Microsoft Copilot Studio Development

Duration 5 days (40 hours)

Module 1: Get started with Microsoft Copilot Studio

Microsoft Copilot Studio allows organizations to quickly create copilots based on business scenarios their customers and employees can easily interact with as needed. In this module, you're introduced to key concepts for copilots.

- Introduction
- Get started working with environments
- Create bots and work with the Microsoft Copilot Studio interface
- Create topics
- Test bots
- Publish bots and analyze performance
- Exercise - Build your first chatbot

Module 2: Describe the AI authoring experience in Power Platform

Learn about Microsoft Copilot Studio, a low-code solution for customizing Copilot experiences and building generative AI tools. AI Builder, in turn, allows you to build and use AI models that optimize your business processes.

- Introduction
- Explore Copilot Studio
- Describe the components of Copilot Studio
- Create a basic copilot
- Describe use cases for Generative AI bots
- Describe AI Builder
- Describe the lifecycle to create an AI Builder model

Module 3: Manage topics in Microsoft Copilot Studio

In Microsoft Copilot Studio, topics are used to small conversations related to a specific subject. A Microsoft Copilot Studio bot typically includes many topics. This module you're introduced to the basic principles of topics such as trigger phrases and conversation paths and how to create them.

- Introduction
- Work with bot topics
- Branch a topic
- Create topics for existing support content
- Work with system fallback topics
- Manage topics

Module 4: Work with entities and variables in Microsoft Copilot Studio

Microsoft Copilot Studio allows organizations to quickly create bots based on business scenarios their customers and employees can easily interact with as needed.

- Introduction
- Work with entities
- Custom entities
- Use entities in conversations
- Work with variables

- Reuse variables across topics

Module 5: Enhance Microsoft Copilot Studio bots

This module examines some of the methods that you can use to enhance your Microsoft Copilot Studio bots such as leveraging Power Automate flow to add actions, and transferring conversations from a bot to Omnichannel for Customer Service.

- Introduction
- Use Power Automate to add actions
- Transfer conversations to agents by using Omnichannel for Customer Service
- Create topics for existing support content
- Analyze bot performance

Module 6: Build effective copilots with Microsoft Copilot Studio

In this module, you'll learn about some design principles and best practices that you can use when designing copilots with Microsoft Copilot Studio.

- Introduction
- Use cases
- Plan for bots
- Topics
- Design your bot
- Build solutions
- Build a conversational bot
- Validate and iterate on your design
- Extend and manage Microsoft Copilot Studio copilots

Module 7: Manage Microsoft Copilot Studio

This module examines the components available for managing and administrating copilots.

- Introduction
- Environments in Microsoft Copilot Studio
- Bot topics permissions
- Bot entities and flow permissions
- Monitor and diagnose
- Administer and manage
- Export and import bots
- Authentication

Module 8: Set up a Microsoft Copilot Studio copilot for voice

This module explores how to set up a Microsoft Copilot Studio copilot to use voice.

- Introduction
- Deploy the necessary extensions
- Set up the handoff to your customer service application
- Set up for voice

Module 9: Use Azure AI Services for Language in a Microsoft Copilot Studio

This module describes the setup that's required to use Azure AI Services for Language to enhance the capabilities of a Microsoft Copilot Studio.

- Introduction
- Azure AI Services for Language
- Define your bot
- Call your service
- Deploy your bot

Online Workshop

In this section you'll complete hands on activities using Microsoft Power Platform, specifically Microsoft Copilot Studio and Power Automate.

Module 10: Plan your first copilot

In this module, you begin building your Microsoft Power Platform solution, starting with a basic copilot.

- Introduction
- Scenarios and prerequisites
- Get started with Generative AI - Copilot creation
- Get started with Generative AI - Generative Answers
- Fundamental knowledge - Natural Language Understanding with Microsoft Copilot Studio
- Ideation
- Requirements gathering and topic planning
- Practice

Module 11: Create your first copilot in Microsoft Copilot Studio

Learn how to create your first copilot in Microsoft Copilot Studio.

- Introduction
- Exercise - Build your first copilot
- Exercise - Try out a conversation in the Test copilot pane
- Exercise - Create your first topic
- Exercise - Publish your copilot to the demo site for testing

Module 12: Authoring 101: writing in unified authoring

Learn the fundamentals of message and question nodes, become familiar with the system topics, and learn how to use variables.

- Introduction
- Setup
- Entities in Microsoft Copilot Studio
- Variables
- Use variables in conditions
- Use topic nodes
- Question node behavior
- Rich text options for message and question nodes
- Message variations
- Productivity features

- Speech authoring
- Code view and Power Fx

Module 13: Build Power Automate flows for your copilot

Microsoft Copilot Studio connects with Power Automate, and it can pass the variables from user's responses and retrieve data from several different data sources, perform complex operations on that data, and then return to Microsoft Copilot Studio to share that data with the user.

- Introduction
- Fundamental knowledge - Power Automate
- Exercise - Build a basic Power Automate flow in Microsoft Copilot Studio

Build plugins and connectors for Microsoft 365 Copilot

Module 14: Microsoft 365 Copilot extensibility fundamentals

Learn how to develop a strategy to enhance Microsoft 365 Copilot with custom skills and organizational knowledge, focusing on plugins and connectors to improve efficiency and productivity across applications. It details the options for extending Copilot, emphasizing the integration of these extensions to maximize the tool's potential.

- Introduction

- Extension fundamentals

- Add knowledge with Graph connectors

- Add skills with plugins

- Build your own copilot

Module 15: Choose a Microsoft 365 Copilot extensibility development path

Develop a strategy to enhance Microsoft 365 Copilot with custom skills and organizational knowledge, focusing on plugins and connectors to improve efficiency and productivity across applications. It details the options for extending Copilot, emphasizing the integration of these extensions to maximize the tool's potential.
- Introduction

- Why extend Copilot?

- Which path for extensibility should you choose?

- What are the benefits and limitations?

- Optimize your plugin for Microsoft 365 Copilot

- How will you use your plugin or connector?

- Apply data, privacy, and security practices when developing your plugin or connector

Module 16: Connect Copilot for Microsoft 365 to your external data in real-time with message extension plugins built with .NET and Visual Studio

Learn how to build Copilot for Microsoft 365 message extension plugins to connect it to external data sources and extend its capabilities.

- Introduction

- What are message extensions?

- Create a message extension

- Exercise - Create a message extension

- Add single sign-on

- Exercise - Add single sign-on

- Retrieve product information from SharePoint Online

- Exercise - Retrieve product information from SharePoint Online

- Extend and optimize message extensions for use with Copilot for Microsoft 365

- Exercise - Extend and optimize message extensions for use with Copilot for Microsoft 365

Module 17: Integrate external content with Copilot for Microsoft 365 using Microsoft Graph connectors built with .NET

Build Microsoft Graph connectors to import external content to Microsoft 365. You can build Microsoft Graph connectors on any platform and using any programming language.
- Introduction

- What are Microsoft Graph connectors?

- Configure an external connection and deploy schema

- Exercise - Configure an external connection and deploy schema

- Import external content

- Exercise - Import external content

- Ensure secure access with access control list

- Exercise - Ensure secure access with access control list

- Understand requirements and recommendations for integrating Microsoft Graph connectors with Copilot for Microsoft 365

- Exercise – Enable external connection for inline results

- Exercise – Get answers based on external content in Copilot

Module 18: Overview of copilot in Dynamics 365 (without demo)

- Copilot for sales

- Copilot for finance

- Copilot for service