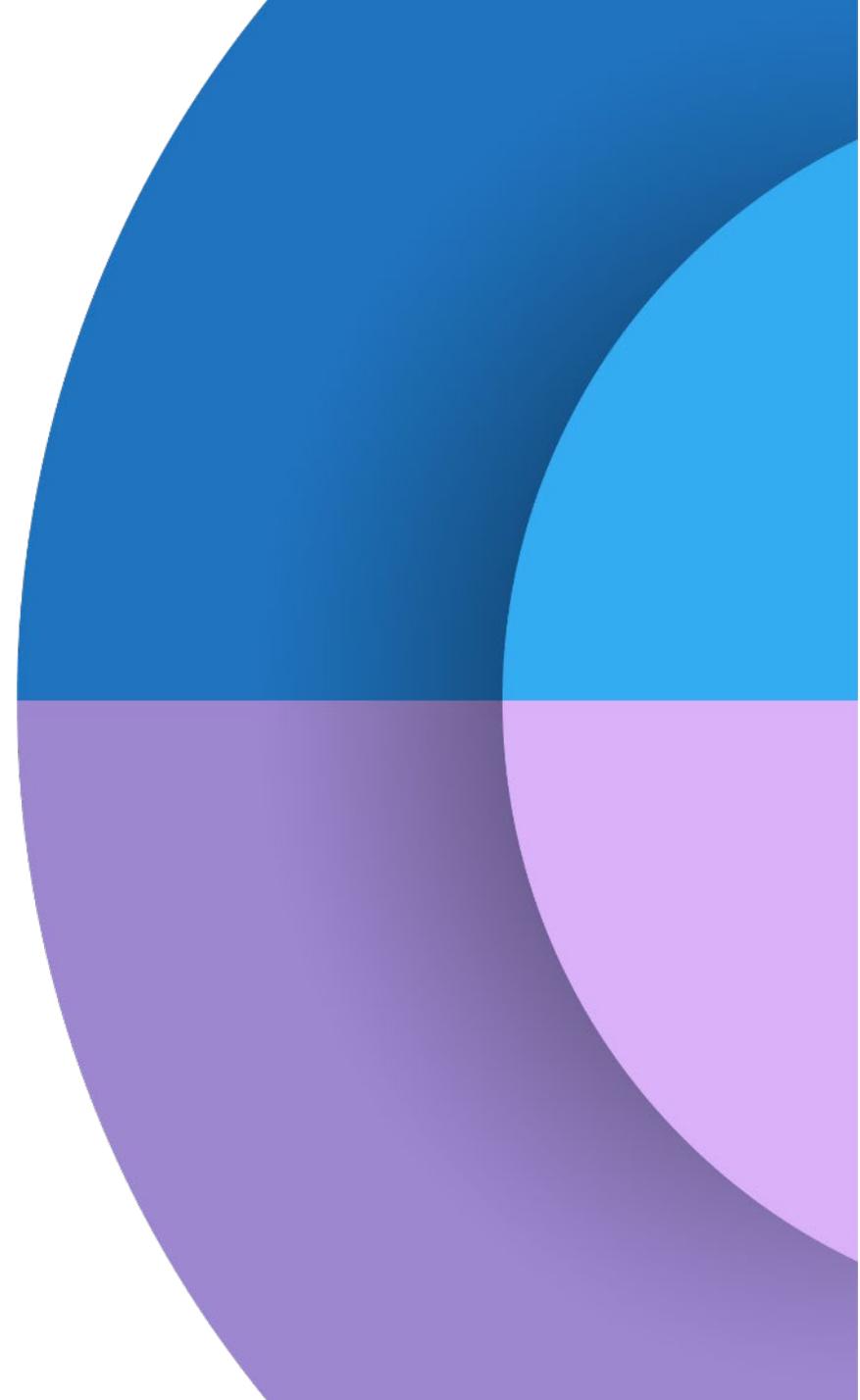


# Build and Extend Agents using Microsoft Copilot Studio



# Daniel Laskewitz

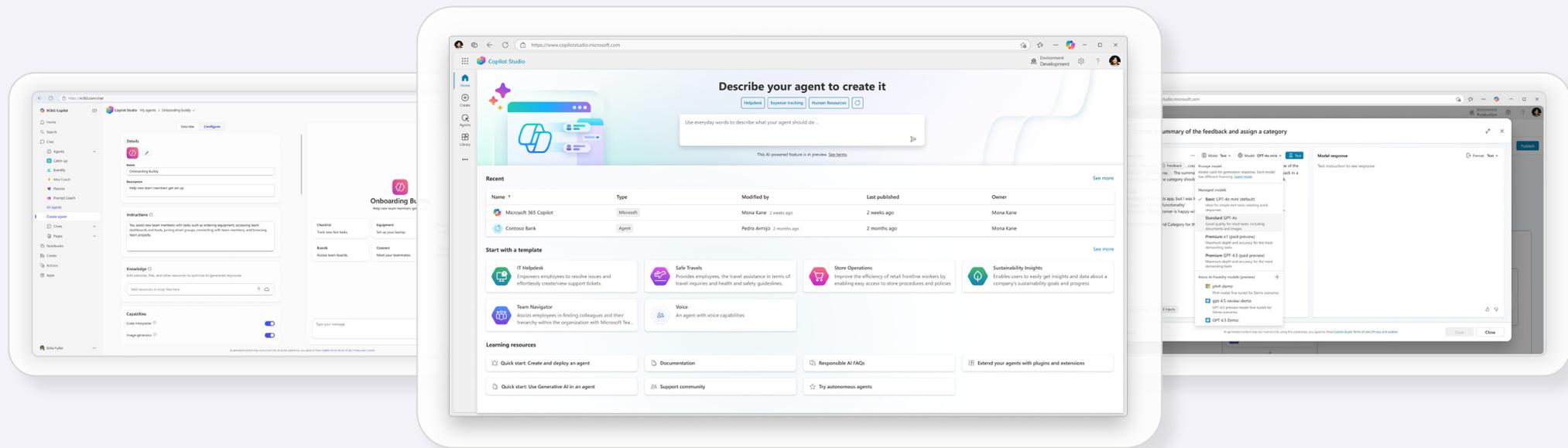
Principal Cloud Advocate at Microsoft  
Focused on the Microsoft Power Platform and  
Microsoft Copilot Studio





# Microsoft Copilot Studio

Build, manage and secure AI agents



## Lite experience

Build agents with natural language right inside Microsoft 365 Copilot

## Full experience

Access a complete set of intuitive tools and capabilities for building agents

## Advanced extensibility

Customize agents using pro dev tools like Microsoft 365 Agents SDK, VS code & Azure AI

# Orchestration

An orchestrator **recognizes intent, routes to the correct agent,** and keeps everything organized.

Makers provide **instructions and human guard rails,** adapting them as needed.

Use **autonomous triggers** so your agent can independently begin work and dynamically reason over its capabilities without human intervention.

Easily **mix and manage** both generative orchestration and agent flows (i.e.. more traditional automation) in one system.



# Models

Choose from the **latest AI models** to match your needs, giving you precision and control across knowledge, tools, and prompts for superior results.

## Orchestrate your agents and summarize answers

- Best-in-class models curation for specific scenarios
- Near-instant availability to new models
- No change management for new model releases
- No need for management your own GPU infra
- Ensure responsible AI controls apply by default

## Power your agent's tools

Easy one-click access and use of the 1,900+ models from Azure AI Foundry including Llama, Mistral, Cohere etc. to handle task and scenario specific needs

### OpenAI models

#### GPT-4o

Great for most tasks

#### ✓ GPT-4.1

Great for most tasks and quick analysis

Default

#### GPT-5 Chat

Great for most tasks

Experimental

#### GPT-5 Auto

Automatically switches between chat and reasoning

Experimental

#### GPT-5 Reasoning

Maximum depth and accuracy for the most demanding tasks

Experimental

### Anthropic models ⓘ

#### Claude Sonnet 4.5

Great for most tasks

External

Preview

#### Claude Opus 4.1

Perform deep reasoning and structured problem solving

External

Preview

# Knowledge

Add your **public and enterprise data** sources using connectors.

Leverage rich structured and unstructured enterprise data to **inform agent responses and actions**

Your agent will be able to **dynamically generate multi-turn answers** in real time using your enterprise data, so you have a useful agent immediately.

Supported data sources include:

Public websites	SharePoint / OneDrive
Dataverse (for LOB apps like Salesforce, ServiceNow etc.)	Microsoft Fabric
File uploads	Microsoft Graph / Power Platform connectors
Open web search	Azure services (AI Search, SQL)

### Add knowledge

Help your agent provide more relevant information and insights. [Learn more](#)



Upload file

Drag and drop or [select to browse](#). Files can be up to 512 MB, and can't be labeled Confidential or Highly Confidential or contain passwords.

☆ Featured   **Advanced**   [See recommendations](#)

 Microsoft Fabric

 Confluence

 Oracle SQL database

 SAP OData

 Snowflake

 Zendesk

 GitHub  
Microsoft Graph only

 Jira  
Microsoft Graph only

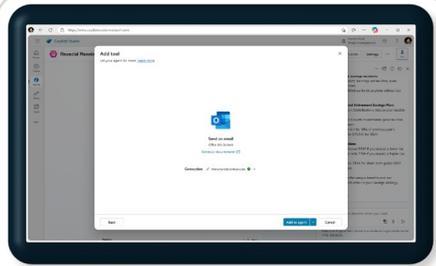
 Stack Overflow  
Microsoft Graph only

[Explore more](#)

Cancel

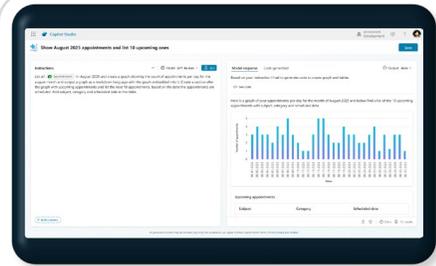
# Tools

Tools are versatile and reusable components.  
Create, manage and use tools across various agents within an environment.



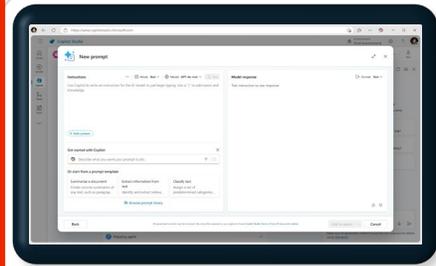
## Connectors

Choose from **1400+ prebuilt** Power Platform connectors, **100+ Copilot connectors** or create a **custom connector** for any public API to retrieve information, write/edit/update records to external services and data sources



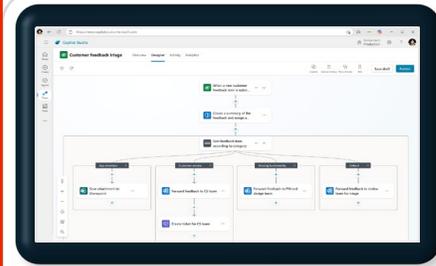
## REST APIs

Use **APIs directly** for your agent to connect with and use data in the most flexible and scalable manner



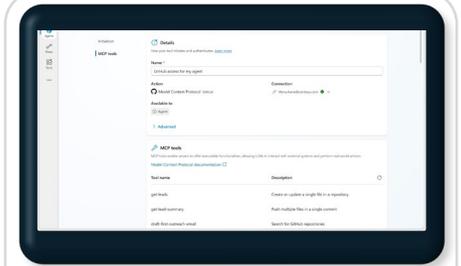
## Prompts

Leverage **library** of prompts or draft **custom instructions** with Copilot to transform text, documents, images and data with LLMs



## Agent Flows

Define **predictable automations** to run the same way each time, giving you more control over specific actions the agent could take, including allowing the agent to directly **use web and desktop apps** through UI automation



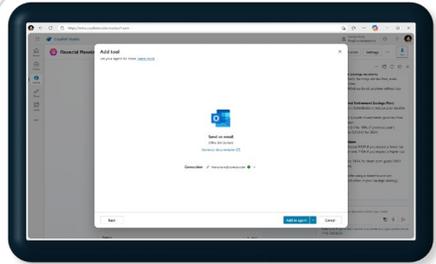
## Model Context Protocol

Use open standard protocol to **connect your LOB services** to the agent with adequate context and tools enabled by the servers

**DEMO – Create an agent, add knowledge and a tool**

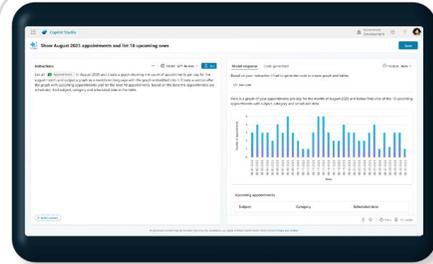
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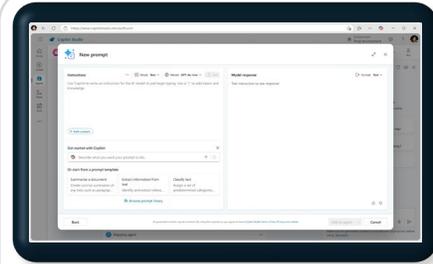
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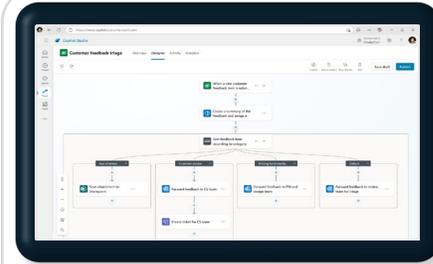
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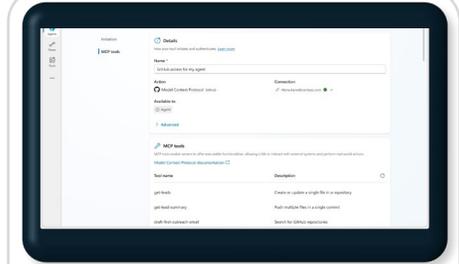
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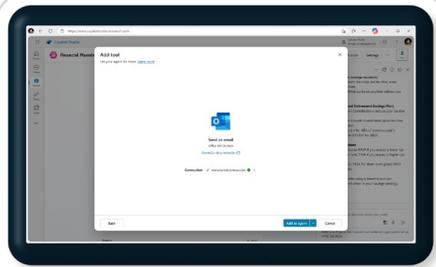
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Use open standard protocol to **connect your LOB services** to the agent with adequate context and tools enabled by the servers

**DEMO – Connect your agent to a backend service**

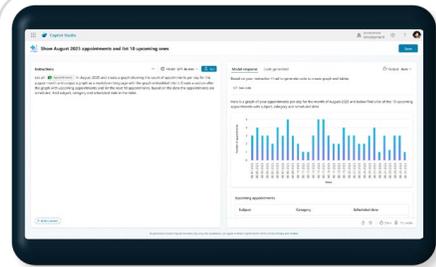
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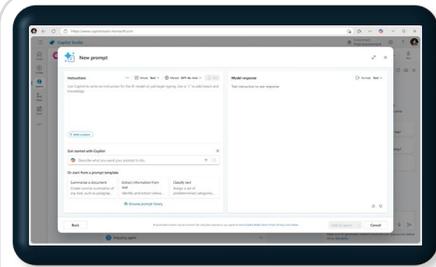
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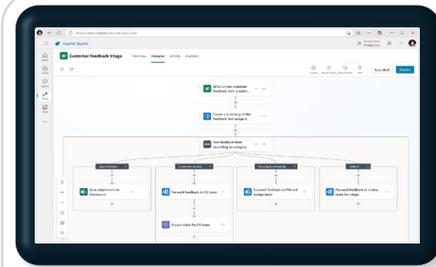
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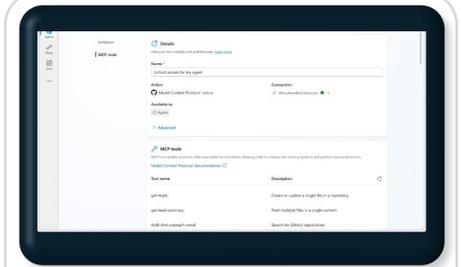
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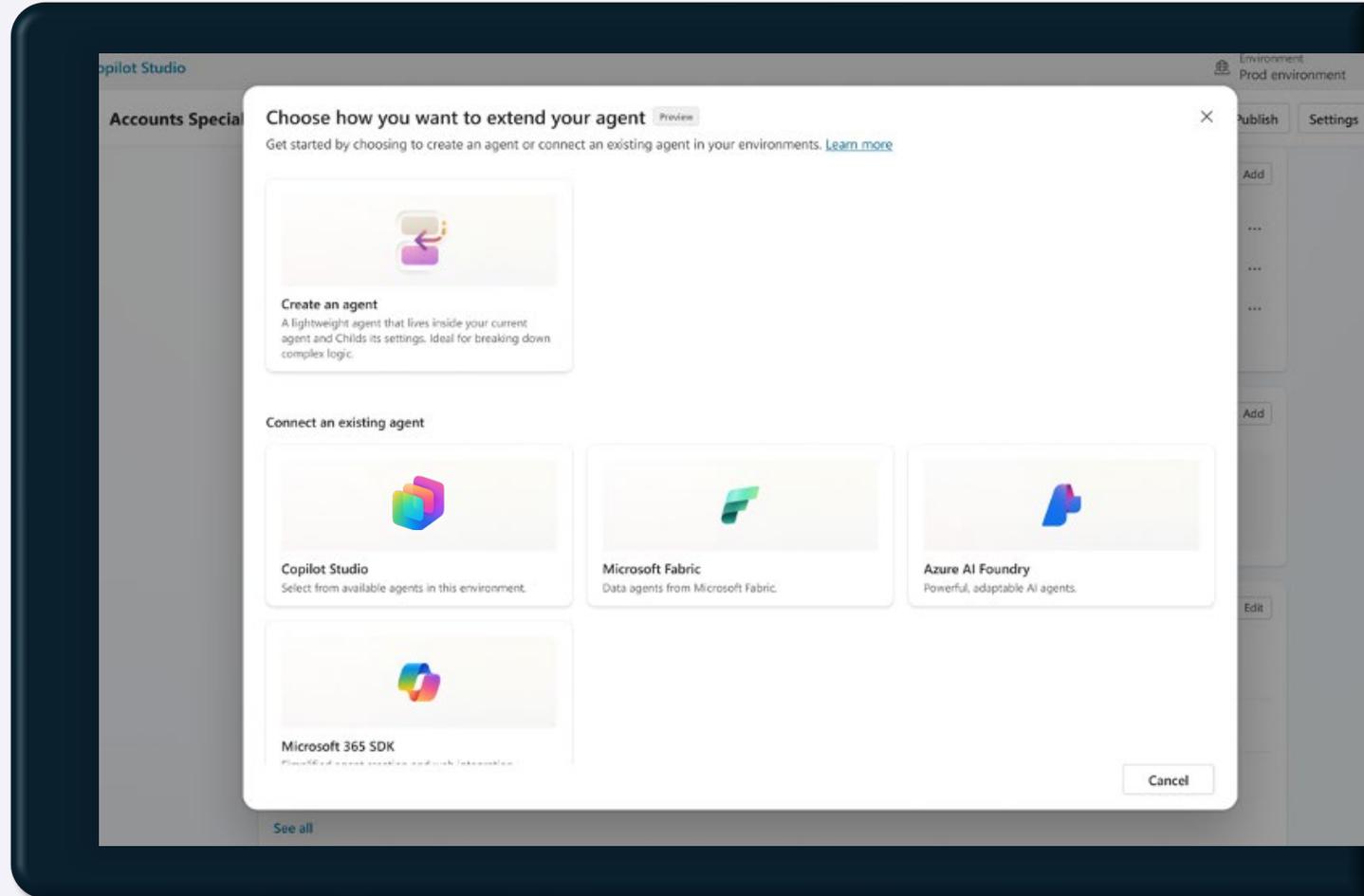
# Multi-agent orchestration

Build multi-agent scenarios by connecting to agents from other services using Copilot Studio

**Effective end-to-end transformation:** Enable agents to talk to each other in Copilot Studio, exchanging data, collaborating on tasks, and distributing work

**Cross-platform orchestration:** Connect your agents with other agents in your tenant, whether they were built using Copilot Studio, Azure AI Foundry Agents, M365 Copilot SDK or Fabric

**Agent specialization:** An agent can call on connected agents where specialized knowledge or actions are required and complete tasks in minutes



# Channels

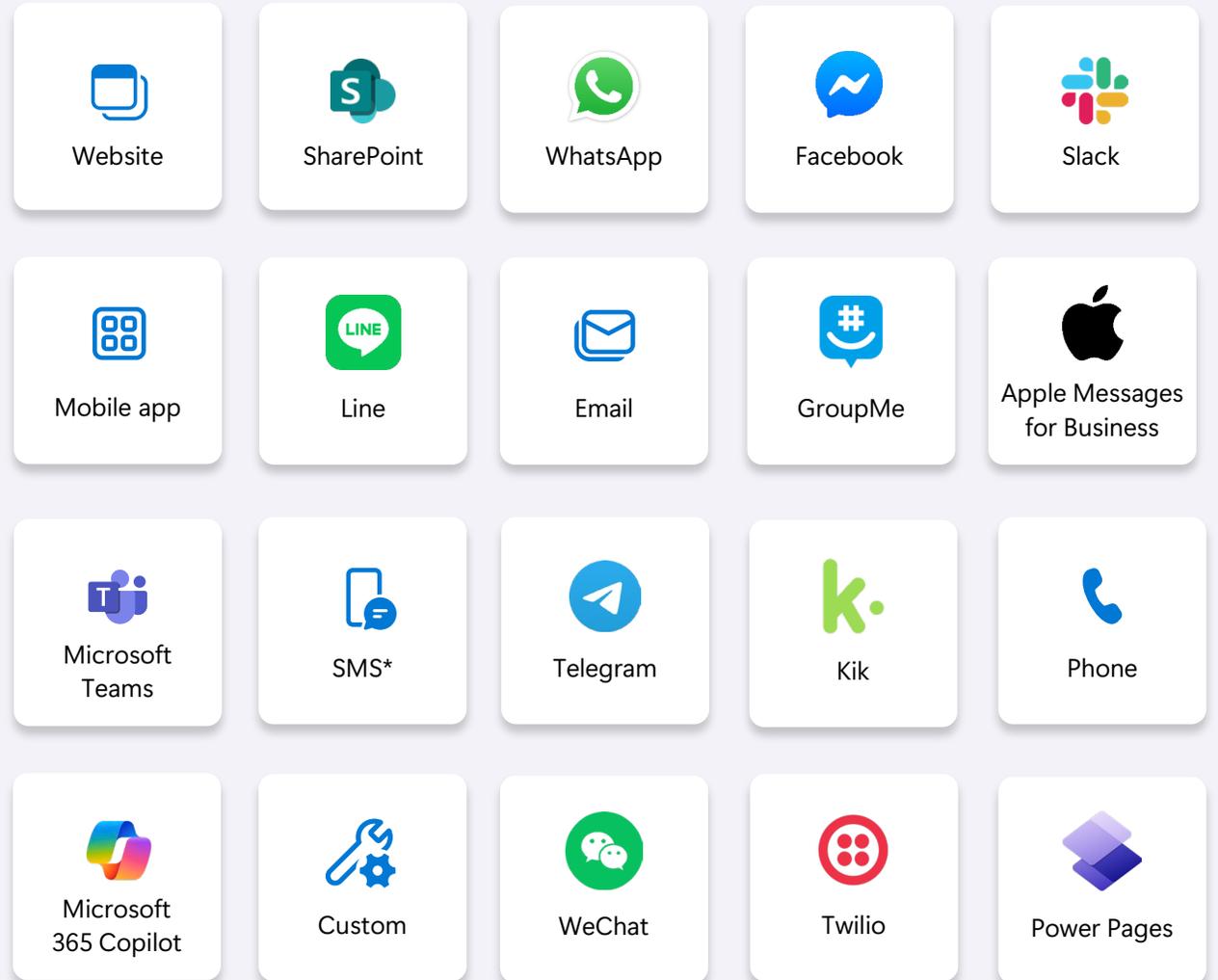
Easily distribute your agent across **multiple channels** with a single click.

---

Deploy agents directly to the applications **your employees frequently work in**, such as Microsoft Teams, SharePoint, and Microsoft 365 Copilot Chat.

---

Get access to **even more channels** beyond what's natively available in Copilot Studio by leveraging Azure Bot Service, Microsoft 365 Agents SDK, Agents Client SDK and Dynamics 365.



# Hand off the conversation to a live agent

Integrate intelligent agents with your existing CRM solutions

Connect to your contact center so your agent can escalate and hand off the conversation with full context to a human agent.

---

Configure agents that can interact with your customers via voice or chat.

---

Selectively route incoming requests to live agents based on context, complexity, and customer.

---

Deliver exceptional customer experiences, unlock service team productivity, and cut costs with autonomous service.



Dynamics 365  
Contact Center



LivePerson



Genesys



Salesforce



ServiceNow



Custom  
engagement hub

# Voice agents

Create a voice-enabled agent to interact with customers over the phone

Add flexibility to your Interactive Voice Response (IVR) systems and voice agents using generative AI to help more users and customers – faster.

Get started in minutes with the voice agent template that comes pre-constructed with voice-specific features.

  
Silence detection

  
DTMF authoring

  
Barge-in

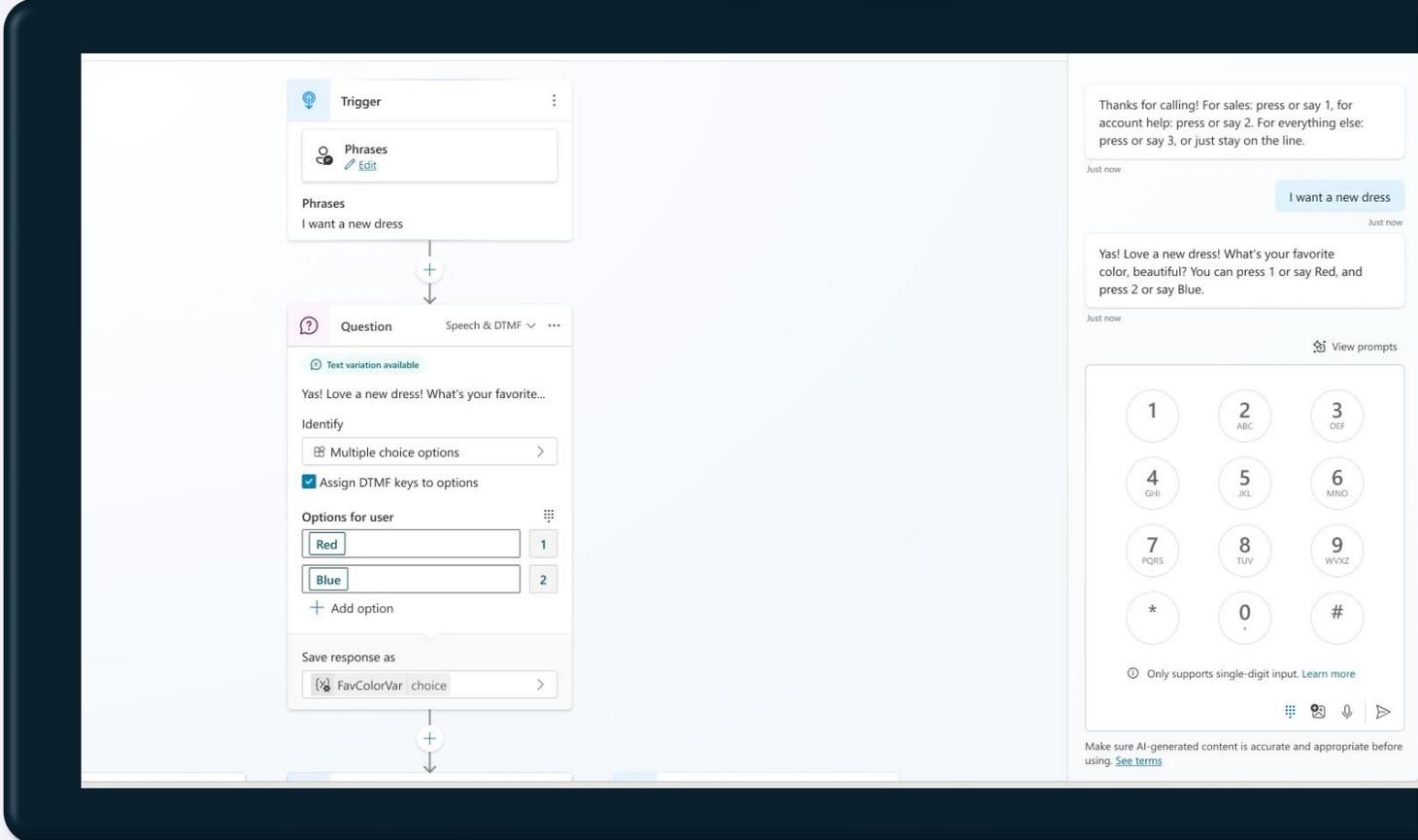
  
Enhanced speech recognition

  
SSML

  
Noise filter

  
Latency message

  
Dialog experiences



The screenshot displays a configuration interface for a voice agent. On the left, a flowchart shows a 'Trigger' step leading to a 'Question' step. The 'Trigger' step has a 'Phrases' field containing 'I want a new dress'. The 'Question' step has a 'Text variation available' toggle, a question text 'Yas! Love a new dress! What's your favorite...', an 'Identify' section with 'Multiple choice options' and 'Assign DTMF keys to options' checked, and 'Options for user' with 'Red' (key 1) and 'Blue' (key 2). Below the flowchart is a user interaction screen showing a message: 'Thanks for calling! For sales: press or say 1, for account help: press or say 2. For everything else: press or say 3, or just stay on the line.' A button 'I want a new dress' is visible. Below the button is another message: 'Yas! Love a new dress! What's your favorite color, beautiful? You can press 1 or say Red, and press 2 or say Blue.' A numeric keypad is shown with options 1-9, \*, 0, and #. A note at the bottom states: 'Only supports single-digit input. Learn more'.

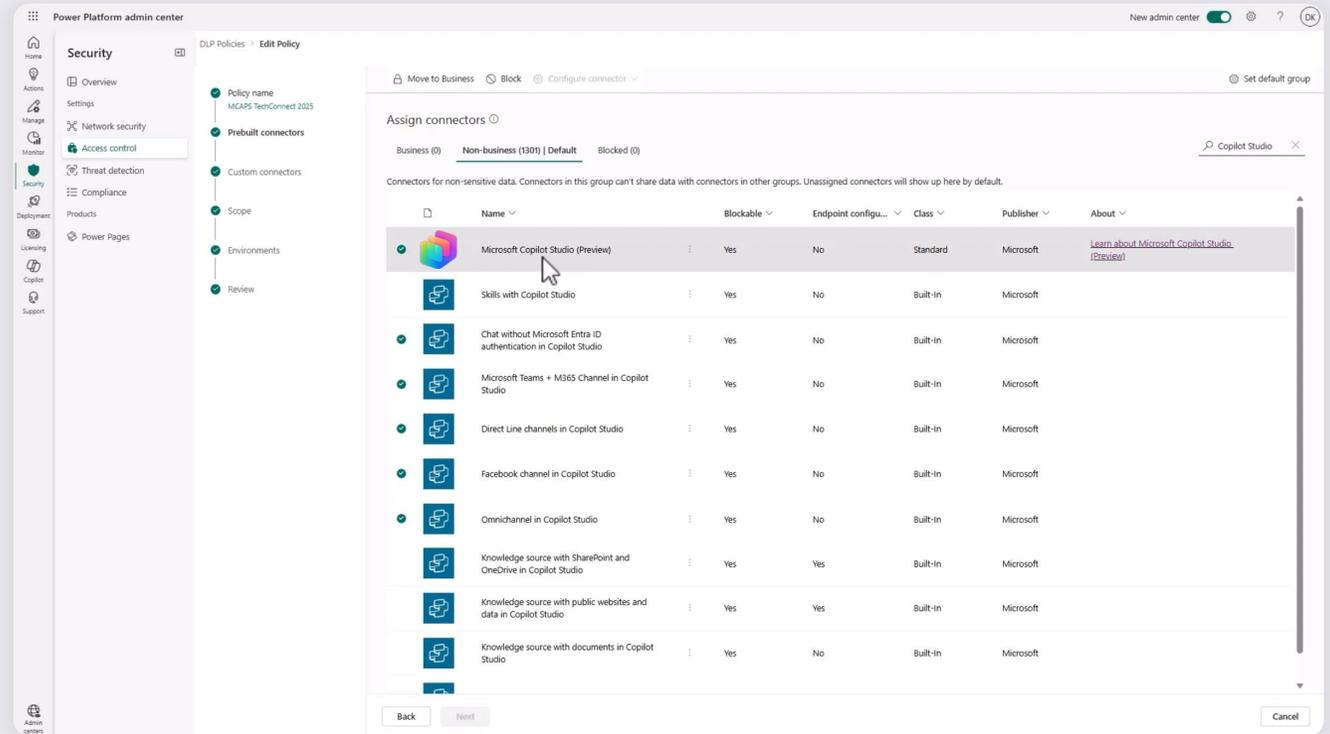
# Security & Governance

Prepare your environment to implement secure Copilot Studio adoption.

Identify risks related to data, users, and agents to prevent sensitive data leakage and ensure agents do not process sensitive files.

Prevent data loss and insider risks by securing sensitive files, agent interactions, and providing alerts and reports on risky behavior and AI usage.

Govern AI use to meet regulations and policies by inspecting interaction content and audit logs, investigating for compliance and ethical violations, and enforcing lifecycle policies and legal holds.



# Management Controls

Manage dedicated development environments, employ agent **lifecycle management controls**, and oversee **agent spend** in the Power Platform admin center.

Establish clear guidelines and policies for agent behavior to **ensure consistency and compliance** across all interactions.

Implement agent policies to **restrict oversharing of agents** and manage publishing channels.

The screenshot displays the Copilot Studio Pipelines management interface. The top navigation bar includes options for '+ Create pipeline', '+ Add stage', 'Delete Pipeline', 'Refresh', and 'Manage pipelines'. The left sidebar shows a navigation menu with 'Back to solutions', 'Cineplex Demo Solution', 'Overview', 'Objects', 'History', 'Pipelines', and 'Source control (Preview)'. The main content area is titled 'Pipelines' and contains a dropdown menu for 'Default Pipeline - Deployments Require ...' and a '+ Create new pipeline' button. Below this, there are two tabs: 'Details' (selected) and 'Run history'. The 'Details' view shows a pipeline configuration with three environments: 'Development', 'UAT', and 'Production'. The 'Development' environment is described as 'Securely test and verify in isolation. After you've got everything working properly, it's time to deploy. [Learn more](#)' with a 'Solution version' of '1.0.0.3'. The 'UAT' environment is 'UAT (Pipelines, Shared)' and shows 'Last successfully installed version' as '1.0.0.3' and 'Last deployed' on 'Sep 11, 2024 5:59 PM (5 hours ago)'. The 'Production' environment is 'Production (Pipelines, Shared)' and 'Requires approval'. A pink warning banner is present in the UAT and Production sections, stating 'Deployments may be pending until an associated background process succeeds. This process is managed by your admin. [Learn more](#)'. Each environment card has a 'Go to this environment' link and a 'Deploy here' button.

# Measurement & Reporting

Track readiness and adoption of agents, audit agent actions and usage, and track agent ROI.

Review agent performance metrics in real-time like usage, engagement, success rates, and satisfaction in the built-in Analytics dashboard.

Analyze data collected from agent interactions to identify trends, areas for improvement, and opportunities for training and development.

Share reports with relevant stakeholders to facilitate informed decision-making.

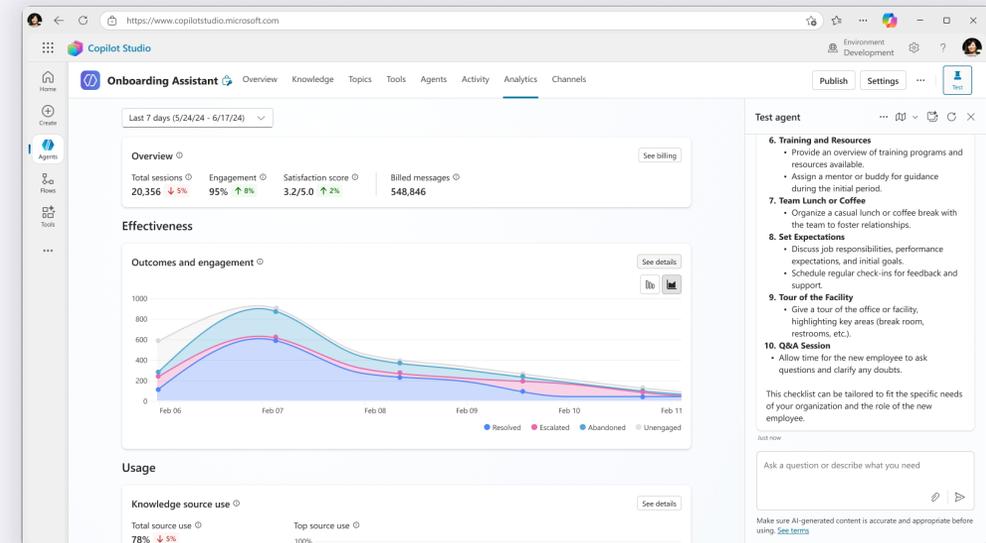
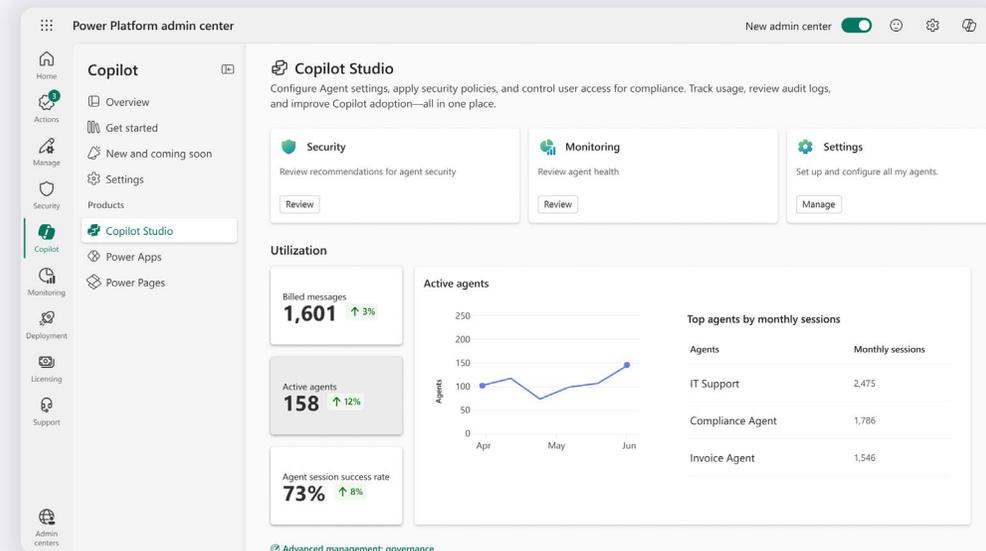
Copilot Studio

Azure Application Insights

Viva Insights

Power Platform Admin Center

Microsoft Purview



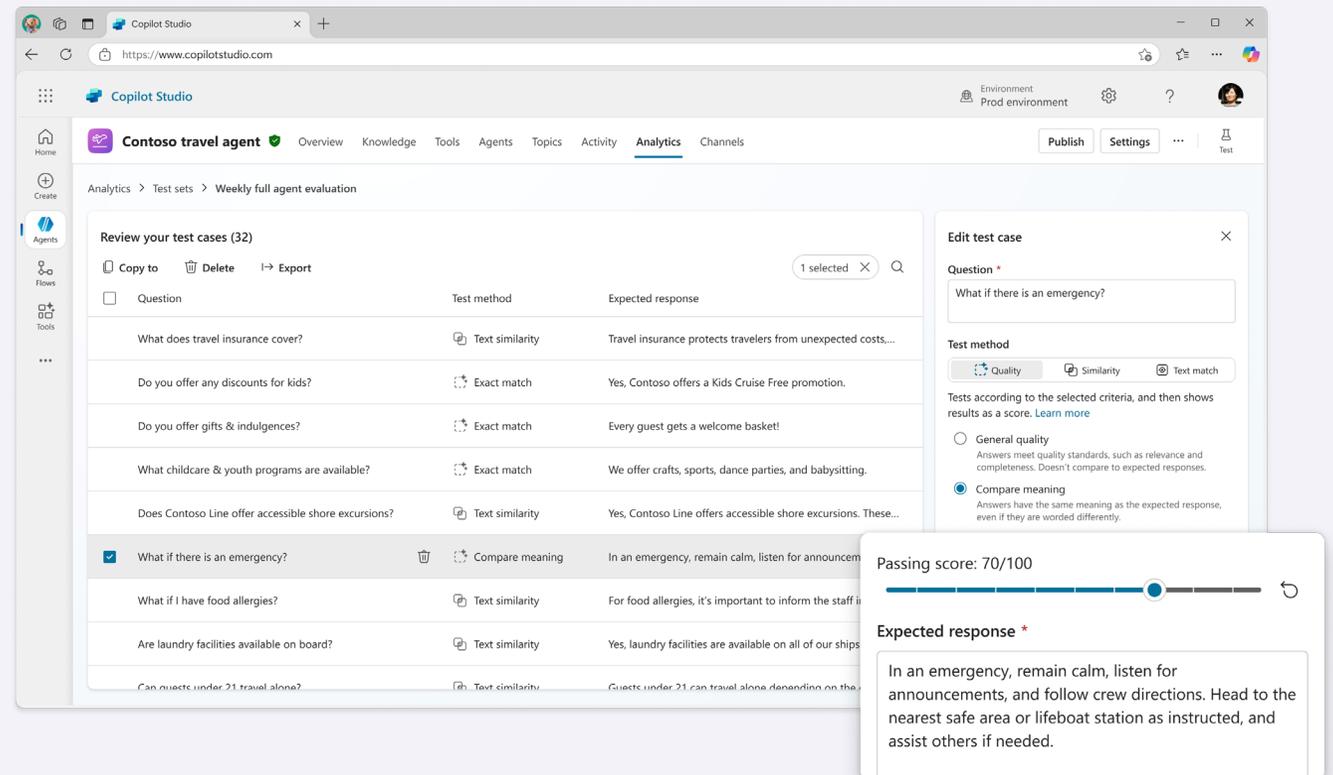
# Agent Evaluation

**Automated testing:** Makers can validate agent performance before and after deployment without manual, ad hoc testing.

## Flexible, Scalable Evaluation Methods:

- Create evaluation sets using manual questions, imported files, or even AI-generated queries
- Choose from multiple test methods (exact match, semantic similarity, intent recognition etc.) to assess agent quality
- Review agent accuracy & reliability with pass/fail indicators, detailed scores, and insights into how knowledge sources are used.

**Continuous Improvement & Risk Reduction:** Identify issues early, reduce risk, and maintain quality as agents evolve throughout their lifecycle



The screenshot shows the Copilot Studio interface for reviewing test cases. The main table lists 32 test cases, with one selected. The selected test case is:

Question	Test method	Expected response
What if there is an emergency?	Compare meaning	In an emergency, remain calm, listen for announcements, and follow crew directions. Head to the nearest safe area or lifeboat station as instructed, and assist others if needed.

The 'Edit test case' modal shows the following details:

- Question:** What if there is an emergency?
- Test method:** Compare meaning (selected)
- Passing score:** 70/100
- Expected response:** In an emergency, remain calm, listen for announcements, and follow crew directions. Head to the nearest safe area or lifeboat station as instructed, and assist others if needed.



# Copilot Studio Agent Academy



## Recruit

Build Foundational Skills



## Operative (Coming Soon)

Build Complex Multi Agent Scenarios



## Commander (Coming Soon)

Build and extend secure, multimodal agents with Azure Integrations and governance

Build real AI agents.  
Free. Self-paced.  
Hands-on.

Start your mission  
today with Recruit:

[aka.ms/agent-academy](https://aka.ms/agent-academy)





# Resources



Thank you

