

Agentic AI and Business Process Automation using Microsoft Copilot and Power Platform

Platform Focus: Microsoft Power Automate + Microsoft Copilot Studio + Microsoft 365 Copilot

Level: Intermediate

Delivery Mode: Instructor-led (Concepts + Demo + Guided Practice)

Duration: 4 Hours

Course Objectives

This course introduces participants to **AI-powered automation and AI agents** using Microsoft Power Automate and Copilot Studio.

Participants will learn to:

- Identify processes suitable for automation.
- Understand workflows, automation, and AI agents.
- Create basic automated workflows using Power Automate.
- Build a simple AI agent using Copilot Studio.
- Connect agents with knowledge and business processes.
- Test and improve agents.
- Apply basic security and governance practices.

Target Audience

- Managers and team leads
- AI champions
- IT professionals
- Data and AI teams
- Power users
- Employees interested in automation and AI agents

Prerequisites

- Basic Microsoft 365 Copilot knowledge
- Understanding of common business processes
- No coding required
- Power Automate and Copilot Studio access recommended

Tools & Platforms Required

- Microsoft 365 Copilot

- Microsoft Power Automate
- Microsoft Copilot Studio

Course Modules

Module 1 — Introduction to AI Automation and Agents

- Automation vs AI automation
- What is an AI agent?
- Copilot vs agents
- Prompt vs workflow vs agent
- Common business automation scenarios
- Identifying suitable processes

Task: Identify one business process suitable for automation or an AI agent.

Module 2 — Introduction to Power Automate

- What is Power Automate?
- Cloud flows
- Triggers and actions
- Automated flows
- Instant flows
- Scheduled flows
- Connectors
- Conditions and approvals
- Using Copilot to create flows

Task: Create a simple automated cloud flow using Power Automate.

Module 3 — Business Process Automation

- Identifying repetitive processes
- Designing simple workflows
- Notifications and reminders
- Approval workflows
- Connecting Microsoft 365 applications
- Human approval in automated processes
- Monitoring flow execution

Task: Build a business workflow such as:

Request → Approval → Notification → Follow-up

Module 4 — Introduction to Microsoft Copilot Studio

- What is Copilot Studio?
- Understanding AI agents
- Agent instructions
- Topics and conversations
- Knowledge sources
- Suggested prompts
- Tools and actions
- Testing agents

Task: Create a basic AI agent in Copilot Studio.

Module 5 — Building a Knowledge-Based AI Agent

- Defining the agent's purpose
- Writing clear agent instructions
- Adding approved knowledge sources
- Grounding agent responses
- Creating conversation topics
- Adding tools and actions
- Handling questions outside the agent's scope

Task: Build a simple knowledge agent such as:

- HR Policy Assistant
 - IT Support Assistant
 - Procurement Assistant
 - Project Knowledge Assistant
 - Customer Service Assistant
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Module 6 — Connecting Agents with Automation

- Agents and business workflows
- Using actions from agents
- Connecting agents with Power Automate

- Triggering business processes
- Human-in-the-loop workflows
- Notifications and approvals
- Agent-to-workflow scenarios

Task: Design an **Agent → Automation → Human Approval** workflow.

Module 7 — Testing, Security and Governance

- Testing agent responses
- Checking accuracy
- Managing knowledge sources
- User permissions
- Protecting sensitive information
- Human review and escalation
- Agent ownership
- Monitoring and maintenance
- Responsible AI considerations

Task: Test the agent with:

- 5 valid questions
 - 1 out-of-scope question
 - 1 sensitive-information scenario
 - 1 escalation scenario
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Course Outcome

Participants will be able to understand and create **basic AI-powered workflows and AI agents** using Power Automate and Microsoft Copilot Studio, while applying appropriate testing, security, governance, and human oversight.

Optional Microsoft Credential: Microsoft Applied Skills — **Build an agent in Microsoft Copilot Studio.**