Microsoft

Copilot Studio and Azure AI Workshop

Lab 5: Use Azure Document Intelligence to extend your agent

Hands-on Lab Step-by-Step Guide

April 2025

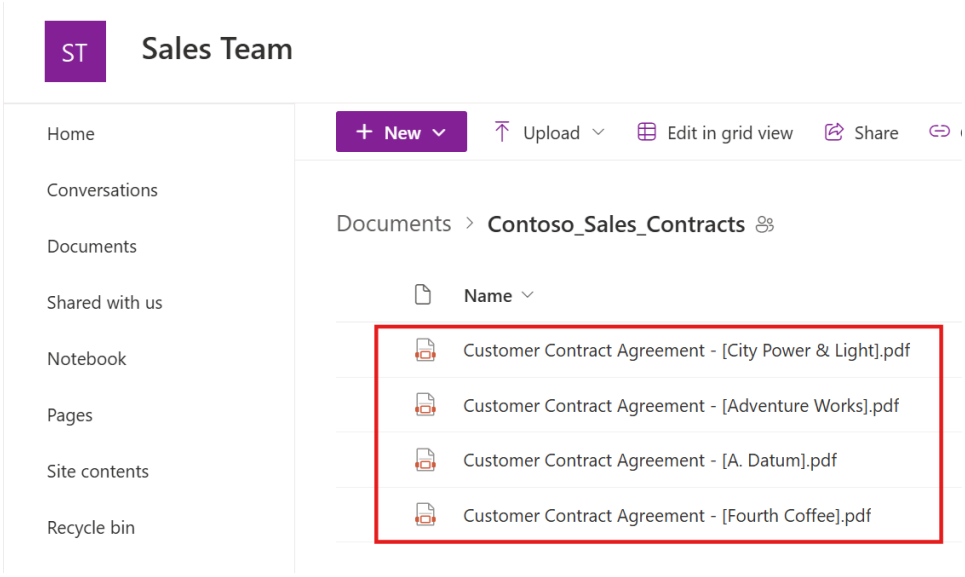
Lab Overview and Pre-requisites

Learning Objectives

This lab is designed to extend our existing Sales Buddy agent with Azure Document Intelligence. We will update users in Teams when new sales contacts are posted to Azure and use a pre-built model to capture information about the sales contract to update the user in the Sales Buddy agent.

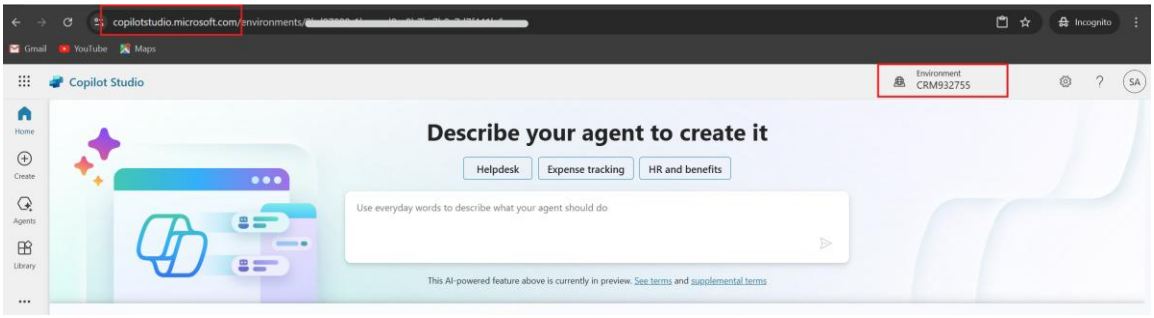
Pre-requisites

- You will need credentials to a demo tenant that has Copilot Studio and AI Builder trial enabled.
- You will need to have created the Sales Buddy agent from Lab 1 and have set up in the Teams channel.
- You will need to have downloaded Lab 5 assets which include 4 sales contracts in .pdf format.

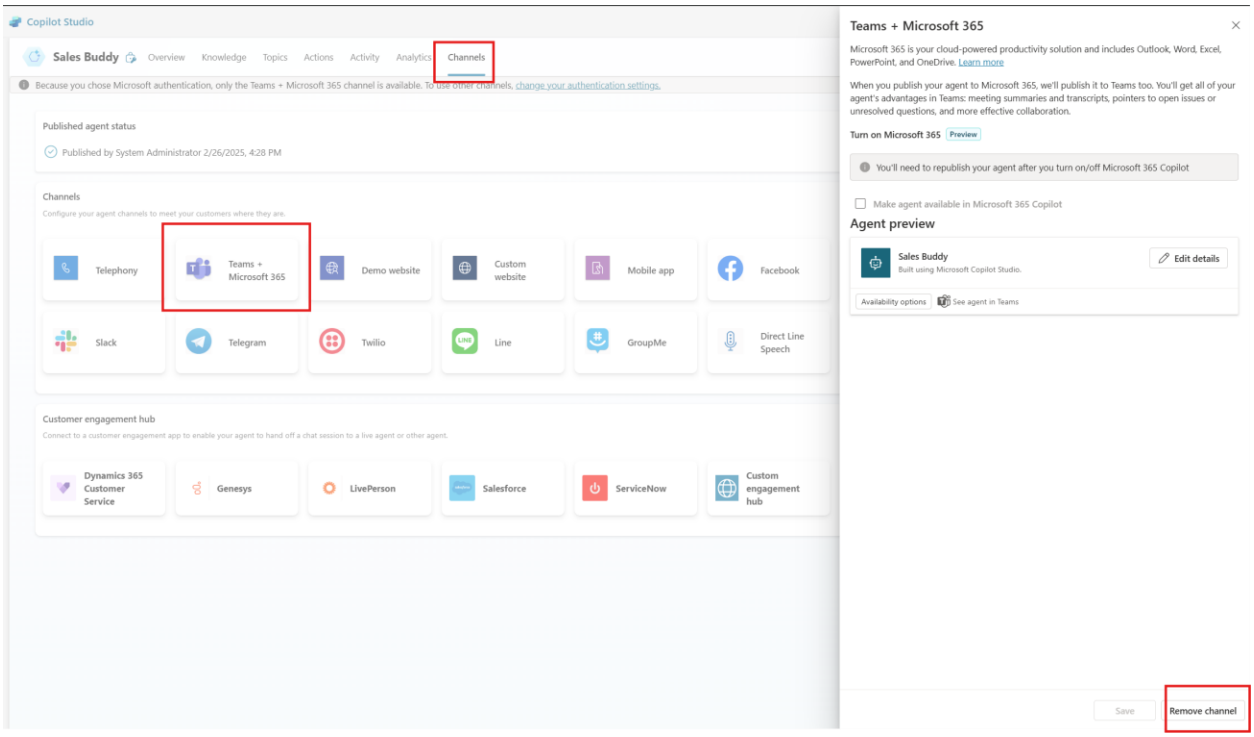


Lab 5: Create an agent and add Knowledge sources

1. Browse to copilotstudio.microsoft.com to open Copilot Studio using the credentials of your demo tenant. You may need to use an In Private or Incognito browser to access your demo tenant. Confirm you are in the correct environment.



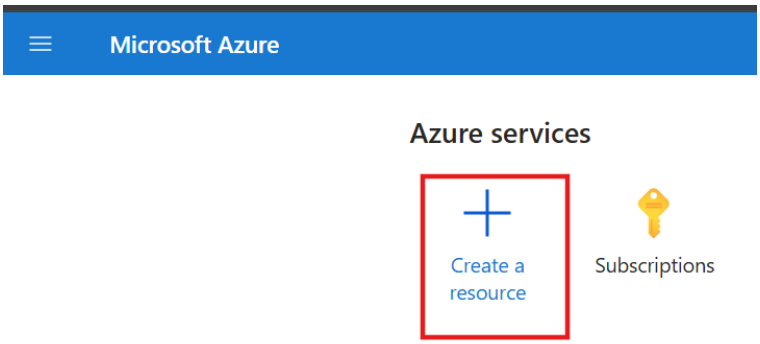
2. Confirm you have the Sales Buddy agent completed from the previous labs or imported in from the lab resources. Also, confirm you have published the agent to the Teams + Microsoft 365 Channel. *You will see the Remove from Channel option if you have already published to this channel. If not, follow the steps in Lab 4.*



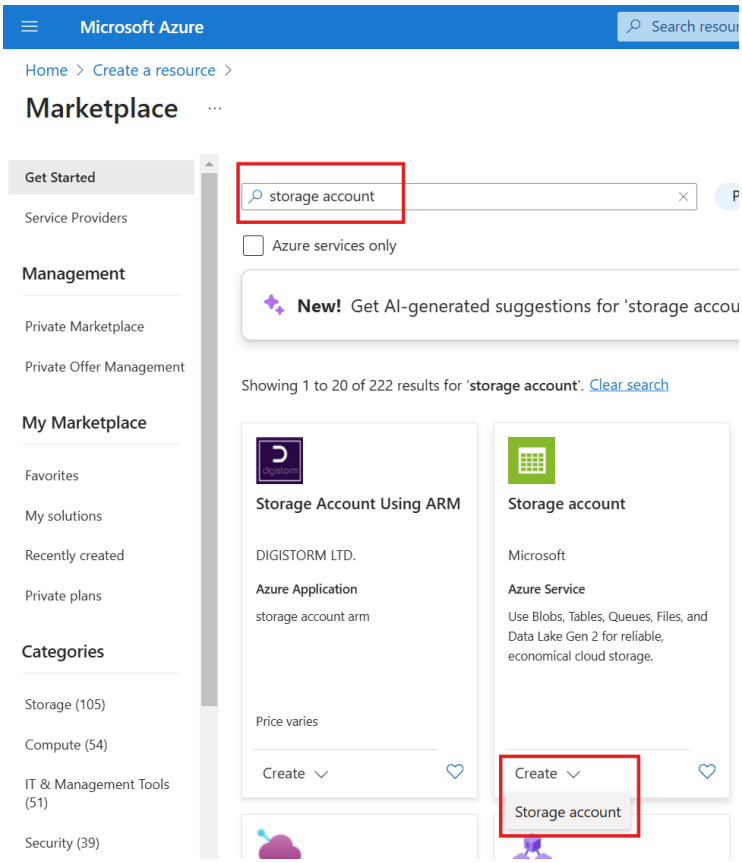
3. Now we will create some Azure resources to extend our Sales Buddy agent. Sign in to your Azure portal (portal.azure.com) using the credentials from the subscription you

will be utilizing for the labs. Most of the services offer a free tier if you haven't used them before if you are not using the free trial. If you are using the free trial, create an Azure subscription for the resources.

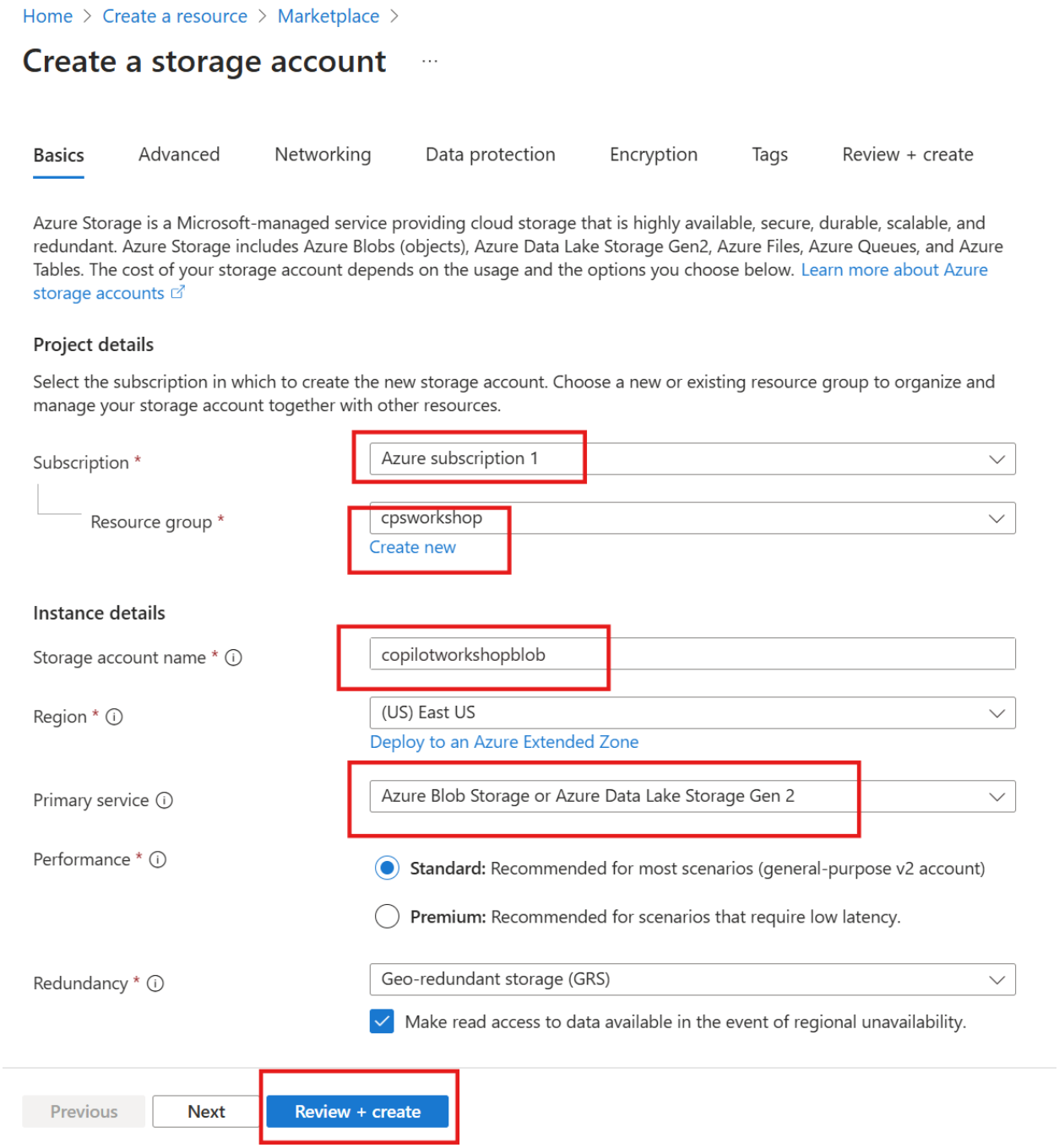
4. Once you are in the portal with the subscription you want to use for the labs or have created a new subscription, click + Create Resource.



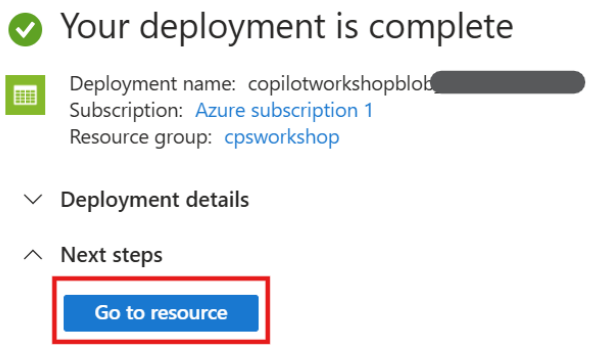
5. Search for storage account. Click on Create drop down for the Microsoft Storage account resource and choose Storage Account.



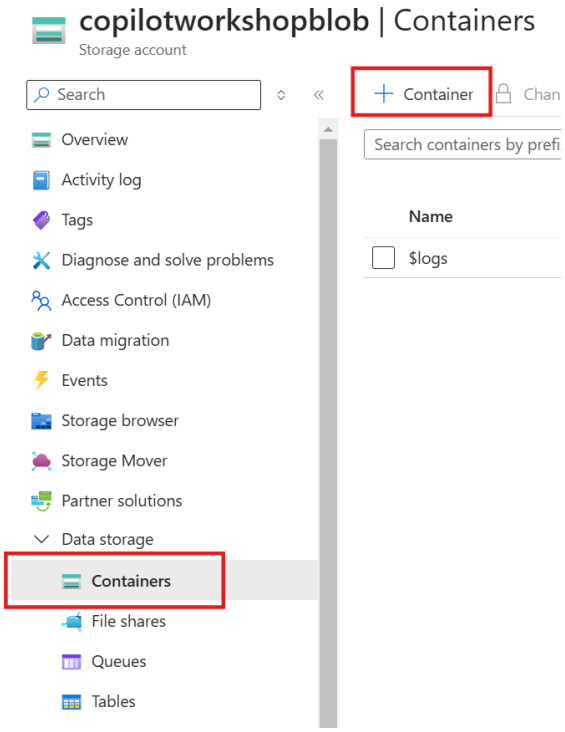
6. Ensure you have the correct subscription selected and **configure the storage account** as per the screen shot below. We recommend creating a new Resource Group for the workshop resources. You will need to have a unique Resource Group and Storage account name. Click **Review + create** and then **Create** again. *Remember your Resource Group and Storage Account Name.*



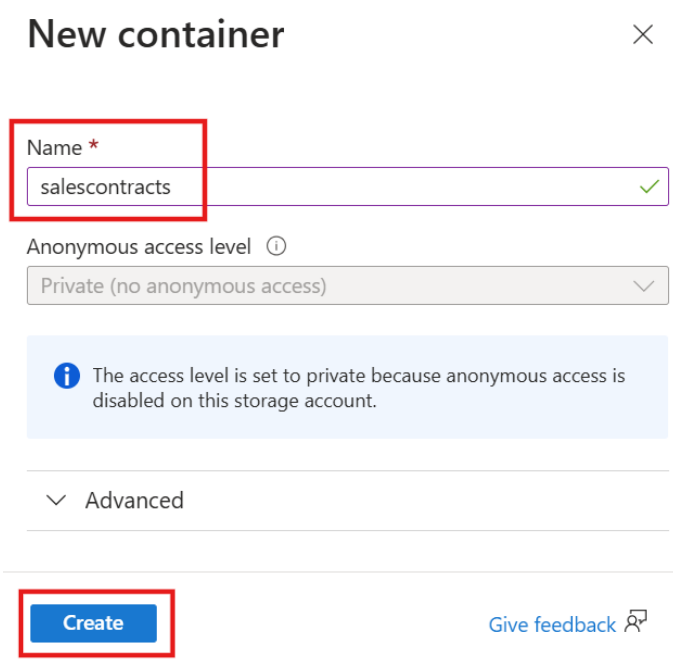
7. Once the storage account is created, create a container for the sales contracts. Click **Go to Resource** to configure.



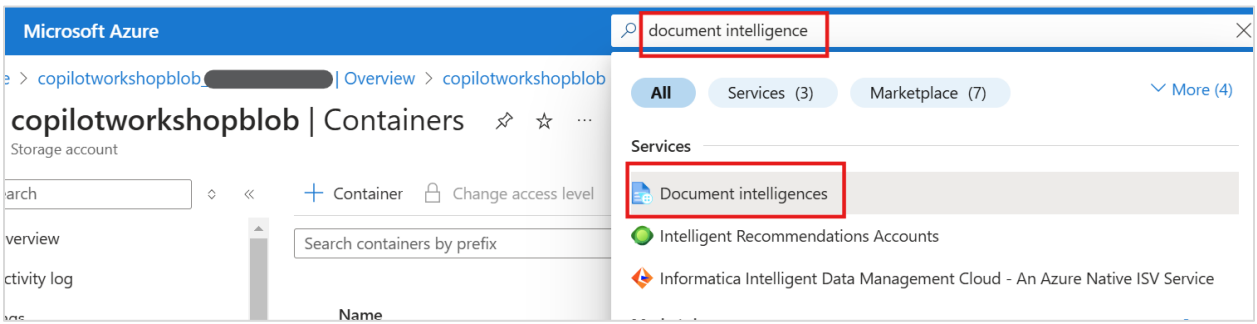
8. Under **Data Storage**, click **Containers** and then **+ Container.**



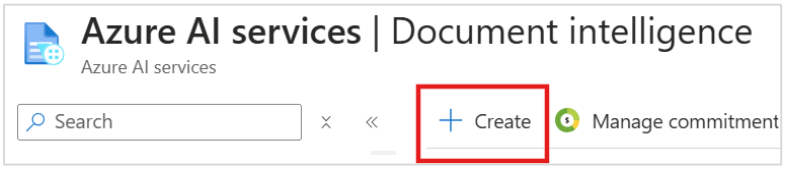
9. Type **salescontracts** for the **Name** and then click **Create.**



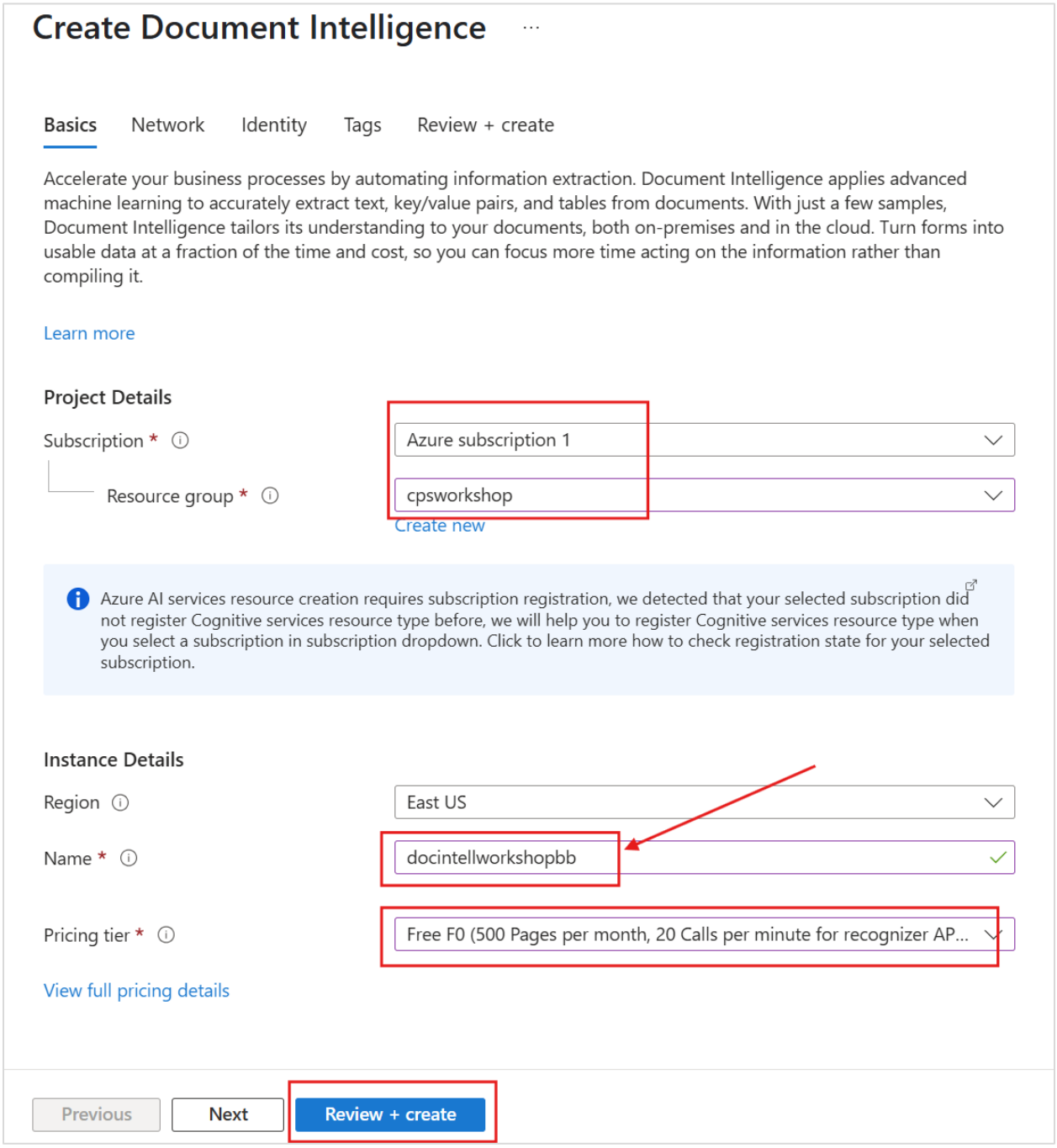
10. Create the Document Intelligences (Form Recognizer) resource. Type **document intelligence** in the search bar and select **Document Intelligences**.



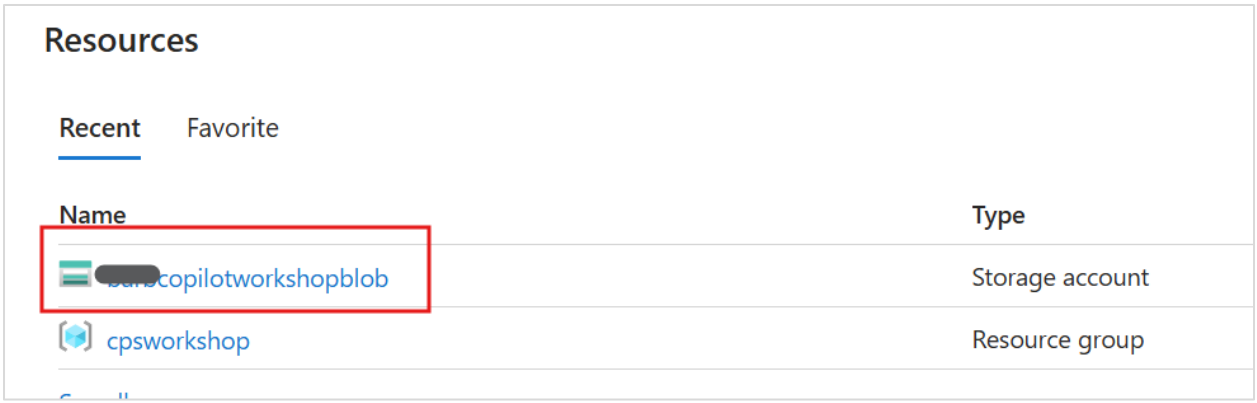
11. Click **+ Create.**



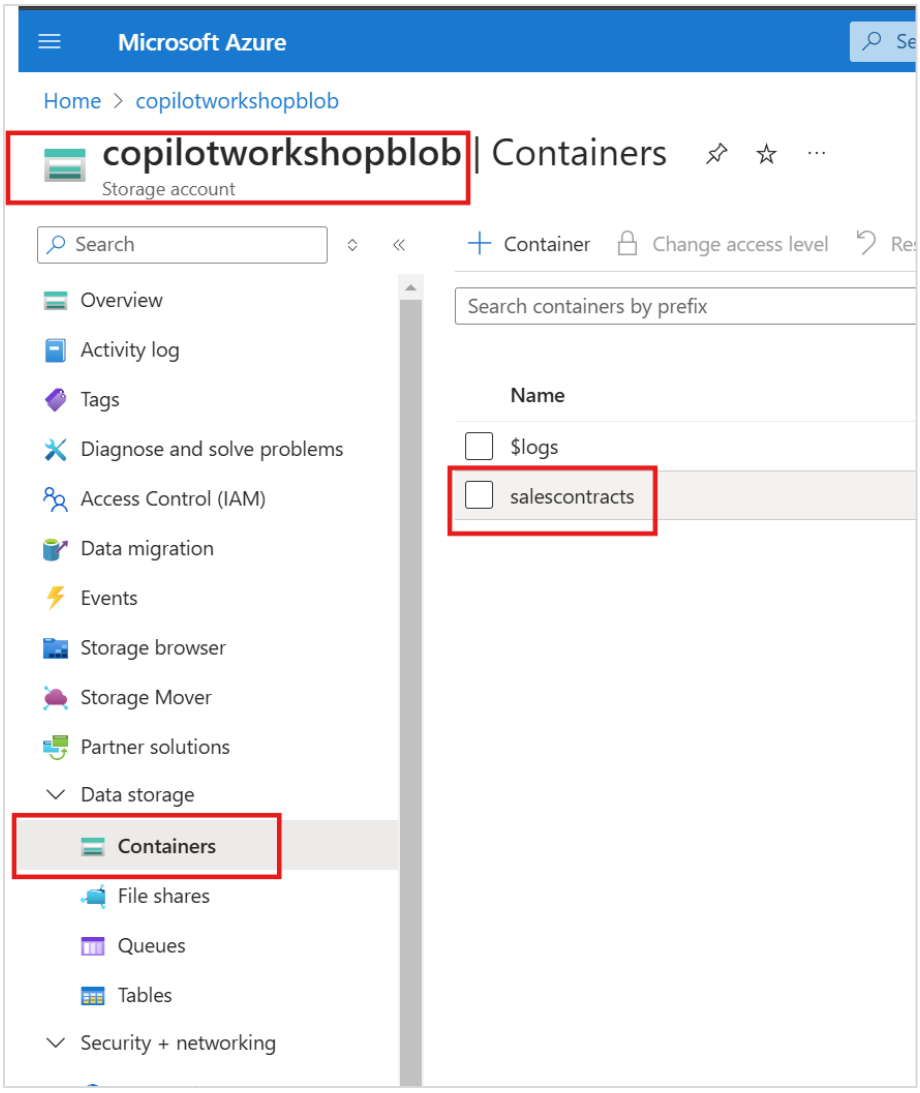
12. Ensure you have the correct subscription and then **configure the resource** based on the screen shot below. *Use the Resource group you created previously and choose the Free Tier **F0** if available.* Click **Review + Create** and then **Create**.



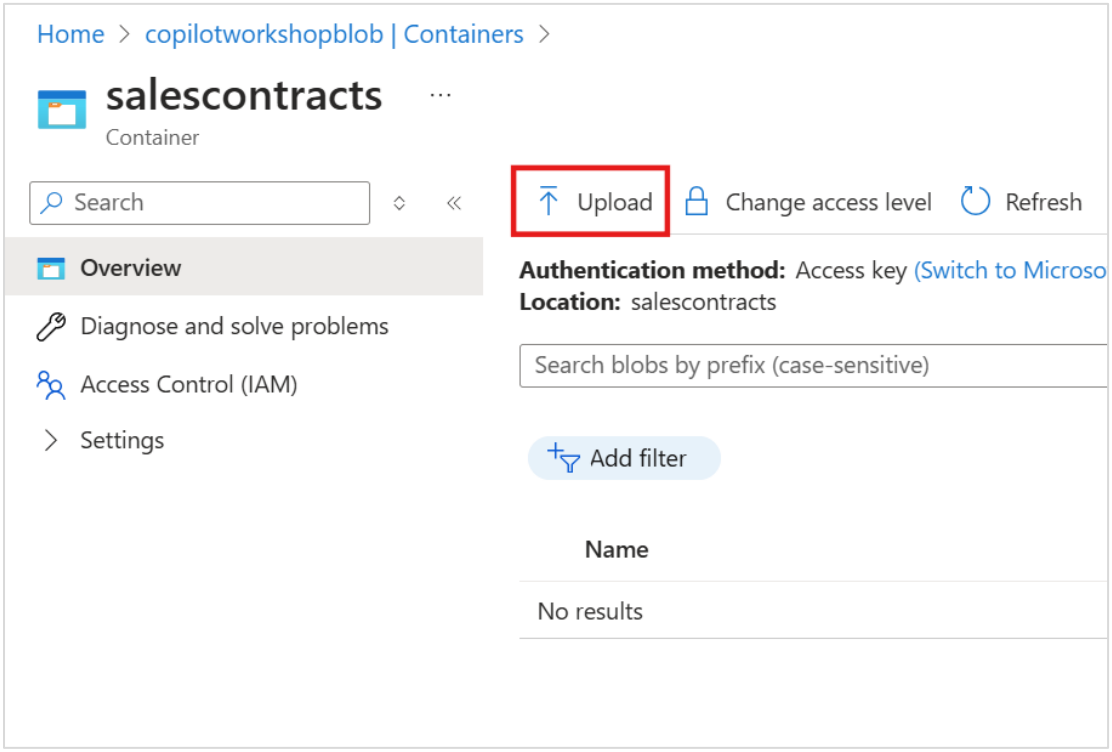
13. We will need to upload 1 of our sales contracts to our storage container that is available in Lab 5 assets folder. Click Home and then select your blob storage account.



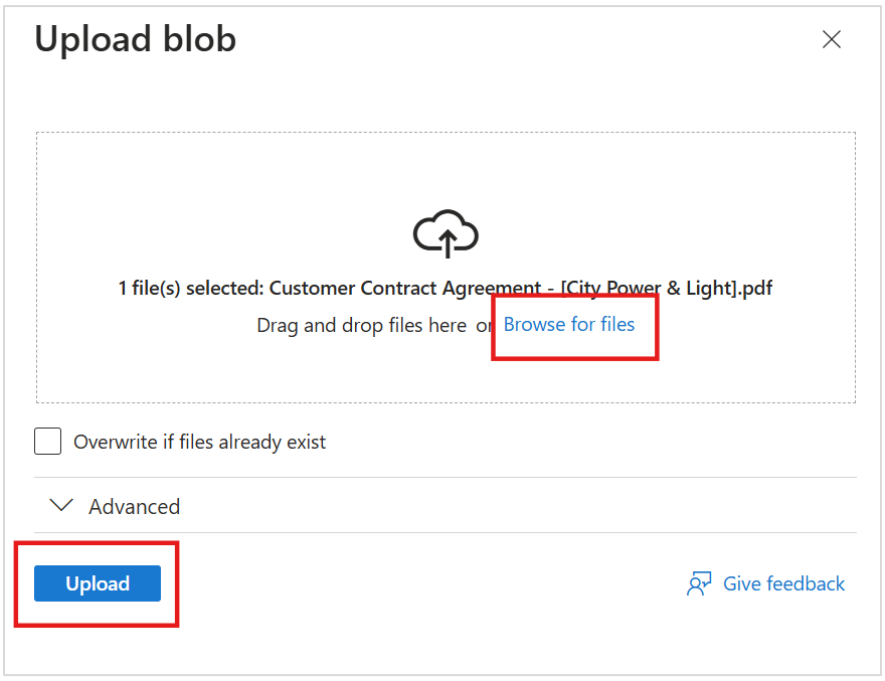
14. In the Storage Account, click on **Data storage** and then **Containers**. Select the **salescontracts** container.



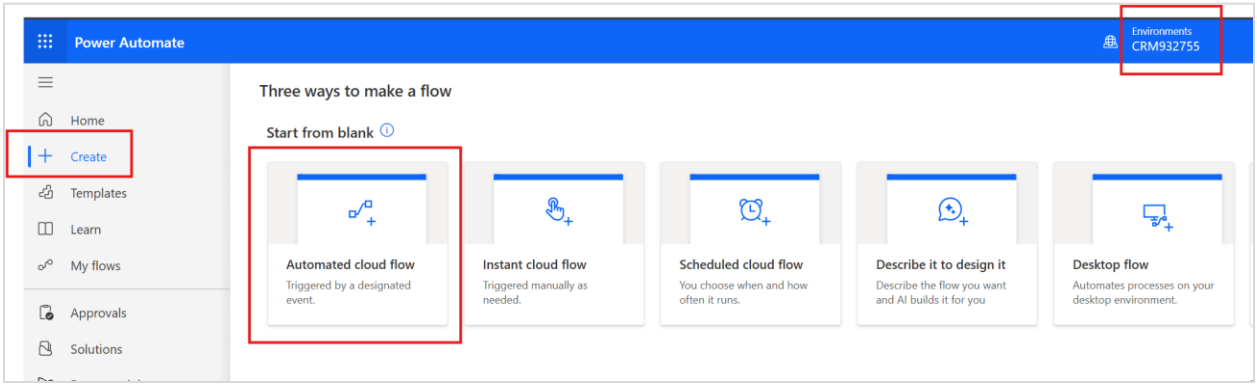
15. Click **Upload.**



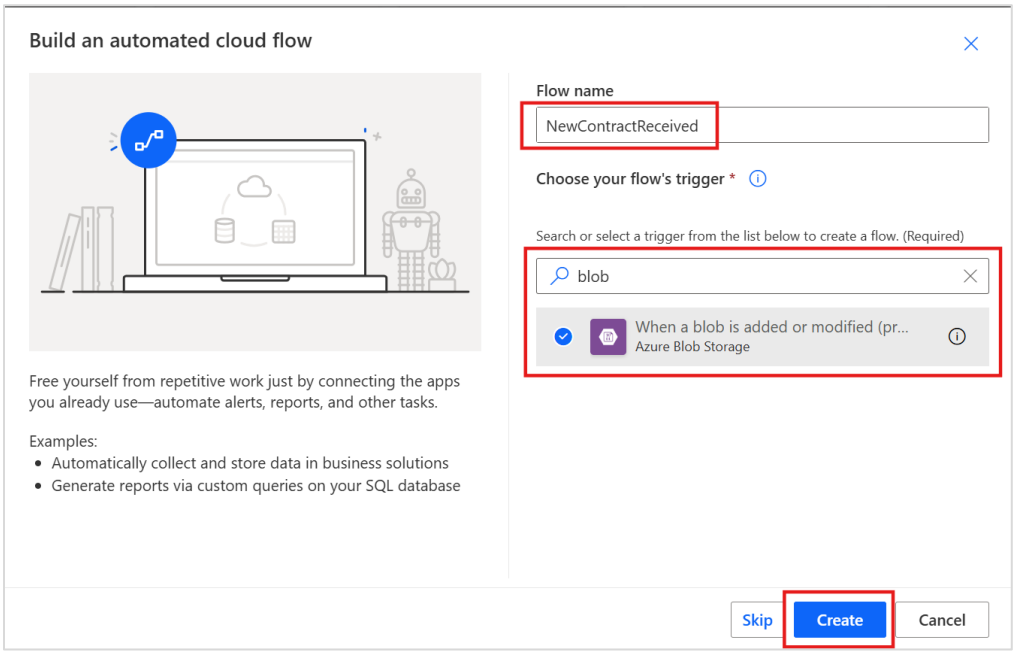
16. Click **Browse for files** and upload 1 of the sales contracts from the **Lab 5 assets** and click **Upload.**



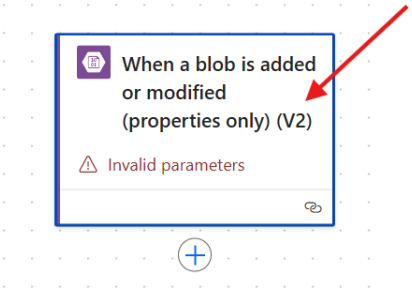
17. Build Power Automate flow to extract data from our sales contract from Document Intelligence resource. Browse to **make.powerautomate.com** using your lab credentials. Ensure you are in the correct **Environment.** Click **+ Create** in the left-hand menu then select the **Automated cloud flow** from **Start from blank**.



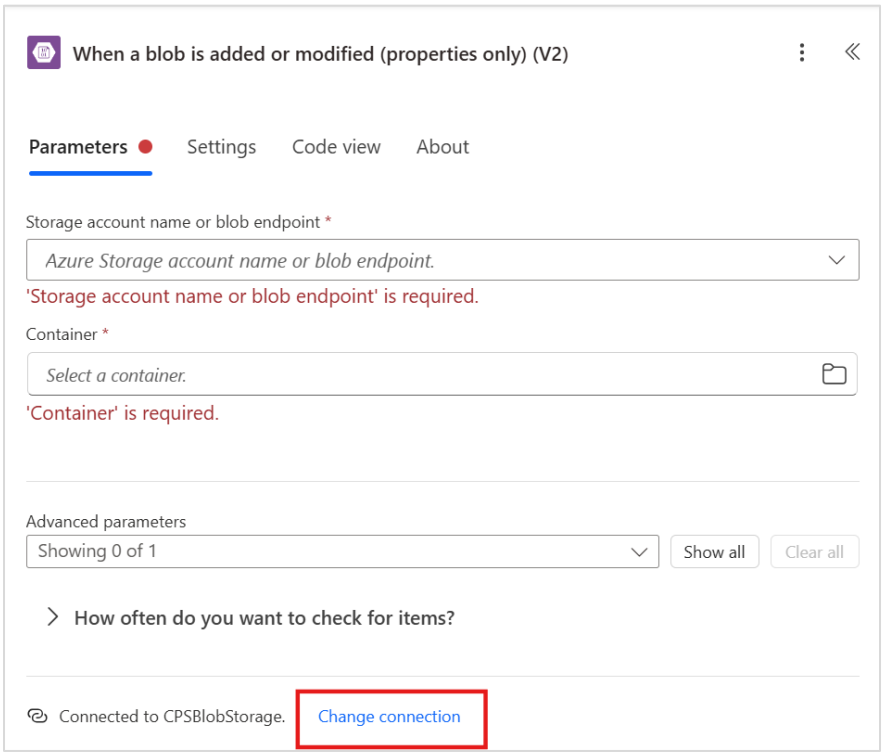
18. Name the flow **NewContractReceived.** For the trigger, search for **blob** and select **When a blob is added or modified** then click **Create**.



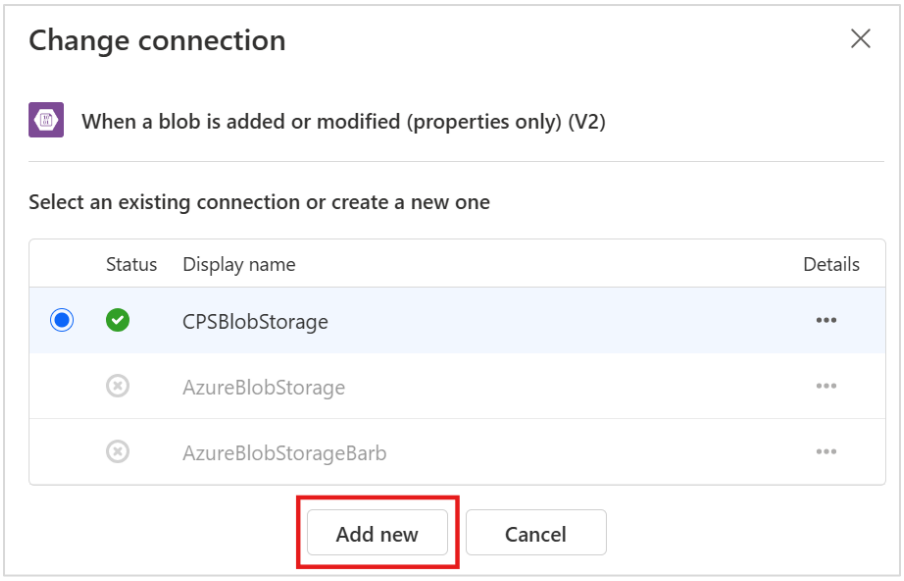
19. Click the **When a blob is added or modified step** to open the configuration screen.



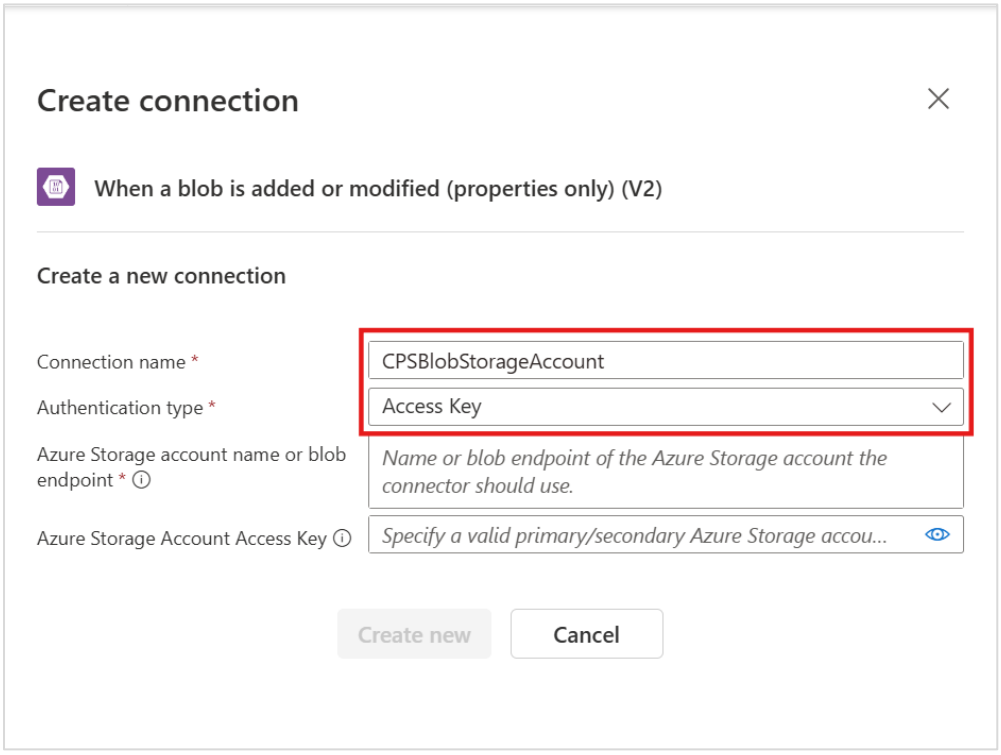
20. We need to set up a connection to our Azure blob storage. Click on **Change connection.**



21. Click **Add new** to add a new connection.

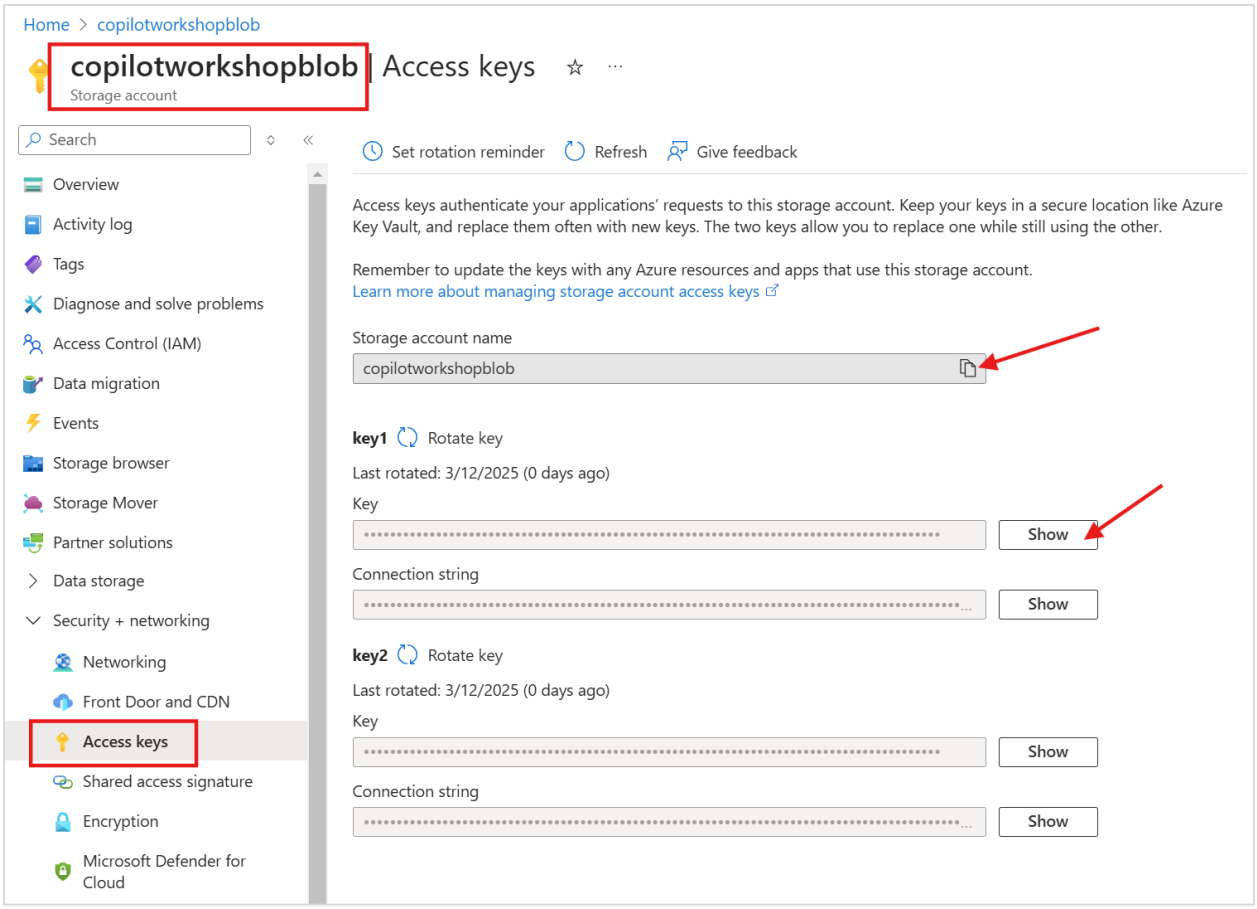


22. We will use the Access Key as the method of Authentication which we need to get form our Azure portal. First, name the connection (ex. CPSBlobStorageAccount), click on the drop down in Authentication type and select Access key.

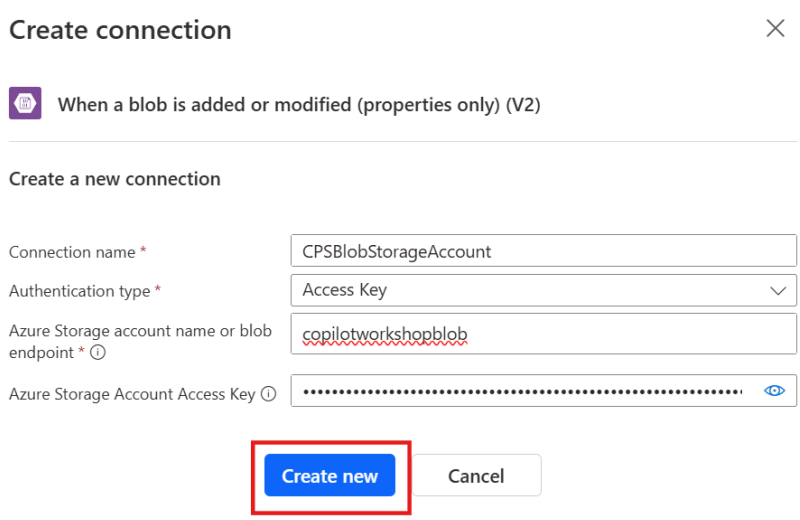


23. For the Azure storage account name and access key, we need to gather that information from the Azure portal. Keep this tab open and click on the Azure portal

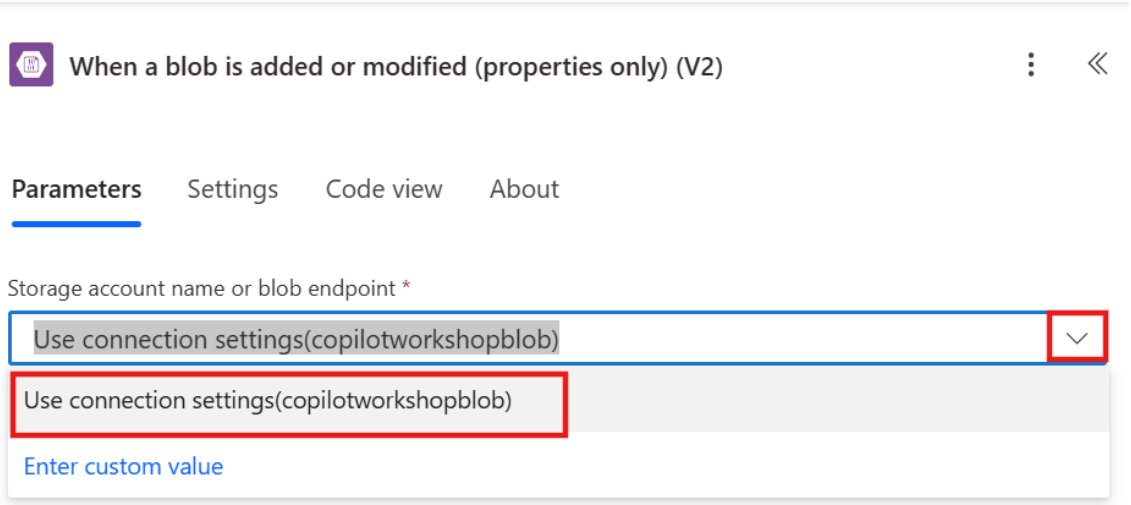
tab or open a new tab and browse to portal.azure.com. Goto your blob storage account you created, click on Security + Networking, then Access keys. Copy the Storage account name and then paste back in our connection creation in the Power Automate flow under Azure Storage account name. Show the Key1 and then copy that and paste in the connection creation in the Power Automate flow in the Azure Storage Account Access Key.



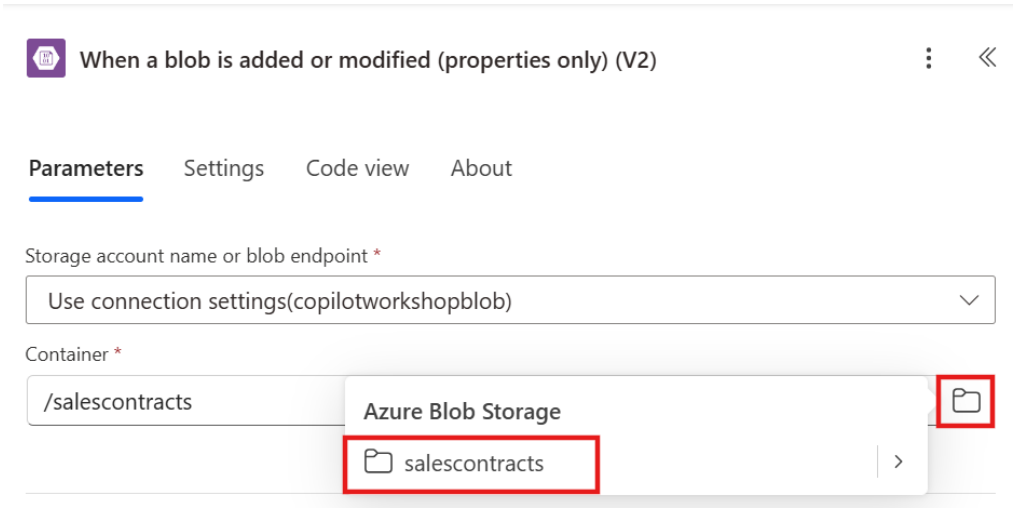
24. You can now click Create new to create the connection.



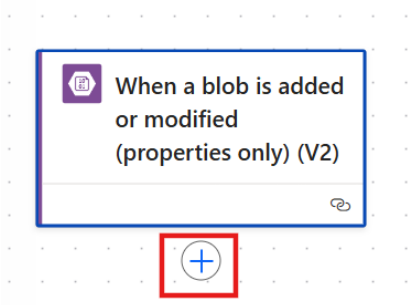
25. We can now use the connection we created. Click on the drop down for the **Storage account name or blob endpoint** and select the connection you just created.



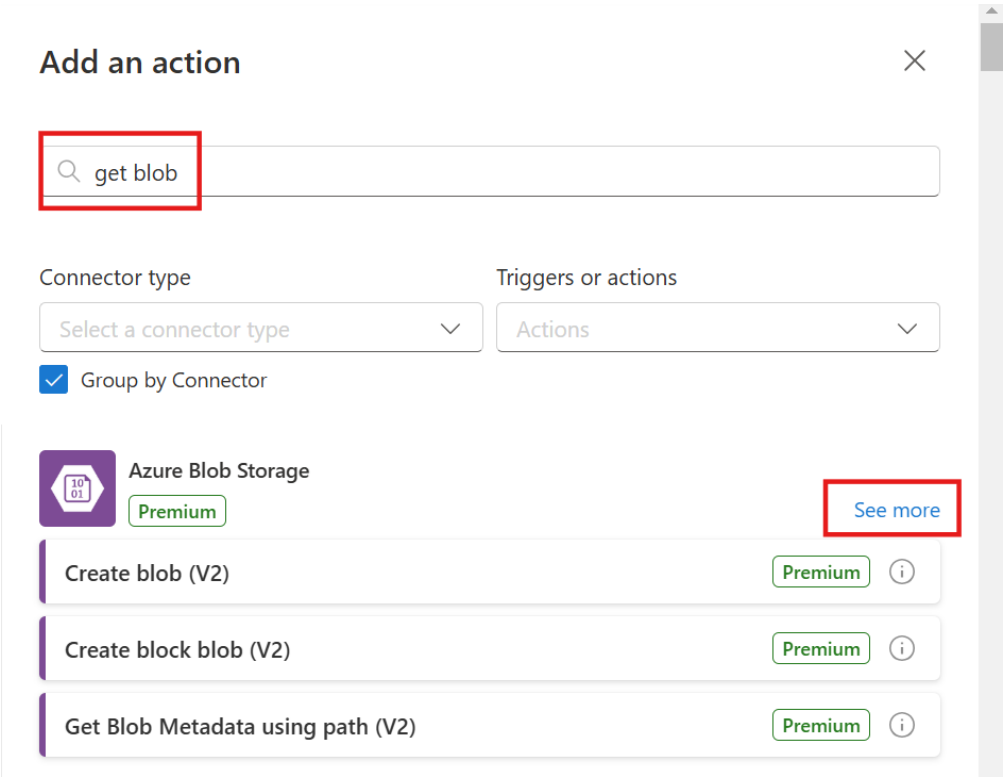
26. Click on the **folder icon** for **Container** and you should see your salescontract container. Select the **salescontract container**.



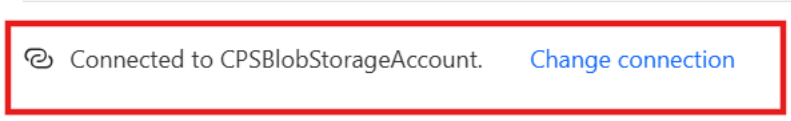
27. Add a new step. Click on the + under the **When a blob is added or modified** step to add a new step.



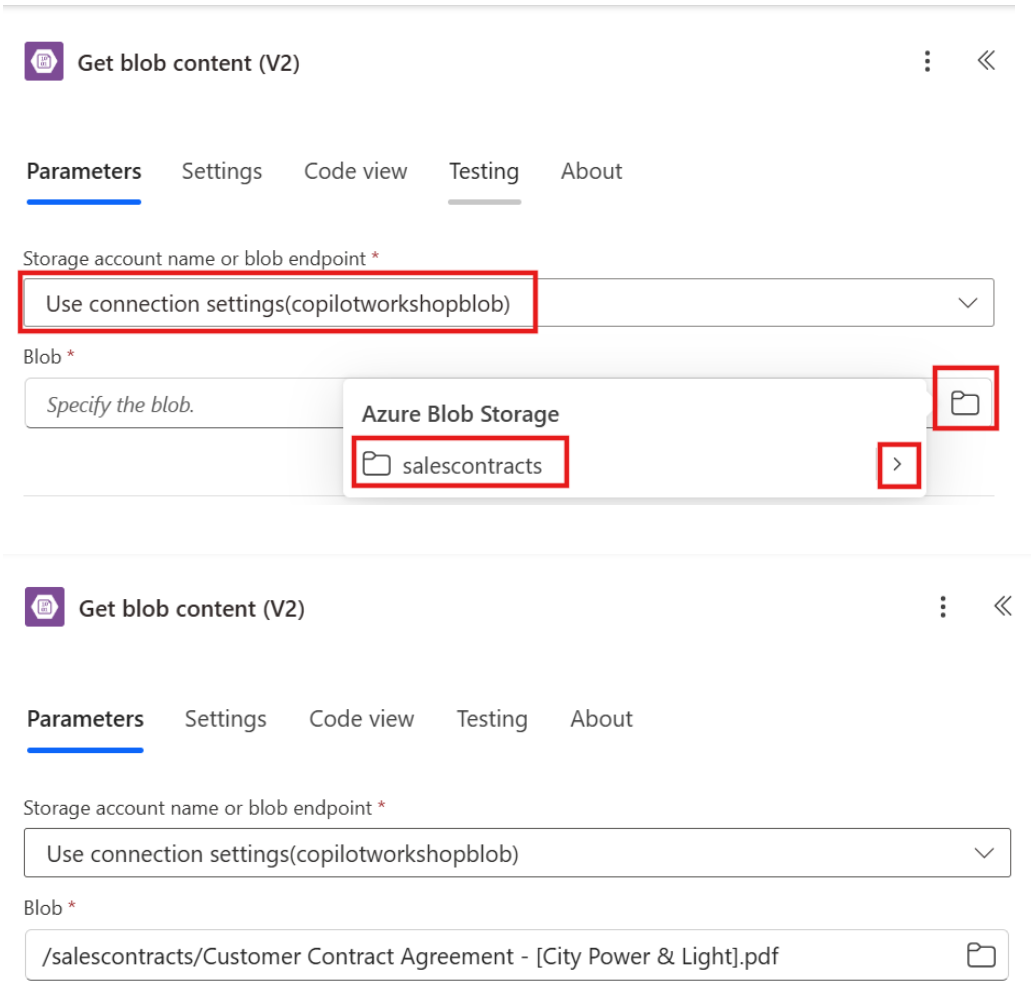
28. Search for **get blob** to get a list of the Azure Blob Storage actions. You may need to click on the **see more** to get the entire list. Select **Get blob content (V2)**



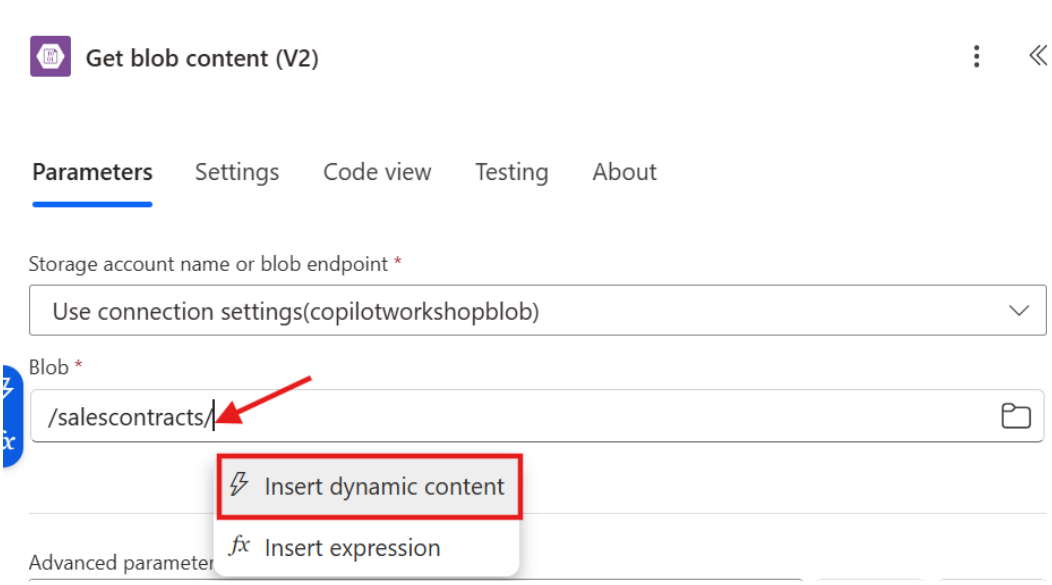
29. Confirm you are using the same connection as the previous step. If not, change the connection.



30. Use the connection for the Storage account name similar to the last step. Click on the folder icon for Blob and select salescontracts. Click on the arrow and select the document we have uploaded to that container from the lab assets.

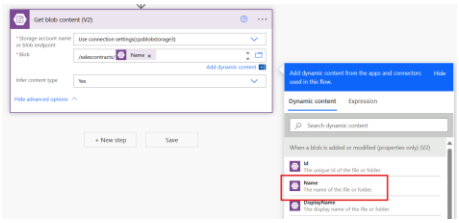


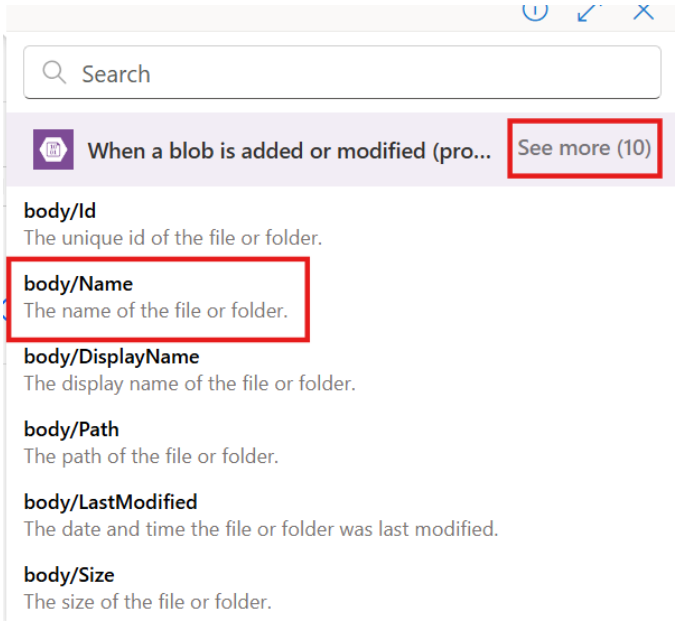
31. We want to use the dynamic content from the previous step to set the folder path. So, **delete** the specific contract name and then **select Insert Dynamic content**.

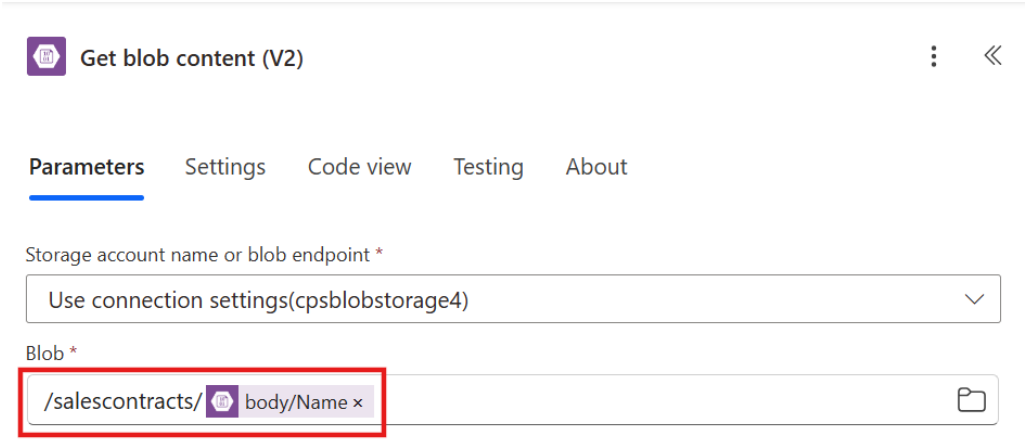


32. Select **body/Name** from the **When a blob is added or modified** step. You may need to click the **See more** to find that field.

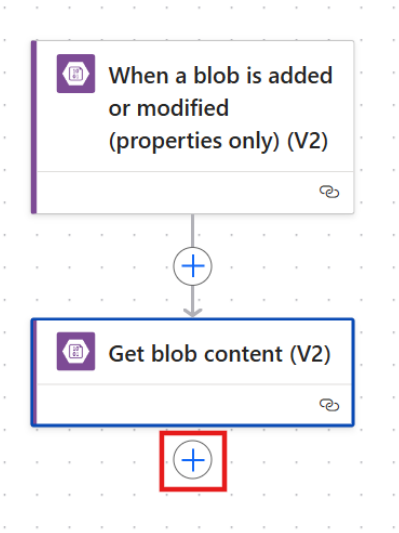
In Classic mode, the dynamic content is **Name**.



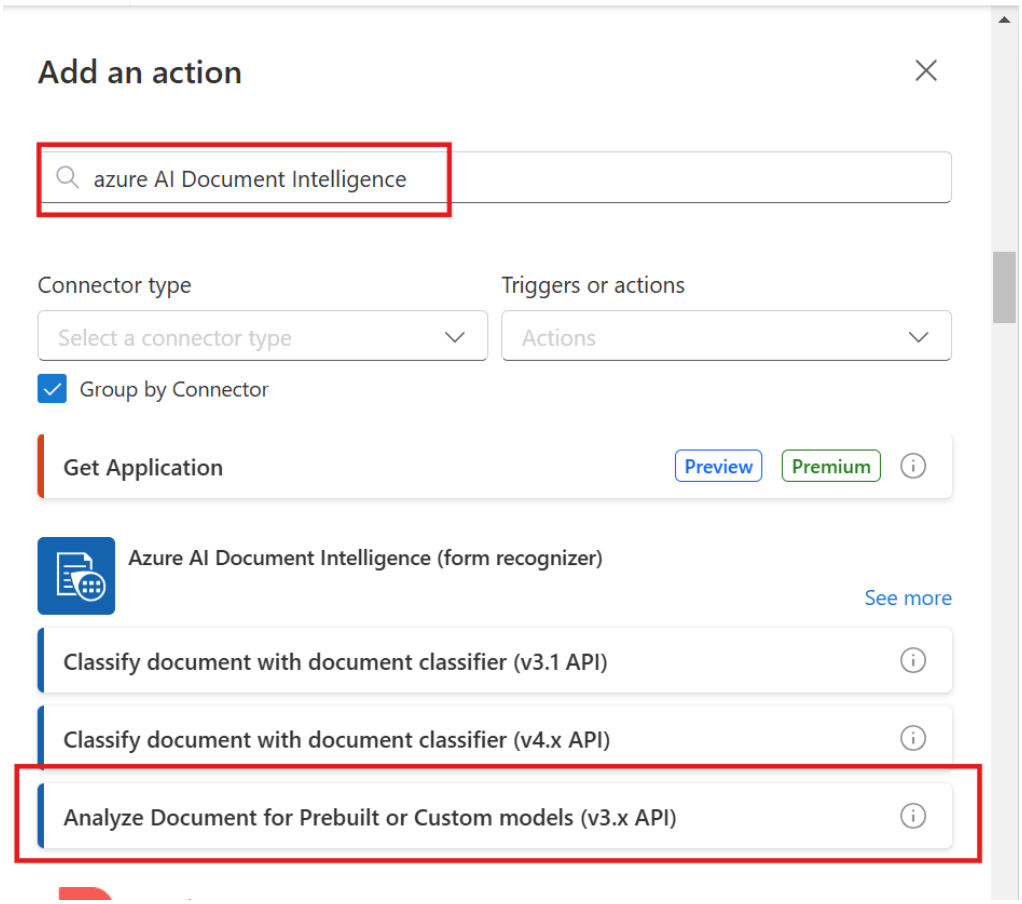




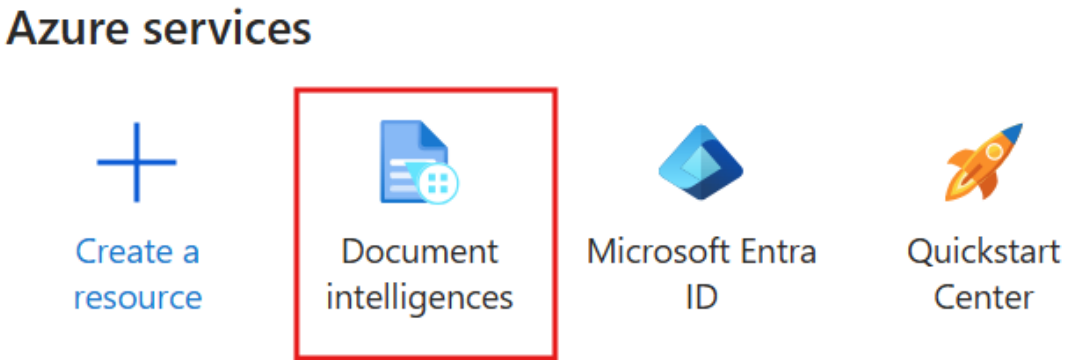
33. Click on the + under **Get blob content** to add a new step.



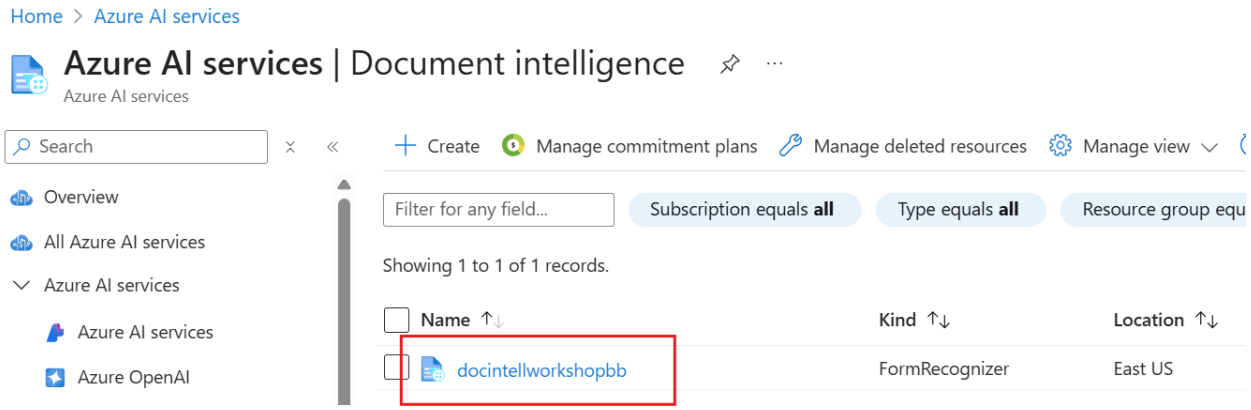
34. **Search** for **Azure AI Document Intelligence**. Scroll down to the **Azure AI Document Intelligence (form recognizer)** and select **Analyze Document for Prebuilt or Custom models (v3.x API)**.



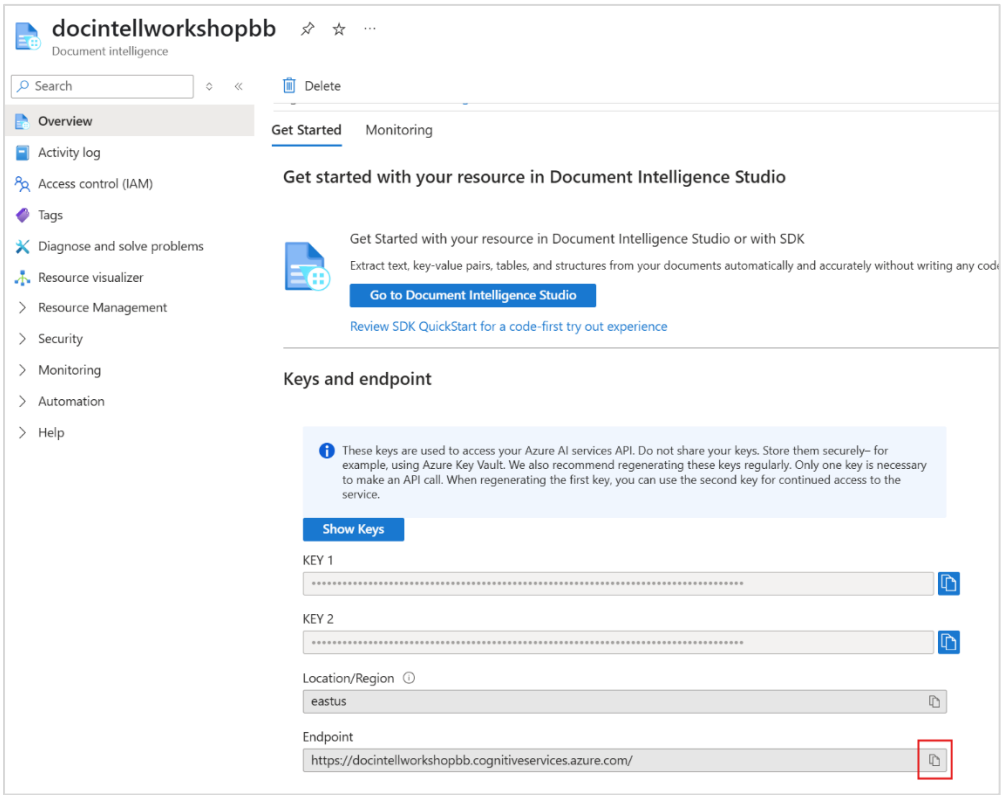
35. We will create a new connection to our Azure Document Intelligence service. Keeping this tab open, click on the **Azure portal tab** and select **Document Intelligences**.

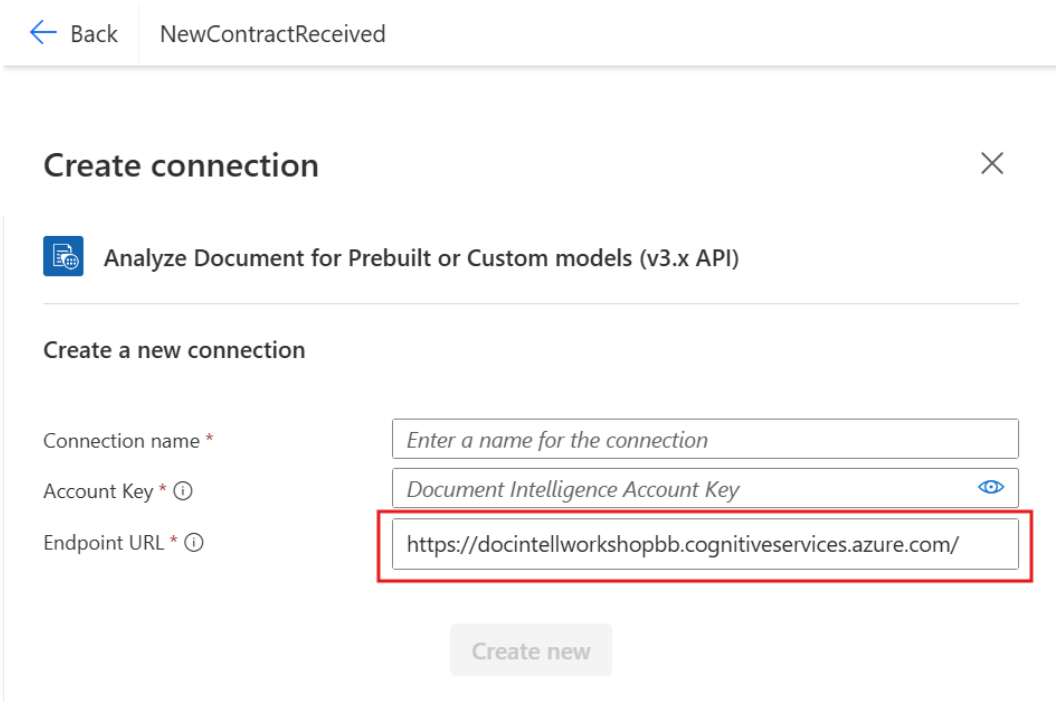


36. Select the **Document Intelligence service you created previously**.

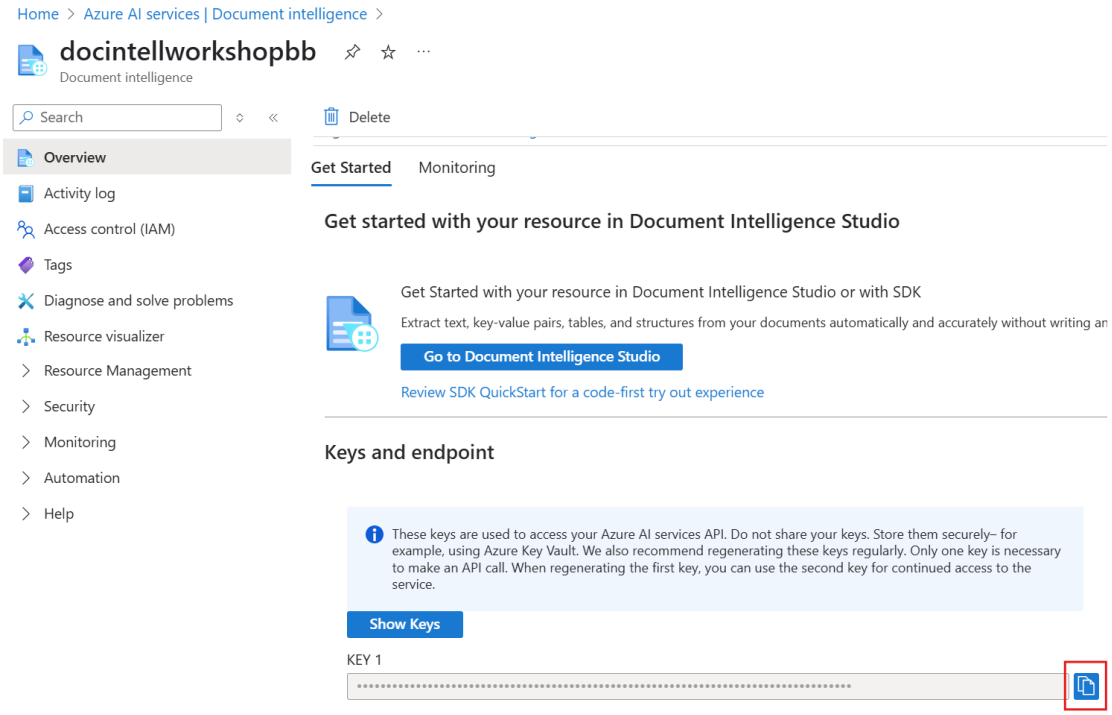


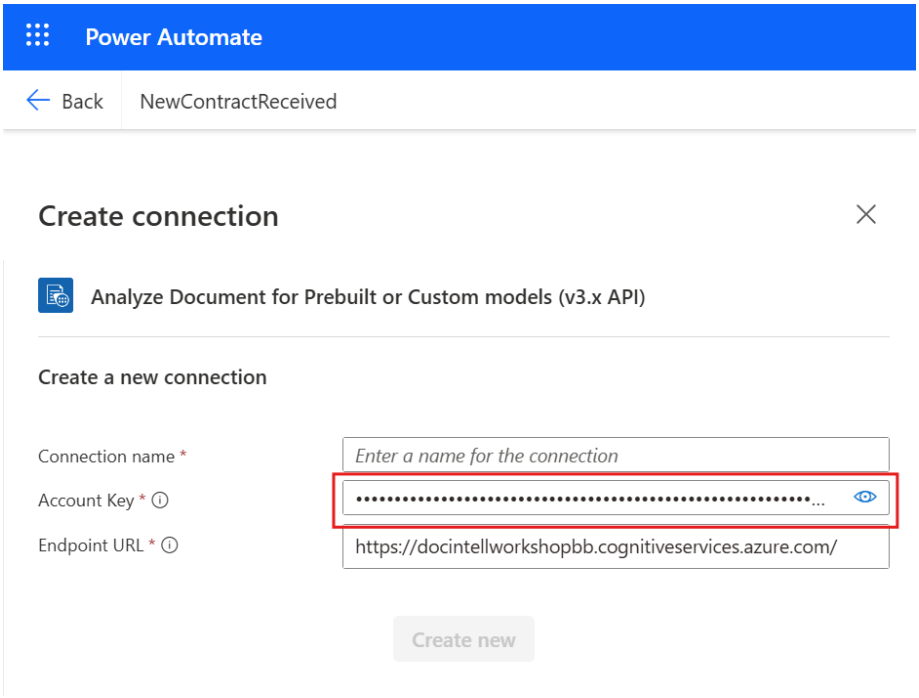
37. **Copy** the **Endpoint** and **paste** in the Power Automate tab where we are creating our connection under **Endpoint URL**.



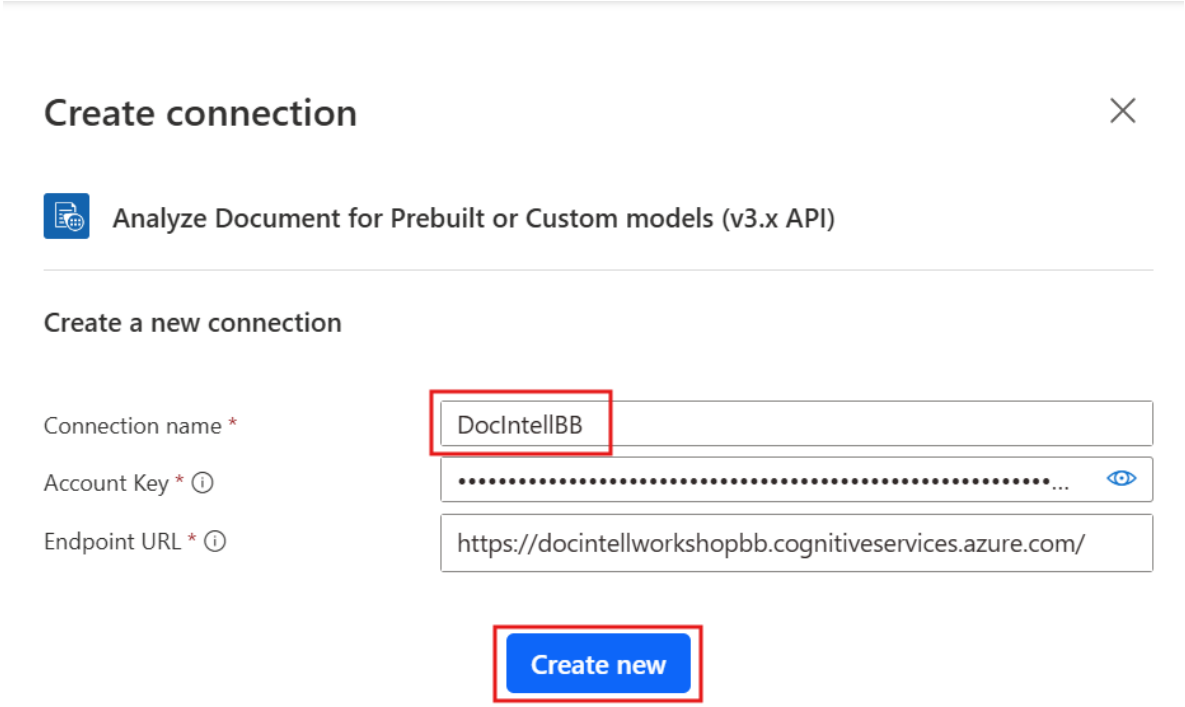


38. Click back to the **Azure portal tab** and **copy Key1** and **paste** in the Power Automate tab in the new Connection under **Account Key**.





39. Enter a unique Connection name and click Create new.

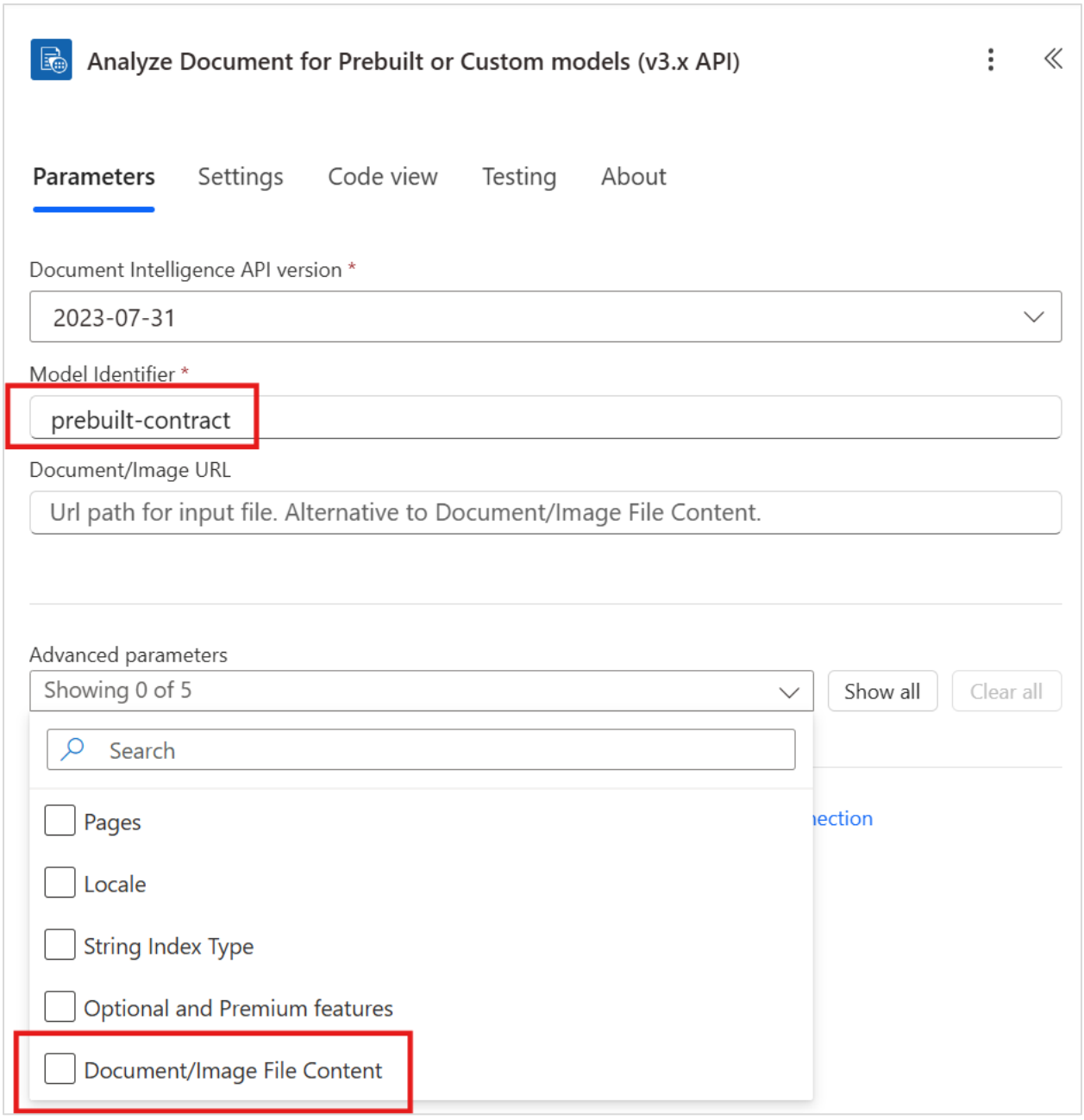


40. We will use one of the many pre-built models to ingest our contract so we don't have to train the model.

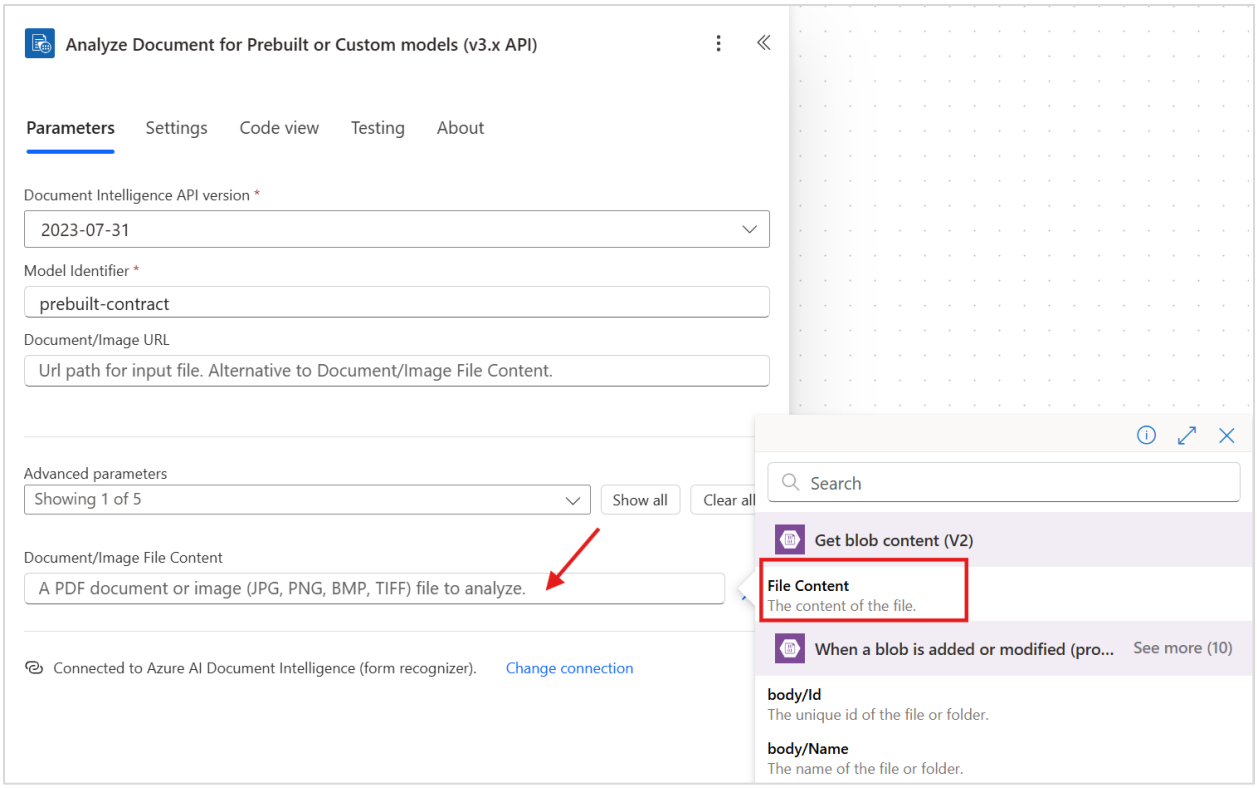
    You can read more about all the other pre-built models in the link below.

    Choose the best Document Intelligence model for your applications and workflows. - Azure AI services | Microsoft Learn

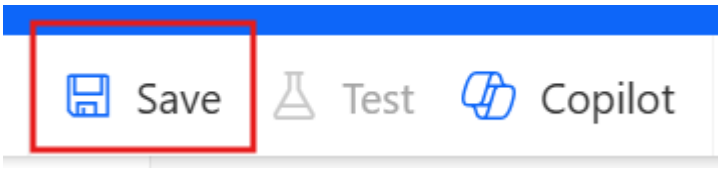
    In the **model Identifier** field, type **prebuilt-contract**. Expand **Advanced parameters** and select **Document/Image file content.** Click in the Advanced parameters again to close the selection.



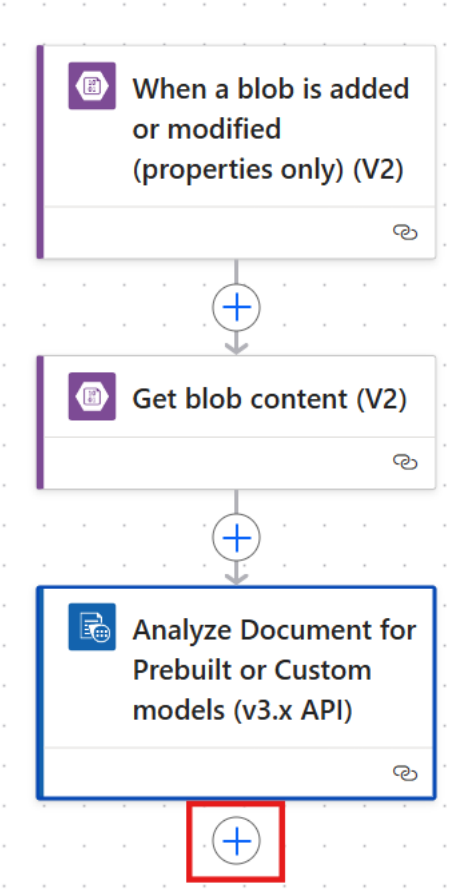
41. Click in the **Document/Image File Content field** and click on the **Dynamic Content** and add the **File Content** from the **Get blob content (V2)** step.



42. Save your flow. Click on **Save** in the upper right corner of the ribbon.

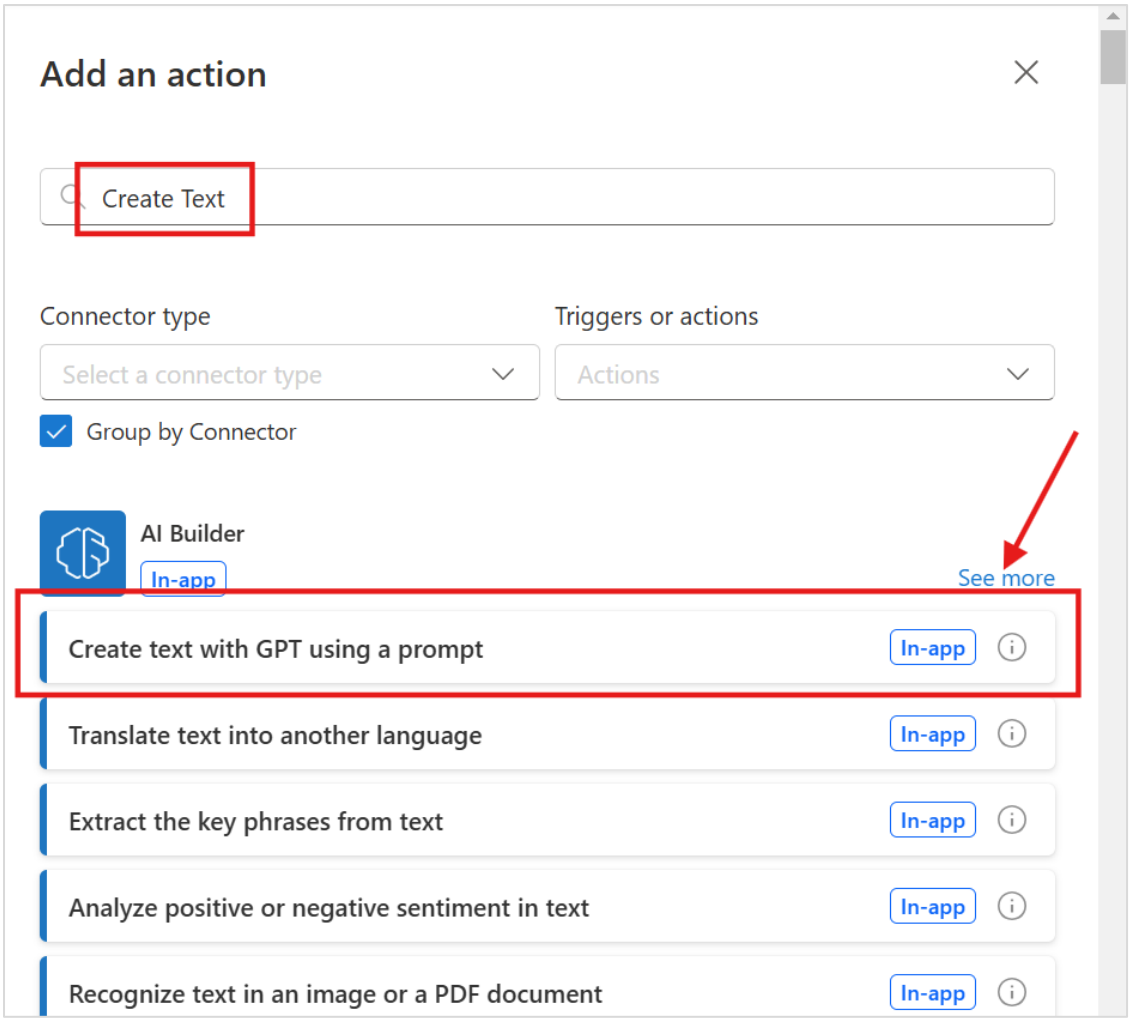


43. Click on **+** to add a new step.

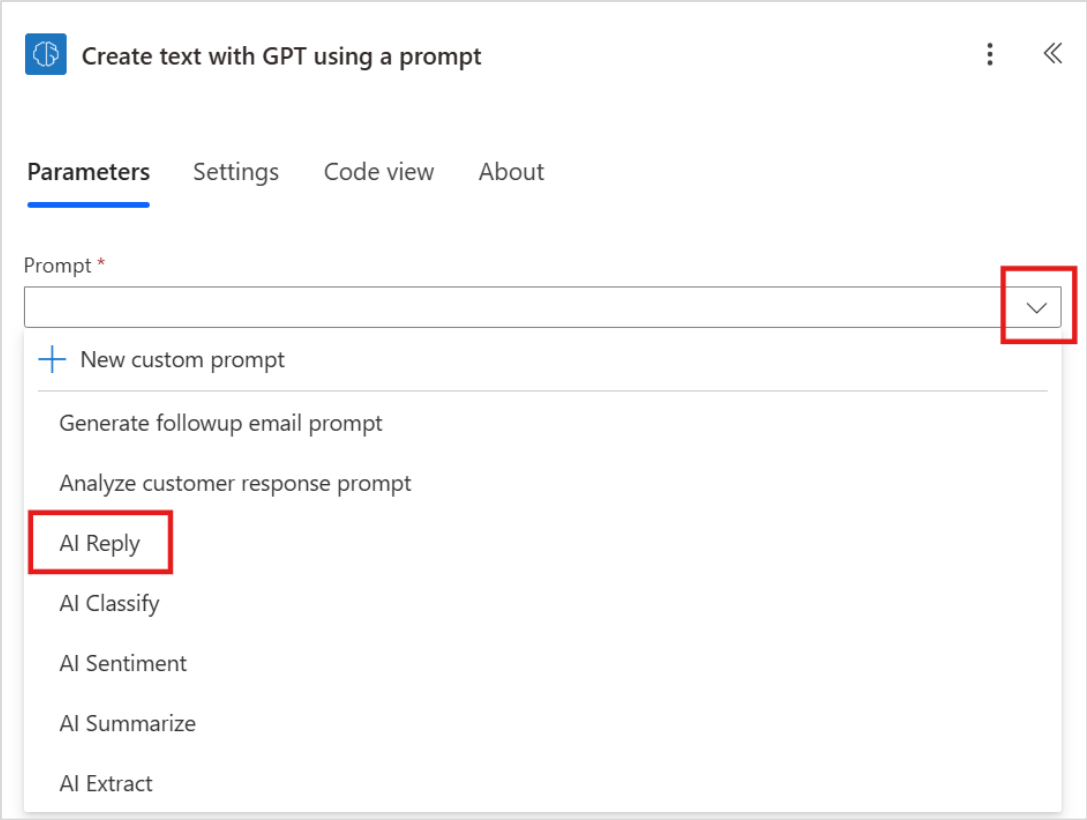


44. This step with use AI Builder to create a response we can send to Teams that will pull specific information about the contract such as contract number and contract value from the Document Intelligence step.

    Search for **Create text** and select **Create text with GPT using a prompt** (If you don't find this, please search and select **Run a Prompt)** from the **AI Builder** section. *You may need to select See more if you don't see that option.*

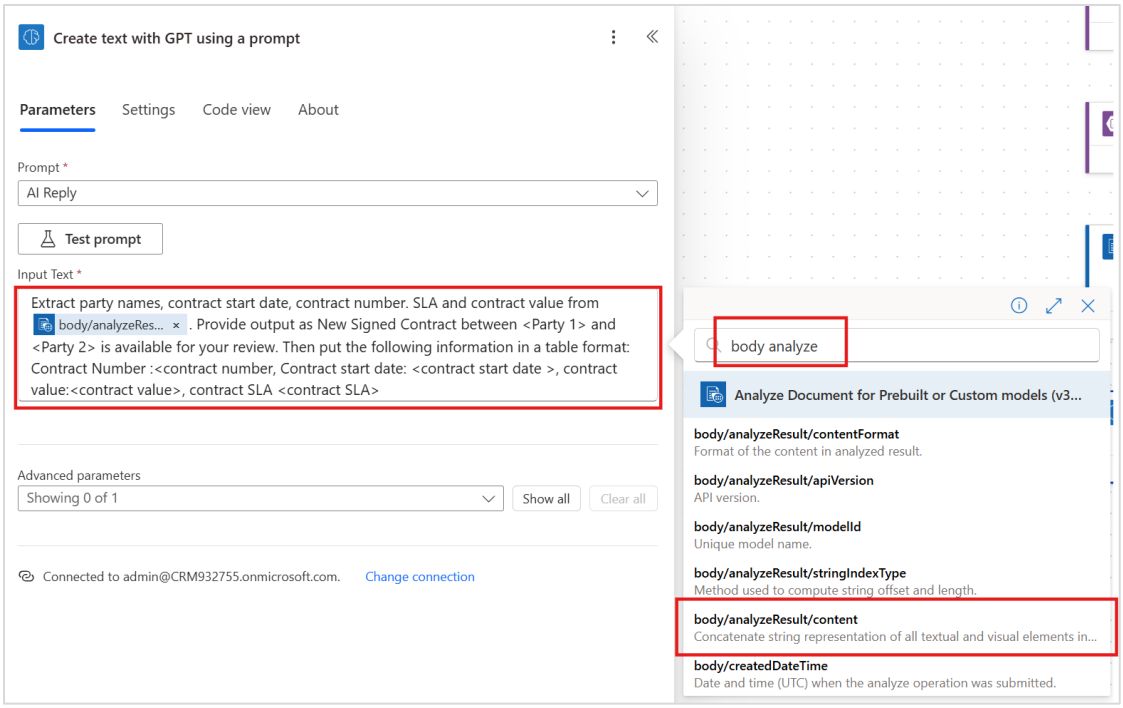


45. In the **Prompt** field, click the **drop-down** and select **AI Reply**.

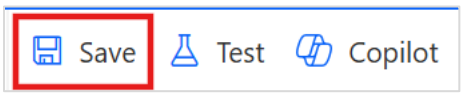


46. Paste the following in the **Input text.** Replace the **highlighted text** with Dynamic Content – **body/analyzeResult/content** from the **Create text with GPT using a prompt** step. *You may need to click See more or search to find the correct dynamic content.*

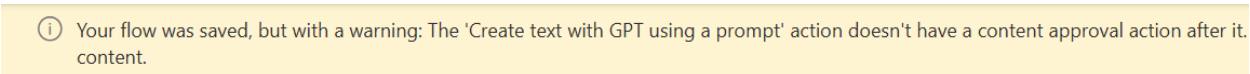
Input Text: *Extract party names, contract start date, contract number, SLA and contract value from **[Dynamic Content Here]**.*
Provide output as New Signed Contract between <Party 1> and <Party 2> is available for your review. Then put the following information in a table format: Contract Number : <contract number>, Contract start date: <contract start date>, contract value:<contract value>, contract SLA <contract SLA>



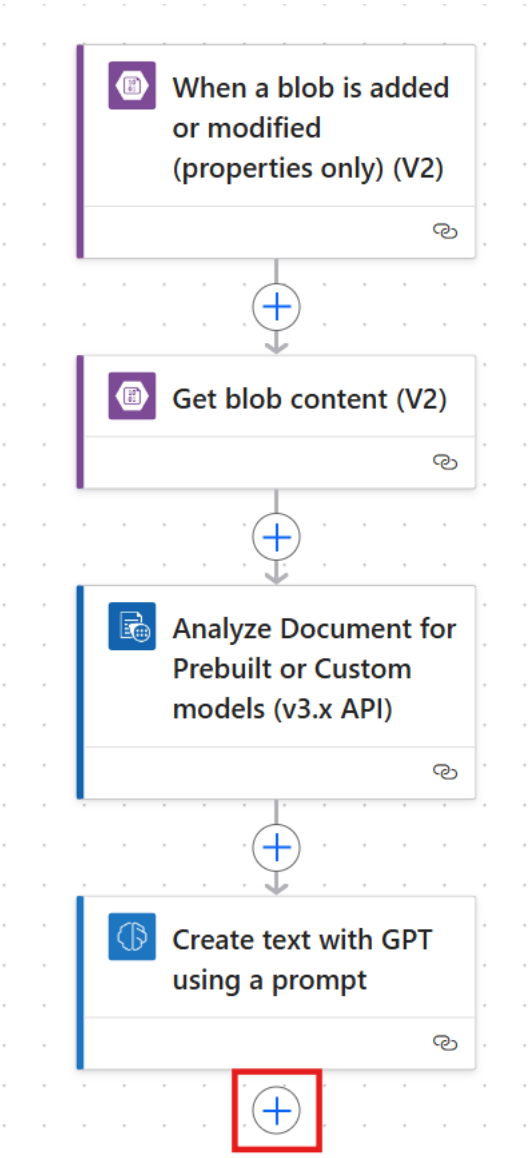
47. Save your flow. Click on **Save** in the upper right corner.



*You may get a warning message that we don't have a step for content approval. You can simply click on the **X** to cancel the warning pop-up.*

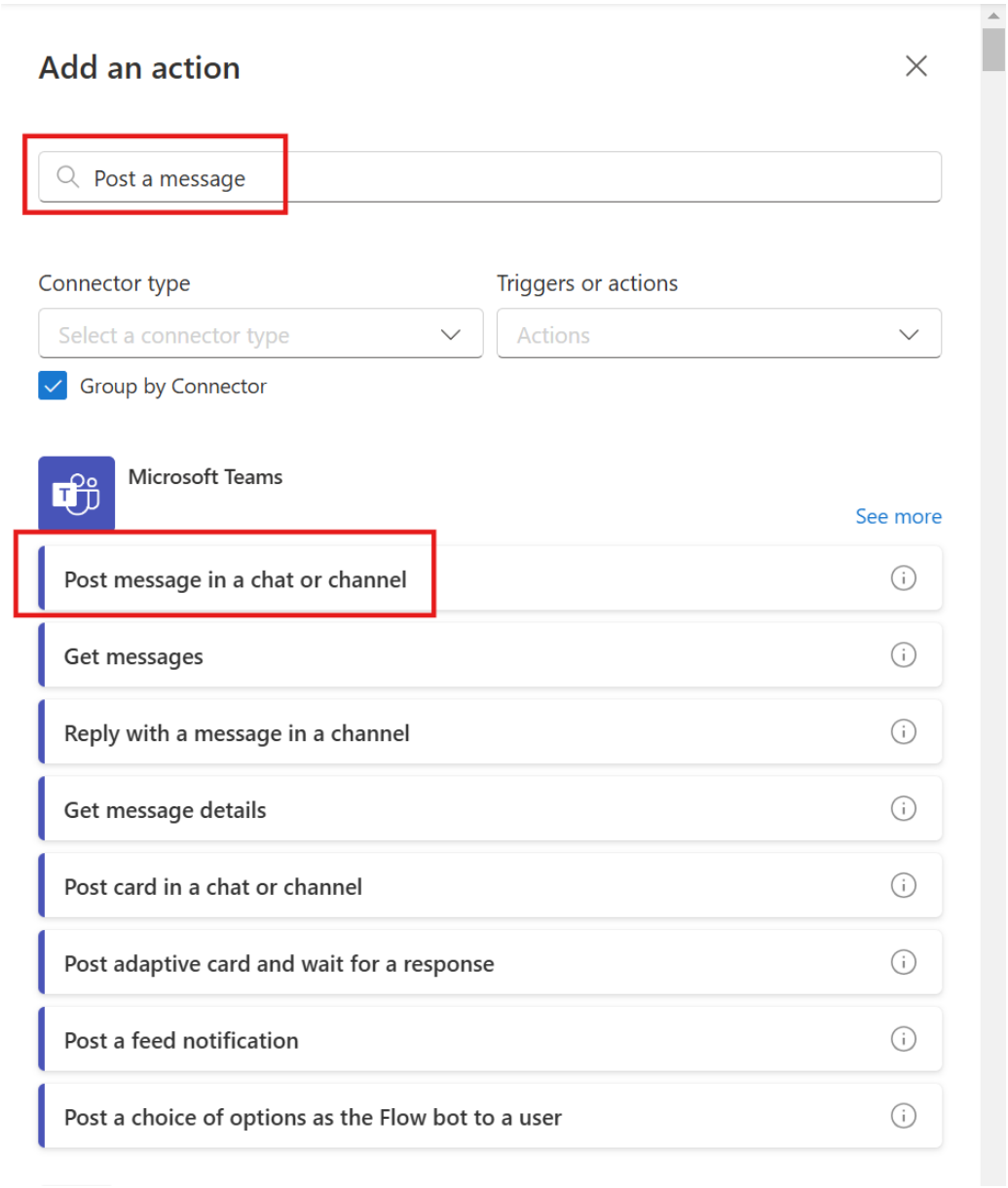


48. Click **+** to add a new step.

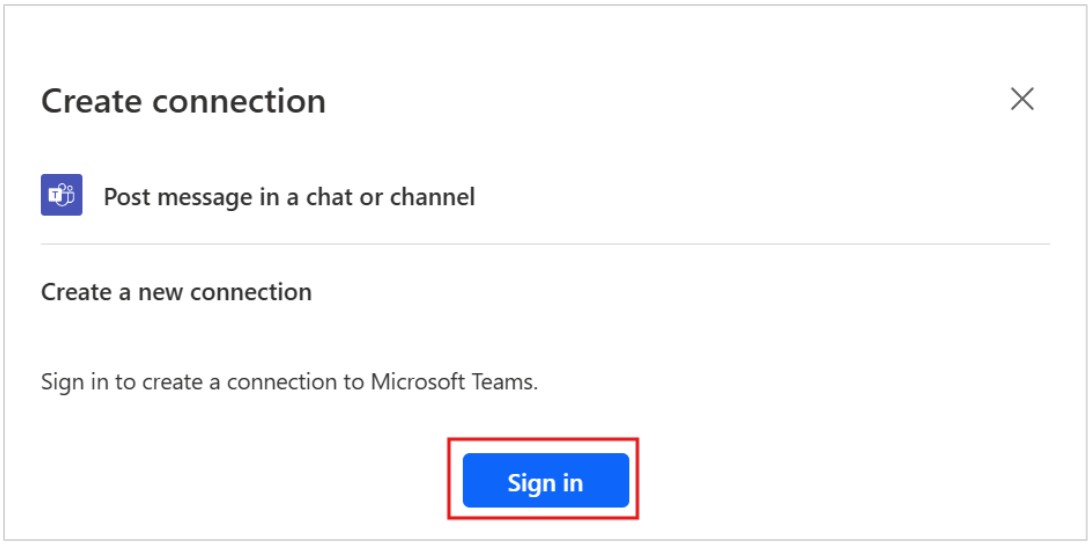


49. This last step will post the information from our last step to Teams so the salesperson can be alerted with key information about any new signed contracts that have been uploaded to the blob storage.

    Search for **Post a message** and select **Post message in a chat or channel** from **Microsoft Teams**.



50. If prompted, Sign In to create a connection to Microsoft Teams. Use your demo tenant credentials.



51. Configure the step with the following:

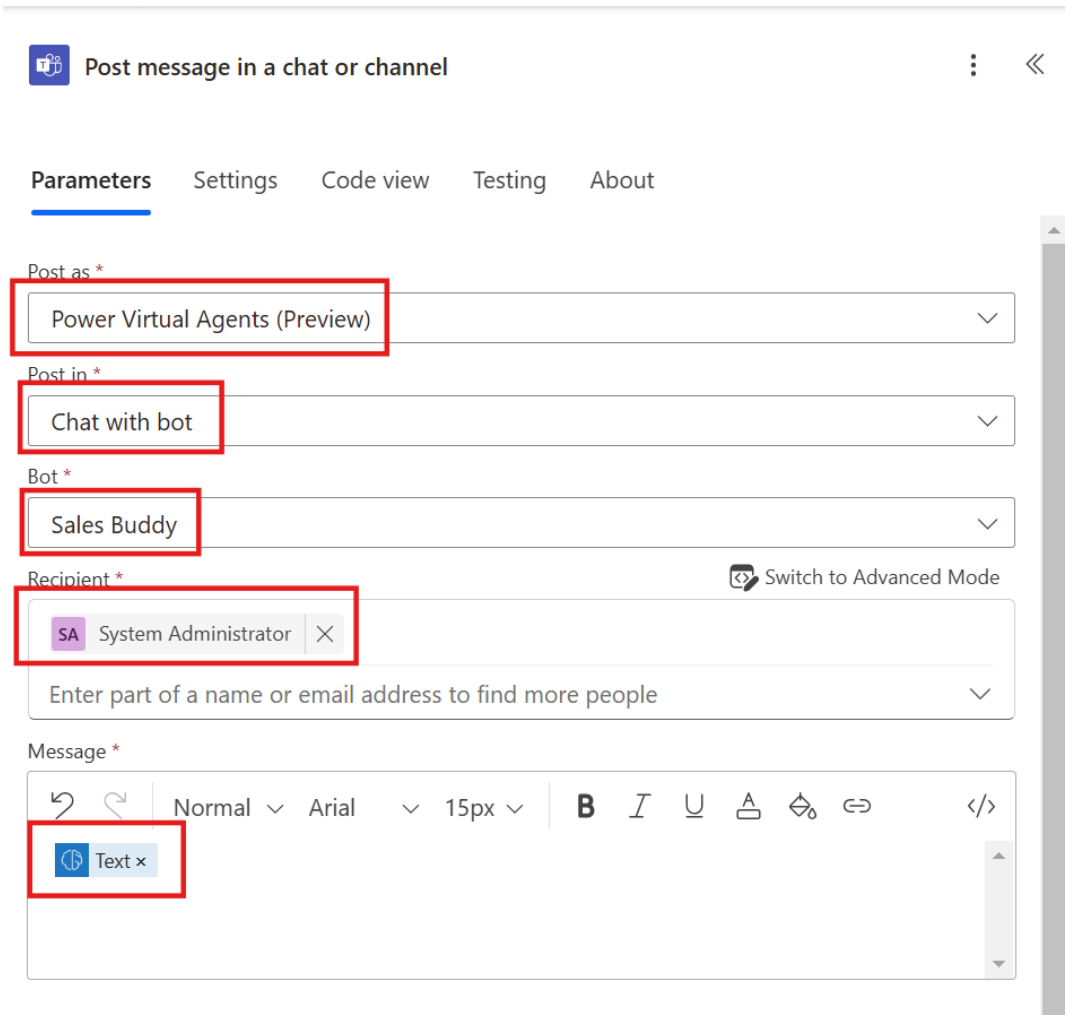
    Post as: **Power Virtual Agents (Preview)**

    Post in: **Chat with bot**

    Bot: **Sales Buddy**

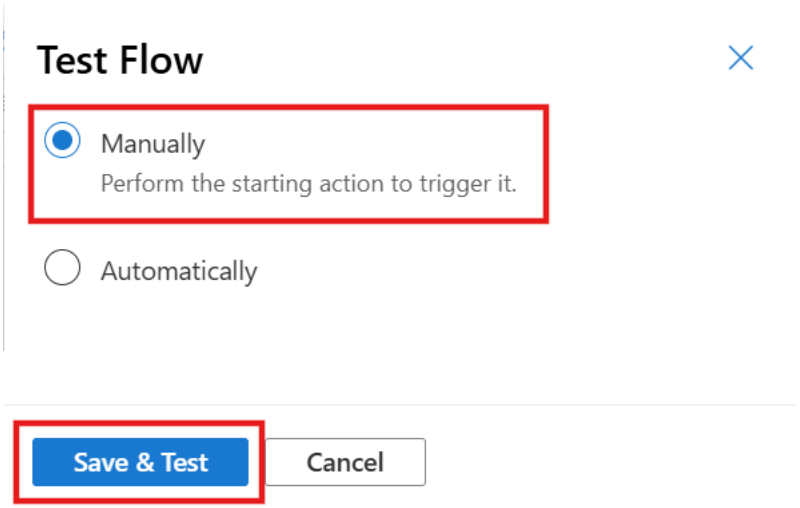
    Recipient: **Email address of your demo tenant**

    Message: **Dynamic content – Text** from the **Create text with GPT using prompt step**

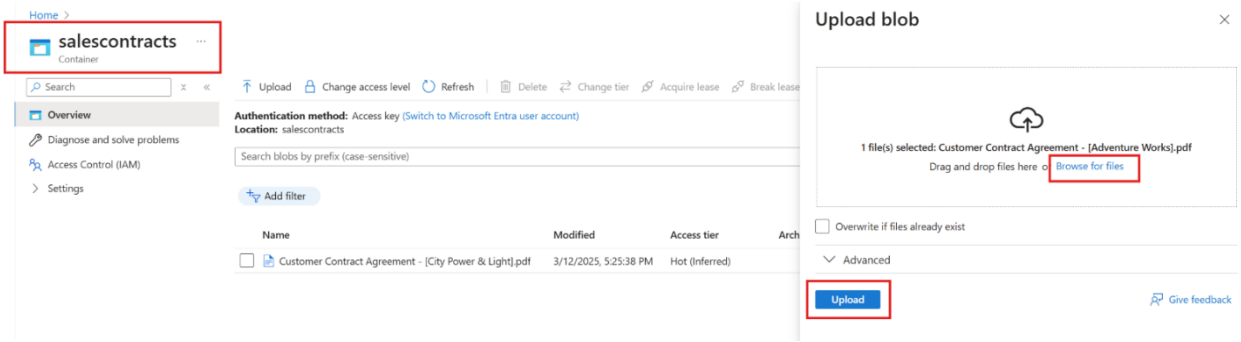


52. We are now ready to test our flow. Click **Test** in the upper right corner.

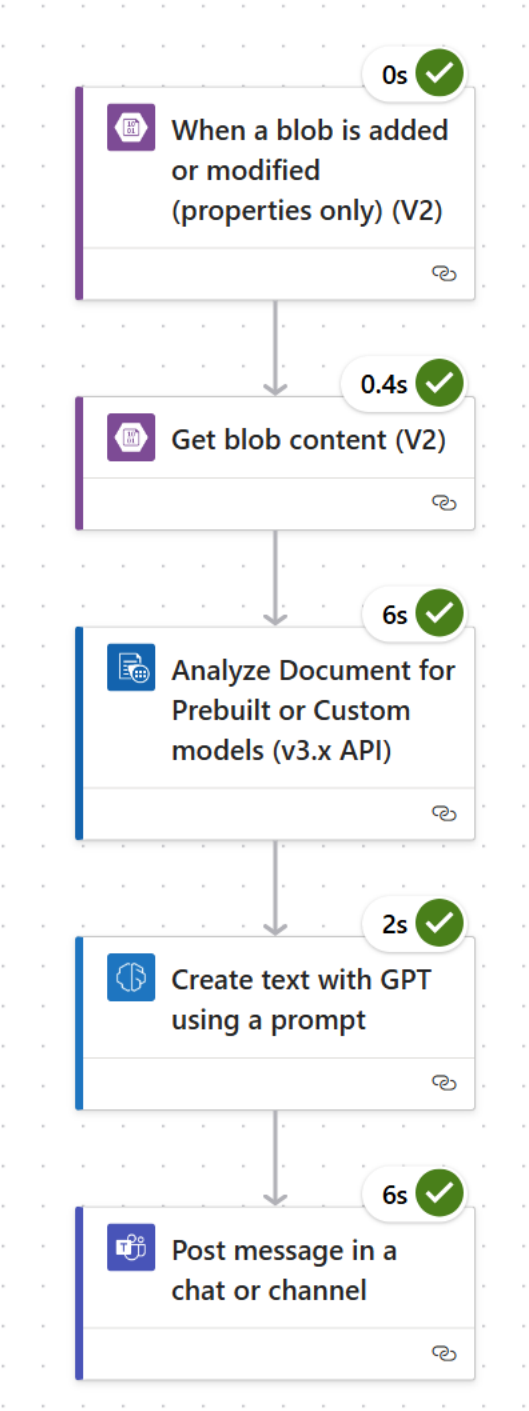
53. Click on **Manually** then **Save & Test**.



54. We need to upload another sales contract to initiate our trigger. Click in your **Azure Portal** tab and click **Home**. Click on your **blob storage account** and then under **Data Storage**, select **Containers**. Select the **salescontracts** folder. Click **Upload** and then **Browse for files** to the Lab 5 assets to add another sales contract to your Azure blob storage container to trigger the flow.

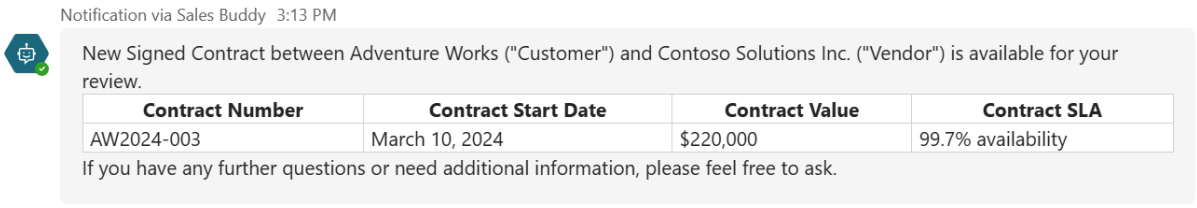


55. Click back in your tab with the Power Automate flow, you will see the various steps complete.



If you get an error on the Create text with GPT using a prompt, you may need to enable AI Builder in your account.

56. To see the output of the flow, browse teams.microsoft.com in your demo tenant and you should have a notification in your Sales Buddy agent with the information regarding the new sales contract.



Congratulations! You have finished Lab 5.

At this stage, the Sales Buddy agent notifies about new contracts when made available. However, it cannot answer any further questions on these contracts yet. In lab 6, we will use Azure AI Search to ask questions off of the sales contracts in the blob storage using our Sales Buddy agent.