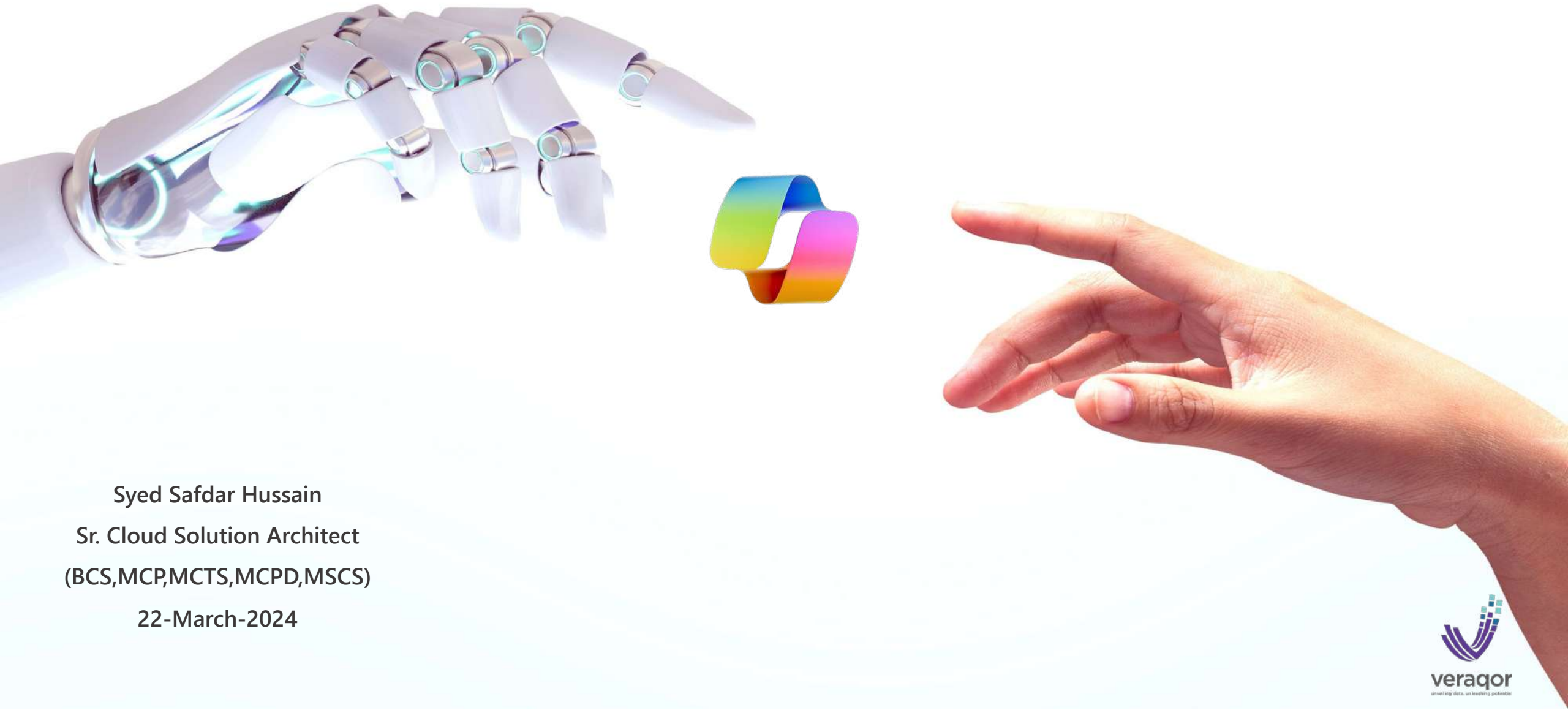


Enabling Your Organization with Personalized Copilots



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Agenda



Copilot & Its Types



Custom/Personalized Copilot



Understand How Organizations Can Leverage Copilot For Their Own Business



Integration with Prebuild & Custom AI Models



Veraqor Offers



Extending Copilot for Microsoft 365



Copilot Architecture



Best Practices to Training your Copilot

DEMO



Demo of Building Your Custom Copilot

Why Copilot?

Copilots are the new chatbots



Throughout this document, we refer to copilots instead of bots or chatbots. This reflects the new branding of Power Virtual Agents into Copilot Studio.



With more immersive UX and next-generation AI capabilities, copilots are the new chatbots.



Microsoft Copilot Studio is an end-to-end conversational AI platform that empowers you to create and customize copilots using natural language or a graphical interface.



Watch: [Understanding Copilots at Microsoft \(video\)](#)

Copilot Types



Embedded

- Integrated into Microsoft Products
- Typically, not extensible
- Help people use a product



Solution Accelerators

- Provide basic capabilities out of the box
- Typically, extensible
- Channel Limited
- OOB Experience not overridable



Custom

- Build your own custom copilot that does what you want where you want it
- Muti-channel
- Full control



Personalized Copilot



- A personalized copilot is an AI-powered assistant that learns your preferences and adapts to your needs.
- It can automate tasks, provide information, and help you stay organized.
- Think of it as your personal productivity powerhouse!

How Can Personalized Copilot Benefit You?



**SAVE TIME AND ENERGY BY
AUTOMATING ROUTINE
TASKS.**



**IMPROVE YOUR FOCUS AND
PRODUCTIVITY BY
ELIMINATING
DISTRACTIONS.**



**GAIN INSIGHTS AND
RECOMMENDATIONS
BASED ON YOUR DATA AND
GOALS.**



**REDUCE STRESS AND
ANXIETY BY STAYING
ORGANIZED AND ON TOP
OF TASKS.**

Personalized Copilot Features



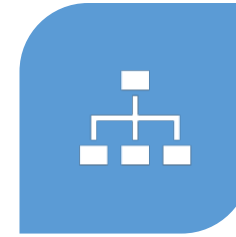
TASK AUTOMATION:
AUTOMATE REPETITIVE
TASKS SUCH AS
SCHEDULING MEETINGS,
SENDING EMAILS, AND
GENERATING REPORTS.



INFORMATION RETRIEVAL:
QUICKLY ACCESS RELEVANT
INFORMATION FROM YOUR
EMAILS, CALENDAR, AND
OTHER SOURCES.



**GOAL SETTING AND
TRACKING:** SET PERSONAL
AND PROFESSIONAL GOALS
AND TRACK YOUR
PROGRESS OVER TIME.



**PRIORITIZATION AND
ORGANIZATION:**
PRIORITIZE TASKS AND
ORGANIZE YOUR DAY
BASED ON YOUR GOALS
AND PRIORITIES.



**COMMUNICATION AND
COLLABORATION:** EASILY
COMMUNICATE AND
COLLABORATE WITH
COLLEAGUES AND
CLIENTS.

Understand How Organizations Can Leverage Copilot For Their Own Business



INCREASED EFFICIENCY: DISCUSS
HOW PERSONALIZED COPILOTS
ENHANCE WORKFLOW
EFFICIENCY.



IMPROVED DECISION-MAKING:
ILLUSTRATE HOW AI-DRIVEN
INSIGHTS CONTRIBUTE TO BETTER
DECISION-MAKING.



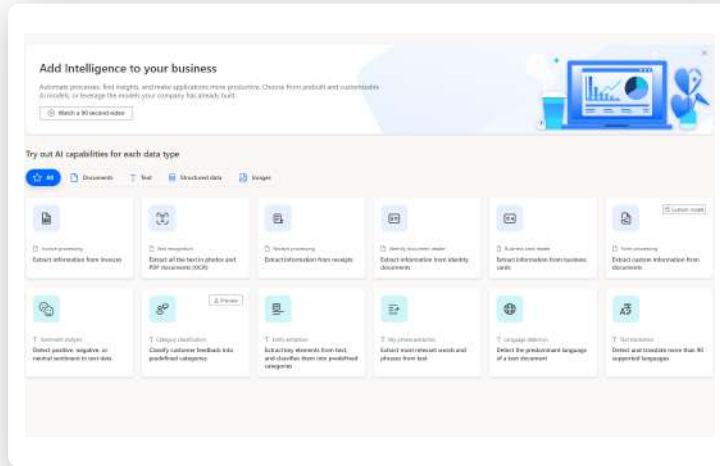
ENHANCED EMPLOYEE
EXPERIENCE: EXPLAIN THE
POSITIVE IMPACT ON EMPLOYEE
EXPERIENCE AND SATISFACTION.



IMPROVE CUSTOMER SERVICE:
OPTIMIZE MARKETING
CAMPAIGNS AND STREAMLINE
RESOURCE ALLOCATION.



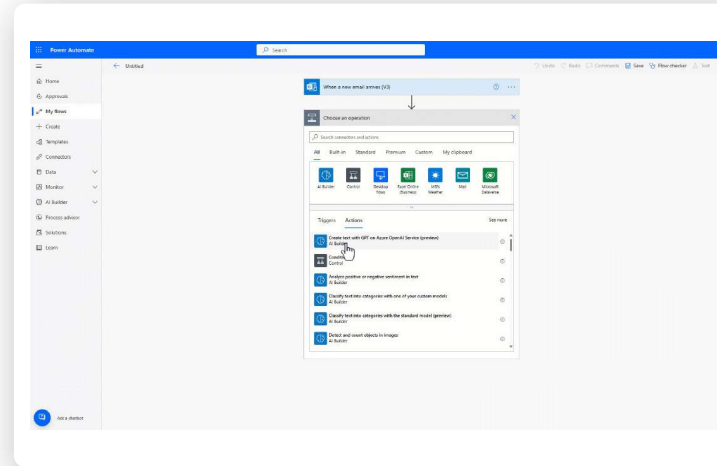
AI Builder



AI models

Democratized access to complex AI models including object detection, sentiment analysis, and many more.

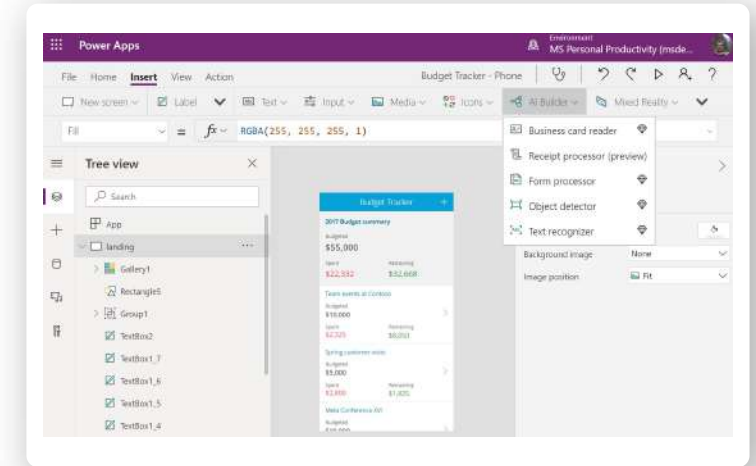
Simplify tasks, increase productivity and reduce time spent developing by easily applying AI models.



Create text with GPT model

The Azure OpenAI Service model enables users to embed intelligent text generation features with a few clicks.

Makers can interact with the model and build prompts for their workflow, reducing development time.



Integrate into your solutions

Easily embed generative AI into your low code solutions across Power Apps and Power Automate.

Reduce time to market by quickly and easily adding AI models to your applications and workflows.



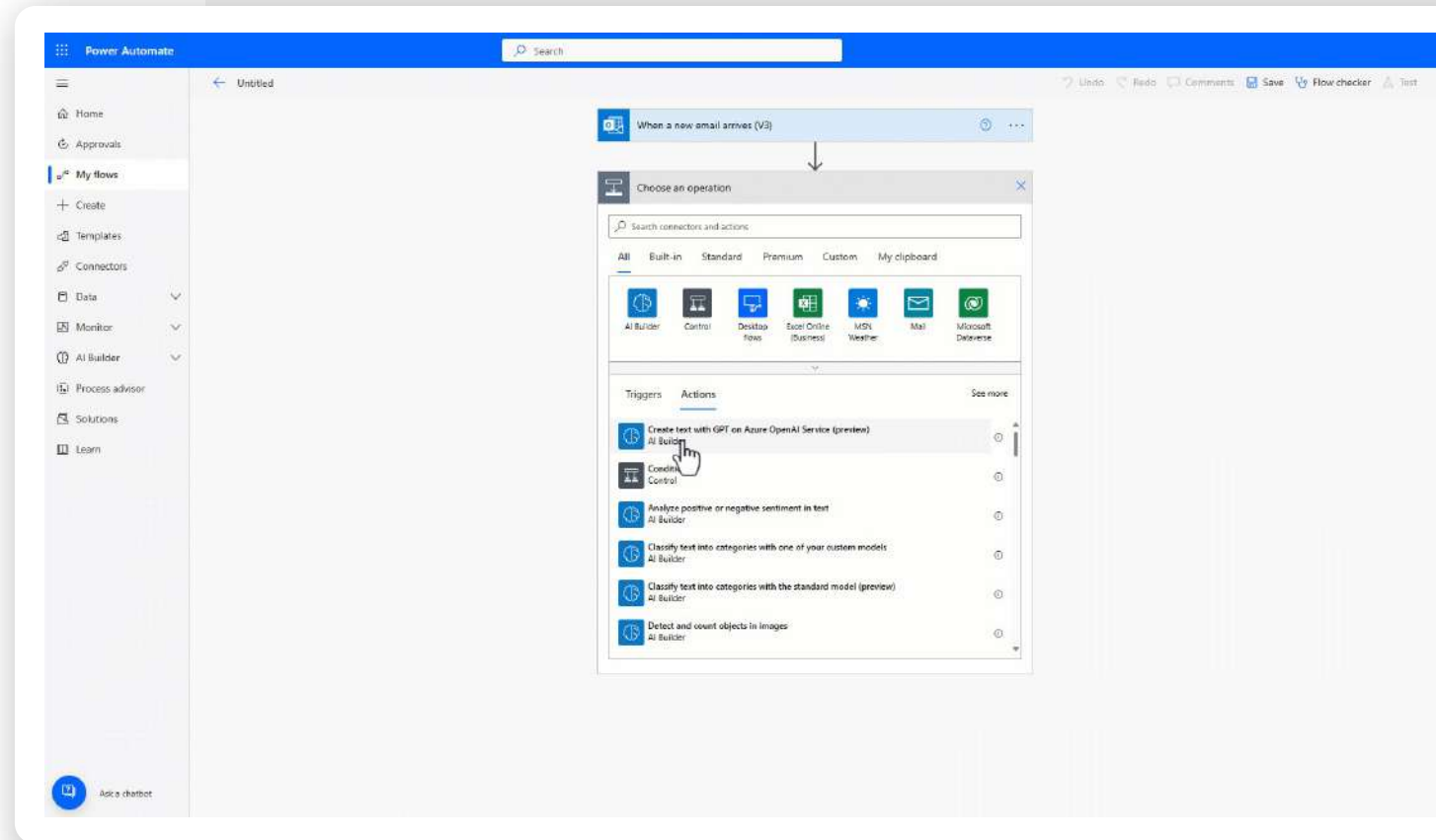
Create text with AI Builder

New AI Builder model built on Azure OpenAI service's large language (LLM) capability that can generate text, summarize documents, answer questions, and more.

Easily **embed generative AI** into Power Apps and Power Automate

Break barrier of entry to **access cutting-edge AI models**

Reduce time to market by adding AI models to your workflow with just a few clicks



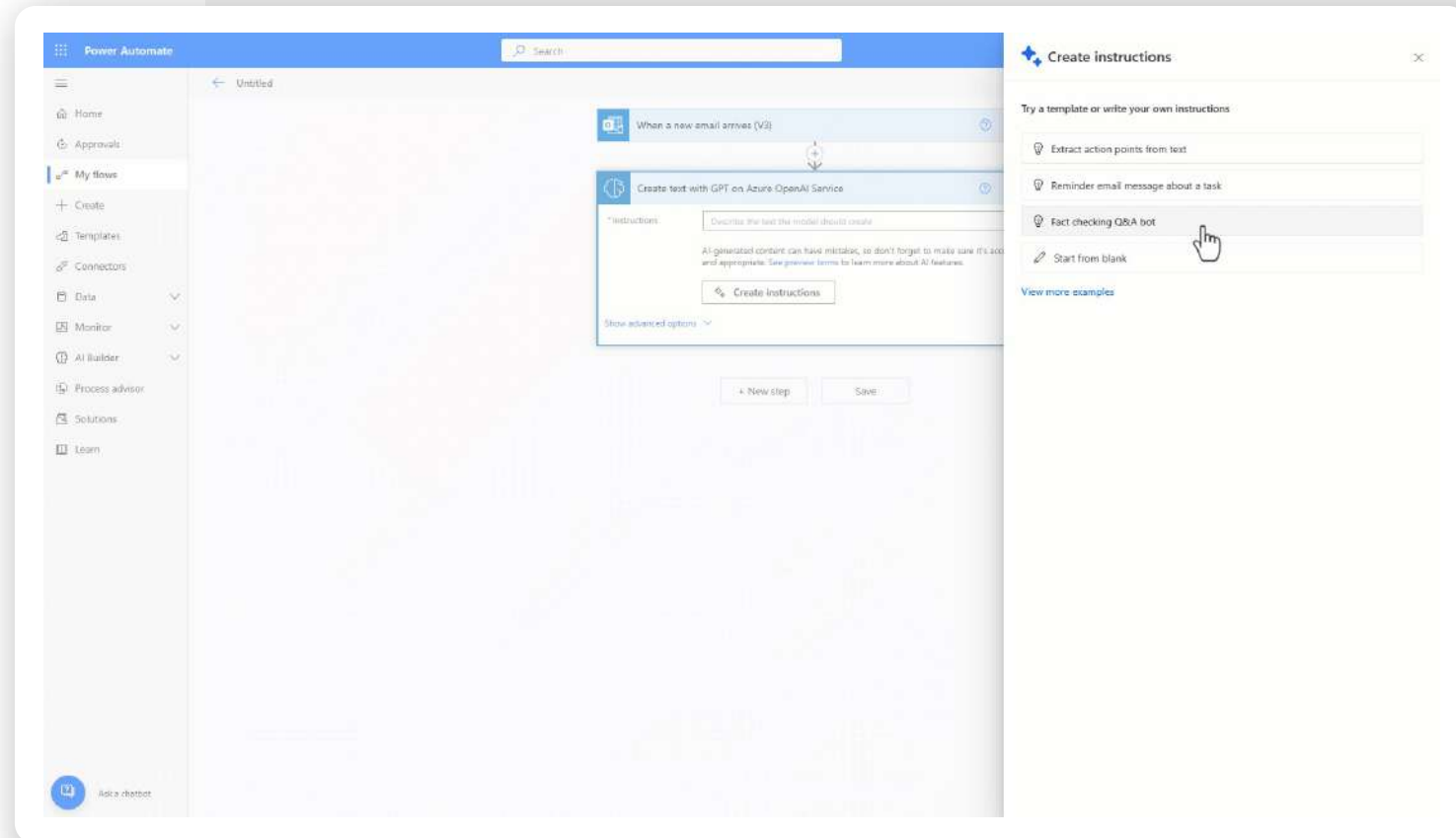


Easily Instruct Your Model

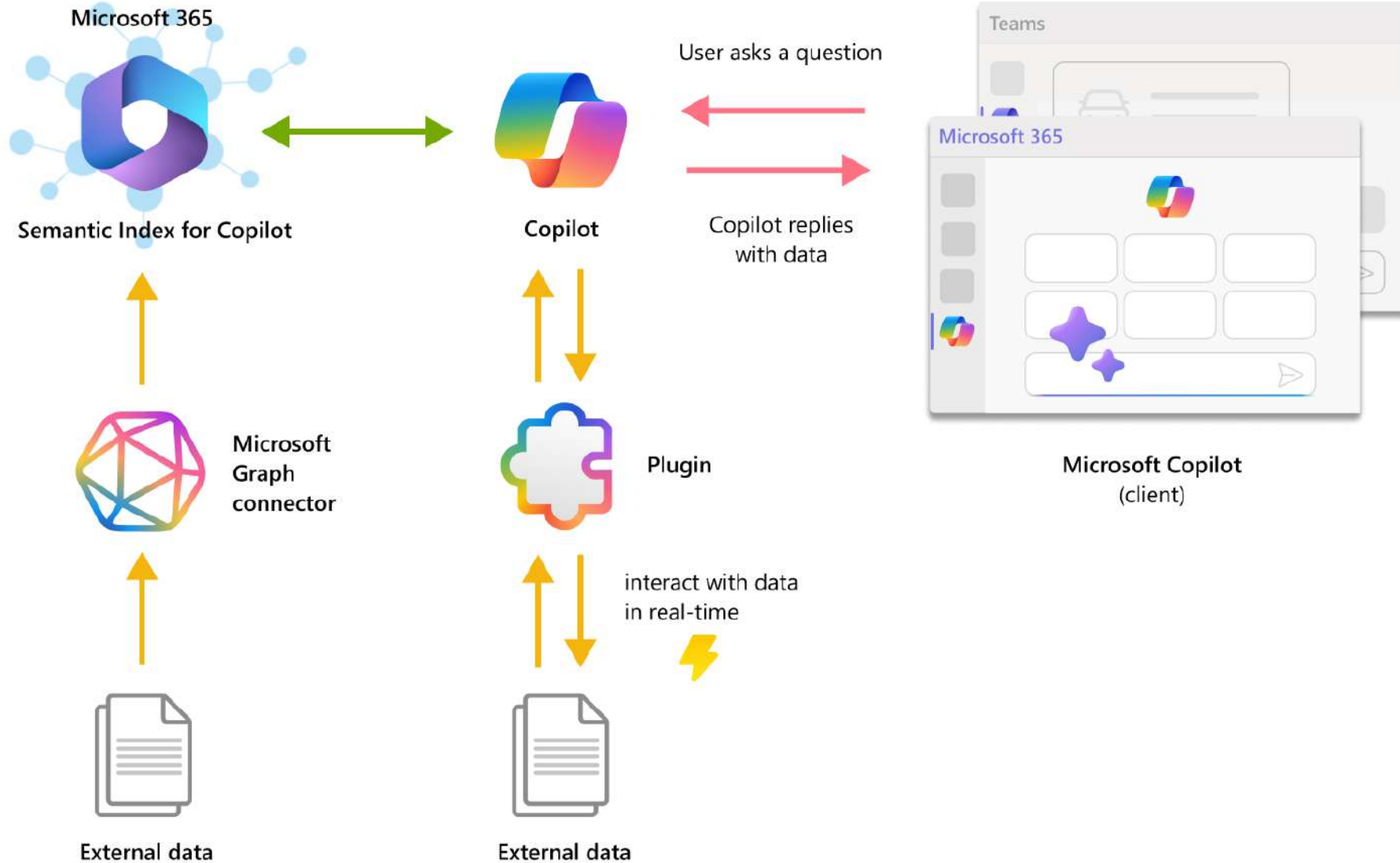
Select from a set of pre-built templates or write your own instructions for greater customization.

Use **pre-built templates** to help guide instructions for the model to perform

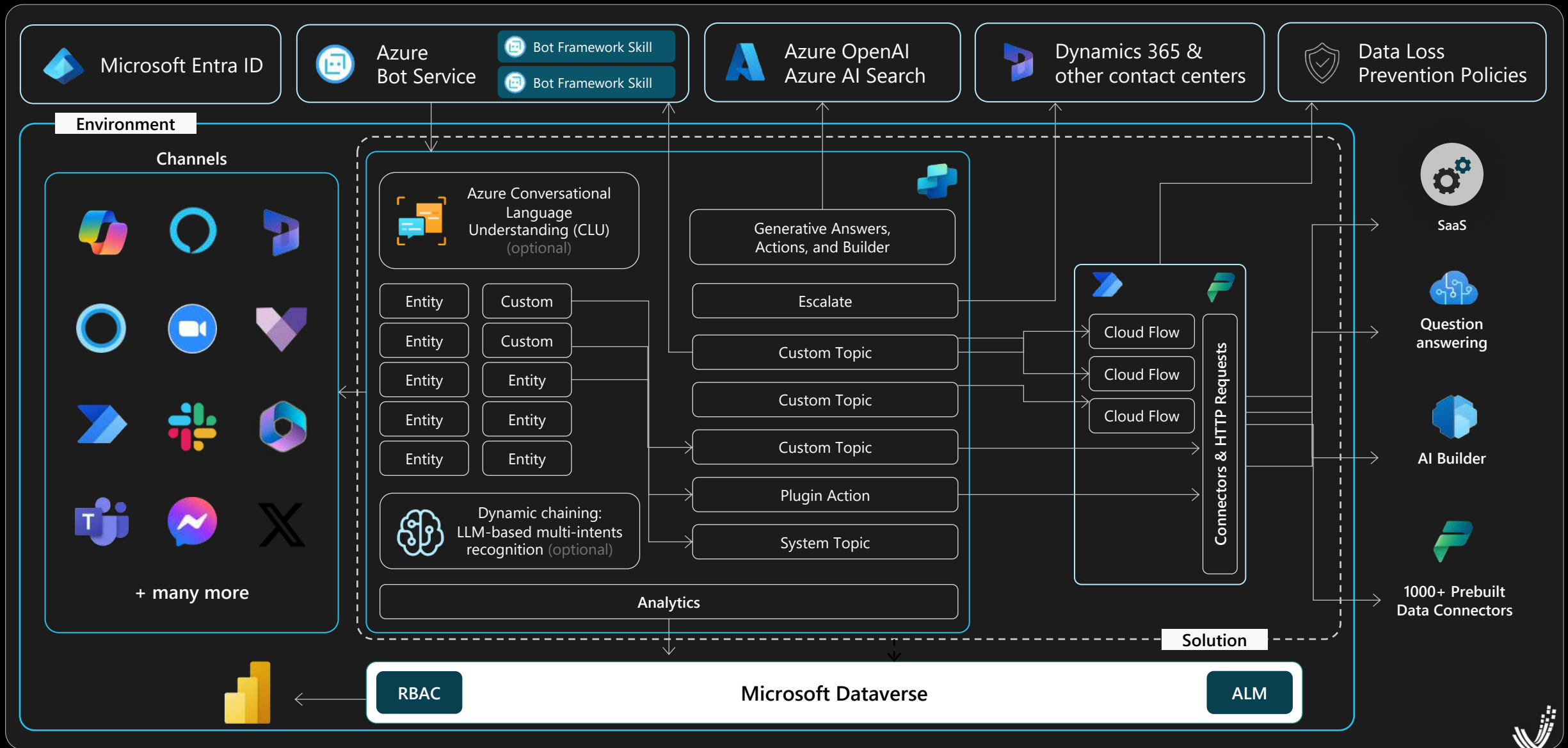
Craft your own set of instructions for more specific actions like classifying or extracting keywords & information from text



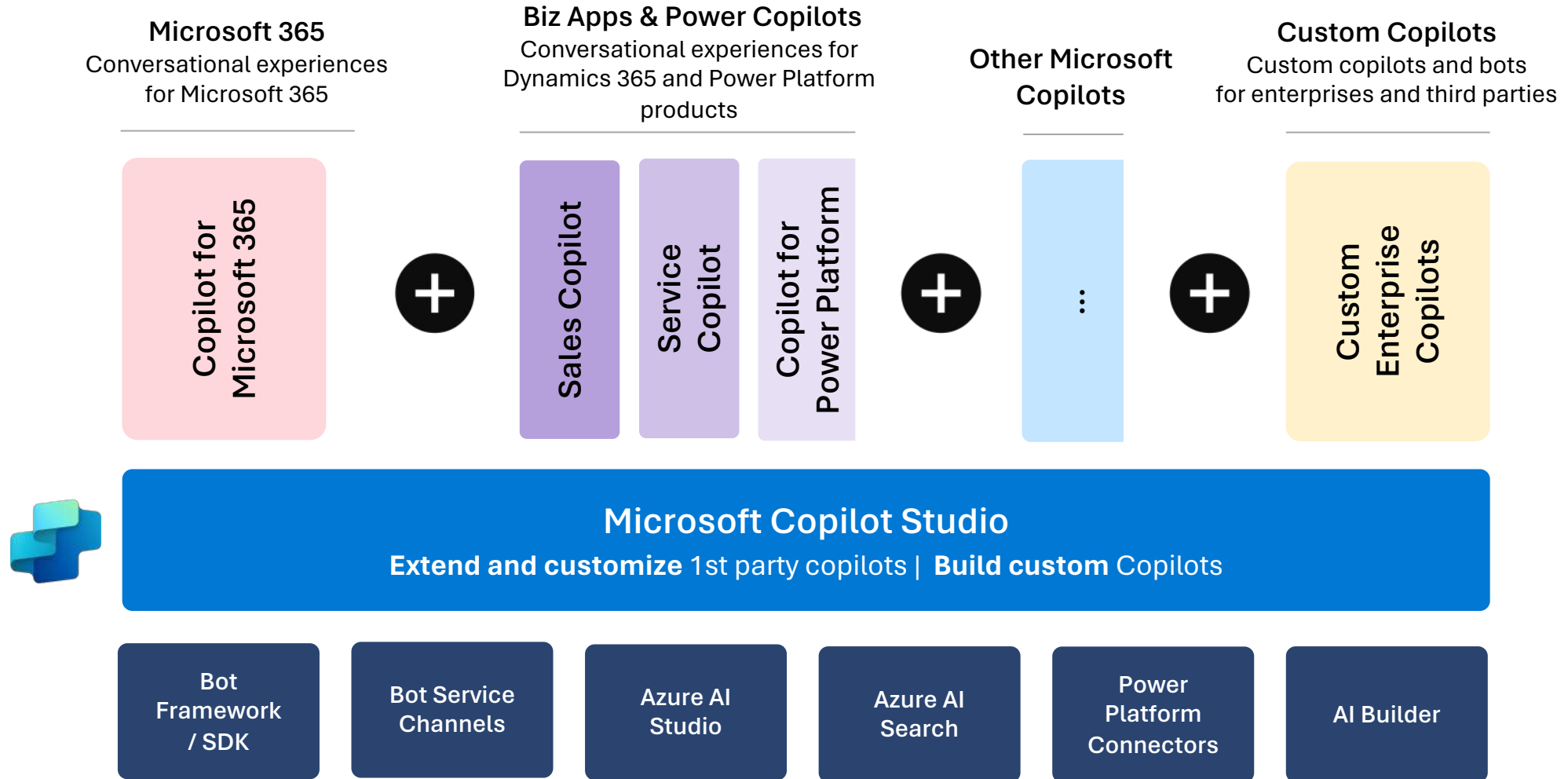
Extending Copilot for M365



Copilot Studio Architecture

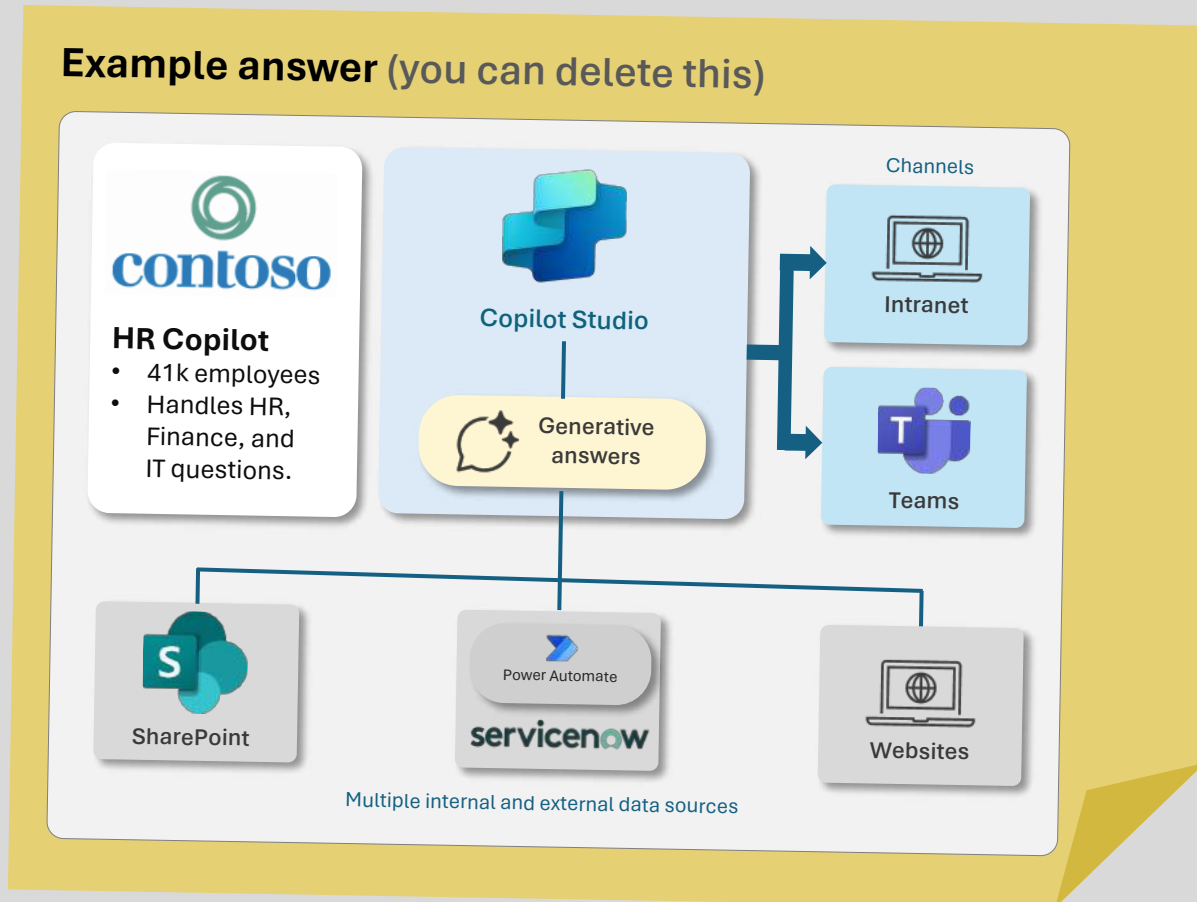


Copilots and Conversational AI



Solution Architecture

- ✓ Provide an architecture diagram with the overview of the technical implementation



Why do we ask these questions?

- To have the big picture of your copilot project and its integration in a broader technical and functional landscape.

Information we're looking for:

- Architecture diagrams or blueprints
- Functional and technical overview of the copilot and its integration in the broader technical landscape (other Power Platform or Azure services, internal APIs, etc.)

Generative Answers Considerations



Generative answers processes and data sources

1

Relevant text content retrieval from configured sources



Summarization using Azure OpenAI

Custom instructions

Past 10 turns for contextualization

References

Content summary



Response Validation

Native Azure OpenAI moderation layer

Responsible AI moderation layer

Grounding validation / hallucination removal

2

3



Public data

- Website content must be indexed by Bing.
- Bing is a global service, no geo boundary.

- Public Website**
 - Up to 4 URLs, but the list can be dynamic.
 - Max 2 subpages depth (*/en/help/*), no direct pages.

- Bing Custom Search**
 - One configuration ID, but can be set using a formula.
 - Azure costs covered by Microsoft
 - Up to 400 URLs, custom ranking options.
 - Max 2 subpages depth (*/en/help/*), supports direct pages.



SharePoint

Internal only

- Requires the user to be authenticated with Entra ID to make delegated calls to the Graph API.
- Up to 4 SharePoint or OneDrive for Business sites (but the list can be dynamic).
- Security trimming: returned results only include content the user has read access to.
- Users eligible to Microsoft 365 Semantic Index benefit from better results.



Azure OpenAI on your data

- Returns results from the linked Azure AI Search index (keyword, semantic, and vector search).
- Not a passthrough to Azure OpenAI – generative answers summarization and validation apply.
- Connection isn't delegated: no security trimming, no authentication requirement for the user.



Uploaded documents

- Files (max 3 MB) are stored in Dataverse file storage and indexed with Dataverse Search.
- Not possible to offer a URL to the source documents in the citations.
- Configured at the bot level: possible to disable file search at the node level but can't filter them.



Custom data

- Allows to first query any data source – through Power Automate or HTTP requests – and then pass the data to generative answers to formulate an answer for the user query.
- Generative answers expects a table variable with 2 properties: Content (typically snippets of relevant content) and ContentLocation (typically a URL).

Best Practices to Train Your Copilot

- **High-Quality Data:** Use clean, relevant, and diverse datasets to train your copilot model.
- **Continuous Learning:** Implement mechanisms for ongoing model improvement based on user feedback and evolving coding practices.
- **Ethical Considerations:** Ensure responsible data usage and adherence to ethical AI principles.
- **Understanding Context:** Train the copilot to understand project context, coding conventions, and specific codebases.
- **Intuitive Suggestions:** Provide suggestions that align with the developer's intent and the overall project structure.
- **Minimizing Errors:** Implement context-aware features to reduce the likelihood of generating incorrect or irrelevant code.
- **Code Security:** Implement measures to safeguard sensitive code snippets and prevent unauthorized access.
- **Privacy:** Clearly communicate data usage policies and prioritize user privacy.
- **Compliance:** Ensure compliance with relevant data protection regulations and standards.

Building Your Personalized Copilot: Demo

- Chatbots
- Overview
- Topics**
- Entities
- Analytics
- Publish
- Settings

Test bot

Track between topics

Chat

more sustainable future by reducing our environmental footprint, accelerating research, helping our customers build sustainable solutions and advocating for policies that benefit the environment. Areas of focus include carbon negative, water positive, and more. Learn more here: <https://www.microsoft.com/en-us/sustainability/approach>

A minute ago | Surfaced with Azure OpenAI

What is the Microsoft Museum

Just now

The Microsoft Visitor Center in Redmond, Washington is the closest thing to a Microsoft Museum. You can learn more about it here: <https://www.microsoft.com/en-us/visitorcenter/default>

Just now | Surfaced with Azure OpenAI

What is the latest Surface Laptop?

Just now

The latest Surface Laptop is the Surface Laptop 5. It has a 13.5" or 15" PixelSense™ touchscreen, powerful 12th Gen Intel® Core™ i5/i7 processors, Windows 11, and is built on the Intel® Evo™ platform. Learn more here: <https://www.microsoft.com/en-us/d/surface-laptop-5/8xn49v61s1bn>

Just now | Surfaced with Azure OpenAI

Type your message

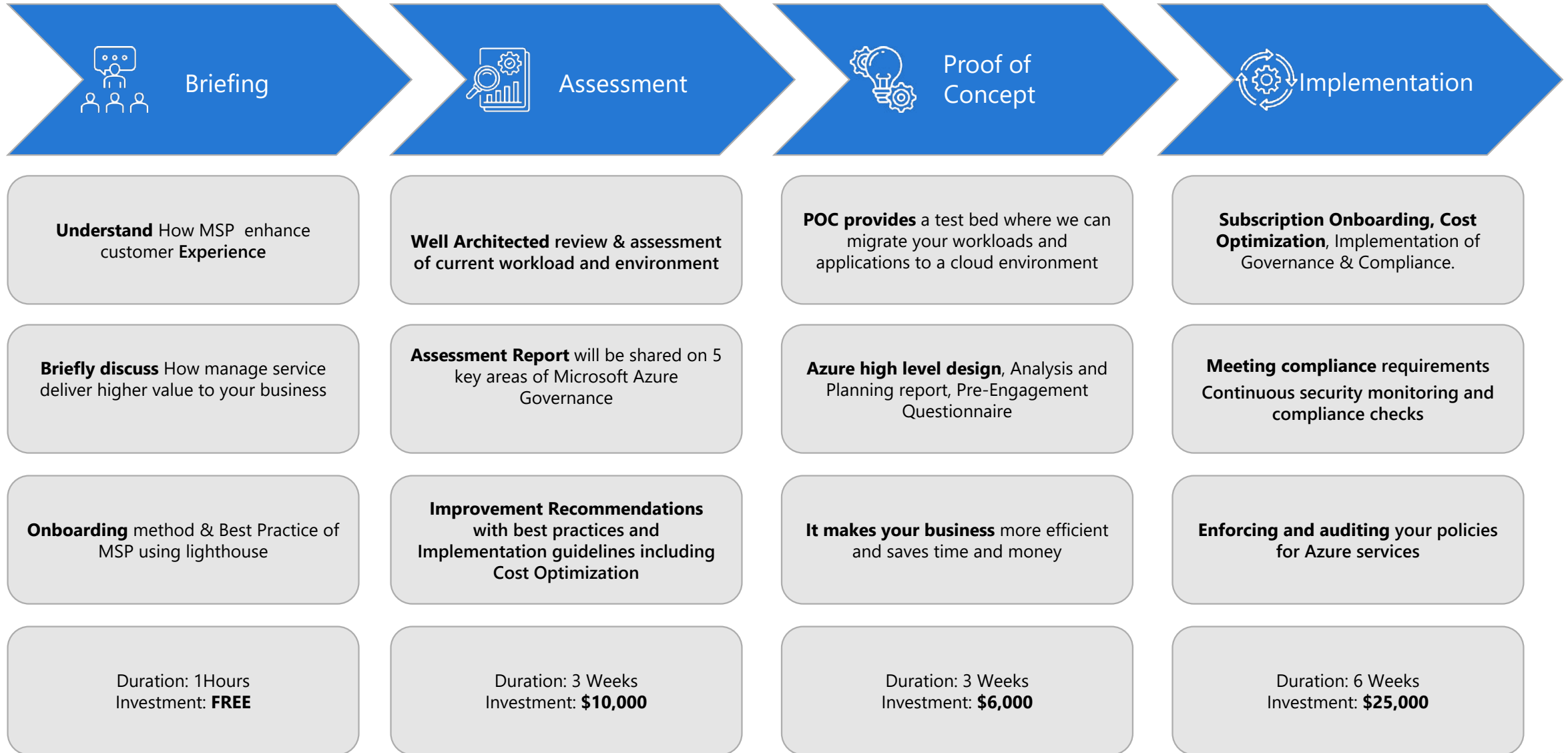
+ New topic

Topics

Custom (7) System (8) Search custom

Type	Name ↓	Trigger phrases	Status	Errors	Currently editing
Message	Goodbye	(6) Bye	On		
Message	Greeting	(5) Good afternoon	On		
Message	Lesson 1 - A simple topic	(4) When are you closed	On		
Message	Lesson 2 - A simple topic with a condition and variable	(5) Find my nearest store	On		
Message	Lesson 3 - A topic with a condition, variables and a pre...	(5) Buy items	On		
Message	Start Over	(4) let's begin again	On		
Message	Thank you	(4) thanks	On		

How Can Veraqor Help?



What Can We Do For You?

Business Outcome Strategy Workshop & Roadmap

Understanding the complexities and best practices to get you where you want to be. A complimentary 2-hour advisory session to assess your current state and provide the guidance you need.

Deeper Solution Session & Briefing

See what Veraqor can do for you! An hour-long envisioning workshop explores the impact of digital transformation and innovation to help customers with vision-setting, strategy, roadmaps, and organizational alignment.

Architectural Design Sessions

This custom 2-hour session focuses on your technical solution objectives and aligns them with specific components of solutions to help you not only meet your goals but also capitalize on them.

Industry Best Practices, Tools & Frameworks

This custom 1-hour session focuses on guidance of best practices working directly with our specialized architects on innovative new capabilities and well-architected framework.

Complimentary Offers for Customers

Thank you!

Please spare a moment to fill out the survey
after this webinar.

Need help? Please write to:
mtu@veraqr.io

