for your agent

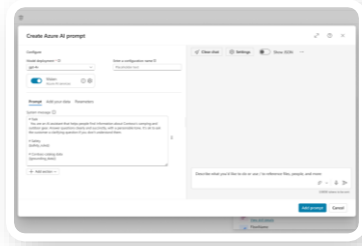
 Start with New Best for modern, knowledge-driven, AI-powered agents	 Stay with Classic Best for existing investments and highly controlled scenarios
 You are starting a brand new agent from scratch	 You are maintaining or extending an existing classic agent
 Your agent's primary knowledge sources are Microsoft 365, SharePoint, OneDrive, Teams	 You need precise, deterministic control over every conversation step
 You want stronger orchestration and better response quality	 Your scenario depends on connectors or features not yet in the new experience
 You prefer writing natural language instructions over designing conversation flows	 You need manual authentication
 Your scenario benefits from clarifying questions and dynamic reasoning	 Your team is deeply proficient in topic-based design and a rebuild is not justified
 You want cross-session memory for returning users	

A rich journey...

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

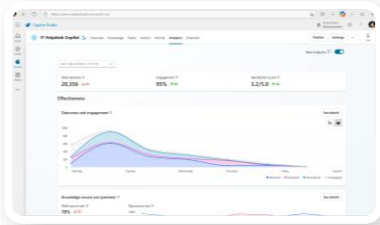
Integrate with AI services

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



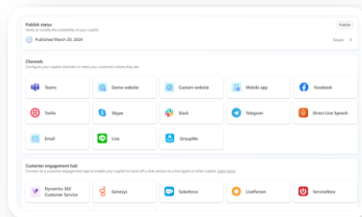
Monitor and improve

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

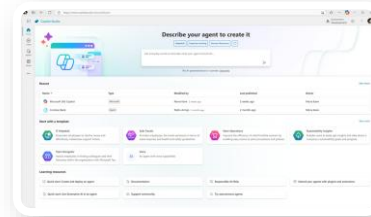


Publish to multiple channels

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



Build & Publish

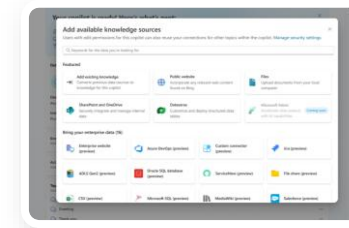


Copilot Studio

Analyze & Improve

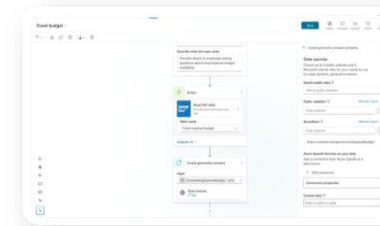
Chat over knowledge with gen AI

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



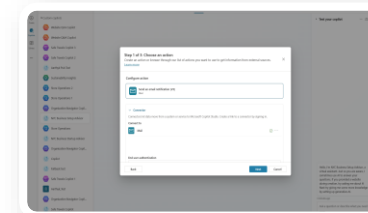
Create specific topics

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



Build actions

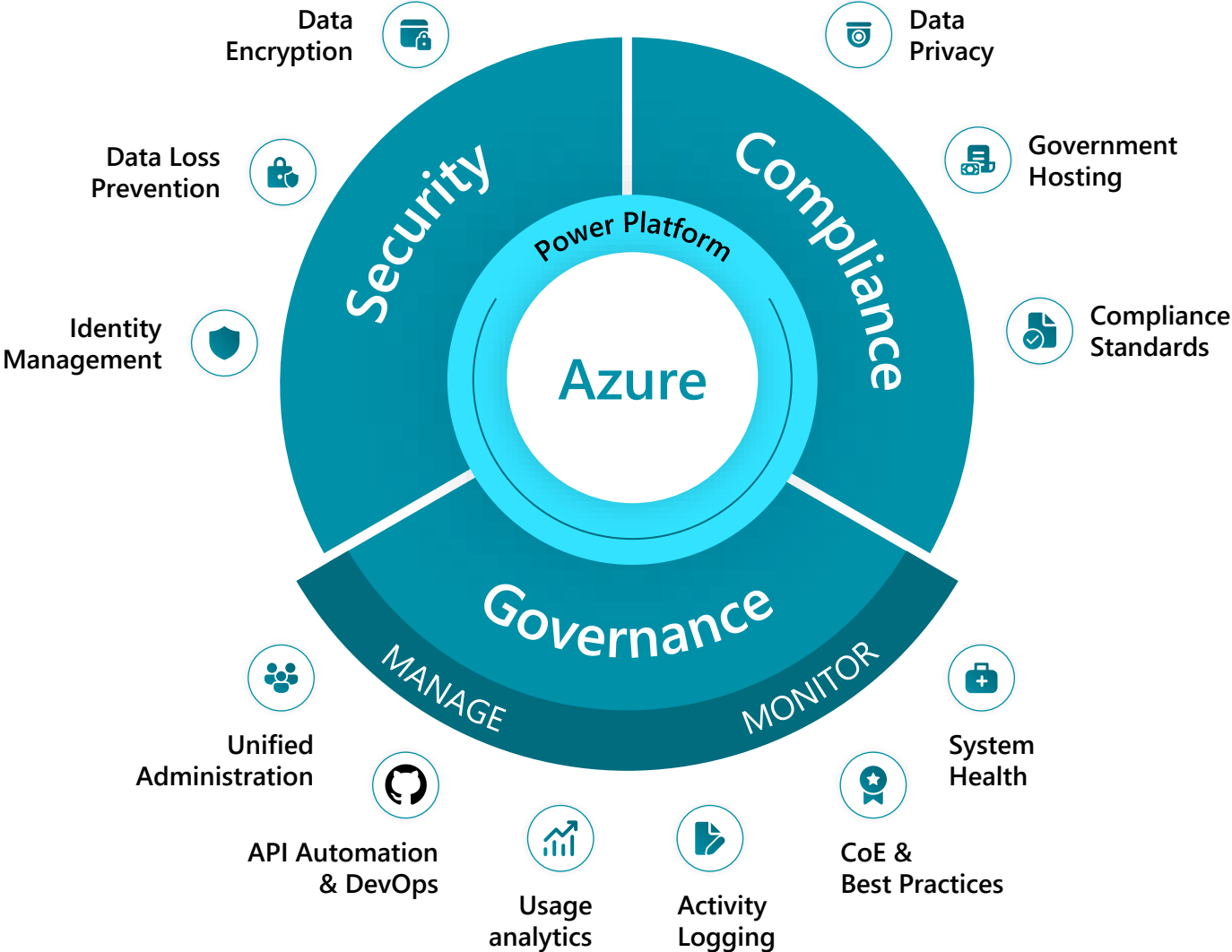
Create actions and use **pre-built connectors** or **agent flows** to call your backends and APIs or complete long-running tasks



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

Copilot Studio “Lite” agents – M365 Admin Centre

The screenshot displays the Microsoft 365 Admin Center interface. The left-hand navigation pane includes links for All tenants, Home, Copilot (with sub-links for Overview and Agents), Connectors, Search, Billing & usage, Settings, Users, Teams & groups, Billing, Settings, and Setup. The main content area is titled 'Agent inventory' and shows a list of Copilot agents. A yellow banner at the top of the list indicates 'Missing an owner' with a count of 1. Below this, there are action buttons: Refresh, Export to Excel, Upload custom agent, and Manage pinned agents, followed by a count of 127 items and a search bar. The table lists agents with columns for Name, Type, Availability, and Supported in. The agents listed are Certifi, Egnyte, Meltwater, and iGlobe CRM. A 'Help & support' overlay is visible in the bottom right corner.

Microsoft 365 admin center

Search

Copilot

Agent inventory Requested agents

Missing an owner

1

Refresh Export to Excel Upload custom agent Manage pinned agents 127 items Search

Filters: Type Agent type Availability Supported in

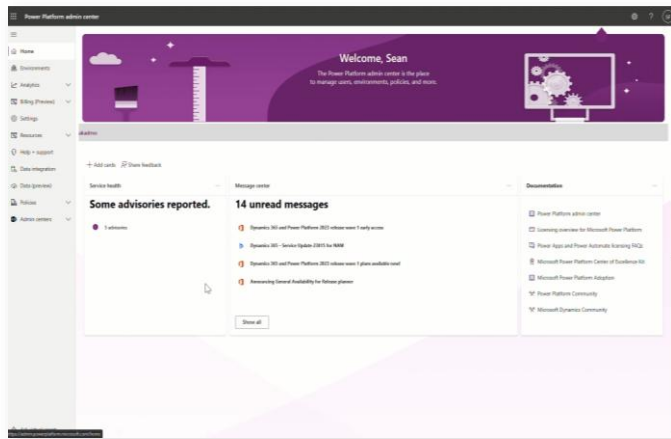
Name	Type	Availability	Supported in
Certifi Certifi is an AI-powered Microsoft Teams app fo...	External	✓ All users	Copilot Microsoft 365 Outlook Teams
Egnyte Easily access and manage your Egnyte content r...	External	✓ All users	Copilot Outlook Teams
Meltwater Smarter Insights, Faster decisions - AI by Meltw...	External	✓ All users	Copilot Outlook Teams
iGlobe CRM Having CRM on a known platform is a key facto...	External	✗ Blocked	Copilot Outlook Teams

Help & support

Give Feedback

Copilot Studio “Full” - Agents in Power Platform tools

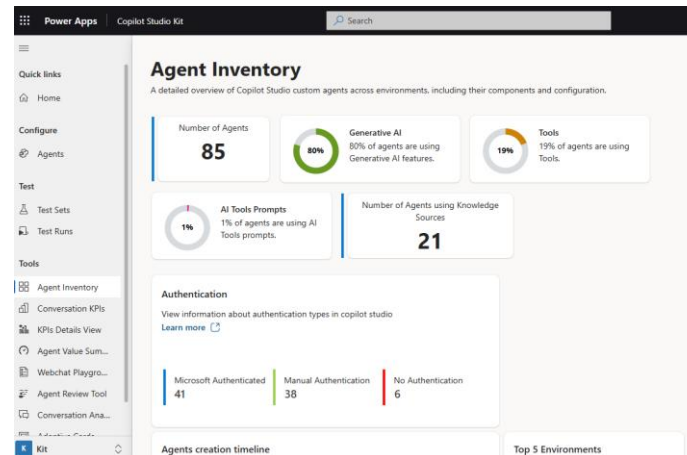
PP Admin Center & Managed Environments



Built-in governance offering:

- Build guardrails around data, apps, and environments, view analytics
- Pipelines, activity management, sharing restrictions, alerts

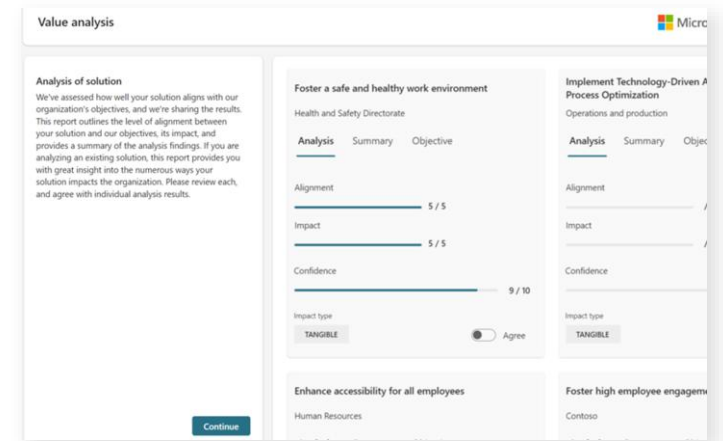
PowerCAT Studio Kit



Copilot Agent governance add-on

- Specific for agent strategy
- Monitor usage, test plans, more

Center of Excellence Kit



Extensible governance add-on:

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

Microsoft Agent 365

The Control Plane for AI Agents

As agents multiply across your organisation, IT and security teams need a single place to manage them all — regardless of how or where they were built.



Observe

Agent registry, visual map of agent connections, analytics, and role-specific oversight for IT, security, and business leaders.



Govern

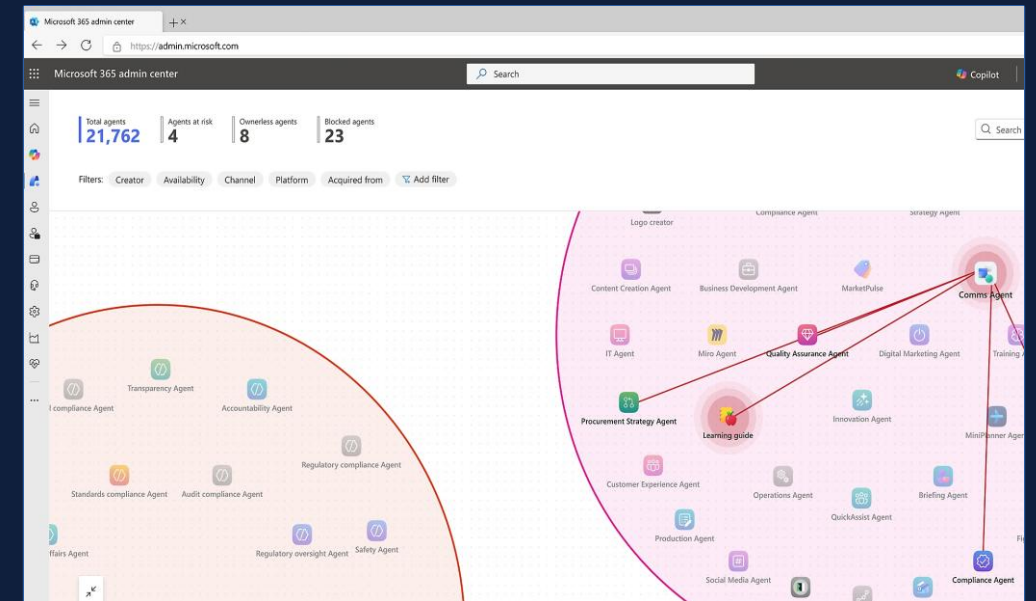
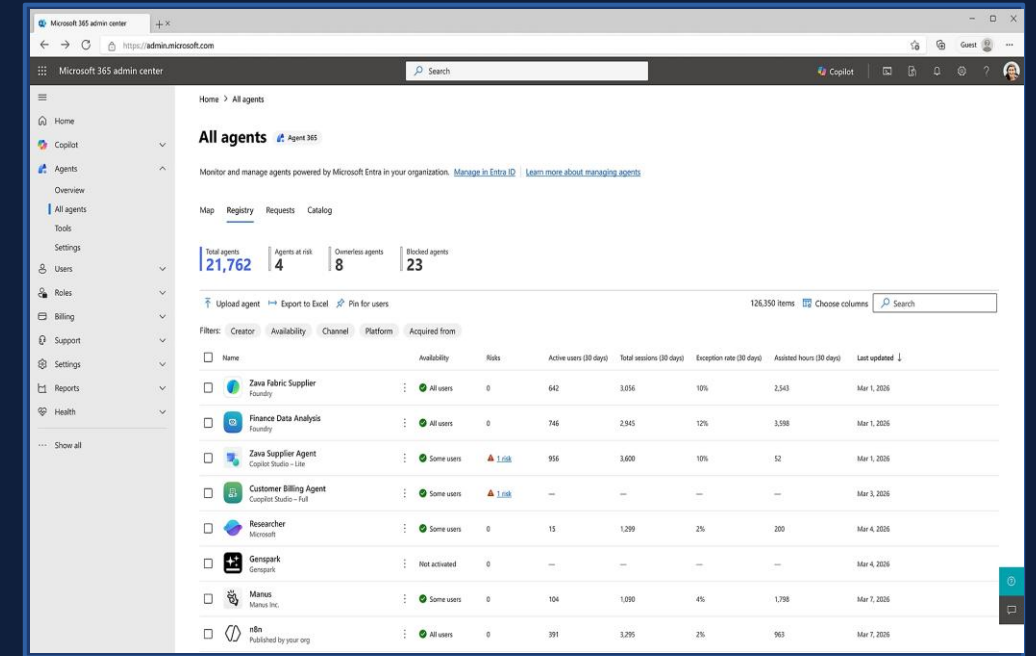
IT-controlled onboarding, lifecycle policies, least-privilege access, audit logging, and data compliance controls.



Secure

Agent identity protection via Entra, threat detection via Defender, and data governance via Purview.

\$15 USD / user / month · Included in Microsoft 365 E7



Microsoft Agent 365

Microsoft 365 admin center

https://admin.microsoft.com

Microsoft 365 admin center

Search

Copilot

Guest

Home

Copilot

Agents

Overview

All agents

Tools

Settings

Users

Roles

Billing

Support

Settings

Reports

Health

Show all

Home > Agent 365 overview

Agent 365 overview

Last updated: Nov 17, 2025 (Last 30 days)

Track agent usage across your org over the last 30 days and take steps to improve impact. Adjust settings, manage access, and help teams unlock more value while staying aligned with governance goals.

Search all agents

Agent Registry

21,762

↑ 28% this week

Total agents in your org

Explore all agents

Active users

58,293

↑ 12% this week

Unique users interacting with agents

Time saved with agents

45,208

↑ 6% this week

Hours saved by using agents

Agent analytics

Agent publishers

Created by your organization

Shared by creator 15.2K

Used only by creator 7.3K

Published by your org 11.8K

Created by external partners

Microsoft 154

Workday 14

Other 732

Agent platforms

Copilot Studio 16.1K

Microsoft Foundry 3.9K

Active users over time

Line chart showing active users from Oct 20 to Nov 18, with a peak around Nov 11.

Trending agents by active users

Claims Processing Agent 10,992

Contract intelligence 8,146

Researcher 7,392

Incident resolution 6,100

Manus 583

Top actions for you

Pending requests for agents

5

+2 this week

Agent risks

4

+3 this week

Ownerless agents

7

-4 this week

Agents with exceptions

100

+3 this week

Why Agent 365 Matters For Your Organisation

✗ Without Agent 365

- No central view of what agents exist or who built them
- Security teams can't enforce policies across agent types
- Orphaned / inactive agents accumulate unnoticed
- IT says 'no' to agent rollout — too much unknown risk
- No audit trail when an agent does something unexpected

VS

✓ With Agent 365

- Complete registry of every agent across your tenant
- Consistent governance policies applied at onboarding
- Lifecycle rules auto-expire or flag risky agents
- IT can confidently say 'yes' — guardrails are built in
- Full audit log of agent actions and interactions

Powered by admin tools you already know:



M365 Admin Center



Microsoft Defender



Microsoft Entra



Microsoft Purview



Microsoft Intune

Summary of Copilot Studio

	Microsoft Copilot Studio pay-as-you-go meter	Microsoft Copilot Studio Copilot Credit pack subscriptions	Copilot Studio use rights with Microsoft 365 Copilot
Plans	RECOMMENDED MOTION Copilot Studio \$0.01 per Copilot Credit	Copilot Studio \$200 per credit pack/month	Copilot Studio in Microsoft 365 Copilot \$30 per user/month
Included Copilot Credits ¹	Pay-as-you-go ²	25,000 Copilot Credits ³	Unlimited ^{4*}
Generative AI	●	●	Limited ^{4*}
Create and publish your own agents and agent flows anywhere	●	●	
Create and Publish your own agents and plugins to extend Microsoft 365 Copilot			●
The output you create is...	Your own agent	Your own agent	Your own agent ⁵
Power Automate cloud flows as actions in agents		● ⁶	
Standard Power Platform connectors	●	●	●
Premium and Custom Power Platform connectors	●	●	●
On premises and cloud services data transfer for Power Platform Connectors	●	●	●
Dataverse for Copilot Studio	● ⁷	● ⁷	● ⁷
Managed Environments	● ⁸	● ⁸	
Available channels to publish your agents/plugins	External channels (e.g., External Web, FB, WhatsApp etc.) Internal Channels (e.g., Internal Web, Teams, etc.)	External channel (e.g., External Web, FB, WhatsApp etc.) Internal Channels (e.g., Internal Web, Teams, etc.)	Microsoft

Microsoft Power Platform

Microsoft Copilot Studio
Licensing Guide



Credit table – billing rates

Copilot Studio feature	Billing rate	Use in Microsoft 365 Copilot scenarios ¹	Autonomous triggers ²
Classic answer	1 Copilot Credit	No charge	N/A
Generative answer	2 Copilot Credits	No charge	2 Copilot Credits
Agent action	5 Copilot Credits	No charge	5 Copilot Credits
Tenant graph grounding for messages	10 Copilot Credits	No charge	10 Copilot Credits
Agent flow actions <i>per 100 actions</i>	13 Copilot Credits	No charge	13 Copilot Credits
AI tools			
- Text and generative AI tools (basic) <i>per 10 response</i>	1 Copilot Credit	No charge	1 Copilot Credit
- Text and generative AI tools (standard) <i>per 10 response</i>	15 Copilot Credits	No charge	15 Copilot Credits
- Text and generative AI tools (premium) <i>per 10 response</i>	100 Copilot Credits	No charge	100 Copilot Credits

[Copilot Studio agent usage estimator \(preview\)](#)

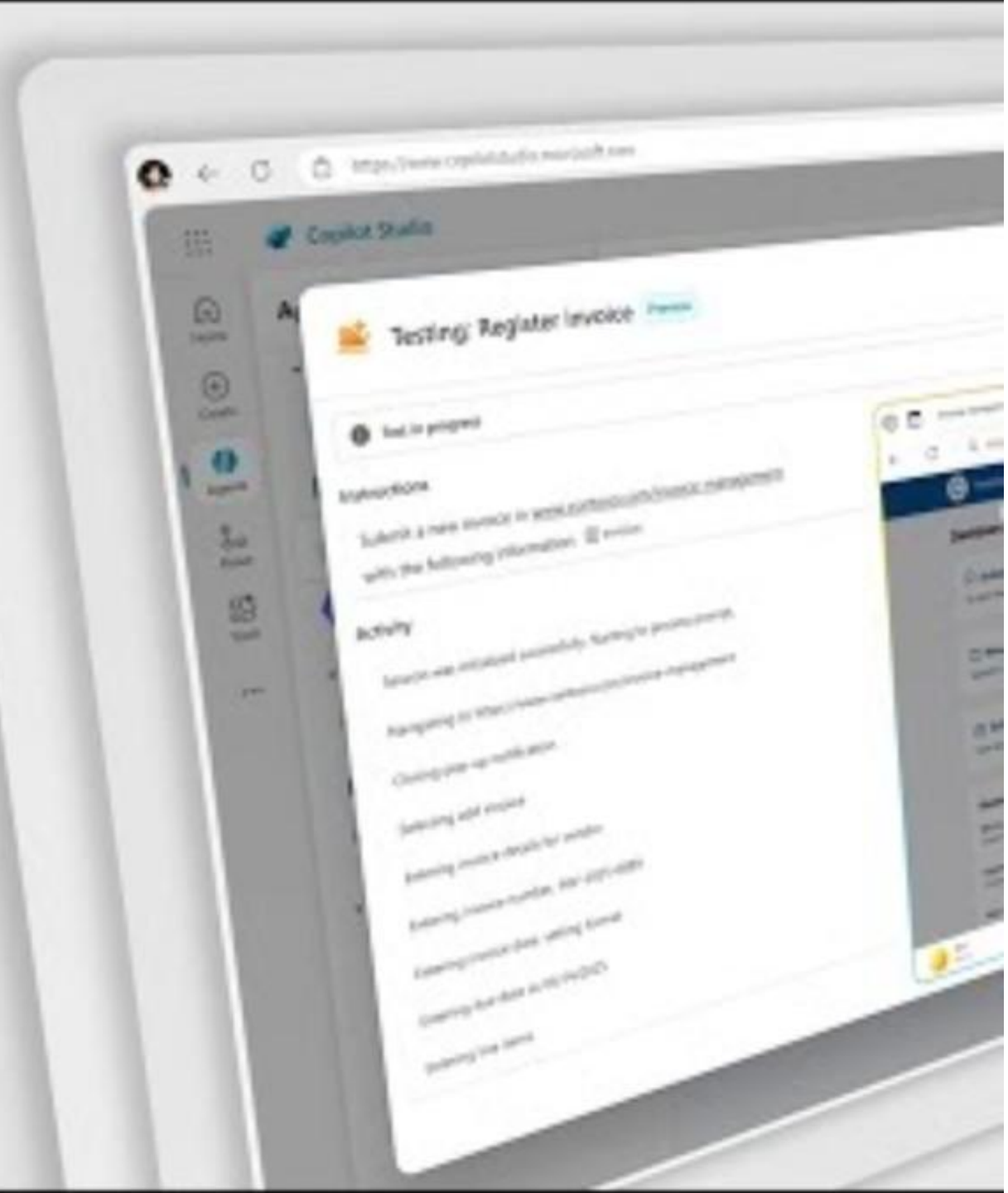


Microsoft Copilot Studio

Computer Use Tool



Microsoft



Introducing Supervised Agents (Power apps MCP preview)



Dynamics 365

Supply Chain Management

Search

Agent feed

Home

Recent

Pinned

New Group

Products

Customer Informatio...

Supplier Information

Invoices

Orders

Agent feed

Agents: 5 of 6 | Status: 4 of 5

To do

Create report and notify on Teams

05/20/25, 10:16 AM

Supplier Discovery Agent

Search the web

05/20/25, 10:16 AM

Supplier Discovery Agent

Get Opportunities Record

05/19/25, 5:04 AM

Request for Proposal Agent

Read Market Price

05/18/25, 11:08 PM

Supply Chain multi-agent 2

Read Excel Content

05/18/25, 9:13 PM

Supply Chain multi-agent 2

Add new engagement to Database

05/16/25, 4:22 PM

Autonomous Engagement Managemen...

Get a list of suppliers from ERP

05/14/25, 7:27 PM

Supplier Discovery Agent

Add new engagement to Database

05/14/25, 7:20 PM

Autonomous Engagement Managemen...

All Products, Families & Bundles

Focused view

Show Chart

Add Family

Add Product

Add Bundle

Delete

Ask about data in this table.

☐	Name	Product ID	Hierarchy Path	Valid From	Valid To	Status	Product Struct...
☐	Office 365 Suite (sample)	Office 365 Sui...				Draft	Product Family
☐	Office 365 and CRM Online: Small ...	Office 365 an...				Draft	Product Bundle
☐	Office 365 and CRM Online: Midsiz...	Office 365 an...				Draft	Product Bundle
☐	Office 365 and CRM Online: Enterp...	Office 365 an...				Draft	Product Bundle
☐	Office 365 Service (sample)	Office 365 Ser...				Draft	Product Family
☐	Office Desktop (sample)	Office Deskto...				Draft	Product Family
☐	CRM Service (sample)	CRM Service (...)	Office 365 Service (sample)			Draft	Product Family
☐	Exchange Online (sample)	Exchange Onli...	Office 365 Service (sample)			Draft	Product
☐	SharePoint Online (sample)	SharePoint On...	Office 365 Service (sample)			Draft	Product
☐	Lync Online (sample)	Lync Online (s...	Office 365 Service (sample)			Draft	Product
☐	CRM Online: Professional (sample)	CRM Online: P...	Office 365 Service (sample)\CRM Service (sample)			Draft	Product
☐	CRM Online: Enterprise (sample)	CRM Online: E...	Office 365 Service (sample)\CRM Service (sample)			Draft	Product
☐	CRM Online: Standard (sample)	CRM Online: S...	Office 365 Service (sample)\CRM Service (sample)			Draft	Product
☐	Office 365 for Small Business (sam...	Office 365 for ...	Office 365 Suite (sample)			Draft	Product Bundle
☐	Office 365 for Small Business Prem...	Office 365 for ...	Office 365 Suite (sample)			Draft	Product Bundle
☐	Office 365 for Midsize Business (sa...	Office 365 for ...	Office 365 Suite (sample)			Draft	Product Bundle
☐	Office 365 for Enterprise (sample)	Office 365 for ...	Office 365 Suite (sample)			Draft	Product Bundle
☐	Office Desktop for Small Business	Office Deskto...	Office Desktop (sample)			Draft	Product

Power Apps MCP Server

Equip your agent with app tools

Automate repetitive app tasks

Equip your agent with AI app tools like autonomous form filling



Supervise agent activity

Enable control handoffs for HITL review



`invoke_data_entry tool`



Your agent



Power Apps
MCP Server

`request_assistance tool`

`log_for_review tool`

Key Takeaway!

Share your insight from the day

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

Copilot + Agents



Copilot makes agents more personal for your customers

Agents make Copilot more capable

Together, they benefit from consistent security, governance & management

Go build them!



THANK YOU

Lab Support Room open until 4:30