

# 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

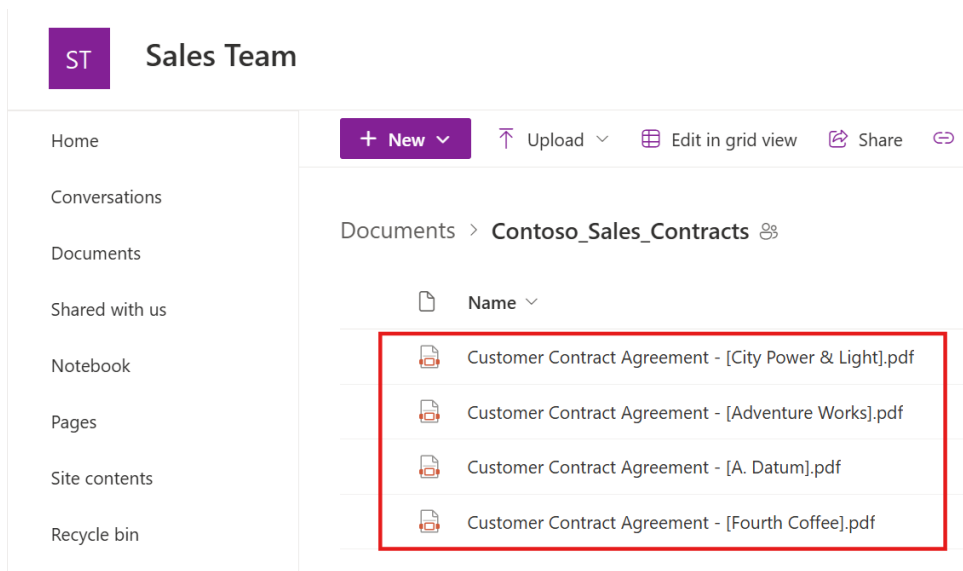
## Lab Overview and Pre-requisites

### 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.

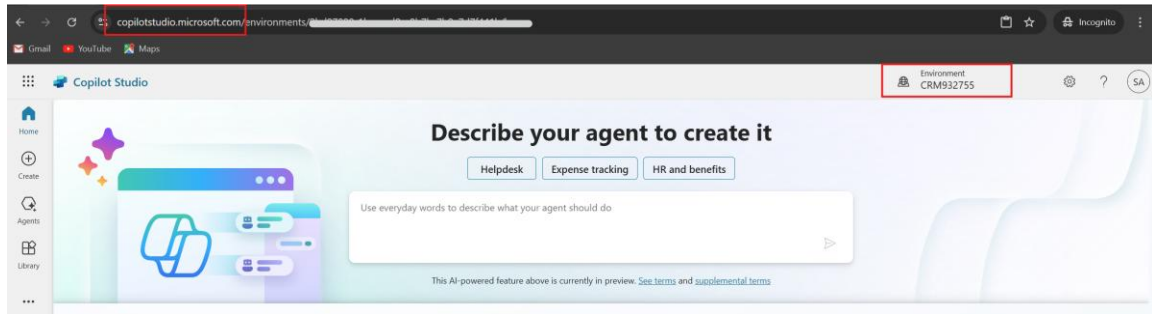
### Pre-requisites

- 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.

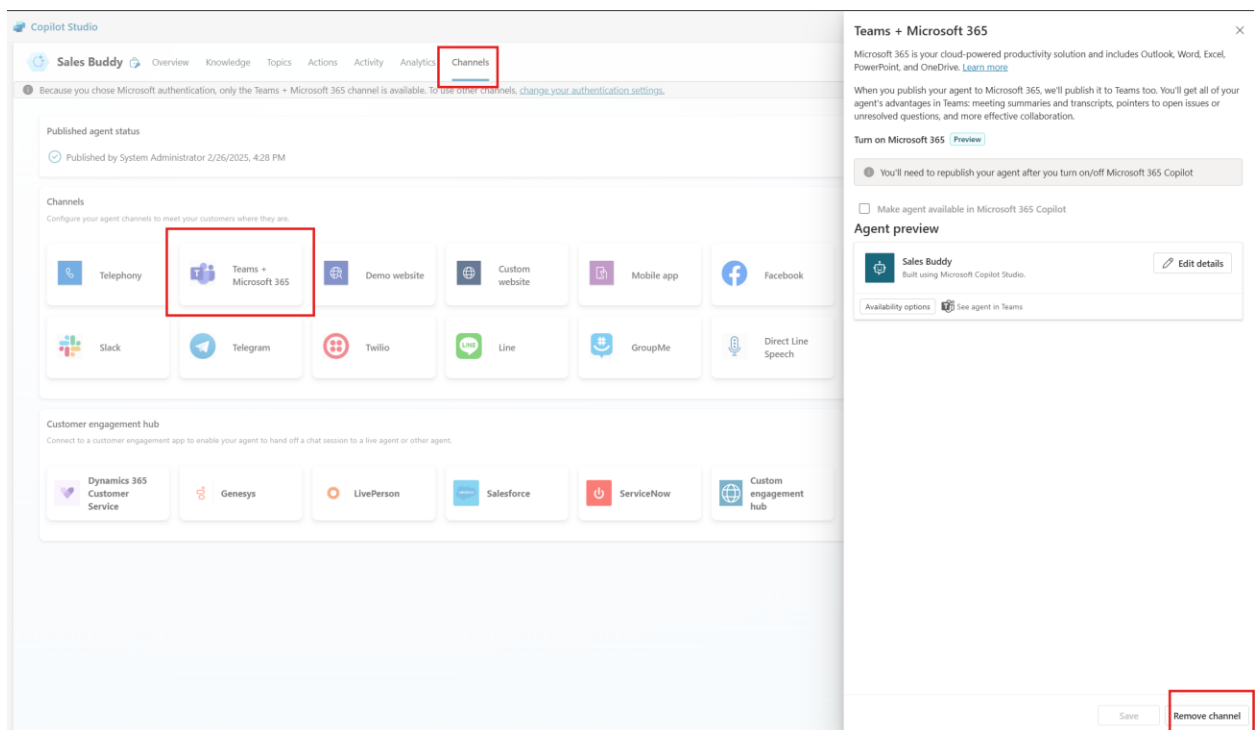


## Lab 5: Create an agent and add Knowledge sources

1. Browse to [copilotstudio.microsoft.com](https://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.



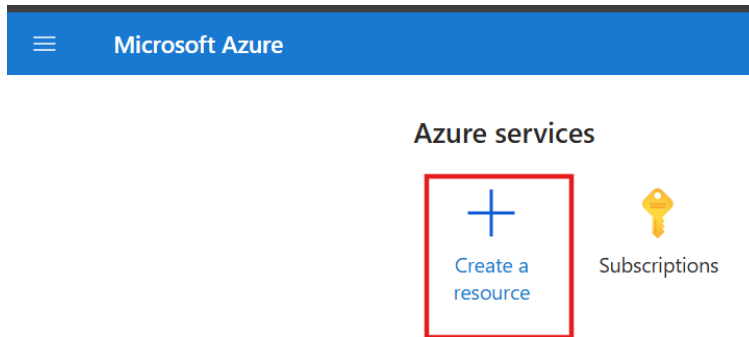
2. Confirm you have the **Sales Buddy** agent completed from the previous labs or imported in from the lab resources. Also, confirm you have published the agent to the **Teams + Microsoft 365 Channel**. *You will see the Remove from Channel option if you have already published to this channel. If not,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



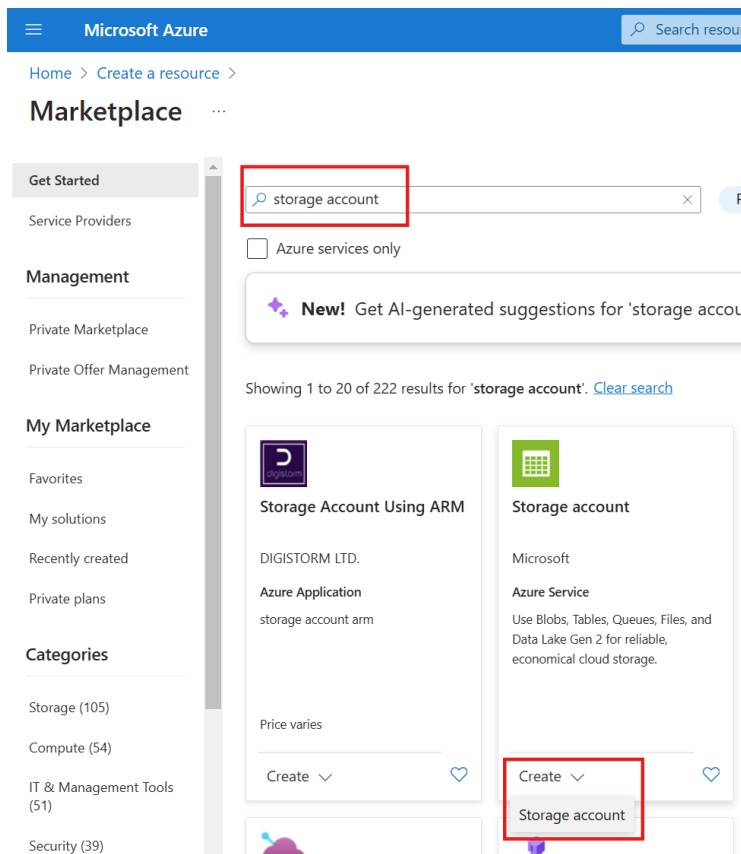
3. Now we will create some Azure resources to extend our Sales Buddy agent. Sign in to your **Azure portal** ([portal.azure.com](https://portal.azure.com)) using the credentials from the subscription you

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.

- 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**.



- 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.*

[Home](#) > [Create a resource](#) > [Marketplace](#) >

## Create a storage account ...

**Basics**

Advanced

Networking

Data protection

Encryption

Tags

Review + create

Azure Storage is a Microsoft-managed service providing cloud storage that is highly available, secure, durable, scalable, and redundant. Azure Storage includes Azure Blobs (objects), Azure Data Lake Storage Gen2, Azure Files, Azure Queues, and Azure Tables. The cost of your storage account depends on the usage and the options you choose below. [Learn more about Azure storage accounts](#) ↗

### Project details

Select the subscription in which to create the new storage account. Choose a new or existing resource group to organize and manage your storage account together with other resources.

Subscription \*

Azure subscription 1

Resource group \*

cpsworkshop

[Create new](#)

### Instance details

Storage account name \* ⓘ

copilotworkshopblob

Region \* ⓘ

(US) East US

[Deploy to an Azure Extended Zone](#)

Primary service ⓘ

Azure Blob Storage or Azure Data Lake Storage Gen 2

Performance \* ⓘ

☒ **Standard:** Recommended for most scenarios (general-purpose v2 account)

☐ **Premium:** Recommended for scenarios that require low latency.

Redundancy \* ⓘ

Geo-redundant storage (GRS)

☒ Make read access to data available in the event of regional unavailability.

[Previous](#)

[Next](#)

**Review + create**

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

✓ **Your deployment is complete**

Deployment name: copilotworkshopblob  
Subscription: [Azure subscription 1](#)  
Resource group: [cpsworkshop](#)

Deployment details

Next steps

**Go to resource**

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

**copilotworkshopblob | Containers**  
Storage account

Search

**+ Container**

Search containers by prefix

Name
<input type="checkbox"/> \$logs

Overview

Activity log

Tags

Diagnose and solve problems

Access Control (IAM)

Data migration

Events

Storage browser

Storage Mover

Partner solutions

Data storage

**Containers**

File shares

Queues

Tables

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

## New container ✕

Name \* ✓

salescontracts

Anonymous access level ⓘ

Private (no anonymous access) ▼

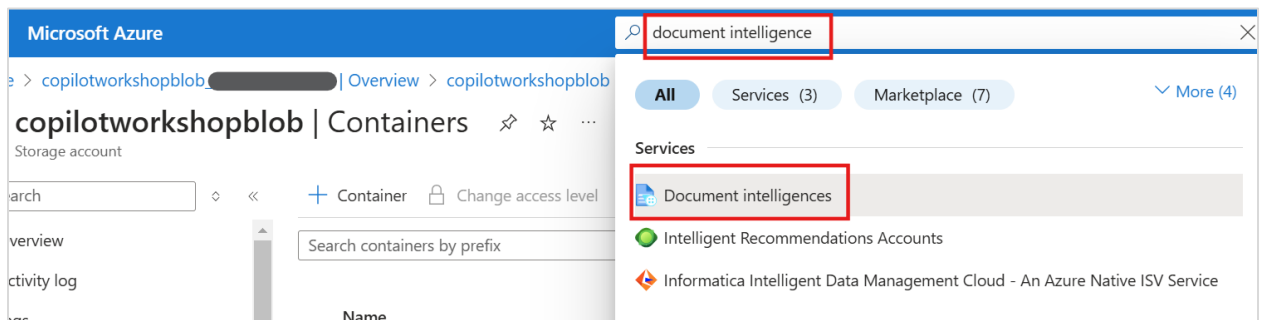
**i** The access level is set to private because anonymous access is disabled on this storage account.

▼ Advanced

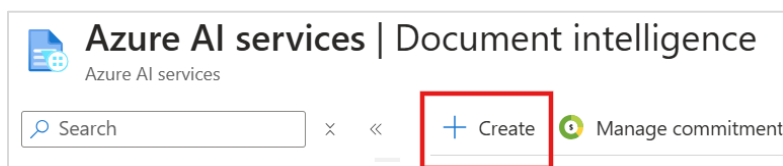
Create

[Give feedback](#)

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**.

## Create Document Intelligence

Basics Network Identity Tags Review + create

Accelerate your business processes by automating information extraction. Document Intelligence applies advanced machine learning to accurately extract text, key/value pairs, and tables from documents. With just a few samples, Document Intelligence tailors its understanding to your documents, both on-premises and in the cloud. Turn forms into usable data at a fraction of the time and cost, so you can focus more time acting on the information rather than compiling it.

[Learn more](#)

### Project Details

Subscription \* ⓘ Azure subscription 1 ▼

Resource group \* ⓘ cpsworkshop ▼

[Create new](#)

**i** Azure AI services resource creation requires subscription registration, we detected that your selected subscription did not register Cognitive services resource type before, we will help you to register Cognitive services resource type when you select a subscription in subscription dropdown. Click to learn more how to check registration state for your selected subscription.

### Instance Details

Region ⓘ East US ▼

Name \* ⓘ docintellworkshopbb ✓



Pricing tier \* ⓘ Free F0 (500 Pages per month, 20 Calls per minute for recognizer AP... ▼

[View full pricing details](#)

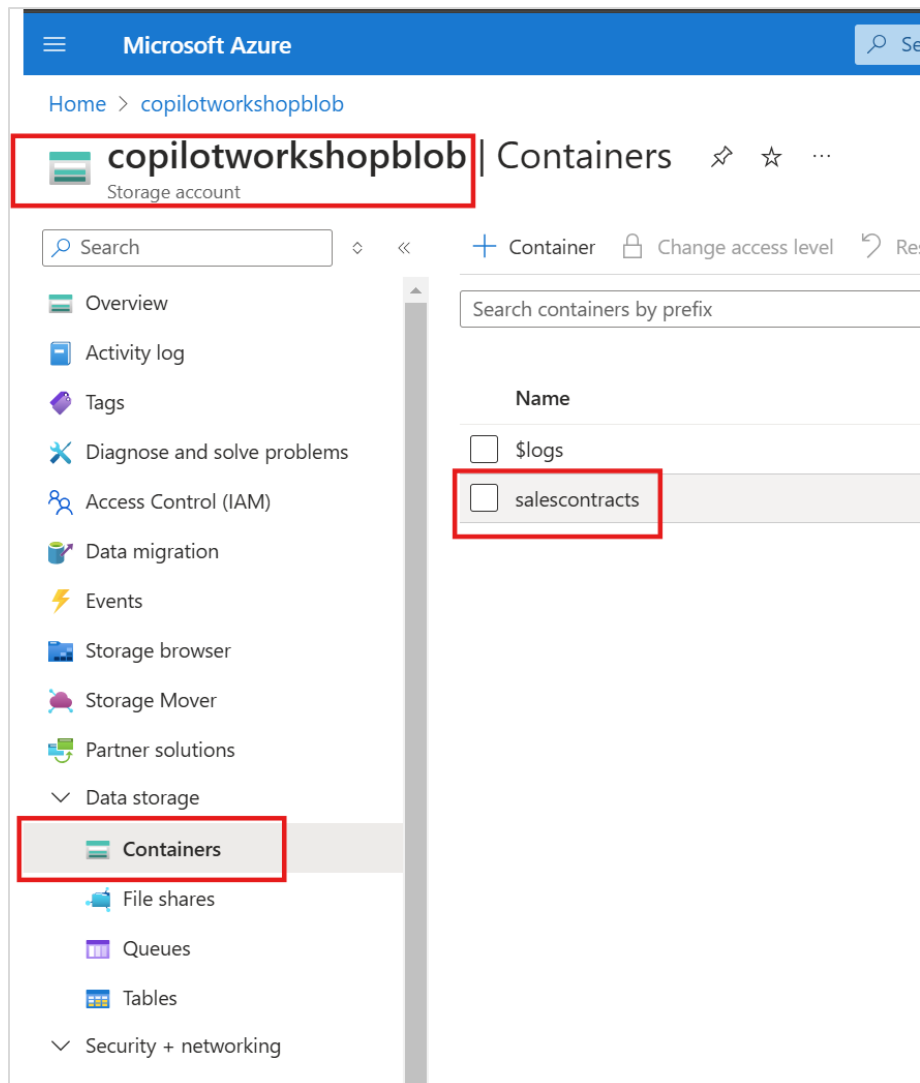
Previous Next Review + create

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.



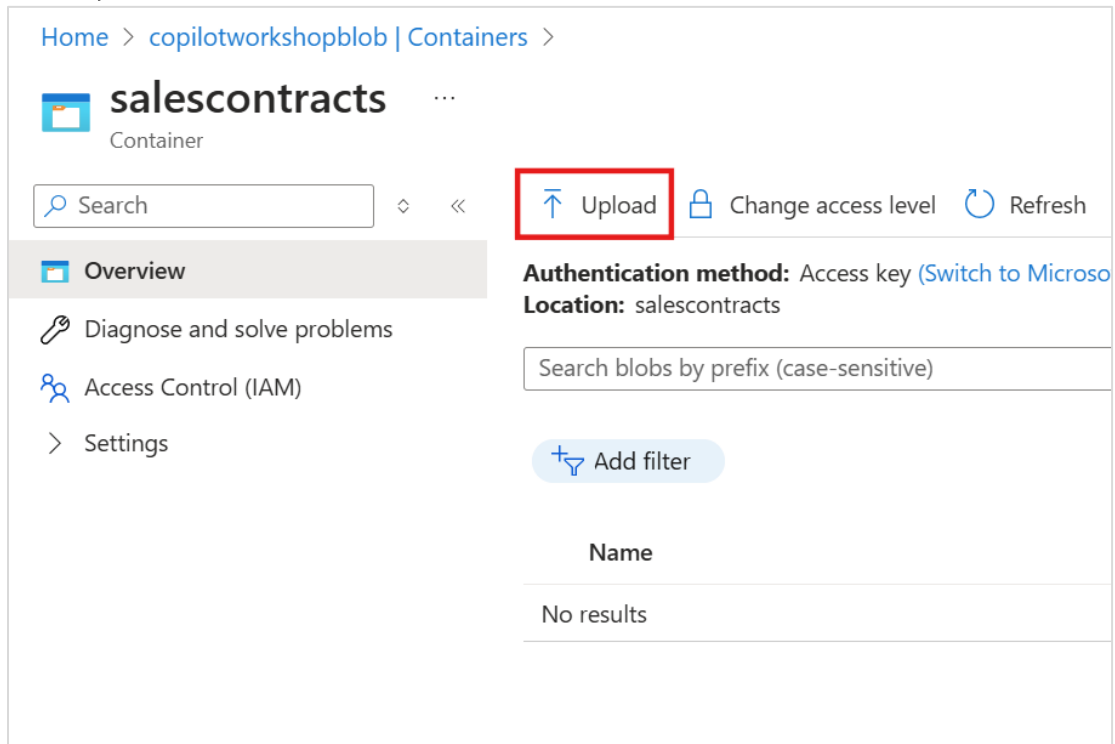
Resources	
Recent Favorite	
Name	Type
 [redacted]copilotworkshopblob	Storage account
 cpsworkshop	Resource group

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

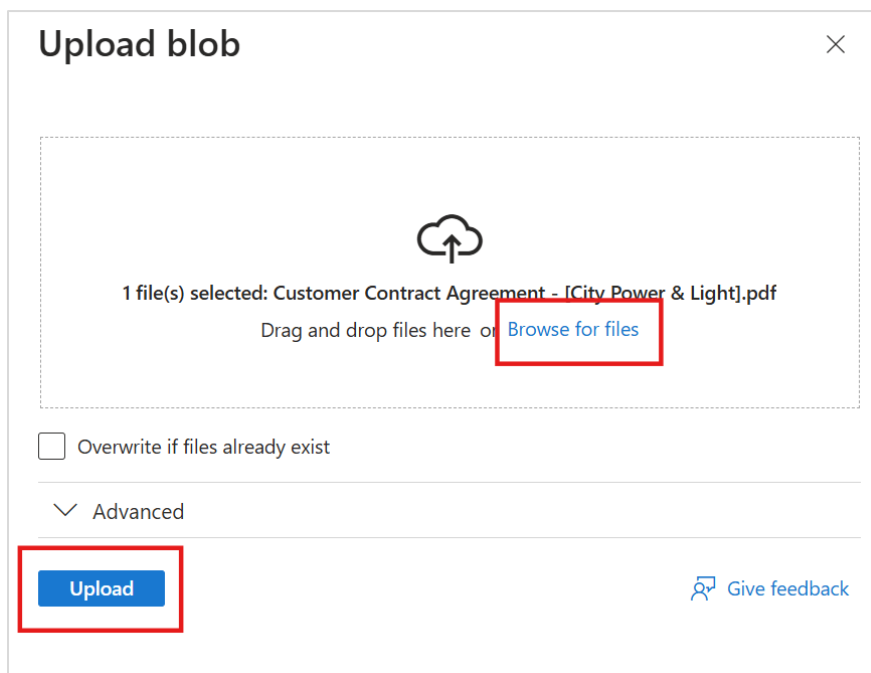


The screenshot shows the Microsoft Azure portal interface. At the top, the header reads 'Microsoft Azure' with a search bar. Below the header, the breadcrumb path is 'Home > copilotworkshopblob'. The main content area is titled 'copilotworkshopblob | Containers'. On the left sidebar, under the 'Data storage' section, the 'Containers' option is highlighted with a red box. In the main pane, there is a search bar 'Search containers by prefix' and a list of containers. The 'salescontracts' container is selected and highlighted with a red box. Other containers listed include '\$logs'.

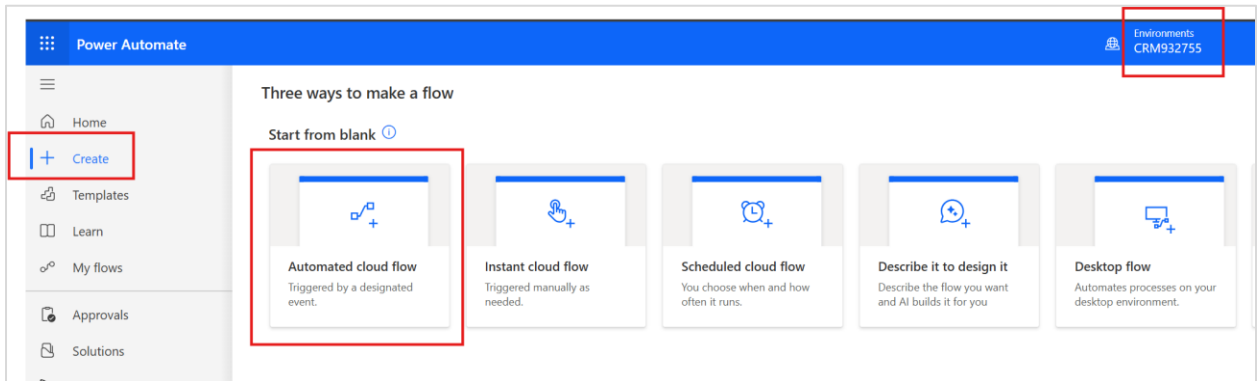
15. Click Upload.



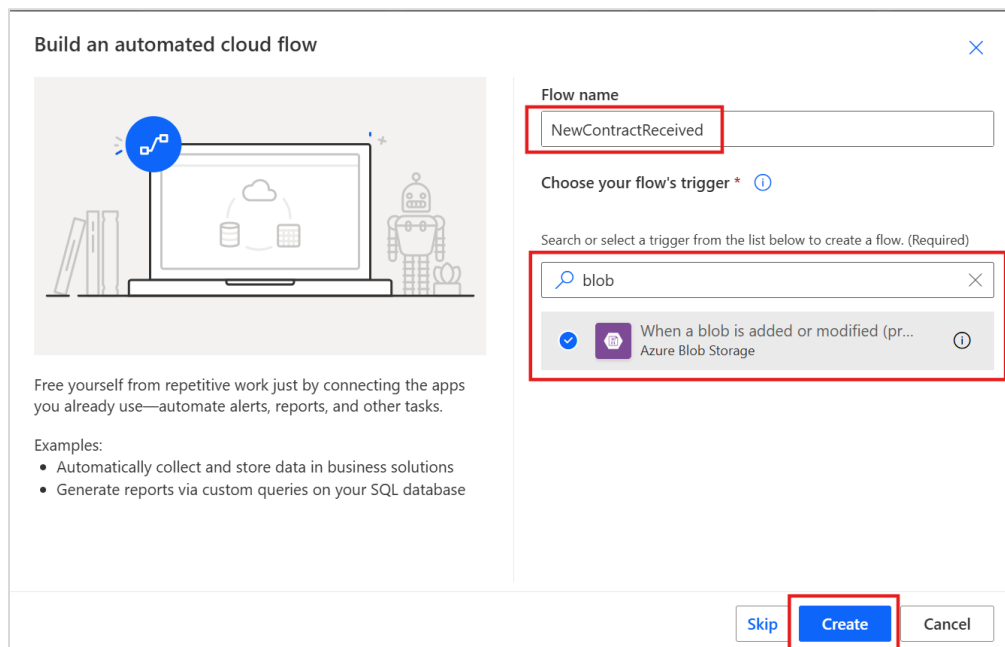
16. Click **Browse for files** and upload 1 of the sales contracts from the **Lab 5 assets** and click Upload.



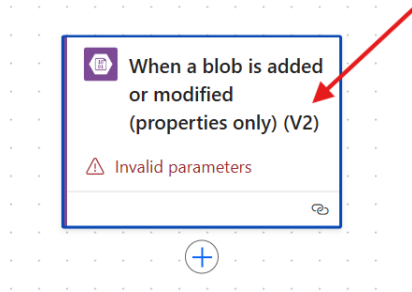
17. Build Power Automate flow to extract data from our sales contract from Document Intelligence resource. Browse to [make.powerautomate.com](https://make.powerautomate.com) using your lab credentials. Ensure you are in the correct **Environment**. Click **+ Create** in the left-hand menu then select 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**.



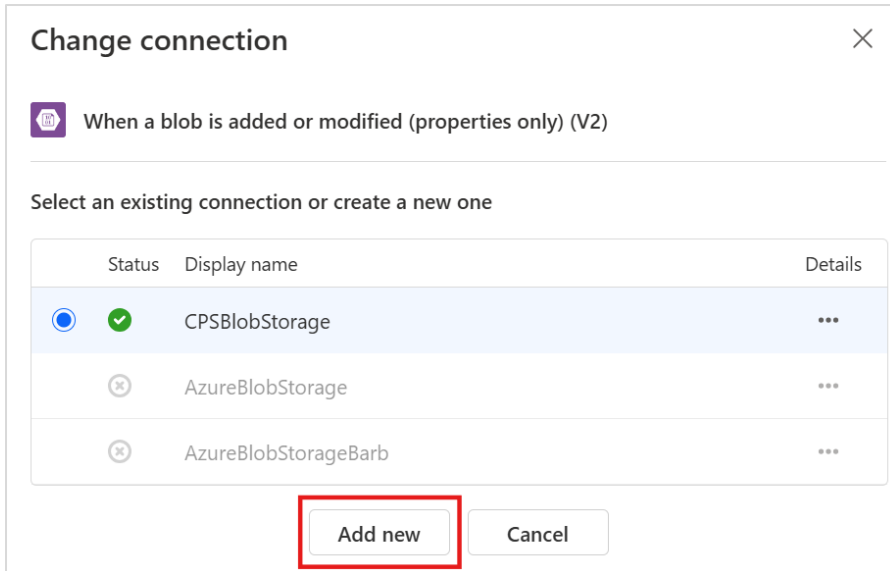
19. Click the **When a blob is added or modified** step to open the configuration screen.




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

A screenshot of the configuration window for the workflow step "When a blob is added or modified (properties only) (V2)". The window has tabs for "Parameters", "Settings", "Code view", and "About". The "Parameters" tab is active. It contains two required fields: "Storage account name or blob endpoint" and "Container". The first field has a dropdown menu showing "Azure Storage account name or blob endpoint." and a red error message "'Storage account name or blob endpoint' is required.". The second field has a text input showing "Select a container." and a red error message "'Container' is required.". Below these fields is an "Advanced parameters" section with a dropdown showing "Showing 0 of 1" and buttons for "Show all" and "Clear all". At the bottom, there is a section titled "How often do you want to check for items?". At the very bottom, there is a status bar showing "Connected to CPSBlobStorage." and a blue link "Change connection" which is highlighted with a red rectangular box.





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



**Change connection** [X]

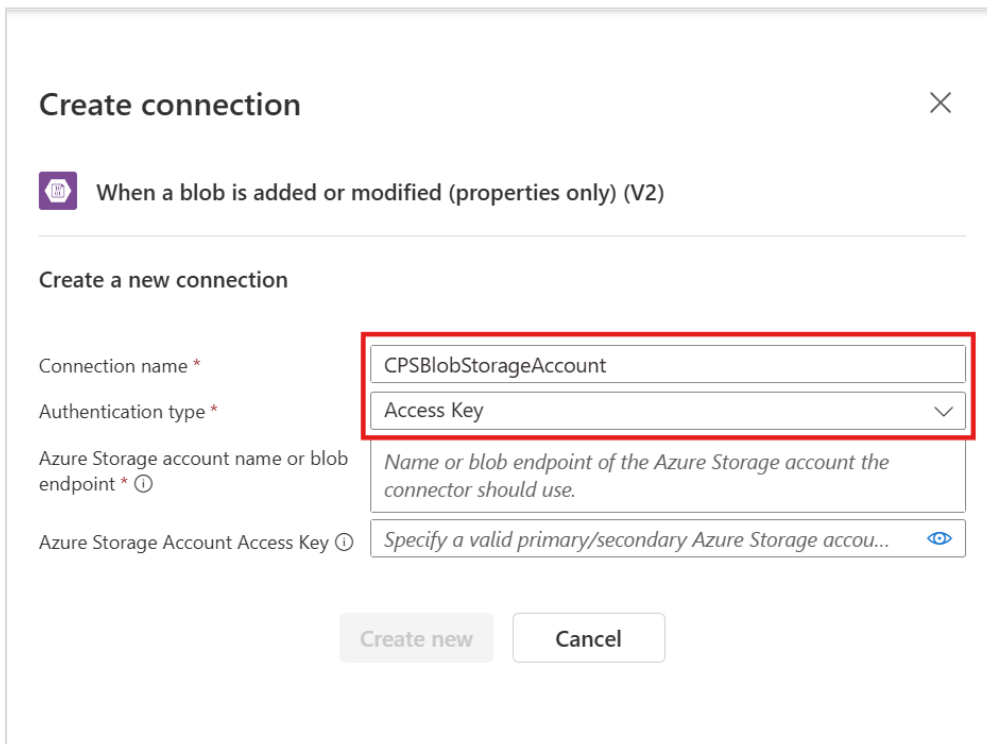
 When a blob is added or modified (properties only) (V2)

Select an existing connection or create a new one


Status	Display name	Details
 	CPSBlobStorage	...
	AzureBlobStorage	...
	AzureBlobStorageBarb	...

**Add new** Cancel

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



**Create connection** [X]


 When a blob is added or modified (properties only) (V2)

Create a new connection

Connection name \* CPSBlobStorageAccount

Authentication type \* Access Key

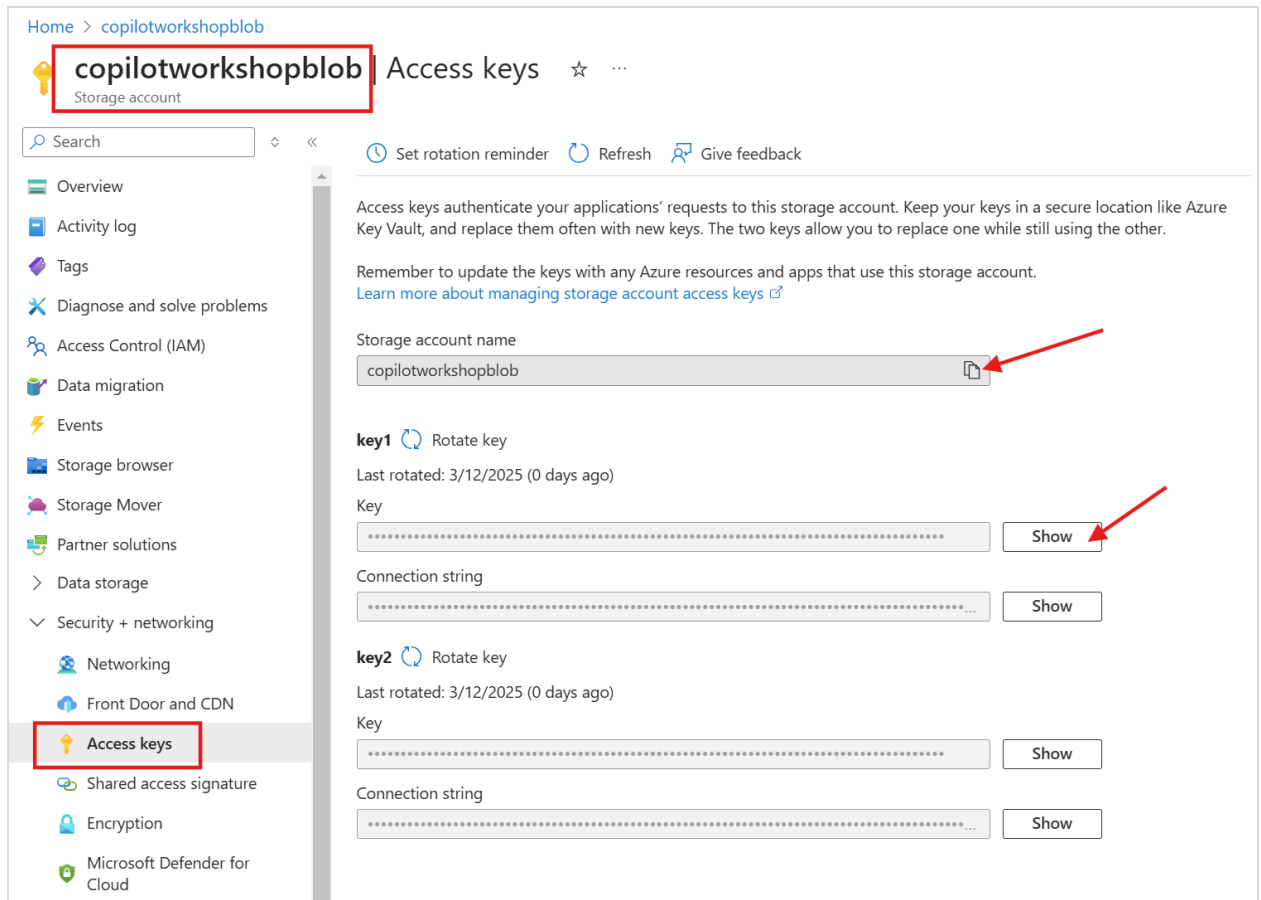
Azure Storage account name or blob endpoint \* ⓘ Name or blob endpoint of the Azure Storage account the connector should use.

Azure Storage Account Access Key ⓘ Specify a valid primary/secondary Azure Storage accou... 

Create new Cancel

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.

Create connection

✕

When a blob is added or modified (properties only) (V2)

---

Create a new connection

Connection name \*

CPSBlobStorageAccount

Authentication type \*

Access Key

▼

Azure Storage account name or blob endpoint \* ⓘ

copilotworkshopblob

Azure Storage Account Access Key ⓘ

.....

👁

Create new

Cancel

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.

When a blob is added or modified (properties only) (V2)
 

⋮ <<

Parameters

Settings

Code view

About

---

Storage account name or blob endpoint \*

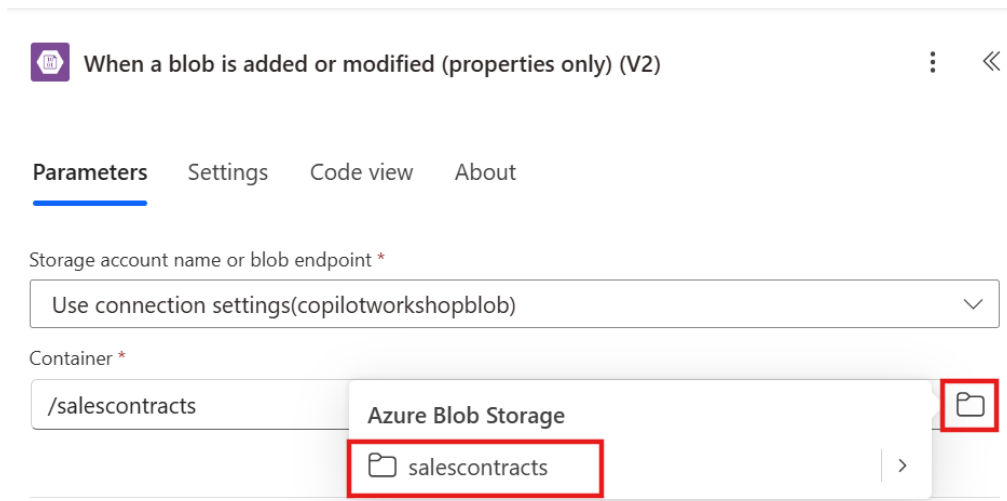
Use connection settings(copilotworkshopblob)

▼

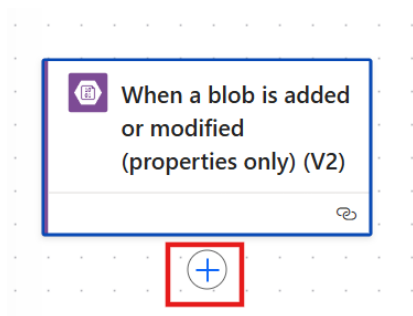
Use connection settings(copilotworkshopblob)

Enter custom value

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)**



### Add an action ✕


Connector type

Select a connector type ▼

Triggers or actions

Actions ▼

☒ Group by Connector



**Azure Blob Storage**

Premium


See more

Create blob (V2) Premium i

Create block blob (V2) Premium i

Get Blob Metadata using path (V2) Premium i

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


Connected to CPSBlobStorageAccount. [Change 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.

**Get blob content (V2)**

Parameters Settings Code view Testing About

Storage account name or blob endpoint \*

Use connection settings(copilotworkshopblob)

Blob \*

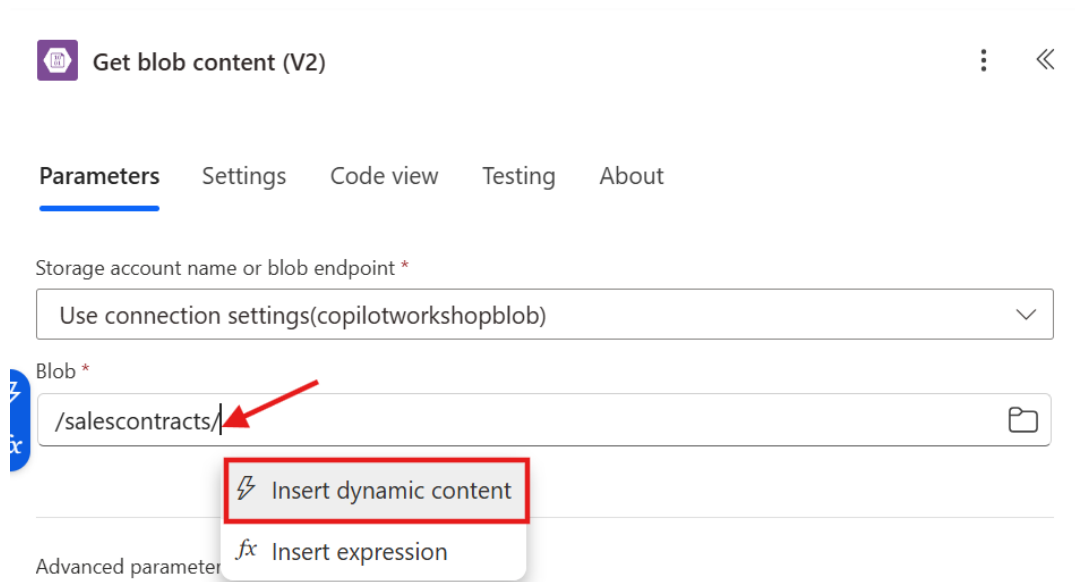
Specify the blob.

Azure Blob Storage

salescontracts

/salescontracts/Customer Contract Agreement - [City Power & Light].pdf

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**.



**Get blob content (V2)**

Parameters Settings Code view Testing About

Storage account name or blob endpoint \*

Use connection settings(copilotworkshopblob)

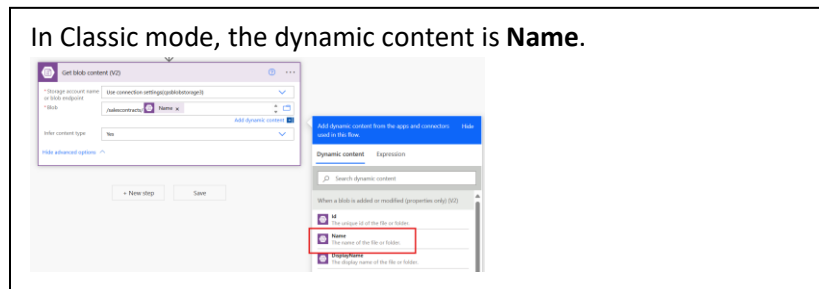
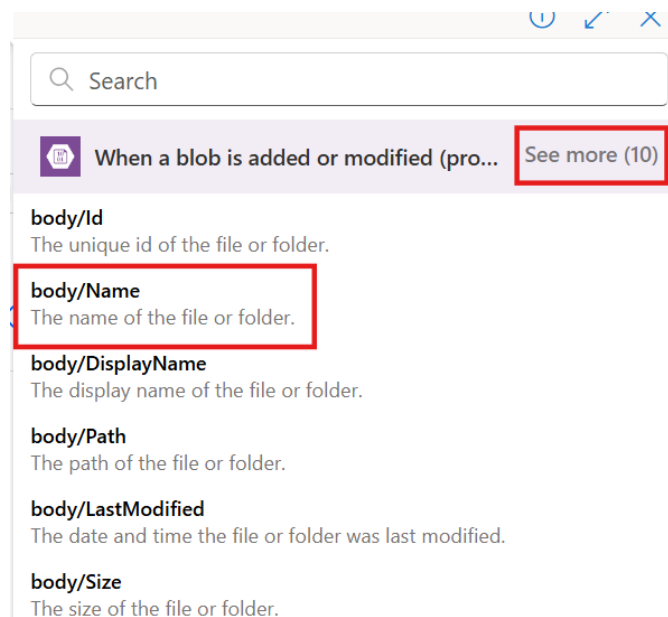
Blob \*

/salescontracts/

Insert dynamic content

Insert expression

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.

Search

**When a blob is added or modified (properties only)** See more (10)

**body/Id**  
The unique id of the file or folder.


**body/Name**  
The name of the file or folder.

**body/DisplayName**  
The display name of the file or folder.

**body/Path**  
The path of the file or folder.

**body/LastModified**  
The date and time the file or folder was last modified.

**body/Size**  
The size of the file or folder.



**Get blob content (V2)**
⋮
⏪

**Parameters**
Settings
Code view
Testing
About

Storage account name or blob endpoint \*

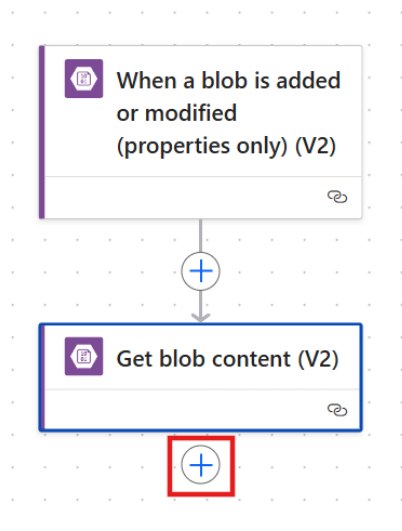
Use connection settings(cpsblobstorage4) ⌵

Blob \*

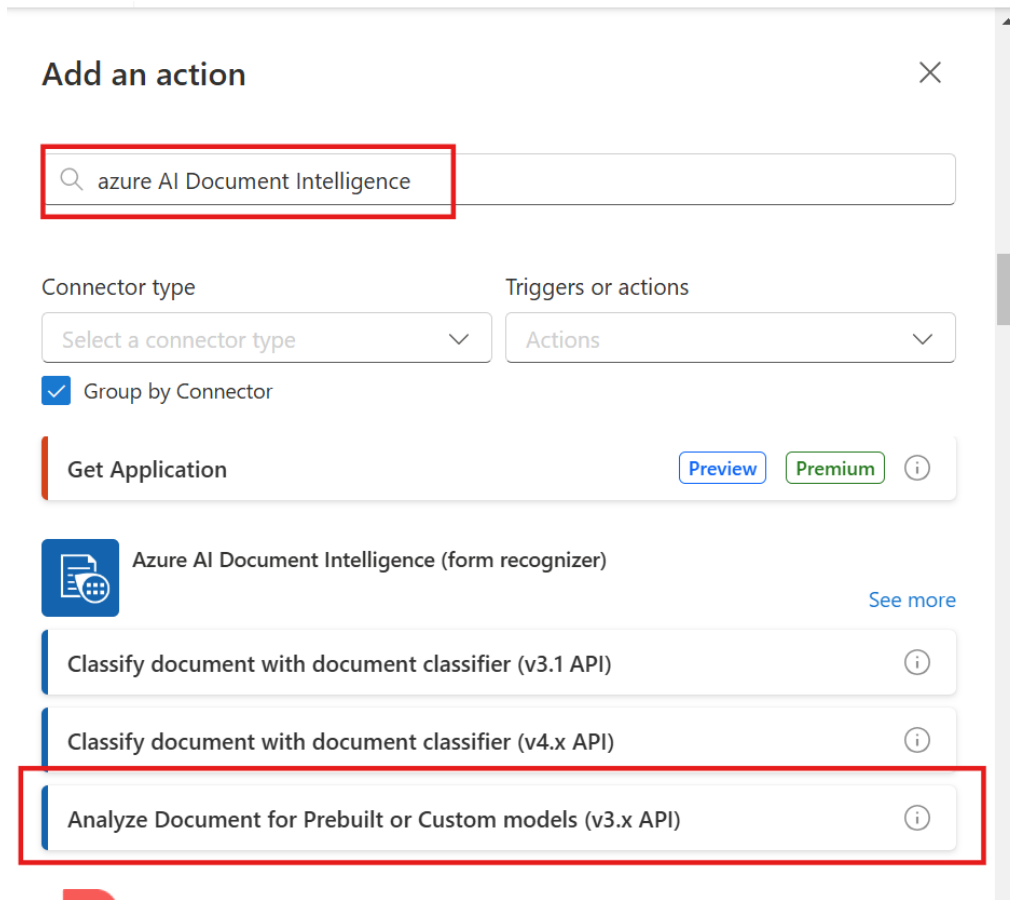
/salescontracts/

body/Name x

📁

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

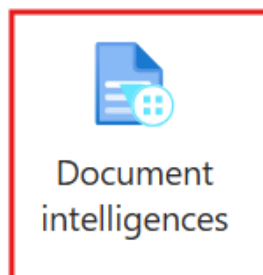


34. Search for **Azure AI Document Intelligence**. Scroll down to the **Azure AI Document Intelligence (form recognizer)** and select **Analyze Document for Prebuilt or Custom models (v3.x API)**.



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**.

## Azure services



36. Select the Document Intelligence service you created previously.

Home > Azure AI services

## Azure AI services | Document intelligence

Search

+ Create Manage commitment plans Manage deleted resources Manage view

Overview

All Azure AI services

▼ Azure AI services

Azure AI services

Azure OpenAI

Filter for any field...

Subscription equals all Type equals all Resource group equals

Showing 1 to 1 of 1 records.

Name ↑↓	Kind ↑↓	Location ↑↓
docintellworkshopbb	FormRecognizer	East US

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

docintellworkshopbb Document intelligence

Search Delete

Overview

Activity log

Access control (IAM)

Tags

Diagnose and solve problems

Resource visualizer

Resource Management

Security

Monitoring

Automation

Help

Get Started Monitoring

Get started with your resource in Document Intelligence Studio

Get Started with your resource in Document Intelligence Studio or with SDK

Extract text, key-value pairs, tables, and structures from your documents automatically and accurately without writing any code

Go to Document Intelligence Studio

Review SDK QuickStart for a code-first try out experience

Keys and endpoint

These keys are used to access your Azure AI services API. Do not share your keys. Store them securely-- for example, using Azure Key Vault. We also recommend regenerating these keys regularly. Only one key is necessary to make an API call. When regenerating the first key, you can use the second key for continued access to the service.

Show Keys

KEY 1

KEY 2

Location/Region

eastus

Endpoint

https://docintellworkshopbb.cognitiveservices.azure.com/

[← Back](#) | NewContractReceived

## Create connection

**Analyze Document for Prebuilt or Custom models (v3.x API)**

### Create a new connection

Connection name \*

Account Key \* ⓘ



Endpoint URL \* ⓘ

[Create new](#)

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**.

[Home](#) > [Azure AI services | Document intelligence](#) >**docintellworkshopbb**

Document intelligence



Delete

**Overview**

Activity log

Access control (IAM)

Tags

Diagnose and solve problems

Resource visualizer

&gt; Resource Management

&gt; Security

&gt; Monitoring

&gt; Automation

&gt; Help

**Get Started**

Monitoring

### Get started with your resource in Document Intelligence Studio



Get Started with your resource in Document Intelligence Studio or with SDK

Extract text, key-value pairs, tables, and structures from your documents automatically and accurately without writing an

[Go to Document Intelligence Studio](#)[Review SDK QuickStart for a code-first try out experience](#)

### Keys and endpoint



These keys are used to access your Azure AI services API. Do not share your keys. Store them securely— for example, using Azure Key Vault. We also recommend regenerating these keys regularly. Only one key is necessary to make an API call. When regenerating the first key, you can use the second key for continued access to the service.

[Show Keys](#)

KEY 1

.....



Power Automate

← Back

NewContractReceived

Create connection

×

Analyze Document for Prebuilt or Custom models (v3.x API)

Create a new connection

Connection name \*

Enter a name for the connection

Account Key \* ⓘ

.....

Endpoint URL \* ⓘ

https://docintellworkshopbb.cognitiveservices.azure.com/

Create new

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

Create connection

×

Analyze Document for Prebuilt or Custom models (v3.x API)

Create a new connection

Connection name \*

DocIntellBB

Account Key \* ⓘ

.....

Endpoint URL \* ⓘ

https://docintellworkshopbb.cognitiveservices.azure.com/

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.


**Analyze Document for Prebuilt or Custom models (v3.x API)**
⋮
⏪

**Parameters**
Settings
Code view
Testing
About

Document Intelligence API version \*

2023-07-31

Model Identifier \*

prebuilt-contract

Document/Image URL

Url path for input file. Alternative to Document/Image File Content.

Advanced parameters

Showing 0 of 5

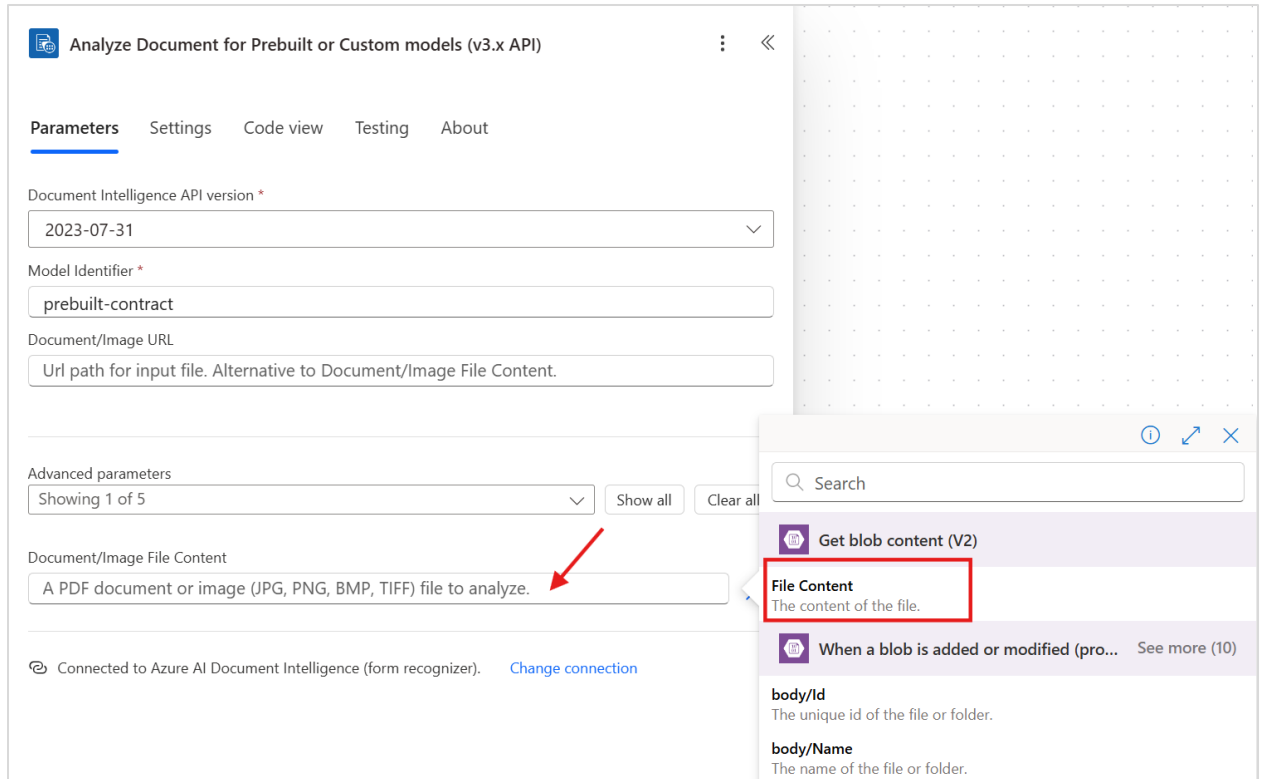
Show all

Clear all

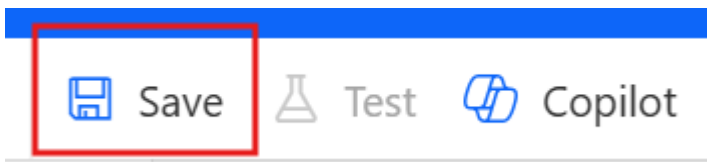
Search

☐ Pages
☐ Locale
☐ String Index Type
☐ Optional and Premium features
☐ Document/Image File Content

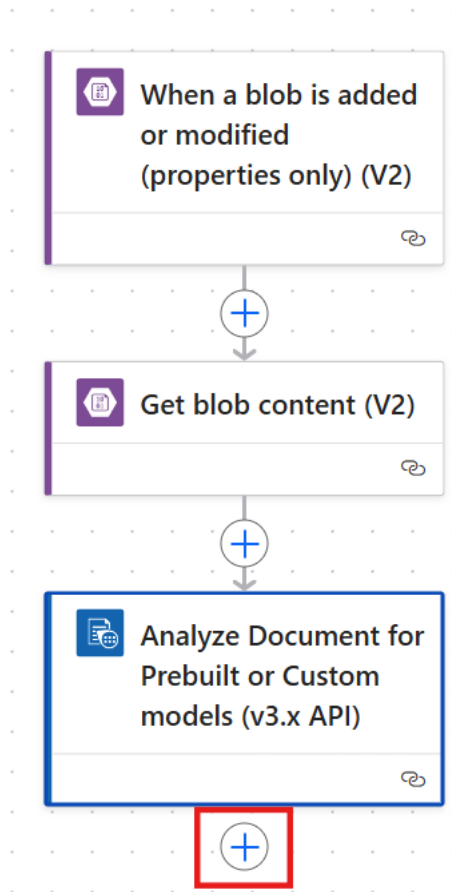
41. Click in the **Document/Image File Content** field and click on the **Dynamic Content** and add the **File Content** from the **Get blob content (V2)** step.



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

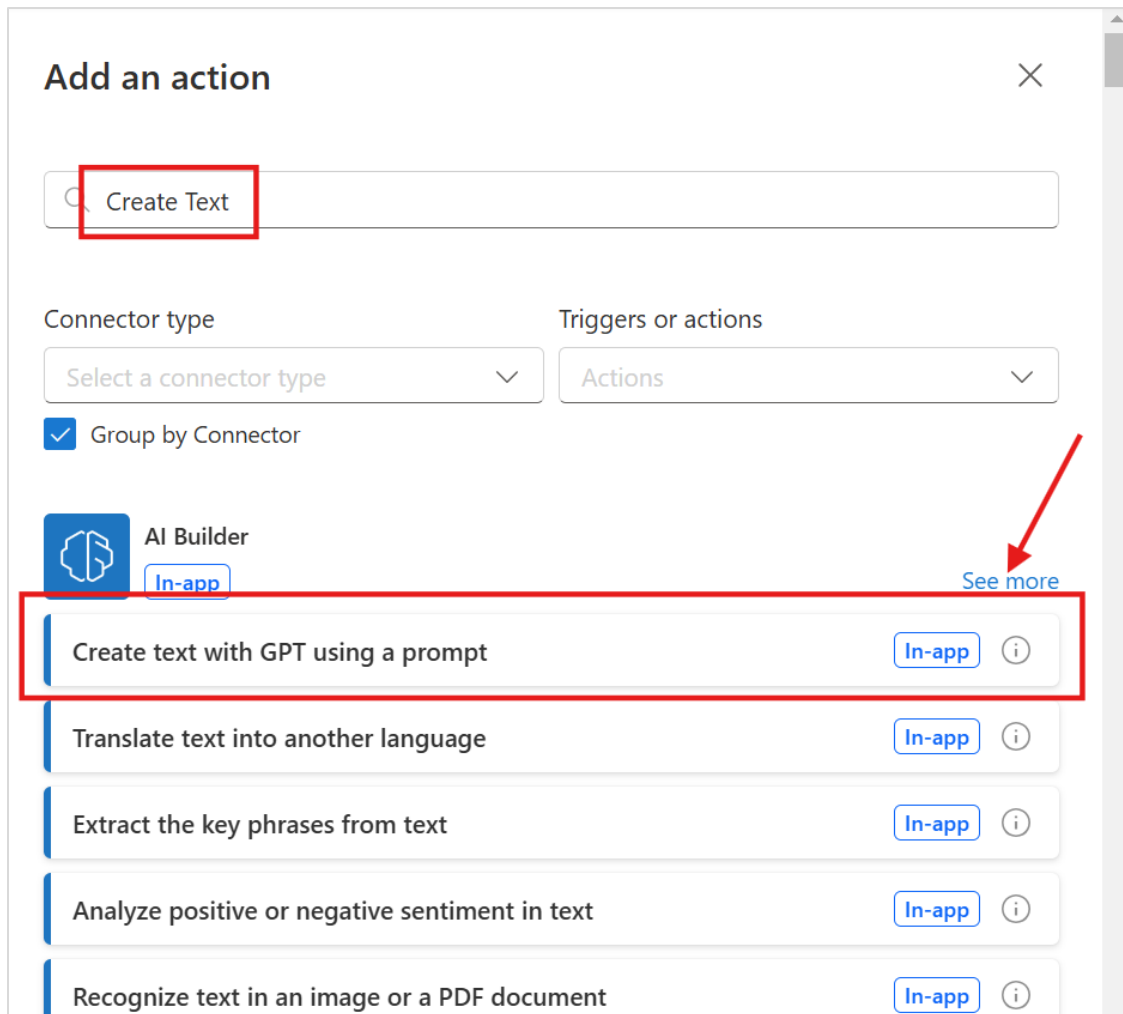


43. Click on **+** to add a new step.

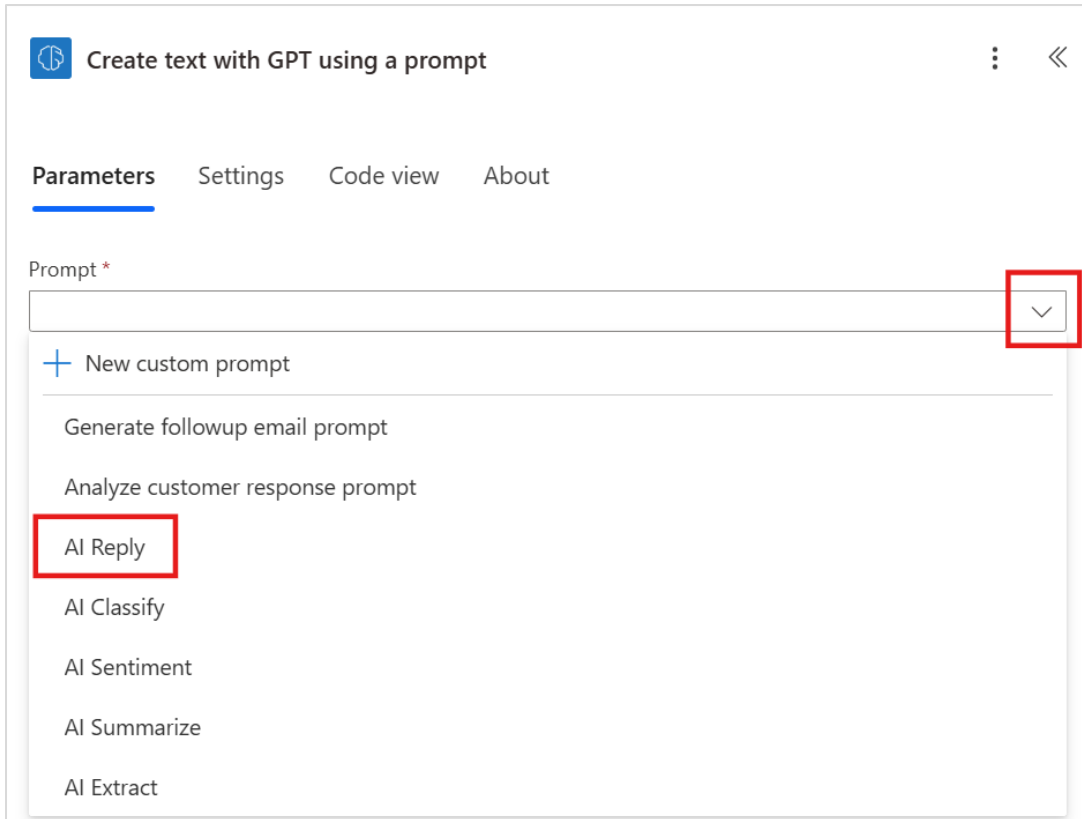


44. This step will use AI Builder to create a response we can send to Teams that will pull specific information about the contract such as contract number and contract value from the Document Intelligence step.

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.*



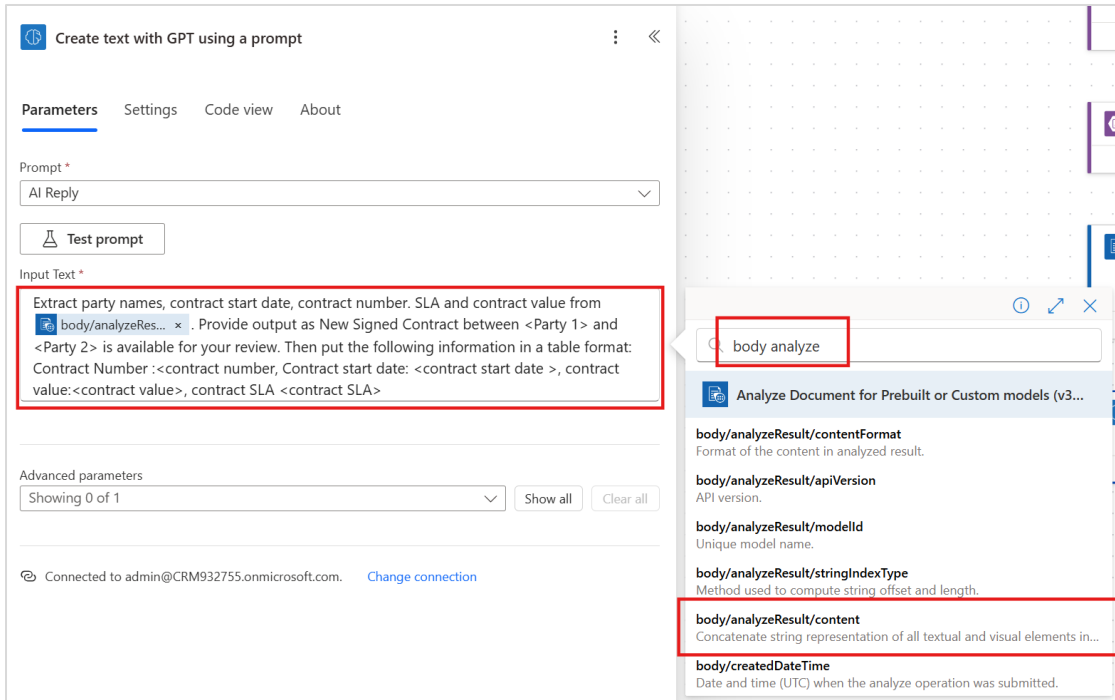
45. In the **Prompt** field, click the **drop-down** and select **AI Reply**.



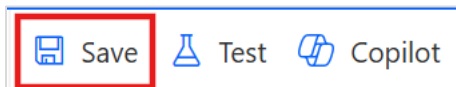
46. Paste the following in the **Input text**. Replace the **highlighted text** with Dynamic Content – **body/analyzeResult/content** from the **Create text with GPT using a prompt** step. *You may need to click See more or search to find the correct dynamic content.*

**Input Text:** *Extract party names, contract start date, contract number, SLA and contract value from [Dynamic Content Here].*

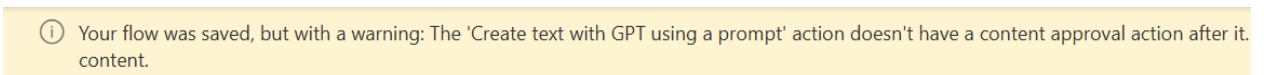
*Provide output as New Signed Contract between <Party 1> and <Party 2> is available for your review. Then put the following information in a table format: Contract Number : <contract number>, Contract start date: <contract start date>, contract value:<contract value>, contract SLA <contract SLA>*



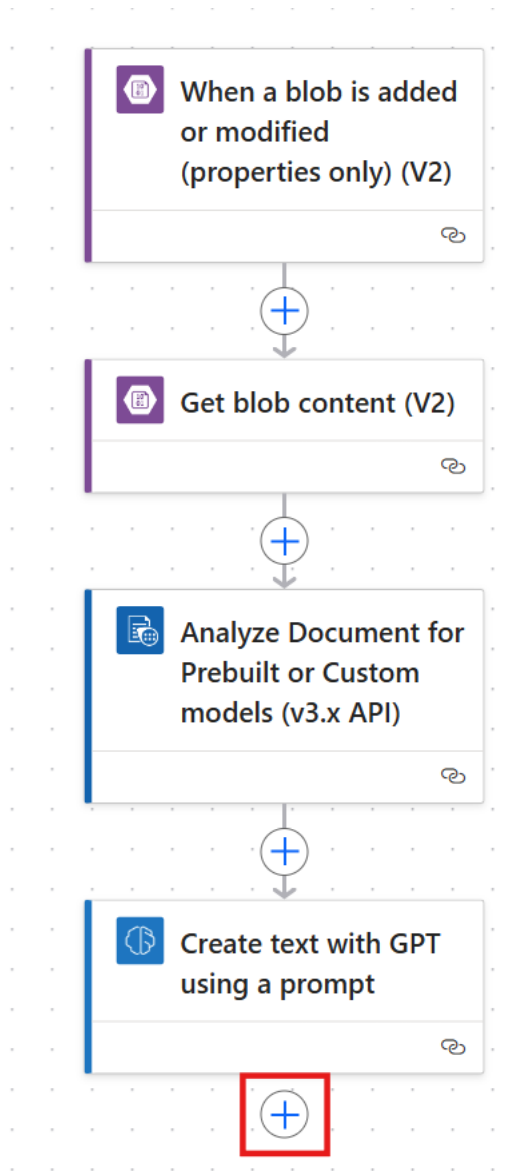
47. Save your flow. Click on **Save** in the upper right corner.



*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.



### Add an action ×

🔍 Post a message


Connector type

Select a connector type ▼

Triggers or actions

Actions ▼

☒ Group by Connector

 Microsoft Teams [See more](#)

Post message in a chat or channel ⓘ

Get messages ⓘ

Reply with a message in a channel ⓘ

Get message details ⓘ

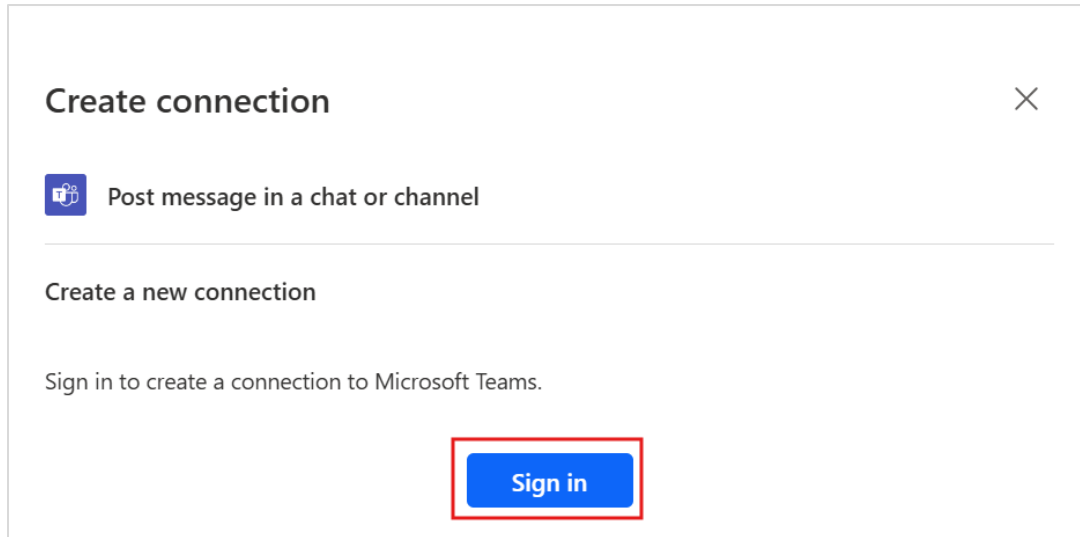
Post card in a chat or channel ⓘ

Post adaptive card and wait for a response ⓘ

Post a feed notification ⓘ

Post a choice of options as the Flow bot to a user ⓘ

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

 Post message in a chat or channel ⋮ ⏪

**Parameters** Settings Code view Testing About

Post as \*  

Power Virtual Agents (Preview) ▾

Post in \*  

Chat with bot ▾







Bot \*  


Sales Buddy ▾

Recipient \* Switch to Advanced Mode  




SA System Administrator X  
Enter part of a name or email address to find more people ▾

Message \*  

  Normal ▾ Arial ▾ 15px ▾ **B** *I* U    

 Text x

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

 Save  Test  Copilot

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

## Test Flow ✕

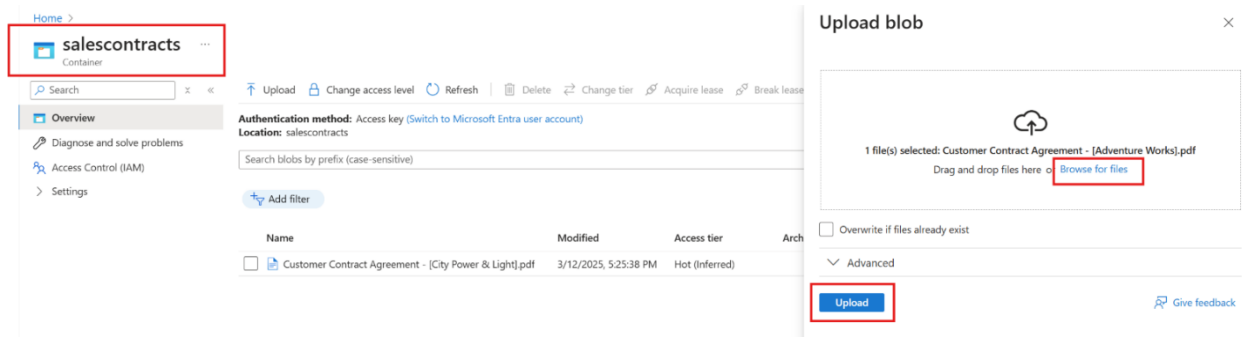
☒ **Manually**  
Perform the starting action to trigger it.

☐ **Automatically**

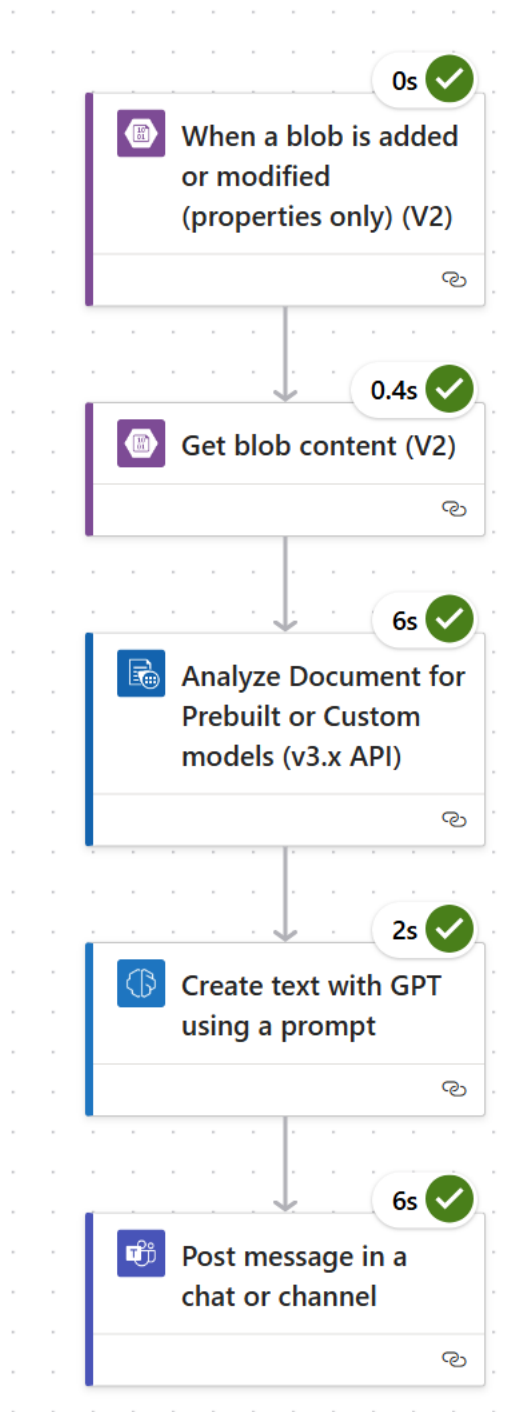
Save & Test

Cancel

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](https://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.

Notification via Sales Buddy 3:13 PM



New Signed Contract between Adventure Works ("Customer") and Contoso Solutions Inc. ("Vendor") is available for your review.

Contract Number	Contract Start Date	Contract Value	Contract SLA
AW2024-003	March 10, 2024	\$220,000	99.7% availability

If you have any further questions or need additional information, please feel free to ask.

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.