

Developing Agents with Copilot Studio

UNM IT Applications

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Overview

What is Copilot Studio?

In addition to the AI tools provided with the Copilot licensure, tools for the ease of developing AI agents are included. These tools can be accessed via [Copilot.microsoft.com](https://copilot.microsoft.com)

The suite of tools allows for users to create and train AI agents within the URL browser and are available immediately upon activation of a purchased Copilot license.

Tools included with the creation of agents/bots include but are not limited to Power Platform and Dataverse.

Licensing

All users that wish to access the Copilot Studio tools require access via a Copilot License.

Licenses are purchased PER NetID/Microsoft account via the UNM Webstore:

<https://webstore.unm.edu>

Starting on 04/14/25, licenses will be available for purchase for faculty, staff, and student employees via a departmental billing index.

The cost per license is \$365. UNM does not receive any discounts for licensure.

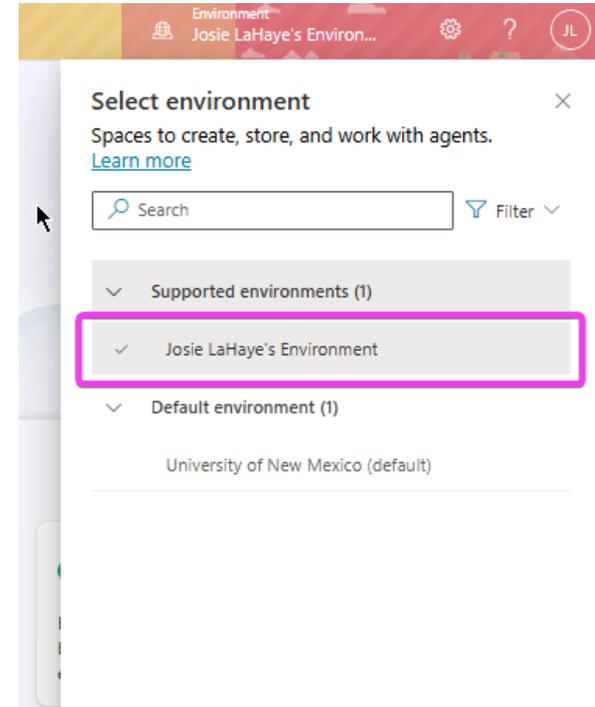
Sign on is achieved via SSO.

Important Links

- UNM AI Resources: ai.unm.edu
- Fast Info: [UNM AI Tools](#)
- Copilot Studio:
copilotstudio.microsoft.com
- Power Automate:
make.powerautomate.com

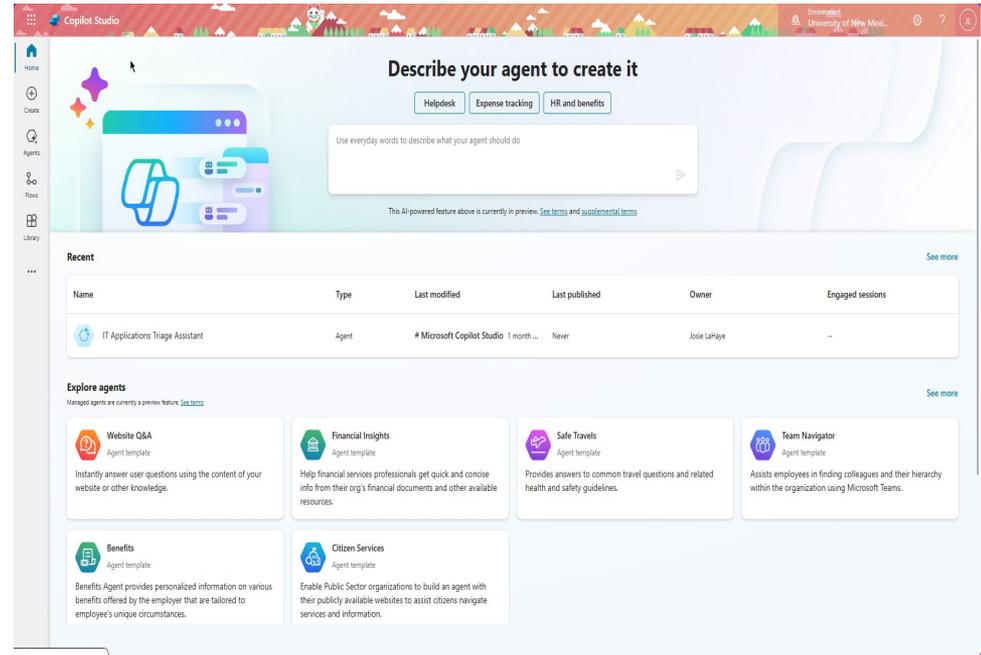
Getting Started

- **BEFORE DEVELOPING!** Ensure that your environment matches across all development applications.
- This can be found in the upper right-hand corner of the Copilot Studio web page. It should match with your name.



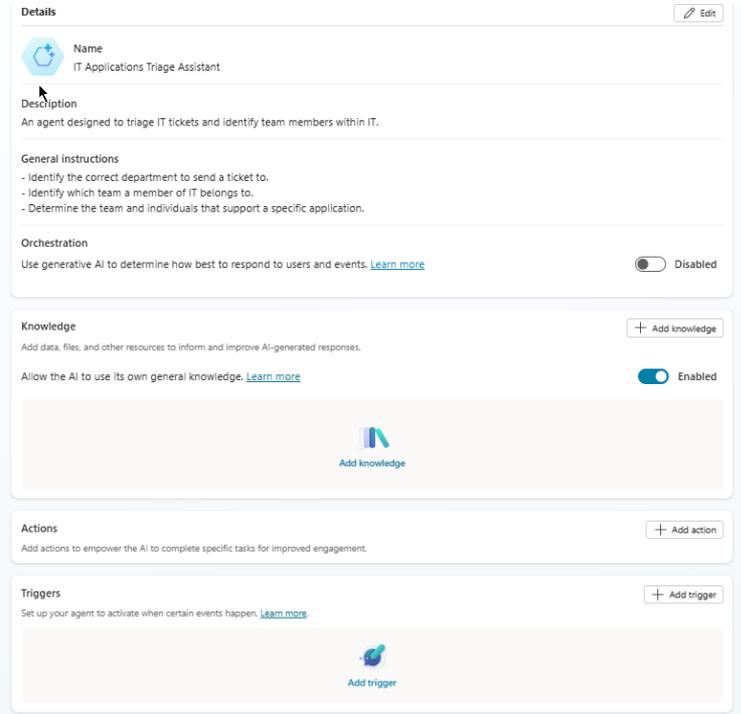
Getting Started

- Go to the Copilot Studio URL listed in the previous slide.
- Here, you can describe what you would like your agent/application to accomplish, and Studio will assist you in the creation.



Getting Started

- Once you specify use cases for your agent, you can add specific data (knowledge), and triggers for your application.

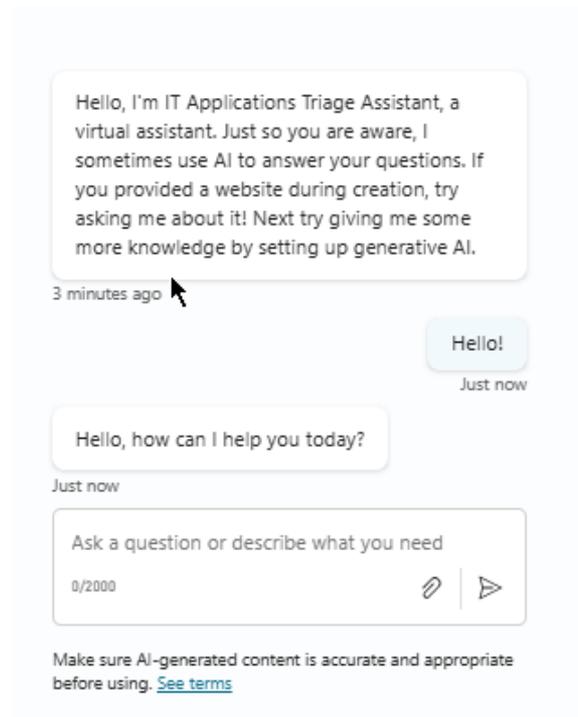


The screenshot displays a configuration page for an AI agent named "IT Applications Triage Assistant". The page is organized into several sections:

- Details:** Includes a name field with a pencil icon for editing, a description field, and general instructions: "An agent designed to triage IT tickets and identify team members within IT." It also lists general instructions: "Identify the correct department to send a ticket to.", "Identify which team a member of IT belongs to.", and "Determine the team and individuals that support a specific application." The orchestration section is currently disabled, with a toggle switch and a "Learn more" link.
- Knowledge:** Features a "+ Add knowledge" button and a description: "Add data, files, and other resources to inform and improve AI-generated responses." The "Allow the AI to use its own general knowledge" option is enabled, with a toggle switch and a "Learn more" link. Below this is a large grey area with a blue "Add knowledge" button.
- Actions:** Includes a "+ Add action" button and a description: "Add actions to empower the AI to complete specific tasks for improved engagement."
- Triggers:** Features a "+ Add trigger" button and a description: "Set up your agent to activate when certain events happen. [Learn more](#)." Below this is a large grey area with a blue "Add trigger" button.

Topics

- Topics are words and phrases that let the agent know what type of assistance you are looking for – or to initiate conversation with the agent.
- For example, I may tell the agent that if a user simply states “Hello”, that it should reply with “Hello, how can I help you?”



Actions

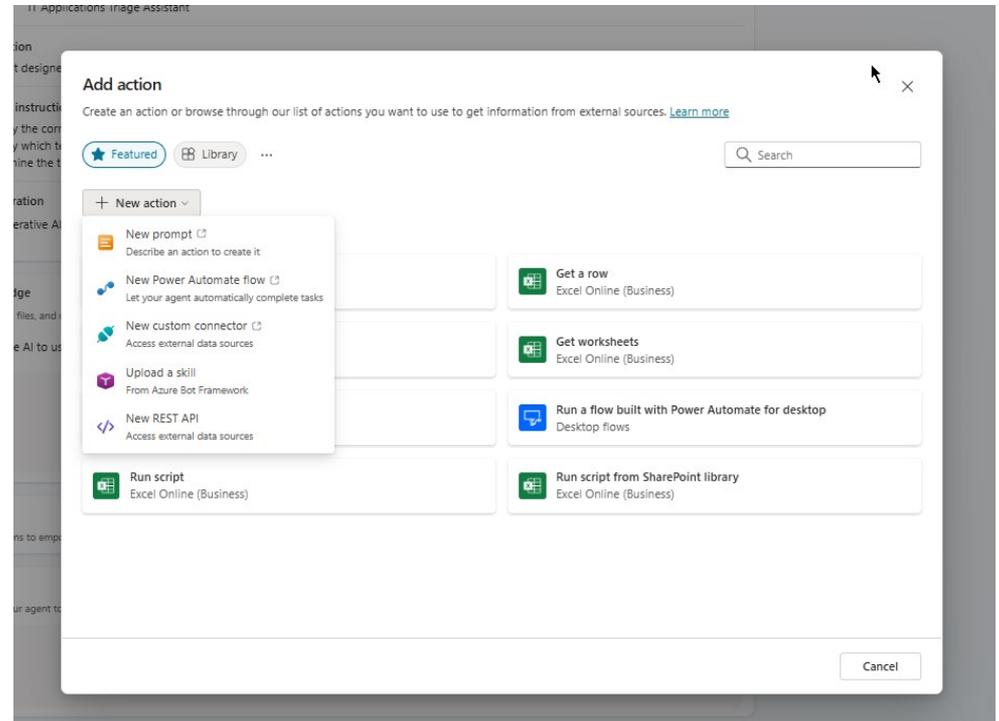
- Actions are workflows that agents follow during specific prompts.
- For example, if a customer asks, “Which department supports the eVisions application?”
- The agent would utilize the appropriate workflow to check the department and ask the customer if they would like additional information regarding the application or department.

The screenshot displays the configuration page for the 'IT Applications Triage Assistant'. The interface is organized into several sections, each with a title and a description, followed by configuration options and a 'Learn more' link. The 'Actions' section is highlighted with a red rectangular border.

- Name:** IT Applications Triage Assistant
- Description:** An agent designed to triage IT tickets and identify team members within IT.
- General instructions:** - Identify the correct department to send a ticket to. - Identify which team a member of IT belongs to. - Determine the team and individuals that support a specific application.
- Orchestration:** Use generative AI to determine how best to respond to users and events. Enabled
- Knowledge:** Add data, files, and other resources to inform and improve AI-generated responses. Allow the AI to use its own general knowledge. Enabled
- Actions:** Add actions to empower the AI to complete specific tasks for improved engagement. (This section is highlighted with a red border)
- Triggers:** Set up your agent to activate when certain events happen.
- Topics:** Add conversation topics to focus and guide the way your agent answers.
 - Goodbye ...
 - Greeting ...

Actions

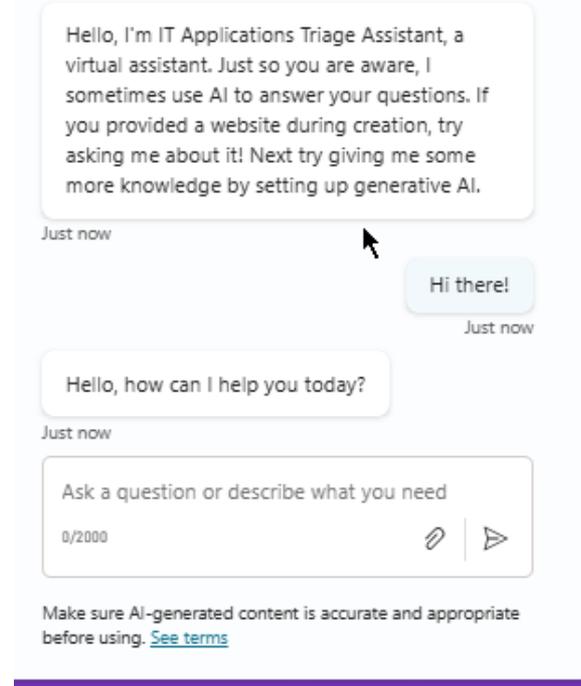
- Actions can be added on the 'Overview' or 'Actions' tabs in the main menu of the agent you're working on.
- There are multiple built-in options, as well as options for creating manual workflows in the 'New Action' drop-down menu



Triggers

Similar to Topics – certain words and phrases will trigger certain events.

For example, multiple types of greetings can initiate the same type of chat initiation.



Data/Knowledge

In order to accurately direct your agent to assist customers, the agent needs to be trained on the type of data it will provide. To do this, we can use databases to train the agent.

Microsoft has its own database building tool that integrates with Copilot Studio called Dataverse.

Access via the Power Automate link in the links slide. On the left side of the screen, click on 'Tables'

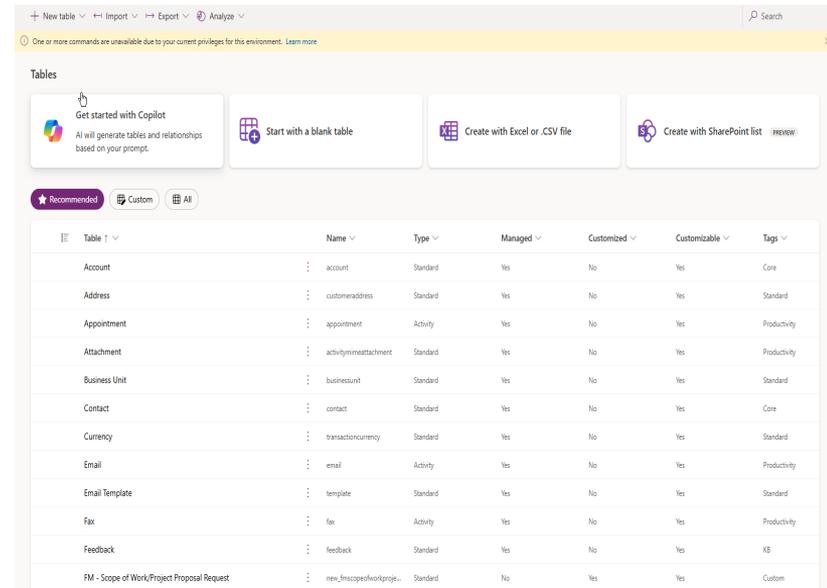
Data/Knowledge

Dataverse is a simplified database creation tool.

If you know how to build out a database, everything can be done manually.

However, if you are new to database building, you can request that Dataverse build your database for you based on use cases and prompts that you provide to it.

Additionally, there are numerous templates within to get you started.



The screenshot displays the Microsoft Dataverse user interface. At the top, there are navigation options: '+ New table', 'Import', 'Export', and 'Analyze'. A yellow warning banner states: 'One or more commands are unavailable due to your current privileges for this environment. Learn more'. Below this, the 'Tables' section offers four starting points: 'Get started with Copilot' (AI-generated), 'Start with a blank table', 'Create with Excel or .CSV file', and 'Create with SharePoint list'. A filter bar shows 'Recommended' (selected), 'Custom', and 'All'. The main area contains a table listing existing tables with columns for Name, Type, Managed, Customized, Customizable, and Tags.

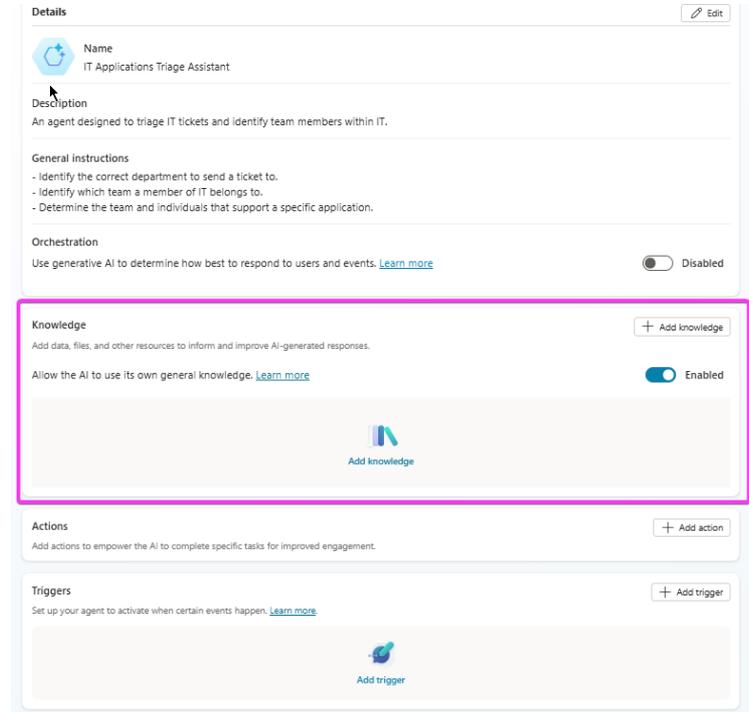
Table	Name	Type	Managed	Customized	Customizable	Tags
Account	account	Standard	Yes	No	Yes	Core
Address	customeraddress	Standard	Yes	No	Yes	Standard
Appointment	appointment	Activity	Yes	No	Yes	Productivity
Attachment	activitymimeattachment	Standard	Yes	No	Yes	Productivity
Business Unit	businessunit	Standard	Yes	No	Yes	Standard
Contact	contact	Standard	Yes	No	Yes	Core
Currency	transactioncurrency	Standard	Yes	No	Yes	Standard
Email	email	Activity	Yes	No	Yes	Productivity
Email Template	template	Standard	Yes	No	Yes	Standard
Fax	fax	Activity	Yes	No	Yes	Productivity
Feedback	feedback	Standard	Yes	No	Yes	KB
FM - Scope of Work/Project Proposal Request	new_fmscopeofworkproje...	Standard	No	Yes	Yes	Custom

Data/Knowledge

Once your knowledge database is set up, return to copilot studio and the agent you have initiated and click on 'Add knowledge'

Here, you can train your agent on necessary data.

Note: If your environments don't match, the database you created will not appear in the popup list! Be sure you are creating everything in the same environment!



The screenshot displays the configuration page for an AI agent named 'IT Applications Triage Assistant'. The 'Details' section includes a description, general instructions, and an orchestration toggle set to 'Disabled'. The 'Knowledge' section is highlighted with a red border and shows an 'Add knowledge' button, a toggle for 'Allow the AI to use its own general knowledge' which is 'Enabled', and a 'Learn more' link. Below this are sections for 'Actions' and 'Triggers', each with an 'Add' button.

Details Edit

Name
IT Applications Triage Assistant

Description
An agent designed to triage IT tickets and identify team members within IT.

General instructions
- Identify the correct department to send a ticket to.
- Identify which team a member of IT belongs to.
- Determine the team and individuals that support a specific application.

Orchestration
Use generative AI to determine how best to respond to users and events. [Learn more](#) Disabled

Knowledge + Add knowledge

Add data, files, and other resources to inform and improve AI-generated responses.

Allow the AI to use its own general knowledge. [Learn more](#) Enabled

[Add knowledge](#)

Actions + Add action

Add actions to empower the AI to complete specific tasks for improved engagement.

Triggers + Add trigger

Set up your agent to activate when certain events happen. [Learn more](#)

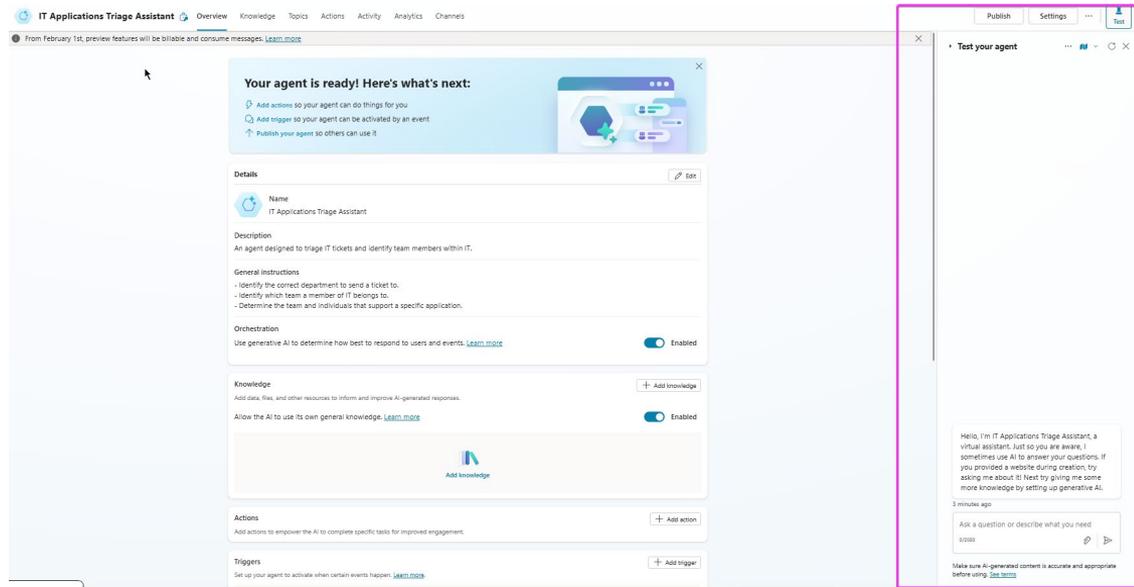
[Add trigger](#)

Testing

Copilot studio includes tools for continuously testing your agent.

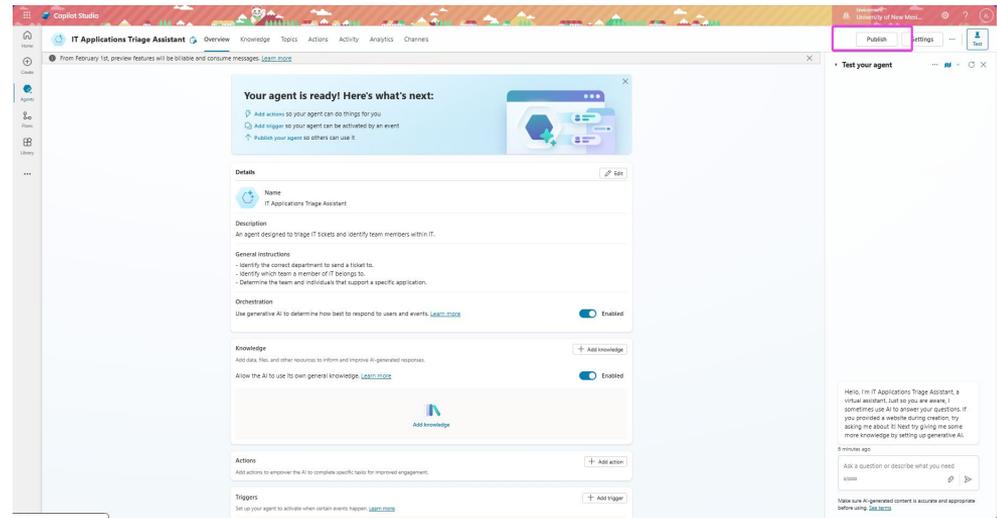
On the right side of the home screen, there is a 'Test your agent box'.

Here, you can enter prompts from the customer perspective and ensure that your topics, triggers, and data are implemented correctly.



Publishing

- Once your bot has been fully tested and completed to your specifications, click 'Publish' on the top-right side of the screen. From here, you can share your agent.
- Congrats! You built your first agent!



**If you require assistance, please
create an SR and direct to IT
Apps > Operations > Attn: Josie**