Faysal Aziz

Building Autonomous AI Agents with Microsoft Copilot Studio

From Intelligent Conversations to Event-Driven, Decision-Making Business Agents - 2 days

FA-0003 · 2 days

Agentic & Generative AI · Automation, RPA & Power Platform

Introduction

This two-day course concentrates on the transition: from building a useful conversational agent to creating agents capable of responding to business events and taking controlled action. Participants begin with a short, practical foundation in prompt engineering and context engineering because agent quality depends heavily on instructions, context, tool descriptions, knowledge boundaries, and clearly defined objectives. The emphasis then moves rapidly into Copilot Studio itself.

Participants will build and configure agents that use enterprise knowledge, interact with Microsoft 365 services, work with SharePoint, invoke tools and agent flows, and respond to events without waiting for a user to initiate a conversation. Copilot Studio currently supports event-driven scenarios such as SharePoint item creation, OneDrive file creation, Planner events, scheduled recurrence, and other connector-supported events.

An important part of the course is understanding that autonomy does not mean removing control. Participants will examine where deterministic workflows, generative reasoning, autonomous actions, and human approvals belong within the same business process. Current Copilot Studio agent flows support AI-driven actions, human-in-the-loop activities, control logic, connectors, and external services. Microsoft is also developing approval capabilities in which AI can evaluate information against defined criteria while human reviewers retain authority over important or exceptional decisions.

The course will also deliberately move beyond the Microsoft 365 boundary. Power Platform connectors and custom connectors allow Copilot Studio agents to interact with external applications, APIs, SaaS platforms, databases, and enterprise systems. Rather than tying the training to one particular third-party

product, the course teaches the integration patterns required to extend agents into whichever systems are relevant to the organization.

This is an industry-focused course rather than an academic treatment of artificial intelligence. The instructor brings more than 30 years of industry experience and will concentrate on practical architectures, implementation decisions, operational considerations, and capabilities that organizations are currently demanding. Given the two-day duration, the objective is not to cover every Copilot Studio feature, but to give participants a focused and achievable path from basic agent construction to practical autonomous and AI-assisted business processes.

Learning outcomes

By the end of the course, participants should be able to:

- Apply practical prompt and context engineering techniques when designing agents.
- Explain the progression from chatbots to conversational, task-oriented, autonomous, and AI-driven agents.
- Create and configure custom agents using Microsoft Copilot Studio.
- Define agent instructions, knowledge, tools, actions, and operational boundaries.
- Use generative orchestration to coordinate agent capabilities.
- Connect agents to SharePoint and Microsoft 365 services.
- Create agent flows for business process automation.
- Configure agents to respond to scheduled and event-driven triggers.
- Design autonomous agents that initiate actions without direct user prompts.
- Incorporate human-in-the-loop approvals and intervention points.
- Distinguish deterministic automation from AI-assisted decision-making.
- Design AI-driven decision stages using defined business criteria and contextual information.
- Connect Copilot Studio agents to systems beyond Microsoft 365.
- Apply appropriate security, permissions, governance, testing, and monitoring considerations.
- Identify practical patterns for deploying agents within enterprise environments.

Prerequisites

Participants should have:

- General familiarity with Microsoft 365 applications.
- Basic understanding of SharePoint concepts.
- Familiarity with business workflows and automation concepts.
- Basic experience working with web-based business applications.
- Access to an appropriate Microsoft Copilot Studio environment.

- Appropriate Microsoft 365 and Power Platform permissions for the training environment.
- No programming or advanced artificial intelligence background is required.
- Previous exposure to Power Automate is useful but not mandatory.
- Full Copilot Studio License to run Prompts and consume credits.

Training outline

1. Prompt and Context Engineering for Agents

Prompt Engineering Fundamentals

1. Instructions and objectives
2. Roles and behavioral boundaries
3. Prompt clarity and specificity
4. Structured instructions
5. Output constraints

Context Engineering Fundamentals

1. Agent context
2. Conversation context
3. Business context
4. Knowledge grounding
5. Context boundaries and relevance

Designing Instructions for Agentic Systems

1. Agent goals
2. Decision boundaries
3. Tool descriptions
4. Knowledge descriptions
5. Handling ambiguity and missing information

2. Understanding Agents and AI-Driven Agents

Evolution from Chatbots to Agents

1. Traditional conversational bots
2. Generative conversational agents
3. Task-oriented agents
4. Autonomous agents
5. AI-driven agents

Agent Behavior Models

1. Deterministic execution
2. Generative reasoning
3. Tool selection
4. Decision-making
5. Human-supervised autonomy

Agent Architecture

1. Instructions
2. Knowledge
3. Topics
4. Tools
5. Actions
6. Triggers
7. Agent flows

3. Microsoft Copilot Studio Fundamentals

Copilot Studio Environment

1. Agent creation experience
2. Agent configuration
3. Testing environment
4. Publishing concepts

Creating a Custom Agent

1. Agent purpose and description
2. Agent instructions
3. Conversation configuration
4. Knowledge configuration
5. Starter prompts

Knowledge and Grounding

1. Organizational knowledge
2. SharePoint knowledge sources
3. Structured and unstructured information
4. Knowledge permissions
5. Grounded responses

4. Building Intelligent Conversational Agents

Conversation Design

1. User intent
2. Topics
3. Variables
4. Inputs and outputs
5. Conversation routing

Generative Orchestration

1. Generative versus classic orchestration
2. Dynamic capability selection
3. Tool selection
4. Knowledge selection
5. Multi-step orchestration

Tools and Actions

1. Built-in tools

2. Connector-based tools
3. Agent flows
4. Reusable actions
5. Agent-to-agent capabilities

5. Connecting Agents with Microsoft 365

Microsoft 365 Integration

1. SharePoint
2. Outlook
3. Teams
4. OneDrive
5. Microsoft 365 data and services

SharePoint Integration

1. SharePoint as a knowledge source
2. SharePoint lists
3. Document-based knowledge
4. Permissions and access boundaries
5. SharePoint-triggered processes

Microsoft 365 Business Actions

1. Retrieving information
2. Creating and updating information
3. Notifications
4. Document-driven processes
5. Collaboration workflows

6. Agent Flows and Business Process Automation

Agent Flow Fundamentals

1. Triggers
2. Actions

3. Conditions
4. Branching
5. Data operations

Combining Agents and Automation

1. Agent-initiated flows
2. Flow-initiated agent activities
3. AI capabilities within flows
4. Calling agents from workflows
5. Multi-step business processes

7. Building Autonomous Agents

Autonomous Agent Concepts

1. Reactive versus proactive agents
2. User-initiated versus event-initiated execution
3. Agent autonomy boundaries
4. Autonomous planning and execution

Event Triggers

1. Scheduled triggers
2. Data-driven triggers
3. File and document events
4. Business application events
5. Connector-based triggers

Event-Driven Agent Processing

1. Trigger payloads
2. Trigger instructions
3. Context from business events
4. Tool and action selection
5. Autonomous execution paths

8. Human-in-the-Loop Agents

Human Oversight Patterns

1. Approval checkpoints
2. Human review
3. Exception handling
4. Escalation
5. Decision authority

Approval-Based Agent Flows

1. Approval requests
2. Approval responses
3. Conditional processing
4. Multi-stage approvals
5. Human and AI approval stages

Controlled Autonomy

1. Low-risk automated actions
2. High-impact actions
3. Human authorization boundaries
4. Fail-safe processing

9. AI-Driven Decision-Making

AI Agents versus Rule-Based Automation

1. Deterministic rules
2. AI interpretation
3. Contextual evaluation
4. Probabilistic decisions
5. Hybrid decision models

AI Decision Processes

1. Decision criteria
2. Unstructured information
3. Classification and evaluation
4. AI-generated recommendations
5. AI-generated decisions with rationale

Combining AI and Human Decisions

1. AI-first processing
2. Human validation
3. Exception routing
4. Confidence and risk considerations
5. Final decision authority

10. Extending Agents Beyond Microsoft 365

External Integration Architecture

1. Power Platform connectors
2. Third-party connectors
3. Custom connectors
4. APIs and services
5. Enterprise applications

External Agent Actions

1. Retrieving external information
2. Sending information to external systems
3. Triggering external processes
4. Cross-platform workflows
5. Integration authentication

11. Enterprise Agent Design and Governance

Security and Access

1. Authentication
2. Connection permissions
3. Maker credentials
4. Data access boundaries
5. Least-privilege principles

Governance

1. Data policies
2. Connector governance
3. Autonomous trigger governance
4. Environment strategy
5. Responsible AI considerations

Testing and Operational Readiness

1. Agent testing
2. Trigger testing
3. Decision-path validation
4. Activity monitoring
5. Failure and exception handling

Production Agent Design

1. Autonomy boundaries
2. Human control points
3. Reliability considerations
4. Maintainability
5. Enterprise deployment considerations

Disclaimer

This training outline is intended to serve as a structured guideline for the delivery of the course. The trainer may, at their professional discretion, amend, reorganize, expand, reduce, substitute, or otherwise modify any topic or sequence to accommodate participant experience, organizational requirements, available systems, changes in Microsoft Copilot Studio functionality, time constraints, or other relevant training considerations. Such adjustments may be made without prior notice where reasonably necessary to maintain the relevance, practicality, and effectiveness of the training.

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