

PL-7008: Create agents in Microsoft Copilot

Duration: 8 hours (1 Day)

Course description

This course will teach you how to build custom agents, manage topics and trigger phrases, configure nodes, manage variables and entities, configure Generative AI, retrieve data from Dataverse, and deploy agents in various channels. This course will allow you to practice your agent building skills by configuring an agent and publishing it to a Teams channel.

Learning objectives

The tasks covered by the Applied Skill are:

- Build an initial agent
- Manage topics and trigger phrases
- Configure nodes
- Manage variables and entities
- Configure generative AI
- Retrieve data from Dataverse
- Deploy the agent

Audience profile

Participants use Microsoft Copilot Studio to solve business problems with custom agents. They are familiar with the capabilities and limitations of Copilot Studio and are self-directed and solution focused but may not have formal IT training. They are comfortable using technology to solve business problems with a personal growth mindset.

Participants should be familiar with Microsoft Copilot Studio, Microsoft Teams, and Microsoft Power Platform.

Audience prerequisites

- Basic data modeling, user experience design, requirements analysis, and process analysis skills.

- A personal growth mindset and are comfortable using technology to solve business problems.
- An understanding of the operational need and have a vision of the desired outcome. They approach problems with phased and iterative strategies.

Agenda

The following agenda provides estimated times to complete each classroom activity. However, the estimated times may vary depending on the background of your students, which may affect whether you can move faster or slower through the course material.

Day	Estimated Time	Classroom activity
1	15 minutes	Course Introduction slide deck (time may vary due to the number of students)
	15 minutes	Introduction to Power Platform (optional)
	10 minutes	Lab 0 - Lab setup
	45 minutes	Module 1 - Get started with Copilot Studio
	30 minutes	Lab 1 - Create an agent with Copilot Studio
	10 minutes	Lab 2 - Import Dataverse solution
	15 minutes	Module 2 - Manage topics in Microsoft Copilot Studio
	30 minutes	Lab 3 - Build an initial agent
	30 minutes	Lab 4 - Manage topics
	30 minutes	Lab 5 - Manage nodes
	30 minutes	Module 3 - Work with entities and variables in Microsoft Copilot Studio
	15 minutes	Lab 6 - Work with entities
	15 minutes	Module 4 - Enhance Microsoft Copilot Studio agents
	30 minutes	Lab 7 - Create agent flows
	10 minutes	Module 5 - Create an agent with Microsoft Copilot Studio and Dataverse for Teams
	30 minutes	Lab 8 - Use Generative AI in Microsoft Copilot Studio
	10 minutes	Lab 9 - Deploy agent to Microsoft Teams