

KOENIG SOLUTIONS • COURSE OUTLINE

HR Automation with Microsoft Copilot Studio: Building Intelligent Agents

Learn to build, secure and deploy HR chatbots and agents using Microsoft Copilot Studio, from topics and entities to Power Automate flows.

2 Days

8 HOURS A DAY

9

MODULES

40

TOPICS

4

HANDS-ON ACTIVITIES

COURSE OVERVIEW

This course covers building HR automation solutions with Microsoft Copilot Studio, starting with common HR pain points and use cases such as onboarding, leave management, helpdesk queries, recruitment and performance reviews. It then moves through setting up the environment, creating and configuring copilots, topics, entities and variables, and enhancing copilots with Power Automate flows, actions and generative answers. The course also addresses publishing and deploying copilots to Teams, security and compliance considerations such as role-based access control and GDPR, and monitoring bot performance and escalations. It closes with real-world HR scenarios, scaling copilots across departments, and demonstrations of autonomous agents and data validation tasks.

WHO THIS COURSE IS FOR

HR Professionals

HR Systems Administrators

Power Platform Developers

Automation Specialists

IT Support Staff

LEARNING OBJECTIVES

- Identify HR pain points and use cases for automation
- Explain Copilot Studio capabilities within the Power Platform
- Build an initial copilot using the conversational builder
- Configure topics, trigger phrases and nodes
- Apply system, custom entities and variables in copilots
- Implement Power Automate flows and Copilot actions
- Deploy copilots to a demo website and Teams channel
- Assess security, compliance and escalation handling for HR bots

9 Modules, 40 Topics

01

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

02

Activity

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

03

Activity

Manage Topics in Microsoft Copilot Studio

TOPICS

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

04

Activity

Work with Entities and Variables in Microsoft Copilot Studio

TOPICS

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

05

Activity

Enhance Microsoft Copilot Studio Copilots

TOPICS

- 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

06

Create a Copilot with Microsoft Copilot Studio and Dataverse for Teams

TOPICS

- 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

07

Security & Compliance Considerations for HR Bots

TOPICS

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

08

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

09

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

HANDS-ON ACTIVITIES

Practise What You Learn

#	MODULE	ACTIVITY
02	Getting Started with Microsoft Copilot Studio	Lab1: Create an initial copilot using Microsoft Copilot Studio
03	Manage Topics in Microsoft Copilot Studio	Lab2: Creating Your First HR Copilot Agent
04	Work with Entities and Variables in Microsoft Copilot Studio	Lab3: Developing an Employee Leave Request Bot
05	Enhance Microsoft Copilot Studio Copilots	Lab4: Automating Recruitment & Candidate Screening Bot

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

FLEXIBLE DELIVERY

Learn the Way That Suits You

Classroom Training

Live Online Classes (ILO)

Fly-Me-A-Trainer (FMAT)

Flexi (Self-Paced)

1-on-1 Training

Ready to Get Started?

Talk to a learning advisor about schedules, group training and customised delivery.

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