

HR Automation with Microsoft Copilot Studio: Building Intelligent Agents

Duration: 2 days (~8 hours per day)

Module 1: Introduction to HR Automation with Copilot Studio

Understanding HR Challenges & Automation Opportunities

- Common HR pain points (manual processes, employee self-service needs)
- Role of AI & chatbots in HR transformation

What is Microsoft Copilot Studio?

- Overview of Copilot Studio capabilities
- How it fits into the Microsoft Power Platform

Identifying HR Use Cases for Copilot Agents

- Employee Onboarding & Offboarding
- Leave & Attendance Management
- HR Policy FAQs & Employee Helpdesk
- Recruitment & Candidate Screening
- Performance Reviews & Employee Feedback

Module 2: Getting Started with Microsoft Copilot Studio

Accessing & Setting Up Microsoft Copilot Studio

- Licensing requirements
- Setting up the environment & permissions

Build an initial copilot with Microsoft Copilot Studio

- Create and name a custom copilot
- Copilot creation using conversational builder in plain language
- Configure Generative AI instructions
- Deploy copilots

Lab1: Create an initial copilot using Microsoft Copilot Studio

Module 3: Manage topics in Microsoft Copilot Studio

- Create topics in Microsoft Copilot Studio
- Add trigger phrases
- Disable topics
- Delete topics
- Configure nodes

Lab2: Creating Your First HR Copilot Agent

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

- Use system and custom entities
- Create custom entities
- Configure Variables

Lab3: Developing an Employee Leave Request Bot

Module 5: Enhance Microsoft Copilot Studio copilots

- Use Power Automate cloud flows for Microsoft Studio copilots
- Create Copilot actions
- How to use the Generative answers feature to improve your copilot's responses.

Lab4: Automating Recruitment & Candidate Screening Bot

Module 6: Create a copilot with Microsoft Copilot Studio and Dataverse for Teams

- Publish a copilot
- Test the copilot in the Demo website
- Create a copilot with Microsoft Copilot Studio for Teams app
- Deploy the copilot to a Teams channel

Module 7: Security & Compliance Considerations for HR Bots

- Role-based access control (RBAC)
- Data privacy & GDPR compliance

Monitoring Performance & Improving Bot Accuracy

- Analyzing bot usage reports

Handling Edge Cases & Escalations to HR Teams

- Defining fallback scenarios
- Managing complex HR inquiries

Module 8: Real-world HR Scenarios & Case Studies

Scaling HR Copilots Across Departments

- Multi-department use cases

Handling Sensitive Employee Data with AI Agents

- Ethical AI & bias mitigation

Module 9: Additional content where demonstration will be shown

- Creation of autonomous agents in the Employment process lifecycle.
 - Example. When an excel file is updated, then auto create flow to generate a letter with a template provided.
- Example. Check for data integrity.
- Validate excel sheet data