

MS-PL7008: CREATE AGENTS IN MICROSOFT COPILOT STUDIO



DURATION	LEVEL	TECHNOLOGY	DELIVERY METHOD	TRAINING CREDITS
1 Day	Intermediate	Power Platform	Instructor-led	NA

INTRODUCTION

In this learning path, you'll learn how to create custom agents in Copilot Studio and practice your skills with a guided project.

AUDIENCE PROFILE

This course is designed for individuals who use Microsoft Copilot Studio to solve business problems.

PREREQUISITES

Candidates for this credential should be familiar with data modeling concepts in Microsoft Dataverse and with Copilot Studio.

COURSE OBJECTIVES

After completing this course, students will be able to:

- Build Initial Copilots: Learn how to create copilots using Microsoft Copilot Studio, including the use of conversational builders and generative answers
- Manage Topics: Understand how to manage and create topics, branch topics, and work with system fallback
- Work with Entities and Variables: Gain skills in creating and applying custom entities within topics to extract
- Deploy Copilots: Learn the steps to effectively deploy copilots in a business environment.

COURSE CONTENT

Module 1: Get started with Microsoft Copilot Studio

Microsoft Copilot Studio allows organizations to quickly create agents based on business scenarios their customers and employees can easily interact with as needed. In this module, you're introduced to key concepts for agents.

Lessons

- Introduction
- Get started working with environments
- Create agents and work with the Microsoft Copilot Studio interface
- Create topics
- Enhancing productivity with Generative AI
- Test your agents
- Publish agents and analyze performance
- Exercise - Create an agent with Microsoft Copilot Studio
- Check your knowledge
- Summary

This module explains how to:

- Create agents.
- Test agents.
- Analyze performance.

Module 2: Build an initial agent with Microsoft Copilot Studio

This module describes how to create agents by using Microsoft Copilot Studio.

Lessons

- Introduction.
 - Agent creation.
 - Agent creation using conversational builder.
 - Generative Answers.
 - Deploy agents.
 - Check your knowledge.
 - Summary.
- This module explains the following concepts:
- Microsoft Copilot Studio.
 - Generative AI features.
 - How to build an agent by using Microsoft Copilot Studio.
 - Deploy an agent.

Module 3: Manage topics in Microsoft Copilot Studio

Microsoft Copilot Studio uses topics, which are like small conversations related to a specific subject. A Microsoft Copilot Studio agent typically includes many topics. This module introduces you to the basic principles of topics such as trigger phrases and conversation paths and how to create them.

Lessons

- Introduction.
- Work with agent topics.
- Branch a topic.
- Create topics for existing support content.
- Work with system fallback topics.

- Manage topics.
 - Check your knowledge.
 - Summary.
- This module explains the following concepts:
- Use topics to create and manage conversation paths in an agent.
 - Work with topic triggers and conversation nodes.
 - Add branching to a topic.
 - Use system topics and create topics from content.
 - Set up fall-back topics to handle unrecognized user input.

Module 4: Work with entities and variables in 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. Items like topics can be easily created by subject matter experts with no coding required, to create intelligent conversation paths to help guide individuals down as they interact with the copilots. The copilot authoring functionality provided by Microsoft Copilot Studio provides a great starting point for organizations to build intelligent copilots.

Lessons

- Introduction.

- Work with entities.
- Custom entities.
- Use entities in conversations.
- Work with variables.
- Reuse variables across topics.
- Check your knowledge.
- Summary.

This module explains the following concepts:

- Understand entities and custom entities.
- Learn about variables across topics.

Module 5: Build effective agents with Microsoft Copilot Studio

In this module, you'll learn about some design principles and best practices that you can use when designing agents with Microsoft Copilot Studio.

Lessons

- Introduction
- Use cases
- Plan for agents
- Topics
- Design your agent
- Build solutions
- Build a conversational agent
- Validate and iterate on your design
- Check your knowledge
- Summary

In this module, you'll:

- Examine techniques for planning agents.
- Explore design elements for creating successful agents.
- Review the different conversation types and why they're important.
- Examine best practices for creating good trigger phrases.
- Explore different techniques for building conversational agents.
- Review how to use analytics to improve your agent performance.

Module 6: Enhance Microsoft Copilot Studio agents

Many times, you might need to leverage or integrate other technologies for your agent to provide the experience you want. This module examines some of the methods that you can use to enhance your Microsoft Copilot Studio agents such as leveraging Power Automate flow to add actions and transferring conversations from an agent to Omnichannel for Customer Service.

Lessons

- Introduction.
- Use Power Automate to add actions.
- Agent actions.

- Transfer conversations to agents by using Omnichannel for Customer Service.
- Create topics for existing support content.
- Trigger types.
- Analyse agent performance.
- Check your knowledge.
- Summary.

After completing this module, students will be able to:

- Initiate Power Automate flows directly from topics in your copilot.
- Configure copilot to pass conversations to applications such as Omnichannel for Customer Service.
- Extract content from support pages and configure it into copilot topics that you can use in conversations.

Module 7: Create an agent with Microsoft Copilot Studio and Dataverse for Teams

Employees who have quick access to information make better decisions, reduce errors, and save money. Agents create a personalized experience that simplifies how employees get information. Microsoft Copilot Studio and Dataverse for Teams create intelligent agents to quickly respond to employee needs without building high-code solutions.

Lessons

- Introduction.
- Create your first agent.
- Create and modify topics.
- Add inputs, variables, and conditions.
- Call an action to pull in Dataverse for Teams data.
- Publish and share your new agent.
- Check your knowledge.
- Summary.

After completing this module, students will be able to:

- Learn how to create an agent.
- Discover how the agent can call Microsoft Power Automate actions to retrieve data from Dataverse for Teams.
- Publish the agent to your team or the whole company.

Module 8: Build an autonomous agent in Copilot Studio

Discover how to build an autonomous agent by using Microsoft Copilot Studio to transform routine tasks into intelligent, automated workflows.

This module introduces the fundamental concepts of autonomous agent capabilities, explores real-world applications, and provides exercises to help you practice building and deploying an agent effectively. Designed for

learners with beginner to intermediate experience, this module offers a step-by-step approach to creating an autonomous agent. Throughout this module, you explore the core components of Copilot Studio, gain practical experience in building a no-code autonomous agent, and learn how to deploy and manage it in a live environment.

Lessons

- Introduction
- Bring autonomous agents into the enterprise
- Exercise - Create your first autonomous agent
- Test and refine the autonomous agent
- Exercise - Deploy an agent in a live environment
- Check your knowledge
- Summary

This module explains how to:

- Explore use cases for creating an autonomous agent.
- Identify the core components of an autonomous agent.
- Build an autonomous agent in Copilot Studio.
- Integrate knowledge and configure actions, instructions, and triggers to your agent.
- Test and refine an autonomous agent in Copilot Studio.
- Deploy and publish the agent that's built to Microsoft Teams.

Module 9: Guided Project - Create agents with Microsoft Copilot Studio

This module describes how to create agents by using Microsoft Copilot Studio. Microsoft Copilot Studio is a new feature that you can use to create agents by using natural language. It uses the power of GPT-3 to generate topics, trigger phrases, and responses for your agent. This module also briefly covers how to use the Conversation Booster feature to improve your agent responses.

Lessons

Introduction.

- Prepare.
- Exercise - Create custom tables.
- Exercise - Build an agent in Microsoft Copilot Studio with the new AI capabilities.
- Exercise - Create and manage topics.
- Exercise - Set up Generative AI.
- Check your knowledge.
- Summary.

This module explains the following concepts:

- Microsoft Copilot Studio and Conversation Booster features.

- | | |
|---|---|
| – How to build an agent by using Microsoft Copilot Studio | to generate topics, trigger phrases, and responses. |
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ASSOCIATED CERTIFICATION & EXAM

There is no associated Certification or Exam for this course; however, there is an assessment to achieve your Applied Skills credential. ([Assessment Link](#)).