

Create copilots with Microsoft Copilot Studio

Duration 3 days (24 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 administering 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