COURSE OVERVIEW

Course name

PL 7008 - Create agents in Microsoft Copilot Studio

DURATION: 1 day

Gauteng
3rd Floor, 34 Whiteley Road,
Melrose Arch
Johannesburg 2196

Gauteng
192 on Bram
192 Bram Fischer Drive Ferndale,
Randburg Johannesburg 2160

Cape Town
1st floor, TBE, 3 Bridgeway
Bridgeway Precinct,
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COURSE OVERVIEW

In this course, you will learn how to create custom agents in Copilot Studio and practice your skills with a guided project.

COURSE OBJECTIVES

By the end of this course, you will:

1. Familiarise yourself with Microsoft Copilot Studio

2. Build an initial agent with Microsoft Copilot Studio

3. Manage topics in Microsoft Copilot Studio

4. Work with entities and variables in Microsoft Copilot Studio

5. Build effective agents with Microsoft Copilot Studio

6. Enhance Microsoft Copilot Studio agents

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

8. Build an autonomous agent in Copilot Studio

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AUDIENCE AND PRE-REQUISITES

This course is for application builders who want to learn how to create custom agents in Copilot Studio with low code

Participants need to be familiar with CoPilot Studio

RELATED CERTIFICATIONS

None

COURSE OUTLINE

Module 1: Get started with Microsoft Copilot Studio

In this module, you're introduced to key concepts for agents.

- 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 analyse performance

Module 2: Build an initial agent with Microsoft Copilot Studio

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

- Agent creation
- Agent creation using conversational builder
- Generative Answers
- Deploy agents

Module 3: Manage topics in Microsoft 365 Copilot Studio

This module introduces you to the basic principles of topics such as trigger phrases and conversation paths and how to create them.

- Work with agent topics
- Bot Framework Skills
- Branch a topic
- Create topics for existing support content
- Work with system fallback topics
- Manage topics

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

The agent authoring functionality provided by Microsoft Copilot Studio provides a great starting point for organizations to build intelligent agents.

- Work with entities
- Custom entities
- Use entities in conversations
- Work with variables
- Reuse 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.

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

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Module 6: Enhance Microsoft Copilot Studio agents

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.

- 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

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

Microsoft Copilot Studio and Dataverse for Teams create intelligent agents to quickly respond to employee needs without building high-code solutions.

- 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

Module 8: Build an autonomous agent in Copilot Studio

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.

- Bring autonomous agents into the enterprise
- Create your first autonomous agent
- Test and refine the autonomous agent

DELIVERY METHOD

Our courses offer flexible delivery options:

- In-person classroom training at Impactful facilities in Johannesburg, Durban and Cape Town
- Virtual instructor-led training
- Nationally: On-site at the client