

Copilot Studio and Azure AI Workshop

Lab 6: AI-Powered Contract Search &
Insights using Azure Search.

Hands-on Lab Step-by-Step Guide

April 2025

Lab Overview and Pre-requisites

Learning Objectives

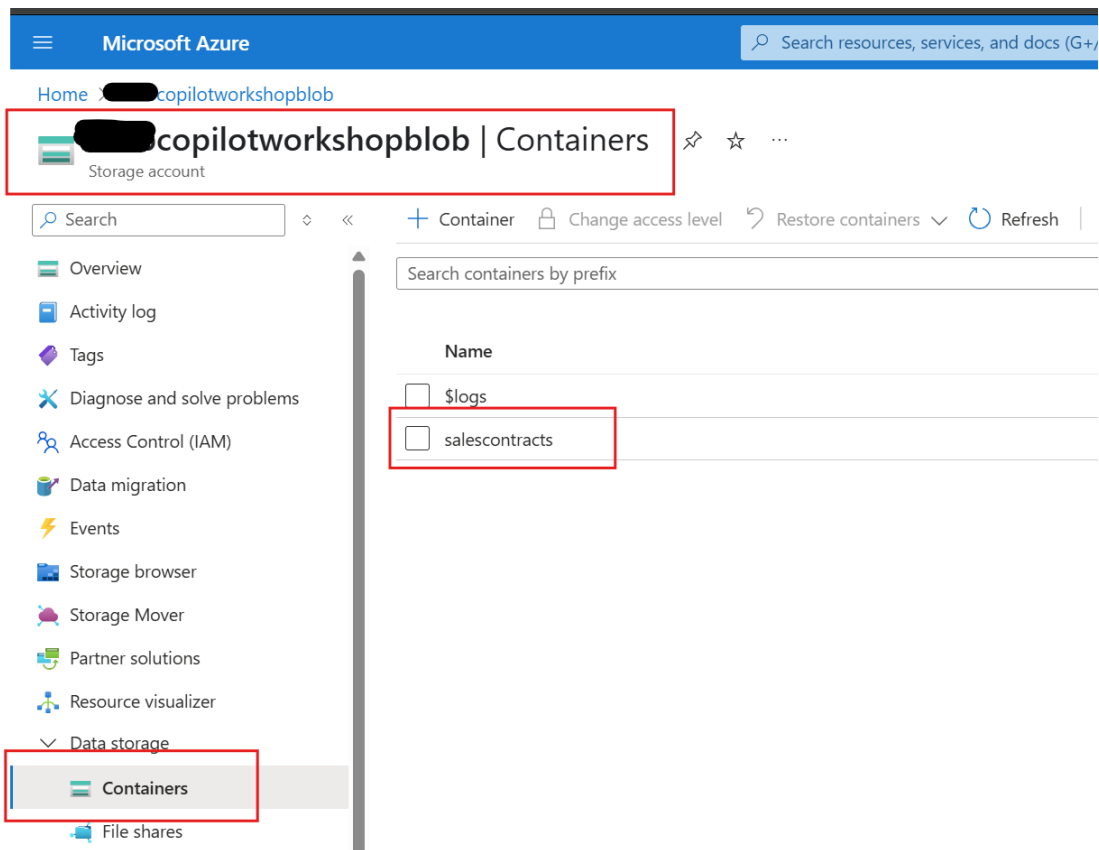
In this lab, participants will learn how to store and index customer contracts in Azure Blob Storage and make them searchable using Azure AI Search. They will configure the search index, apply AI-driven semantic search, and retrieve key contract details such as payment terms, SLAs, and renewal dates.

Pre-requisites

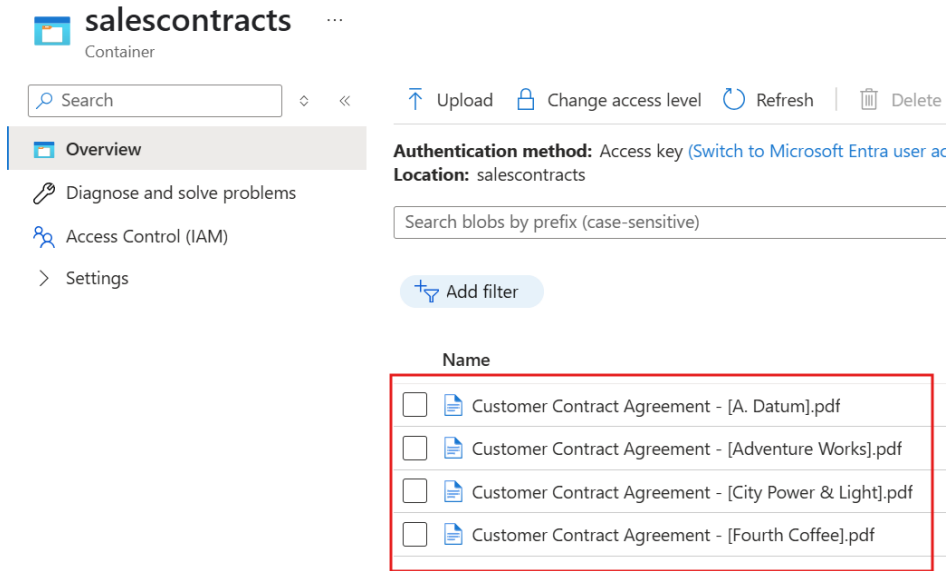
- You will need credentials to a demo tenant that has Copilot Studio and AI Builder trial enabled.
- You will need access to Azure portal with an Azure subscription
- You should have completed Lab 5 (As some of the Azure resources are created in Lab 5)
- Access to Lab 5 Assets (If all 4 contract documents are not already uploaded to Blob in Lab 5)

Lab 6: Enhance the agent to use Azure AI Search to index a large set of customer contract documents and enable semantic search for insights.

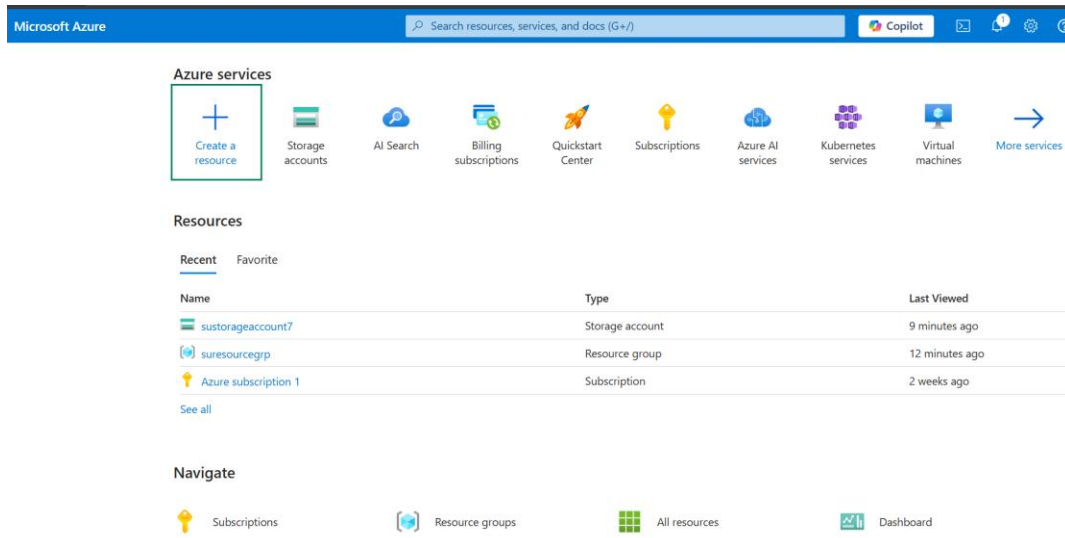
1. Sign into **Azure Portal** (<https://portal.azure.com>) and open the **storage account** created in Lab 5 and click on **Containers** under **Data storage** and select your container where all contracts are stored.



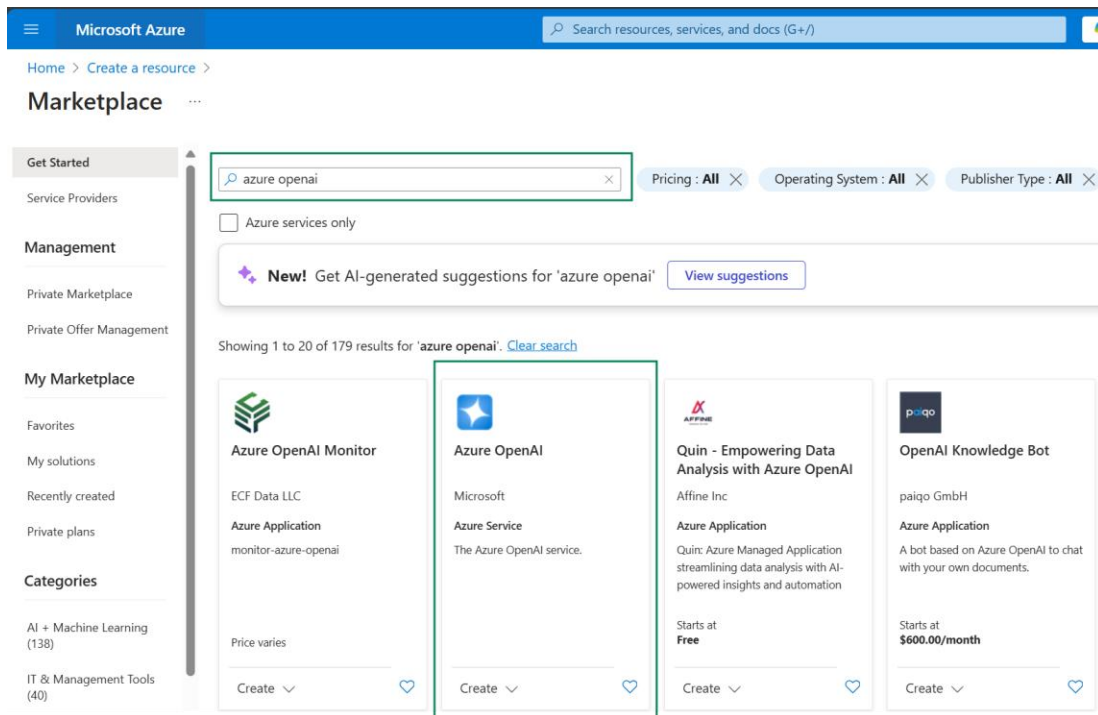
2. Ensure your container has all 4 sample contracts available. If not, upload the contracts from Lab 5 assets folder



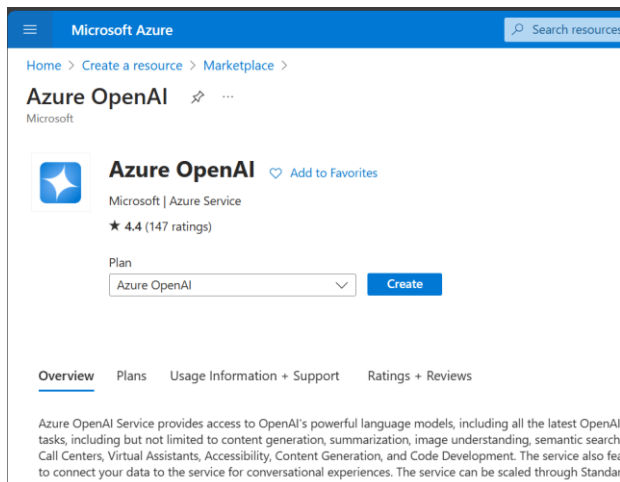
- Go back to the Azure Portal home screen and click on Create a resource



- Search for **Azure OpenAI** and select it to create a new **Azure OpenAI** resource



5. Select Create



6. Select the available resource group, region, provide a resource name, select pricing tier as S0 and click on Next

Microsoft Azure

Search resources, services, and docs

Home > Create a resource > Marketplace > Azure OpenAI >

Create Azure OpenAI

1 Basics 2 Network 3 Tags 4 Review + submit

Azure OpenAI Service provides access to OpenAI's powerful language models, including all the latest OpenAI models. These models can be easily adapted to your specific tasks, including but not limited to content generation, summarization, image understanding, semantic search, and natural language to code translation. Top use cases include Call Centers, Virtual Assistants, Accessibility, Content Generation, and Code Development. The service also features the Assistants API, Fine Tuning capabilities and many ways to connect your data to the service for conversational experiences. The service can be scaled through Standard (tokens) and Provisioned (PTUs) deployment types.

[Learn more](#)

Project Details

Subscription * ⓘ Azure subscription 1

Resource group * ⓘ suresourcegrp [Create new](#)

Instance Details

Region ⓘ East US

Name * ⓘ openairesource07 ✓

Pricing tier * ⓘ Standard S0

[View full pricing details](#)

Content review policy

To detect and mitigate harmful use of the Azure OpenAI Service, Microsoft logs the content you send to the Completions and image generations APIs as well as the content it sends back. If content is flagged by the service's filters, it may be reviewed by a Microsoft full-time employee.

[Learn more about how Microsoft processes, uses, and stores your data](#)

[Apply for modified content filters and abuse monitoring](#)

[Previous](#) [Next](#)

Open

- Click **Next > Next** and **Create**. The **Azure OpenAI** resource should get deployed in few minutes.

Microsoft Azure

Search resources, services, and docs (G+/)

Copilot

Home > Create a resource > Marketplace > Azure OpenAI >

Create Azure OpenAI

✓ Basics
✓ Network
✓ Tags
4 Review + submit

[View automation template](#)

TERMS

By clicking "Create", I (a) agree to the legal terms and privacy statement(s) associated with the Marketplace offering(s) listed above; (b) authorize Microsoft to bill my current payment method for the fees associated with the offering(s), with the same billing frequency as my Azure subscription; and (c) agree that Microsoft may share my contact, usage and transactional information with the provider(s) of the offering(s) for support, billing and other transactional activities. Microsoft does not provide rights for third-party offerings. See the [Azure Marketplace Terms](#) for additional details.

Basics

Subscription	Azure subscription 1
Resource group	suresourcecgrp
Region	East US
Name	openairesource07
Pricing tier	Standard S0

Network

[Previous](#)
[Next](#)
[Create](#)

- Go back to the Azure portal home screen and select the newly created Azure OpenAI resource

Microsoft Azure

Search resources, services, and docs (G+/)

Copilot

Azure services

[Create a resource](#)
[Storage accounts](#)
[AI Search](#)
[Billing subscriptions](#)
[Quickstart Center](#)
[Subscriptions](#)
[Azure AI services](#)
[Kubernetes services](#)
[Virtual machines](#)
[More services](#)

Resources

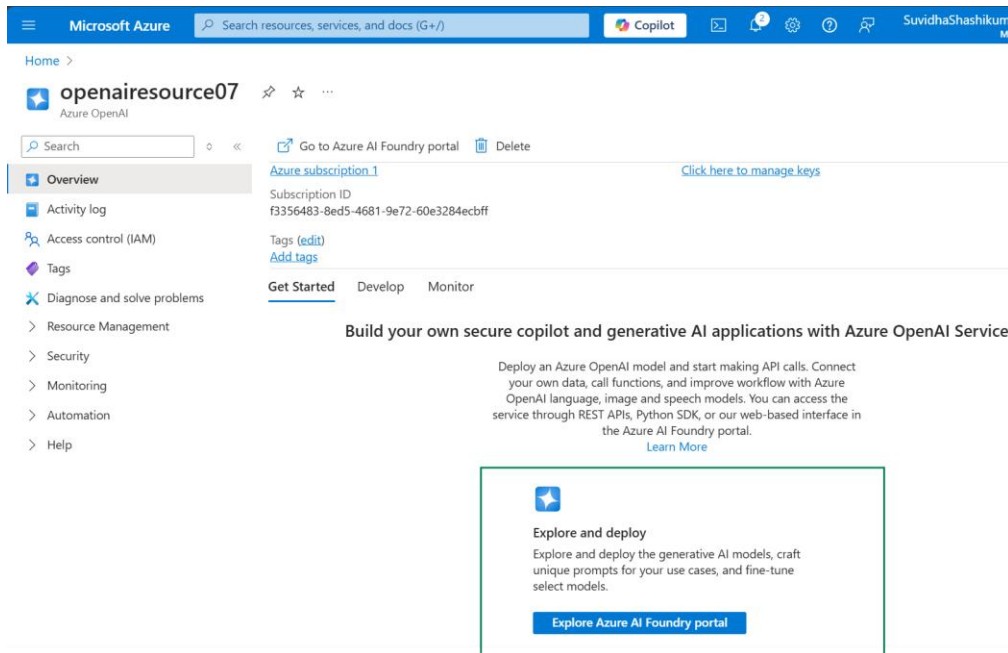
Recent Favorite

Name	Type	Last Viewed
openairesource07	Azure OpenAI	a few seconds ago
suresourcecgrp	Resource group	a minute ago
sustorageaccount7	Storage account	26 minutes ago
Azure subscription 1	Subscription	2 weeks ago

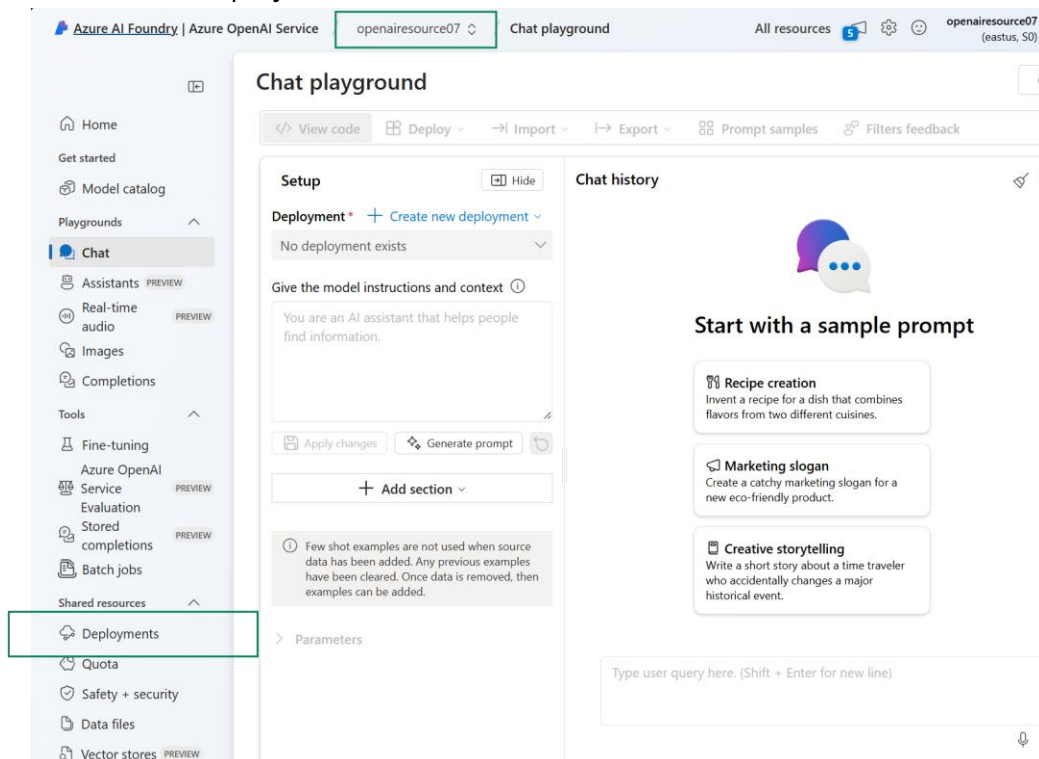
[See all](#)

Navigate

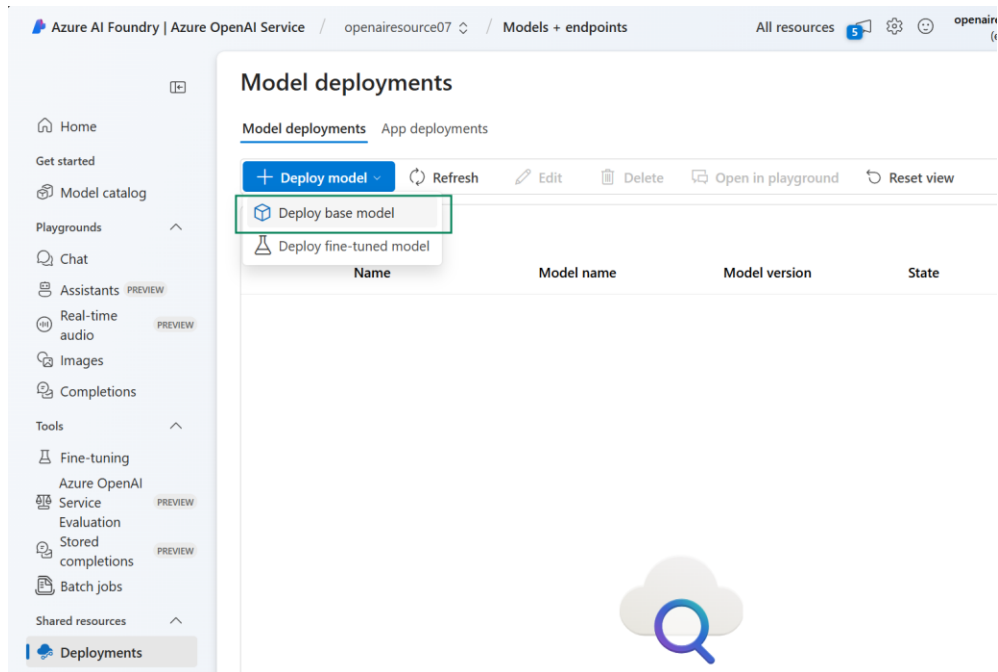
- Inside the Azure OpenAI resource, select **Explore Azure AI Foundry portal** and this should open the **Azure AI Foundry** portal in new tab.



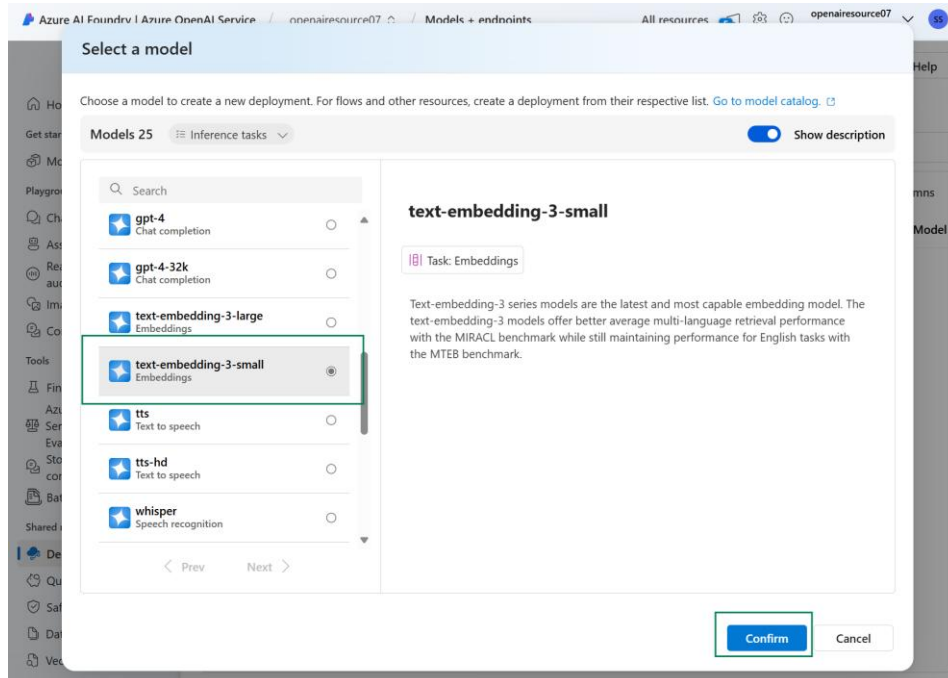
10. In the Azure AI Foundry, make sure your Azure OpenAI service is selected at the top. Next, click on **Deployments**



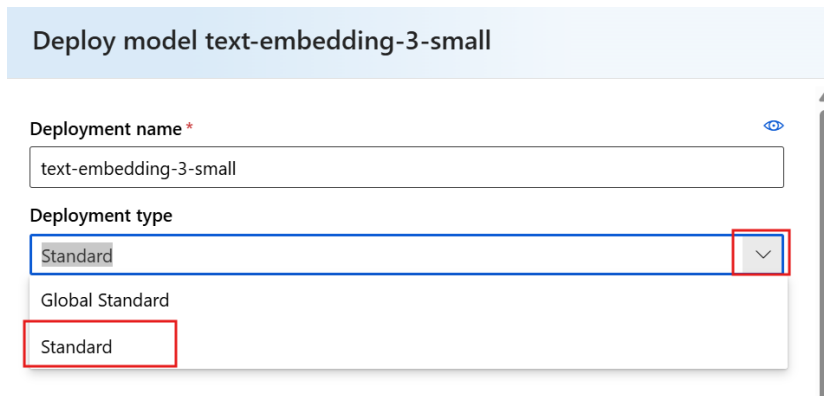
11. In Model deployments screen, Select **Deploy Model** > **Deploy base model**.



12. In the pop-up window, scroll down to select **text-embedding-3-small** and click on **Confirm**.



13. Change the **Deployment type** to **Standard**.

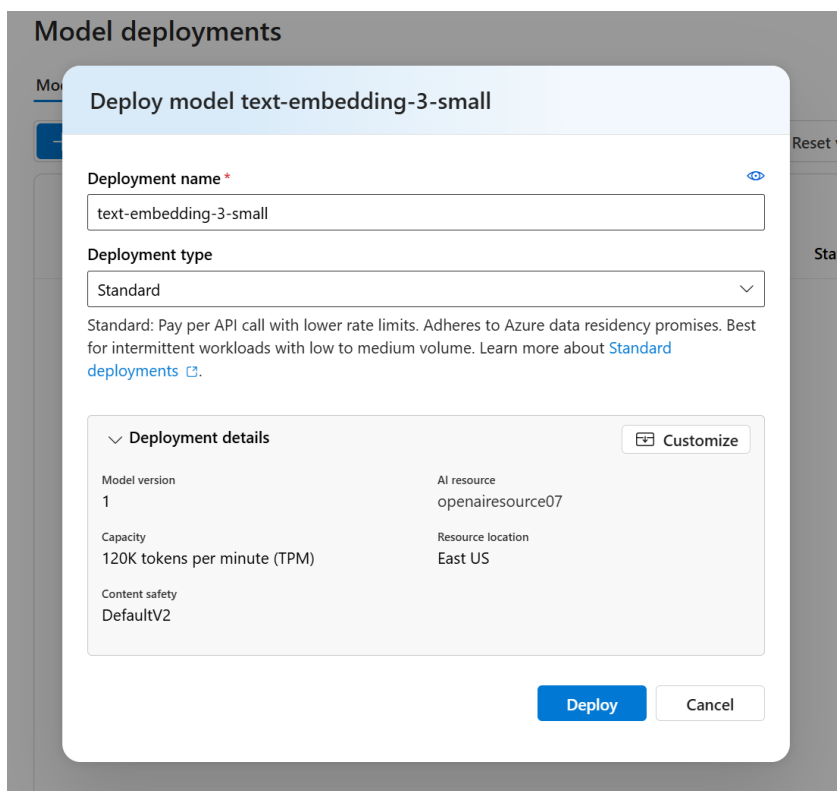


Deploy model text-embedding-3-small

Deployment name *
text-embedding-3-small

Deployment type
Standard
Global Standard
Standard

14. Select **Deploy** to deploy the text embedding model to Azure OpenAI service.



Model deployments

Deploy model text-embedding-3-small

Deployment name *
text-embedding-3-small

Deployment type
Standard

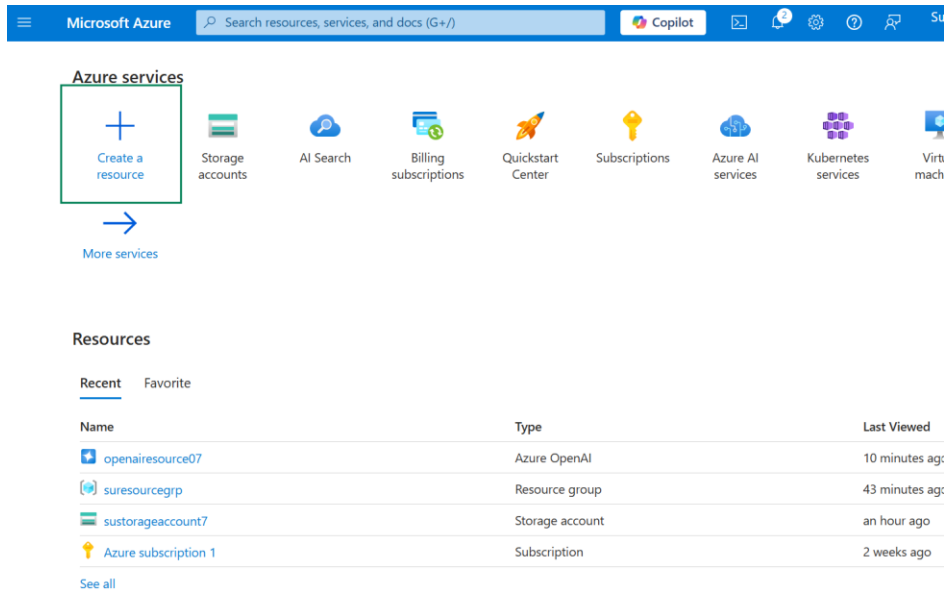
Standard: Pay per API call with lower rate limits. Adheres to Azure data residency promises. Best for intermittent workloads with low to medium volume. Learn more about [Standard deployments](#).

Deployment details

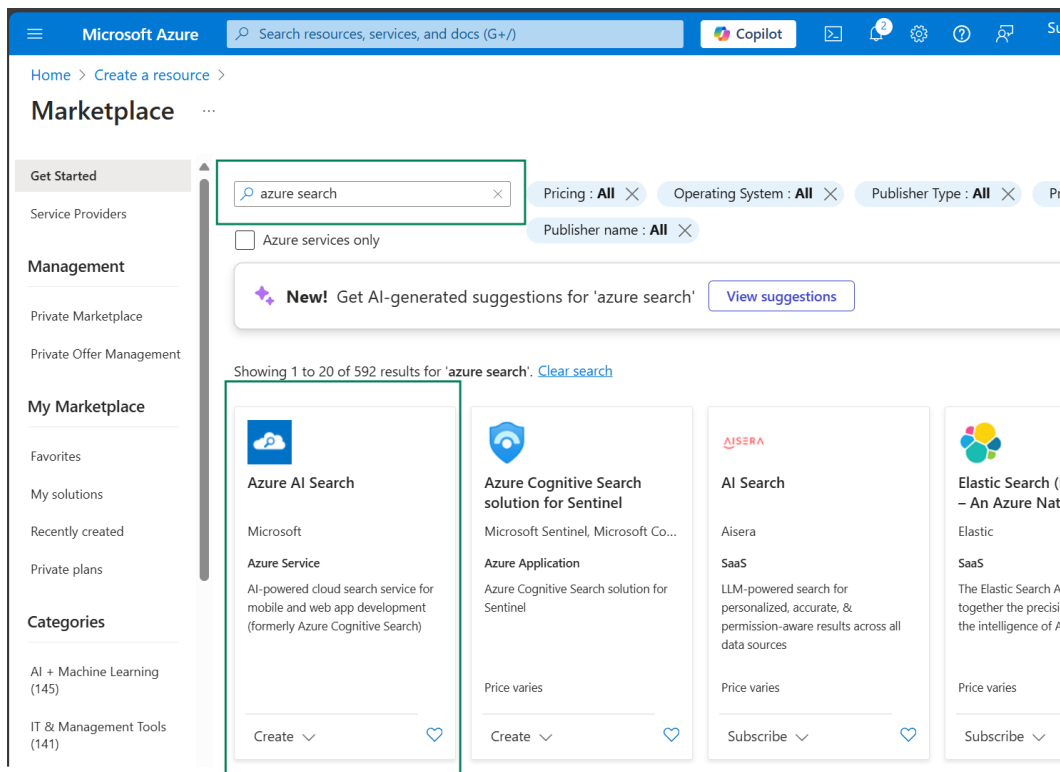
Model version	AI resource
1	openairesource07
Capacity	Resource location
120K tokens per minute (TPM)	East US
Content safety	
DefaultV2	

Deploy Cancel

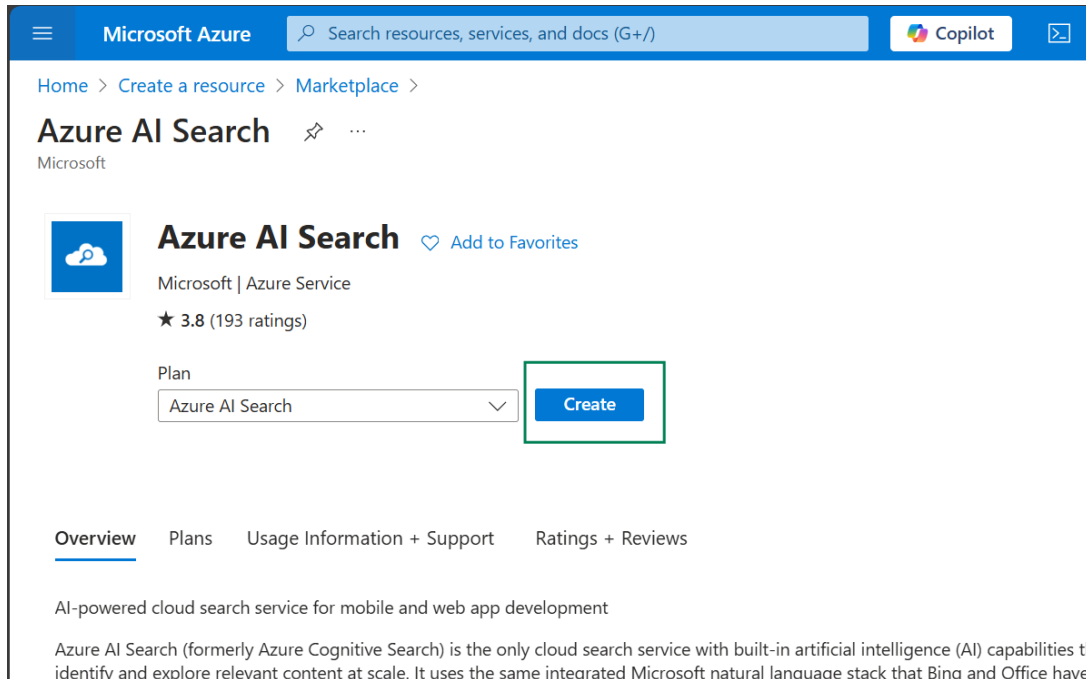
15. Go to Azure portal and select **Create a resource**



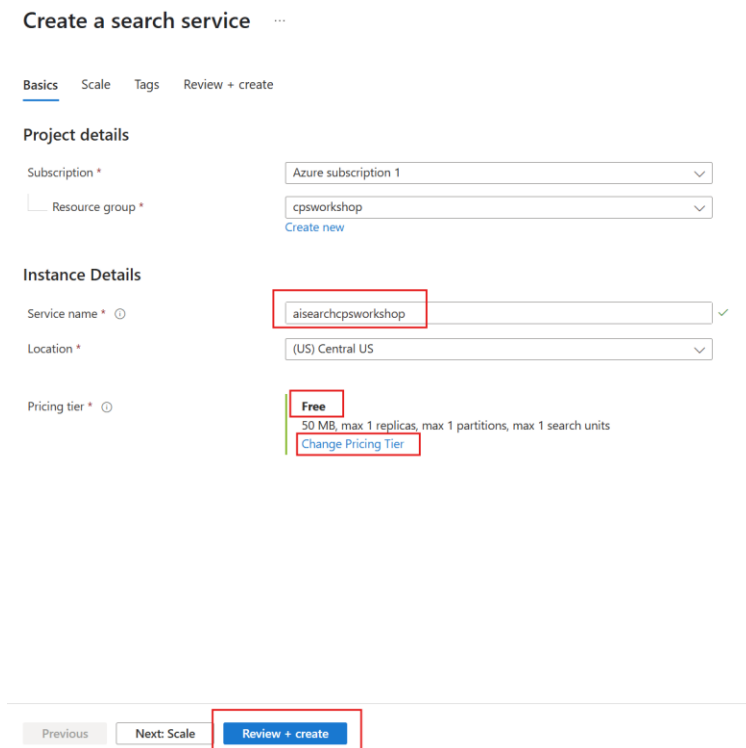
16. Search for *Azure Search* and select *Azure AI Search*



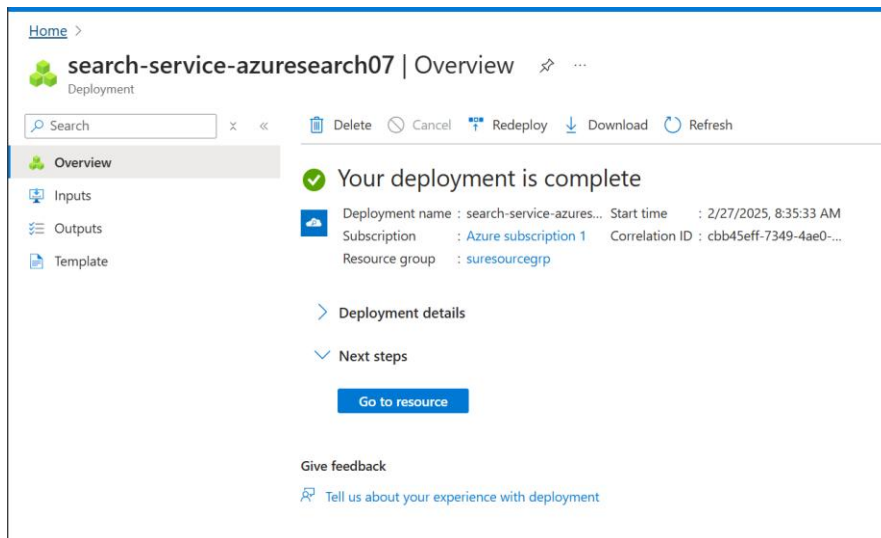
17. Select *Create*



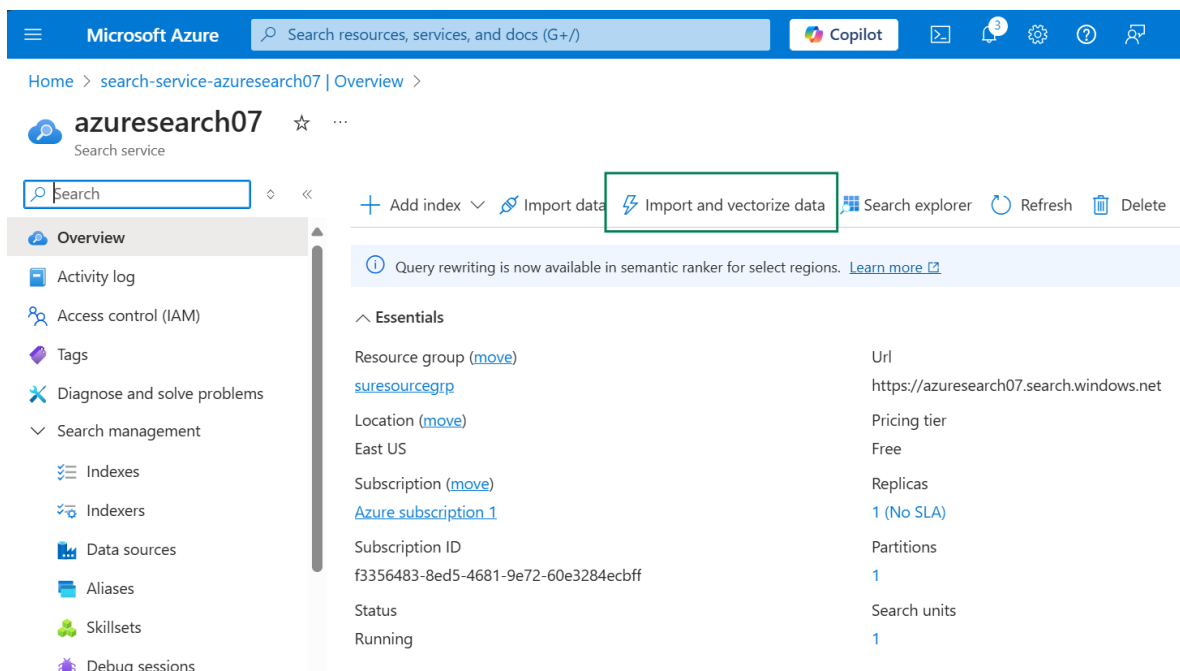
18. In the Create Search Service window, select your **resource group**, provide a **name** for search service, select **region** and click **Change Pricing Tier** to [select Free pricing tier](#). Next, select **Review + Create**.



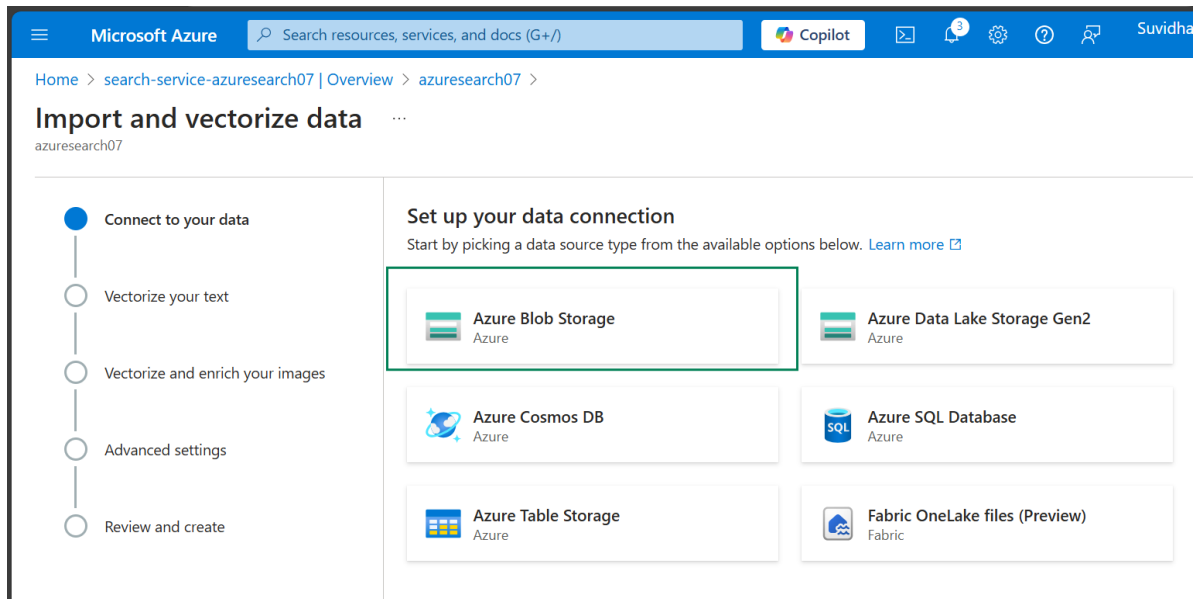
19. Select **Create** again to deploy Azure search service. Once deployed, select **Go to resource**.



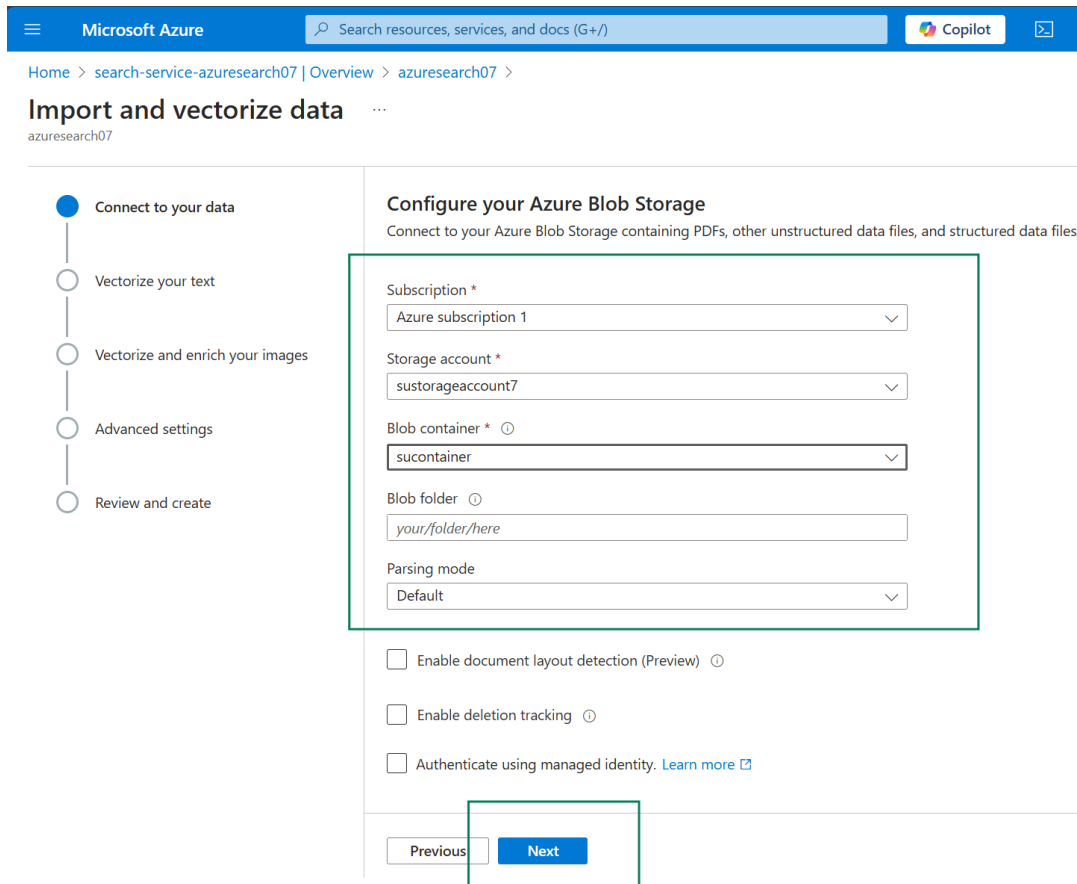
20. In the Azure search service, select **Import and vectorize data**



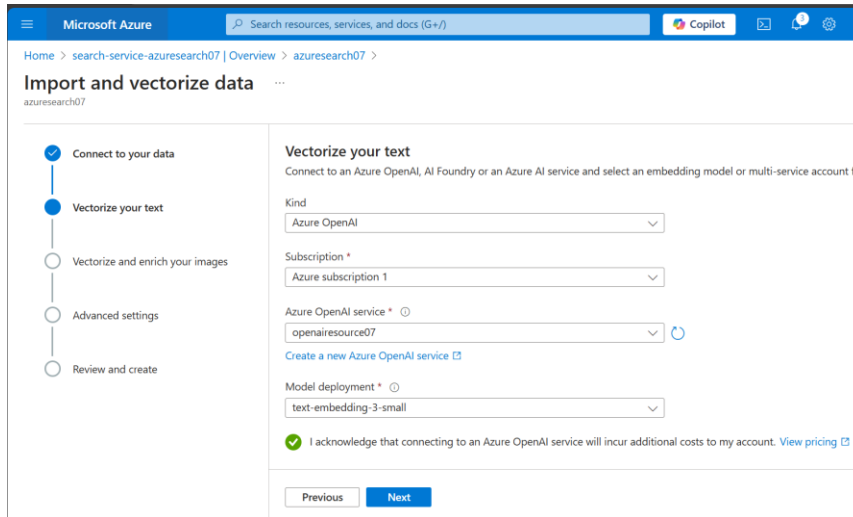
21. Select **Azure Blob Storage**



22. Select the subscription, storage account and container where all contract documents are stored, and click on **Next**

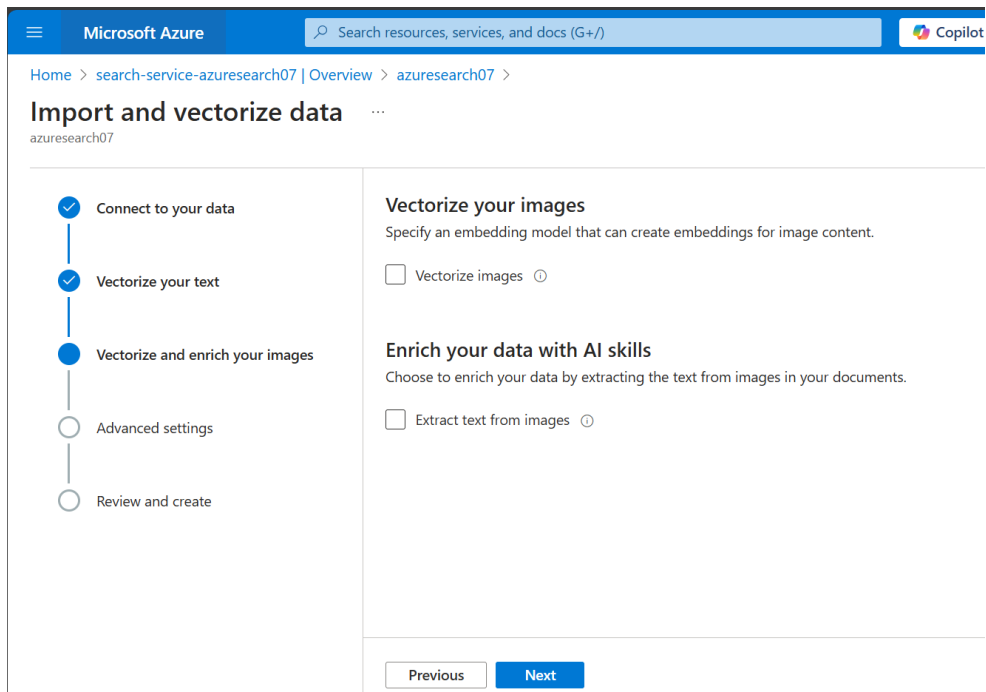


23. In the next screen, choose Kind as Azure OpenAI, your Azure subscription, newly created Azure OpenAI service, the text embedding model values. Click on the box to acknowledge that connecting to an Azure OpenAI service will incur costs and select **Next**



The screenshot shows the 'Import and vectorize data' page in the Azure portal. The left sidebar contains a progress indicator with five steps: 'Connect to your data' (checked), 'Vectorize your text' (selected), 'Vectorize and enrich your images', 'Advanced settings', and 'Review and create'. The main content area is titled 'Vectorize your text' and includes the instruction: 'Connect to an Azure OpenAI, AI Foundry or an Azure AI service and select an embedding model or multi-service account for'. Below this, there are four dropdown menus: 'Kind' (set to 'Azure OpenAI'), 'Subscription *' (set to 'Azure subscription 1'), 'Azure OpenAI service *' (set to 'openairesearch07' with a link to 'Create a new Azure OpenAI service'), and 'Model deployment *' (set to 'text-embedding-3-small'). At the bottom, there is a green checkmark icon and a text box stating: 'I acknowledge that connecting to an Azure OpenAI service will incur additional costs to my account. [View pricing](#)'. At the very bottom, there are 'Previous' and 'Next' buttons.

24. Select **Next**



The screenshot shows the 'Import and vectorize data' page in the Azure portal, now at the 'Vectorize and enrich your images' step. The left sidebar progress indicator shows: 'Connect to your data' (checked), 'Vectorize your text' (checked), 'Vectorize and enrich your images' (selected), 'Advanced settings', and 'Review and create'. The main content area is titled 'Vectorize your images' with the instruction: 'Specify an embedding model that can create embeddings for image content.' Below this is a checkbox labeled 'Vectorize images'. Further down, there is a section titled 'Enrich your data with AI skills' with the instruction: 'Choose to enrich your data by extracting the text from images in your documents.' Below this is a checkbox labeled 'Extract text from images'. At the bottom, there are 'Previous' and 'Next' buttons.

25. Select **Next**

Microsoft Azure Search resources, services, and docs (G+/) Copilot

Home > search-service-azuresearch07 | Overview > azuresearch07 >

Import and vectorize data

azuresearch07

- ✓ Connect to your data
- ✓ Vectorize your text
- ✓ Vectorize and enrich your images
- Advanced settings
- Review and create

Index fields

Shows a preview of the index fields and allows you to make updates. [Learn more](#)

[Preview and edit](#)

Schedule indexing

Schedule

Once

Previous Next

26. Update the **Objects name prefix** to `indexcustomersalescontract` and click **Create** to create a vector index.

Home > searchservice-1743359129488 | Overview > aisearchcpworkshop >

Import and vectorize data

aisearchcpworkshop

- ✓ Connect to your data
- ✓ Vectorize your text
- ✓ Vectorize and enrich your images
- ✓ Advanced settings
- Review and create

The wizard generates an index, indexer, data source, and skillset on your search service. You can view and independently manage these objects once the many other properties are fixed for the lifetime of the object. To customize the name, change the object name prefix.

Objects name prefix

indexcustomersalescontract

Review your configuration

Vectorize your text

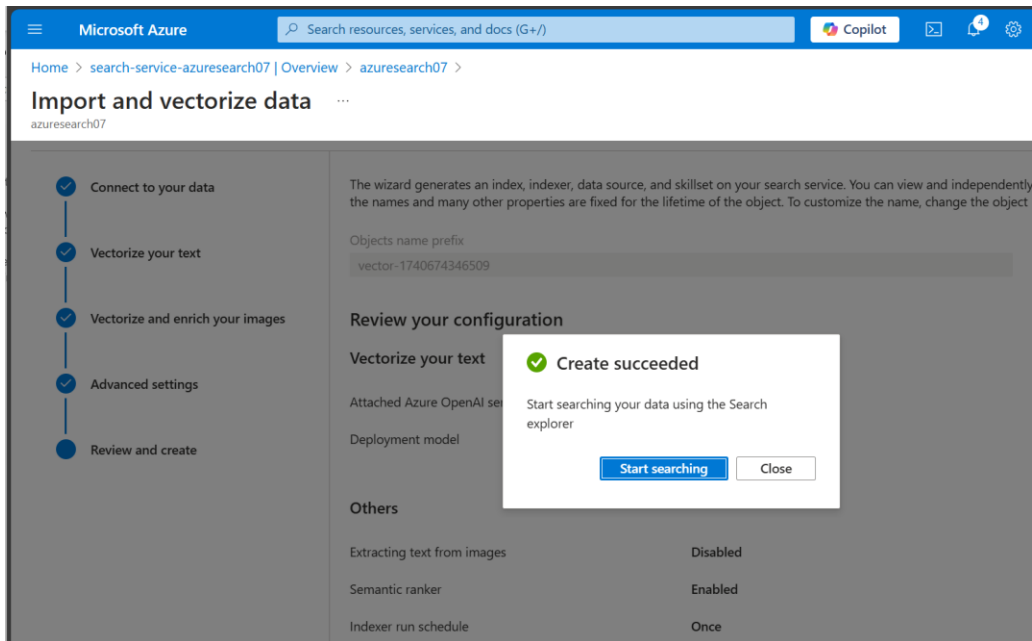
Attached Azure OpenAI service	openaicpsworkshop
Deployment model	text-embedding-3-small

Others

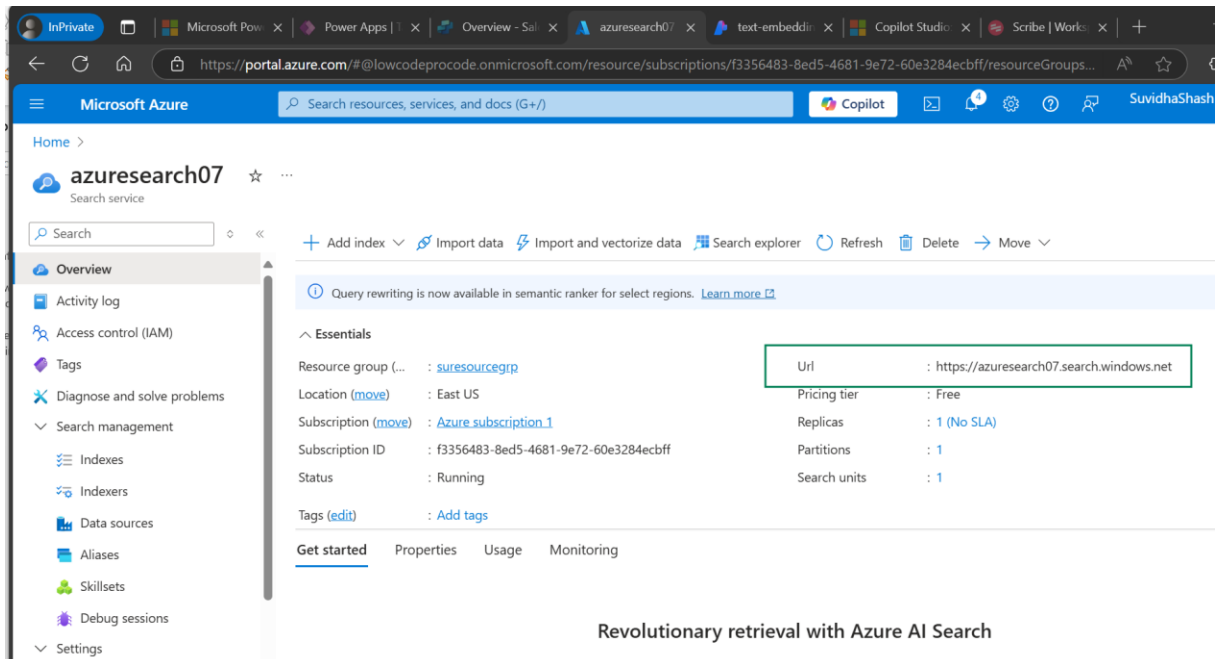
Extracting text from images	Disabled
Semantic ranker	Enabled
Indexer run schedule	Once

Previous Create

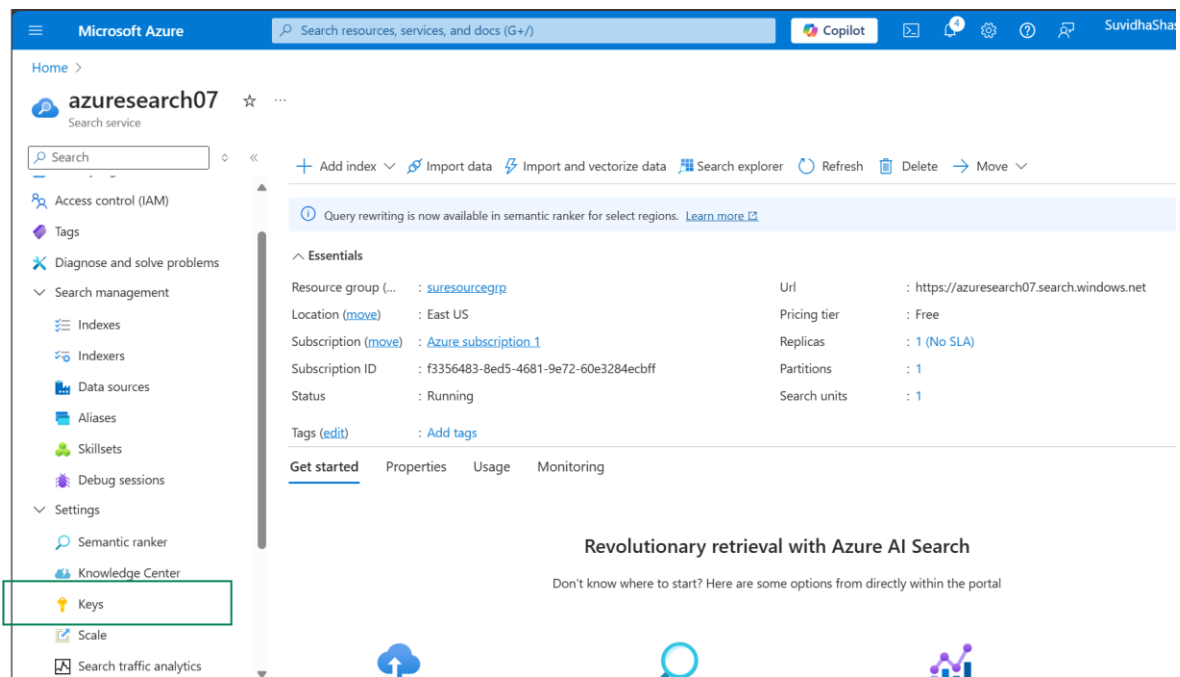
27. You should see a success message –



28. Go to Home page and open the **Azure search service** again. Copy the endpoint URL into a notepad.

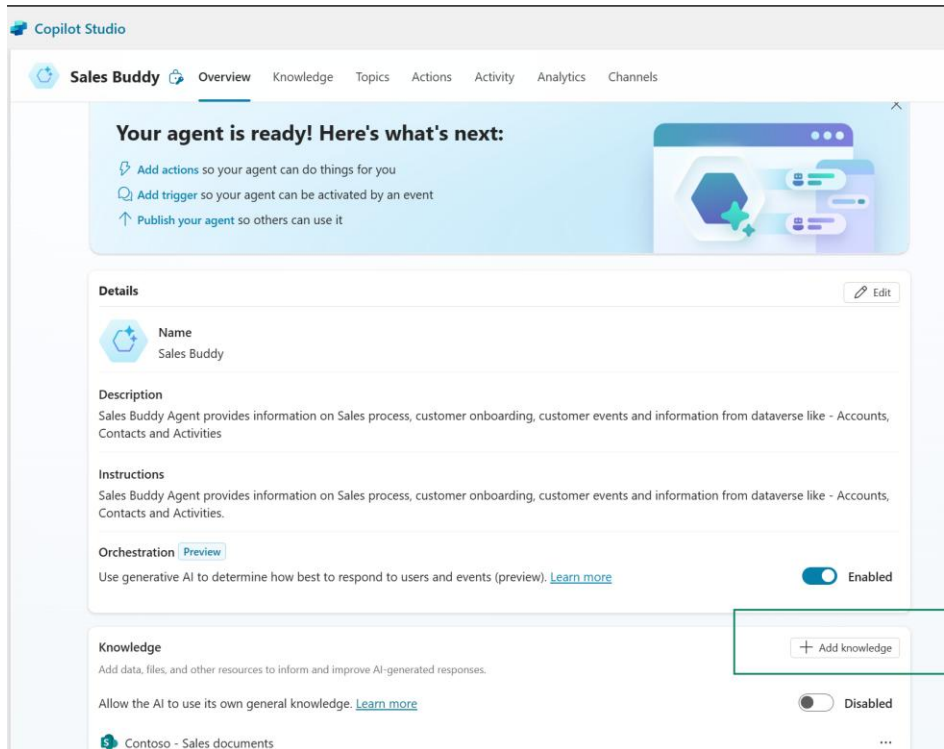


29. In the same window, under **Settings** select **Keys** and copy one of the 2 keys into a Notepad.

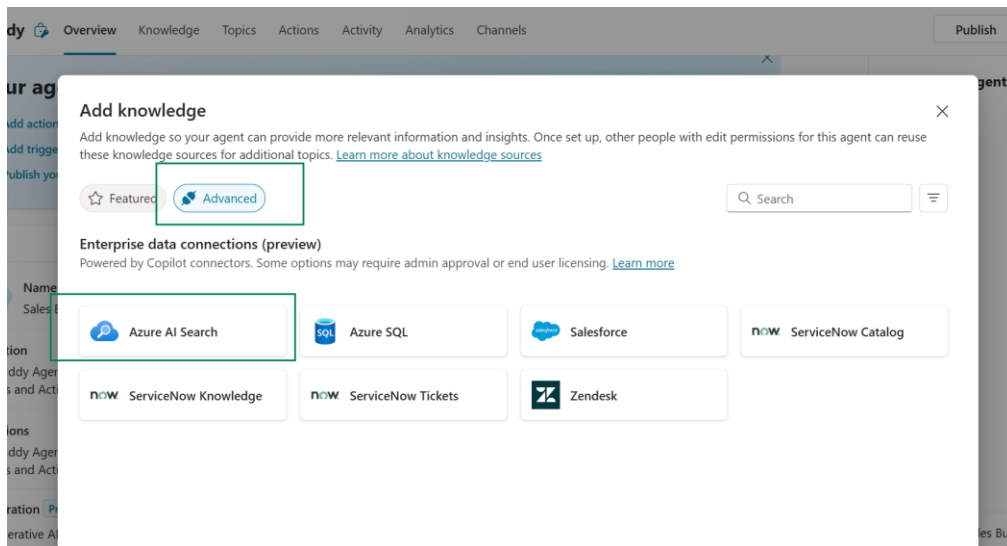


Now, your search service is ready to be used.

30. Open **Copilot Studio** and select the **Sales Buddy** agent. Under **Knowledge**, click on **Add Knowledge**.



31. In the Knowledge window, select **Advanced** tab and select **Azure AI Search**



32. Update **Knowledge name** = *Sales Buddy - Azure AI Search Contracts*;
Knowledge Description =

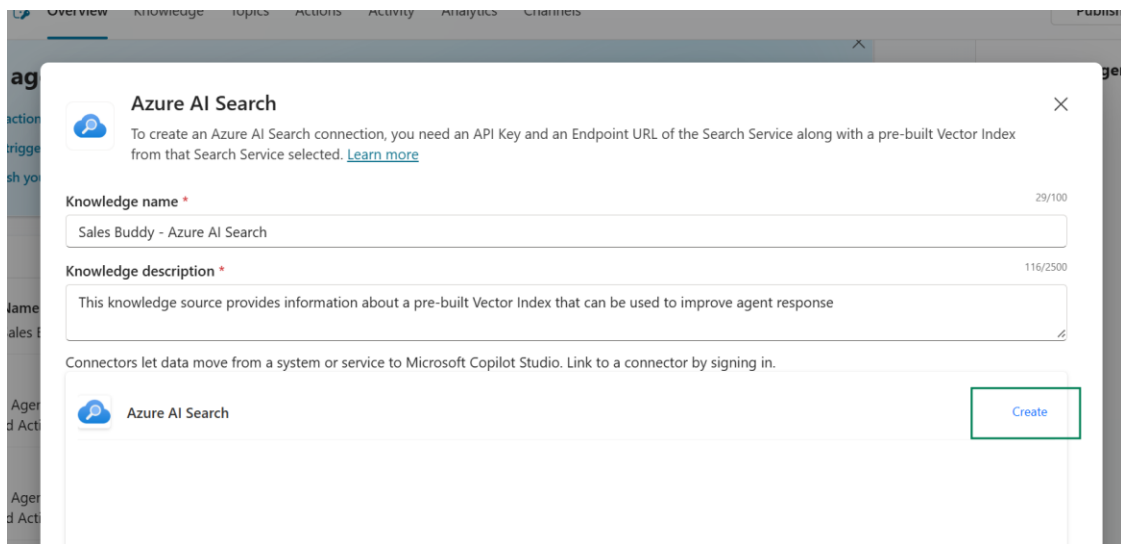
"This knowledge source provides access to customer contract agreements. Each contract file follows the format:

Customer Contract Agreement - [Customer Name].docx

Each contract contains essential details, including:

- *Scope of Services: Defines the services provided*
- *Payment Terms: Specifies the total contract value, milestone-based payments, and due dates.*
- *Service Level Agreement (SLA): Outlines uptime guarantees, response times, and escalation procedures.*
- *Data Privacy & Compliance: Ensures compliance with regulations like GDPR, CCPA, and defines data ownership.*
- *Contract Term & Renewal: States the contract duration, renewal policies, and termination conditions.*
- *Governing Law: Specifies applicable legal jurisdiction "*

Next, click on **Create** to create a connection to **Azure search service**



The screenshot shows a dialog box titled "Azure AI Search" with a close button (X) in the top right corner. Below the title is a brief instruction: "To create an Azure AI Search connection, you need an API Key and an Endpoint URL of the Search Service along with a pre-built Vector Index from that Search Service selected. [Learn more](#)".

There are two input fields:

- Knowledge name *** (with a character count of 29/100): The text "Sales Buddy - Azure AI Search" is entered.
- Knowledge description *** (with a character count of 116/2500): The text "This knowledge source provides information about a pre-built Vector Index that can be used to improve agent response" is entered.

Below the input fields is a section titled "Connectors let data move from a system or service to Microsoft Copilot Studio. Link to a connector by signing in." It contains a list with one item: "Azure AI Search" with a blue cloud icon to its left. To the right of this list is a green "Create" button.

33. Paste the endpoint URL and Key from Notepad and select **Create**. Once the connection is successful, select **Next**.

Azure AI Search

To create an Azure AI Search connection, you need an API Key and an Endpoint URL of the Search Service along with a pre-built Vector Index from that Search Service selected. [Learn more](#)

Knowledge name * 29/100
Sales Buddy - Azure AI Search

Knowledge description * 116/2500
This knowledge source provides information about a pre-built Vector Index that can be used to improve agent response

Connectors let data move from a system or service to Microsoft Copilot Studio. Link to a connector by signing in.

* Authentication type ⓘ
Access Key

* Azure AI Search Endpoint URL ⓘ
https://azuresearch07.search.windows.net

* Azure AI Search Admin Key ⓘ
.....

Create

Back Next Cancel

34. Select the available vector index and select **Add**

Azure AI Search

Select a Vector Index and see Index details. The Vector Index is created using integrated vectorization. [Learn more](#)

Select a Vector Index *
vector-1740674346509

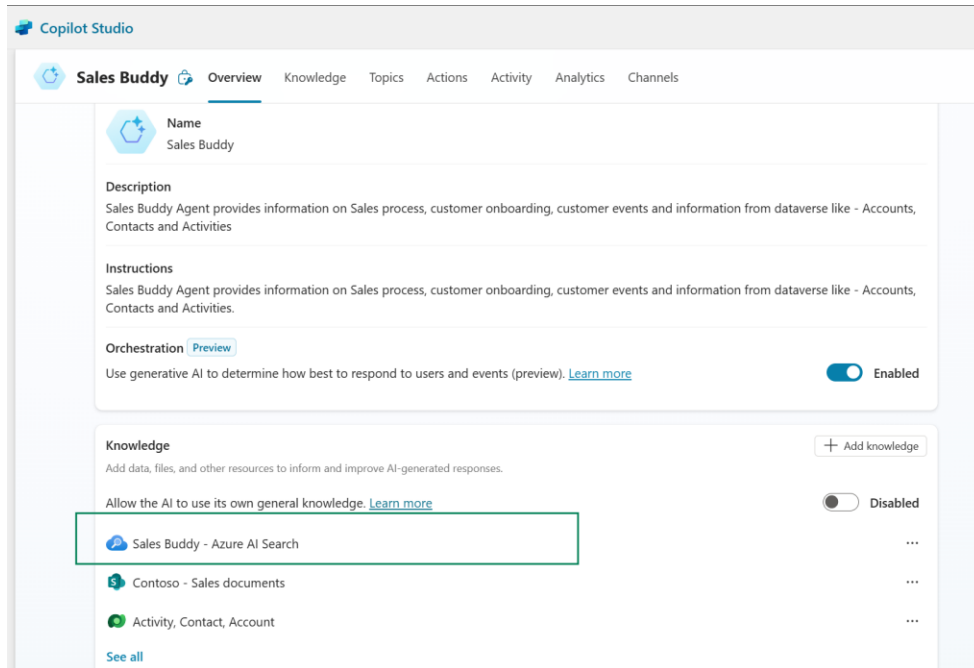
Document count
8

Storage size
182.03 KB

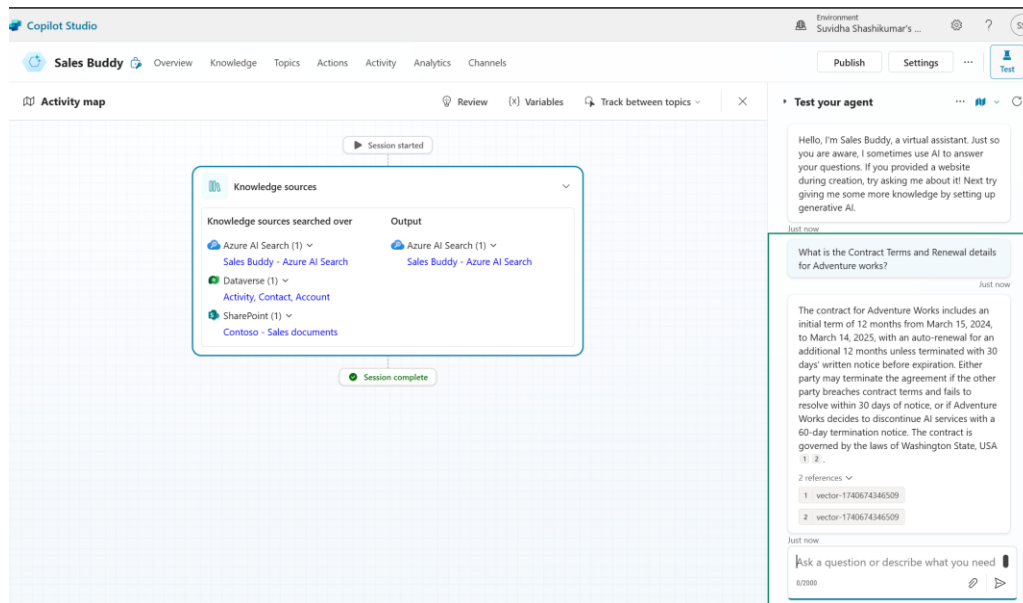
Vector Index size
145.71 KB

Back **Add** Cancel

35. You should see a new Azure AI Search knowledge in your Agent.



36. Now, we're ready for the test. Open **Test window** and ask question – "What are the Contract Terms and Renewal details for Adventure works?"



Congratulations. You have completed Lab 6.