

Creating a custom Microsoft Copilot using Copilot Studio to work with Nasuni data



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Value overview of Microsoft Copilot Studio

- ✓ Copilot Studio is a Microsoft web application that enables users to create custom copilots tailored to your specific needs
- ✓ Unlocks tailored AI solutions that deliver enhanced productivity, insights, and decision-making capabilities while ensuring data privacy and compliance
- ✓ Extends the capabilities of Microsoft Copilot, allowing personalized AI companions to be built for use with Nasuni data
- ✓ Copilot Studio leverages Microsoft's machine learning and natural language understanding to provide context-aware assistance of the Nasuni stored documents that are provided

Component overview of Microsoft Copilot Studio

- **Topic definition:** in Copilot Studio, topics are defined for the custom copilot to handle. These topics represent the areas where the copilot assists users
- **Content integration:** existing Nasuni content can be added to enhance the copilot's knowledge base
- **Language customization:** Copilot Studio allows for the selection of the language the copilot speaks, ensuring alignment with the audience
- **Testing environment:** the copilot's responses can be tested in real-time within the studio
- **Performance metrics:** the performance of the copilot in handling user queries can be monitored, and its behavior can be adjusted as needed

Use cases of Microsoft Copilot Studio

Copilots created using Copilot Studio work particularly well for static data sets that change infrequently. Typical use cases include:

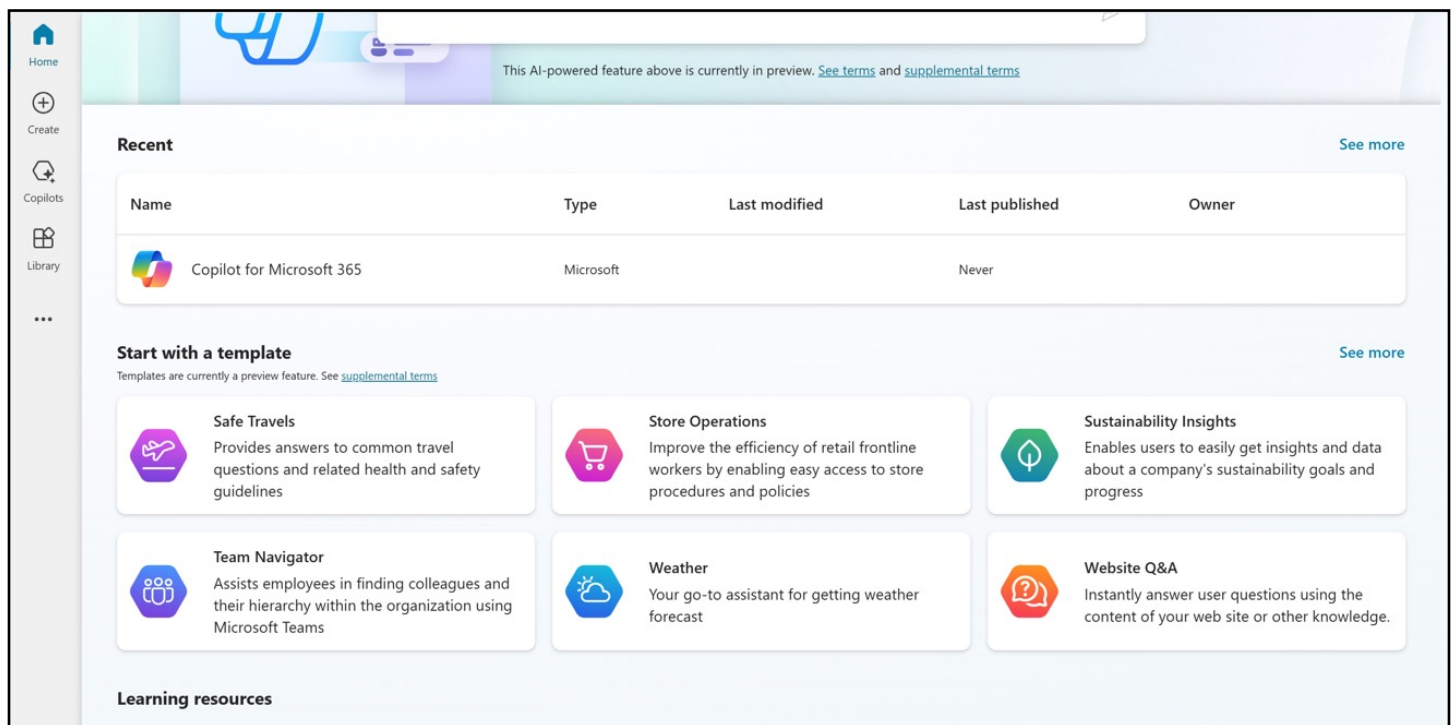
- **Domain-specific assistance:** create copilots specialized in specific domains (e.g., healthcare, legal, finance) to provide accurate and relevant information
- **Custom FAQs:** build copilots that answer frequently asked questions, reducing the load on human support teams
- **Content recommendations:** develop copilots that recommend relevant articles, products, or services based on user queries
- **Process automation:** Copilot Studio can guide users through complex processes or workflows
- **Personalized conversations:** customize copilots to engage in natural conversations with users, enhancing user experience

Getting started

Here's a step-by-step guide to creating a custom copilot with Nasuni data using Microsoft Copilot Studio:

Step 1 – Sign up and access Copilot Studio

1. Navigate to the Microsoft Copilot Studio introduction website:
<https://copilotstudio.microsoft.com/>
2. Click on “Try free” and sign in with a work email address
3. After signing up, a default Power Apps environment will automatically be created



Step 2 - Copilot creation

Create a copilot

Set up the copilot

Start fresh with a new copilot, and start making it yours.

Copilot name * ⓘ

What language do you want your copilot to speak? * ⓘ

English (United States) (en-US) ▾

🔗 Give your copilot some knowledge by setting up your Generative AI ⓘ

Add knowledge to your copilot by pointing it to an external website so your copilot can instantly answer questions over your data. [Learn more](#)

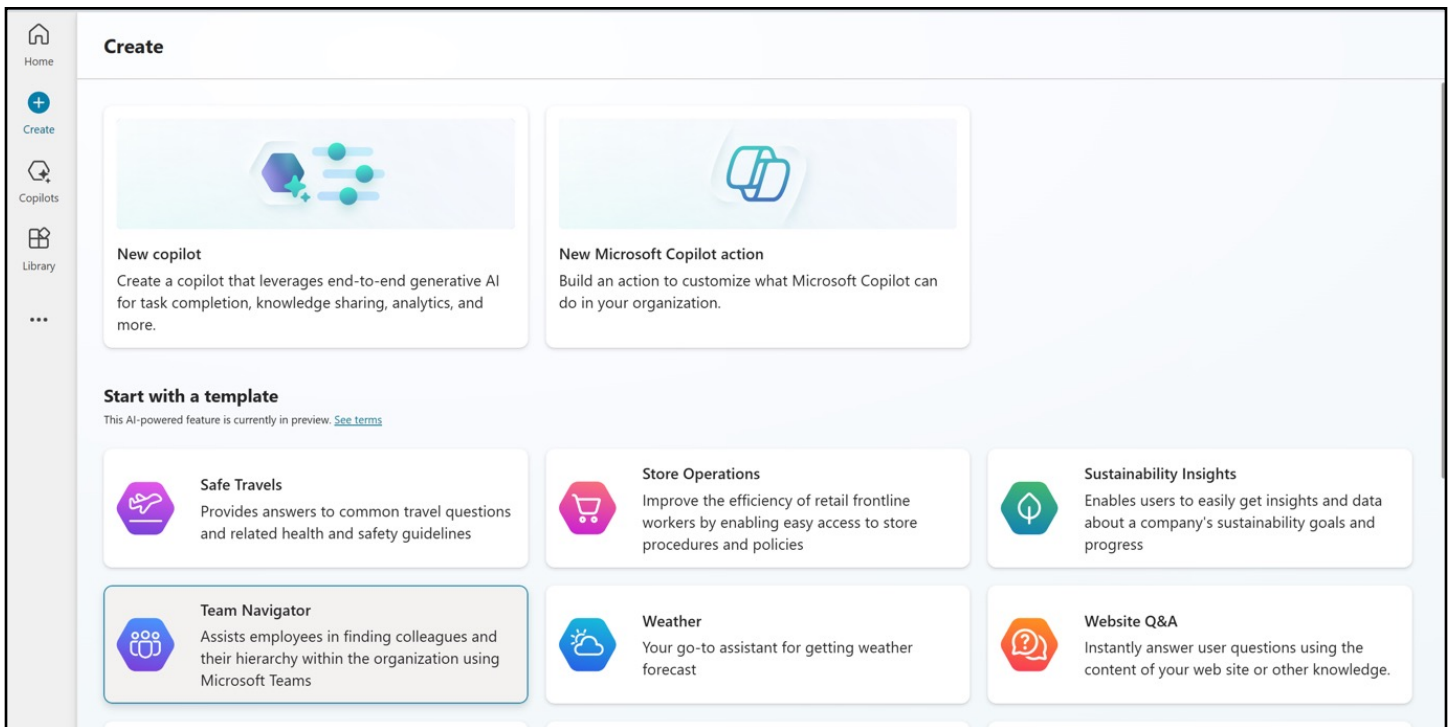
AI-generated content can have mistakes, so don't forget to make sure it's accurate and appropriate. Review the [supplemental terms](#) to learn more.

Edit advanced options >

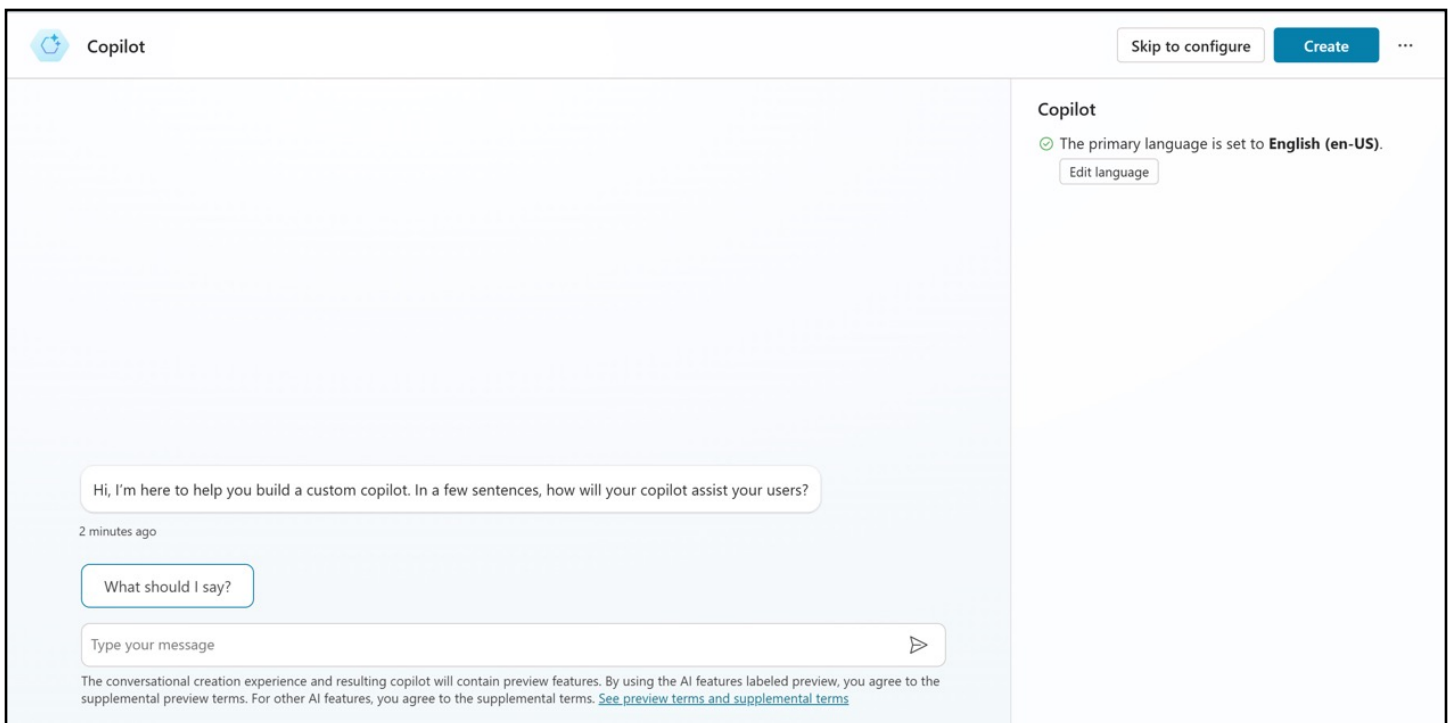
Create

Cancel

- After signing up, the Copilot Studio homepage will be displayed
- Templates for creating copilots will be available and a menu bar with various options, including access to existing copilots, can be found on the right-hand side
- To create a new copilot, click the '+' button labeled "Create a copilot", followed by the "new copilot" option on the next page



- A wizard will not initiate assistance with the creation of a copilot
 - The initial screen will attempt to provide assistance based on natural language, serving as a copilot for the copilot. Clicking the “skip to configure” button at the top right of the screen is recommended.



The screenshot shows the Microsoft Copilot Studio configuration interface. At the top left is the Copilot logo. At the top right is a blue 'Create' button and a three-dot menu. Below the logo is a section for an icon with the text: 'Used to represent the copilot. Icon should be in PNG format and less than 30 KB in size.' The main configuration area has three sections: 'Description' with a text box and the instruction 'Use your own words to describe what your copilot should help with, including your audience and end goal.'; 'Instructions' with a larger text box and the instruction 'Direct the behavior of the copilot, including its tasks and how it completes them.'; and 'Knowledge' with a text box, an 'Add knowledge' button, and the instruction 'Add data, files, and other resources that your copilot will use to learn. These sources form the basis for your copilot's responses.' At the bottom of the Knowledge section is a link to 'supplemental terms' and a disclaimer. On the right side, there is a 'Copilot' section showing a green checkmark and the text 'The primary language is set to English (en-US)', with an 'Edit language' button below it.

- Copilot language is set to English by default. This setting can be left as is or changed to a preferred language.
- If there is a company logo or icon for the copilot, it can be uploaded here.
- Next, enter the description of the copilot for the intended audience.
- The instructions serve as prompt augmentation for the copilot. Instructions are provided directly to the copilot regarding its intended functions. For example: "you are a friendly support assistant that will use the provided knowledge to answer support questions about <product or company name>." These instructions should be as detailed and explicit as possible, as they have a direct effect on the copilot's performance.
 - ◇ At this point, clicking on 'add knowledge' will not allow the addition of Nasuni files because the copilot has not yet been created. Therefore, clicking 'Create' in the top right corner of the screen is the necessary first step.
 - ◇ Once the copilot is created, the user will be taken to the newly created copilot. Here, there will be an opportunity to 'add knowledge' for indexing, such as Nasuni stored files.



Test copilot



Overview

Knowledge

Topics

Actions

Analytics



Name

Test copilot

Description

A copilot to answer questions about Nasuni NOC and File Manuals.

Instructions

You are a support copilot that will answer questions about the attached support manuals / documentation.



Knowledge

Add data, files, and other resources to inform and improve AI-generated responses.

+ Add knowledge

Allow the AI to use its own general knowledge (preview). [Learn more](#)



Enabled

Add available knowledge sources (Powered by Copilot Connectors)

Users with edit permissions for this copilot can also reuse your connections for other topics w

Q Keywords for the data you're looking for

Featured



Public websites

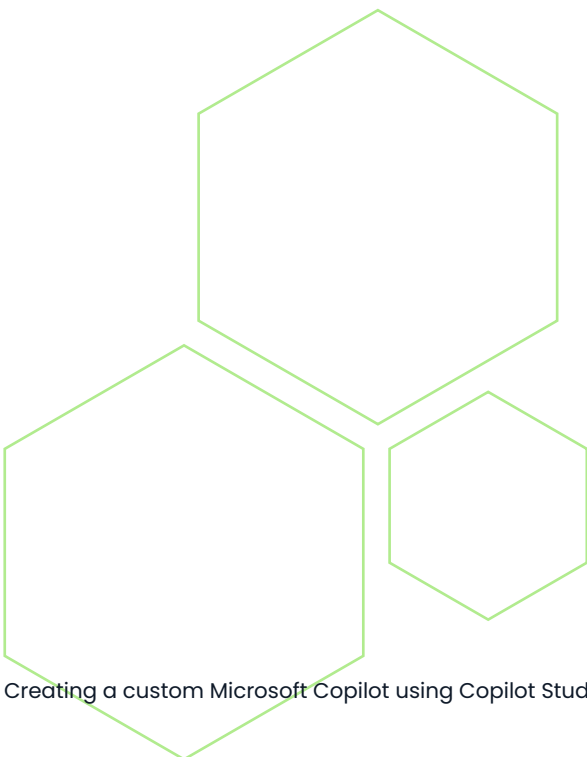
Add public websites for real-time answers





Files

Upload documents from your local computer




- Copilot Studio has been upgraded to accept individual file sizes of up to 512MB per file (it was previously limited to 3MB per file during the preview).
- When a user asks a question and the copilot doesn't have a defined topic to use, it generates the best answer from the Nasuni documents uploaded in a natural language, conversational style.
- Documents that are made available to Copilot Studio are accessible to Microsoft Dataverse, in which some elements of the document are represented in a structured way to aid searching and filtering, and other parts of the documents are vectorized to aid better interactions with Azure AI services. This is all transparent to the end user creating the chatbot.
- Scroll down to the "upload a document" section and browse out to the Nasuni network share to locate the documents you wish to interact with and select those documents. Note that you can select multiple documents at one time. The documents will be uploaded and made accessible to the Dataverse environment as described above.
- Document types supported by Copilot Studio:
 - Word (doc, docx)
 - Excel spreadsheets (xls,xlsx)
 - PowerPoint (ppt, pptx)
 - PDF (pdf)
 - Text (txt, md, log)
 - HTML files (html, htm)
 - CSV files (csv)
 - XML files (xml)
 - OpenDocument files (odt, ods, odp)
 - EPUB (epub)
 - Rich Text Format (rtf)
 - Apple iWork (pages, key, numbers)
 - JSON files (json)
 - YAML files (yaml, yml)
 - LaTeX files (tex)
- After the documents are uploaded, the system extracts and indexes the content. This process may take some time, depending on the size and amount of content. A notification will indicate that indexing is in progress.
- Microsoft has also now added the ability to utilize the File Share Graph Connector with Copilot Studio (this would need to be deployed and available to be used in this way. The setting up of the graph connector is beyond the scope of this tutorial).





Test copilot

Overview
Knowledge
Topics
Actions
Analytics

+ Add knowledge

All
Graph connector
🔄 Last refreshed 30 minutes ago

Name	Type	Last modified	Status
 FileConnector1	 Graph connector	Jim Liddle...	 Ready

- After the knowledge is added, there is an option to answer questions using only the uploaded knowledge or to supplement responses with the model’s general training knowledge. The general knowledge option can be disabled to rely exclusively on the uploaded information.


Knowledge
+ Add knowledge

Add data, files, and other resources to inform and improve AI-generated responses.

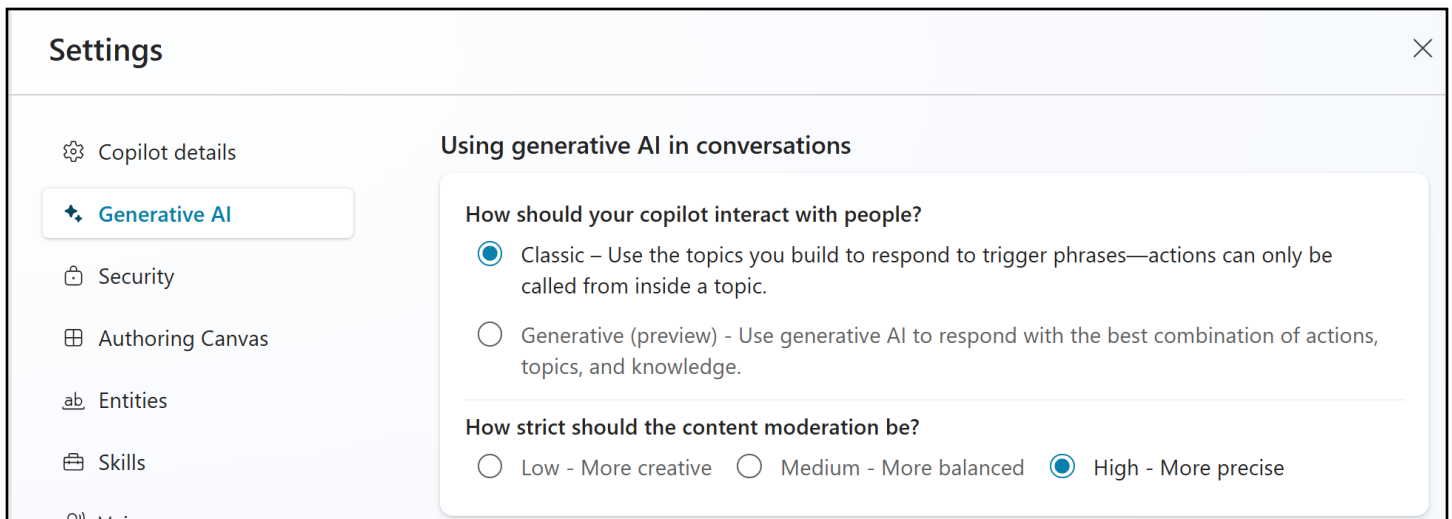
Allow the AI to use its own general knowledge (preview). [Learn more](#)
☒ Enabled

Disabling the default AI knowledge
×

When disabled, your copilot will not use the default AI knowledge and only reference the sources listed under Knowledge.

Continue
Cancel

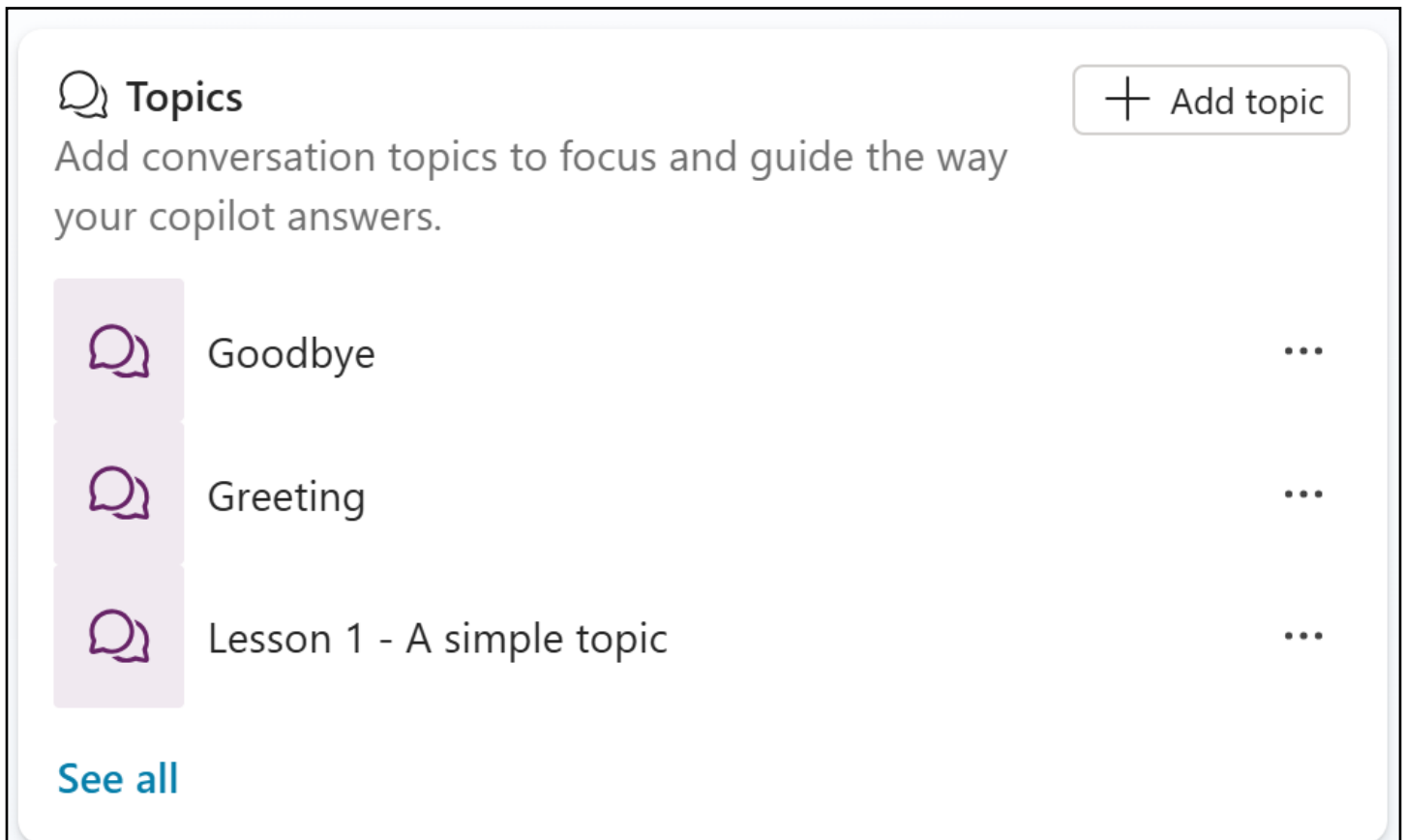
- Head back to settings and choose ‘Generative AI’ from the sidebar.



For the “Using generative AI in conversations”, leave this set to Classic. Generative (preview) uses generative AI to choose from topics created, and from actions added, to extend the copilot.

Consider the content moderation for the copilot, which governs how creative or strict the copilot is when generating answers. Medium is a balanced and good option to start with, and also allows for testing and adjustments as needed.

Step 3 - Topics and content



In Copilot Studio, a topic represents some portion of a conversational thread between a user and a copilot. Topics have trigger phrases, which can be activated as part of the copilot interaction to lead a user down a particular flow or interaction.

For the purposes of this tutorial, the default phrases will be left as is, although this is something to investigate further depending on the specific use case.

Step 4 – Actions



Actions

+ Add action

Add actions to empower the AI to complete specific tasks for improved engagement.

Actions can be used to extend the capabilities of a copilot by adding one (or more) plugin actions

For this tutorial, no plugin actions will be defined, although this is something to [investigate further](#) depending on the use case

Step 5 – Entities

The screenshot displays the Microsoft Copilot Studio interface. On the left, a chat window titled 'Test copilot' shows a welcome message from 'test copilot', a virtual assistant. The chat window includes a 'Tracking: off' toggle and a 'Chat' button. On the right, the 'Entities' section is visible, featuring a '+ New entity' button and a search bar. Below the search bar is a table listing various entities with their descriptions and methods.

Name	Description	Method	Errors
Age	Age of a person, place, or thing, extra	Prebuilt	
Boolean	Positive or negative responses, extract	Prebuilt	
City	City names, extracted as a string	Prebuilt	
Color	Primary colors and hues on the color :	Prebuilt	
Continent	Continent names, extracted as a string	Prebuilt	
Country or region	Country and region names, extracted .	Prebuilt	
Date	Dates, days of the week, and months r	Prebuilt	
Date and time	Dates, times, days of the week, and m	Prebuilt	
Date and time without timezone	Dates, times, days of the week, and m	Prebuilt	
Duration	Lengths of time, extracted as a string,	Prebuilt	
Email	Email addresses, extracted as a string	Prebuilt	

Navigate to the settings on the screen where the copilot was created to access the entities section, typically located in the top right-hand corner. Think of entities as additional details the chatbot may need to assist an end user. While this is not specifically required for this tutorial, consider the following Nasuni customer example:

When contacting support, they may refer to an Edge Appliance in several ways:

- Edge Filer
- Edge
- Appliance
- Filer

Being able to help the chatbot recognize that the user is referring to the same entity when they mention an Edge Appliance is important because it allows the chatbot to provide more accurate and useful responses. By understanding these details, the chatbot can better interpret the context of the information it receives from the user in the prompt.

This step can be skipped for now and revisited once the chatbot is deployed and tuned to align it with specific use cases.

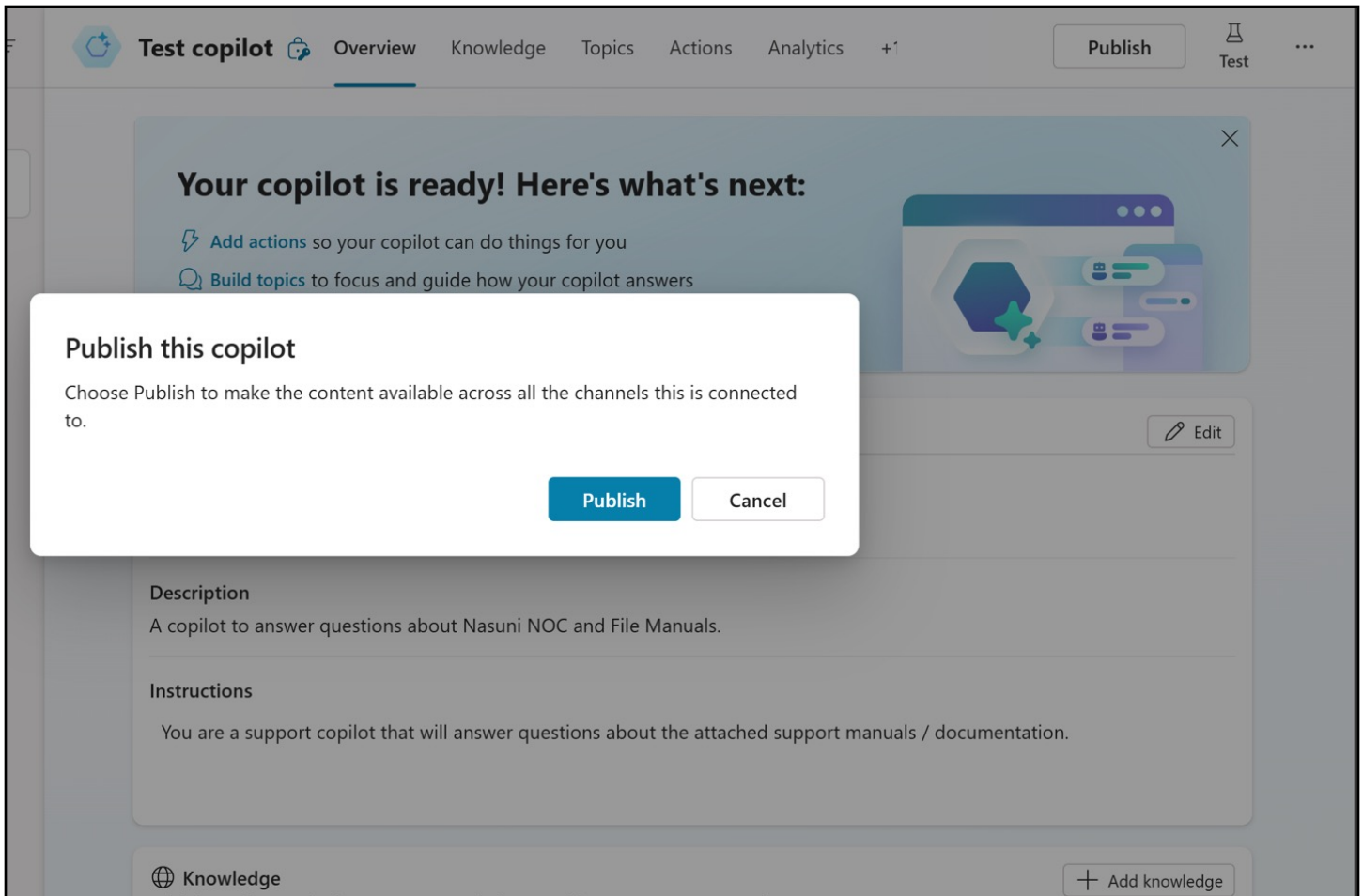
Step 6 – Testing

Test the copilot's responses in real-time to ensure it understands and provides accurate answers. Adjust the copilot's content moderation setting to find the best configuration for the dataset and retest as needed. Recheck and validate the documentation based on the answers provided. The copilot performs better with curated documentation that is neither versioned nor duplicative.

The screenshot displays the Microsoft Copilot Studio interface. At the top, there's a navigation bar with tabs: Overview (selected), Knowledge, Topics, Actions, Analytics, and a '+1' button. To the right of the tabs are 'Publish' and 'Test' buttons. Below the navigation bar, a light blue notification box states: 'Your copilot is ready! Here's what's next:' followed by three items: 'Add actions' (lightning bolt icon), 'Build topics' (speech bubble icon), and 'Publish your copilot' (upward arrow icon). Below this is a 'Details' section with an 'Edit' button. It contains three fields: 'Name' (Test copilot), 'Description' (A copilot to answer questions about Nasuni NOC and File Manuals.), and 'Instructions' (You are a support copilot that will answer questions about the attached support manuals / documentation.). On the right, the 'Test your copilot' section shows a chat window. The chat starts with a system message: 'Hello, I'm Test copilot, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.' Below this is a user input box with the text 'Ask a question or describe what you need' and a character count '0/2000'. At the bottom of the chat area, a disclaimer reads: 'Make sure AI-generated content is accurate and appropriate before using. [See terms](#)'.

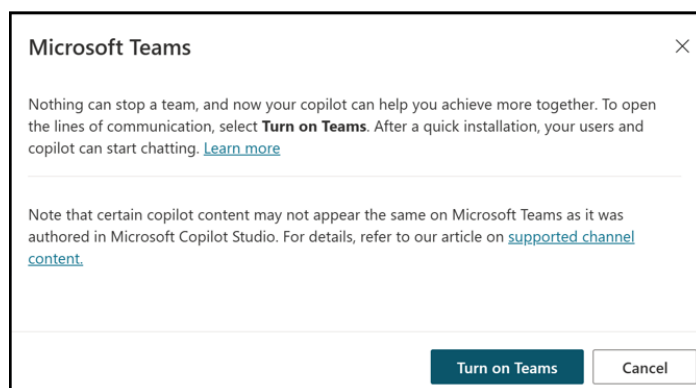
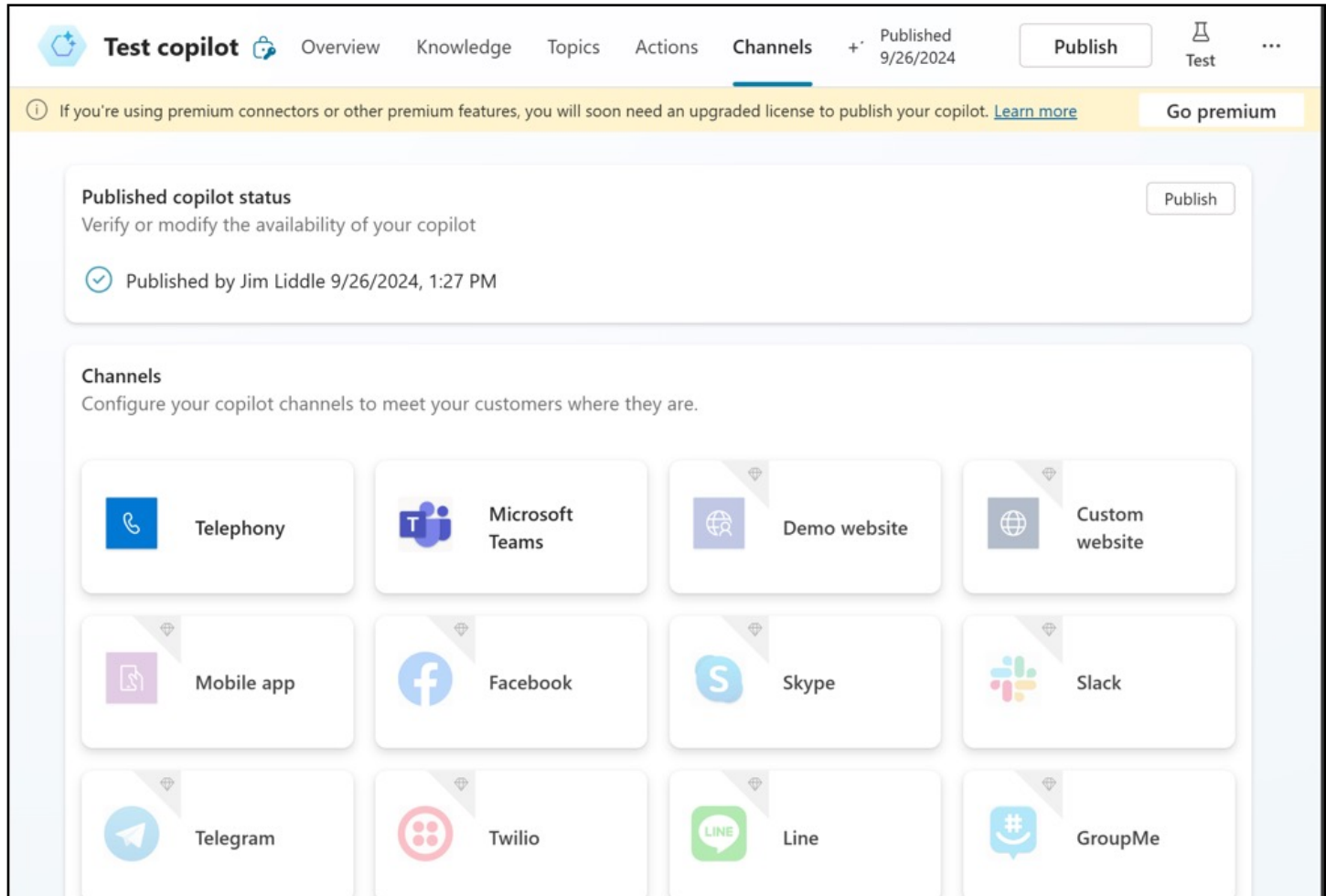
Step 7 – Publish your copilot

Navigate back to the copilot dashboard and select “Publish”. This action makes it available for use with Channels.

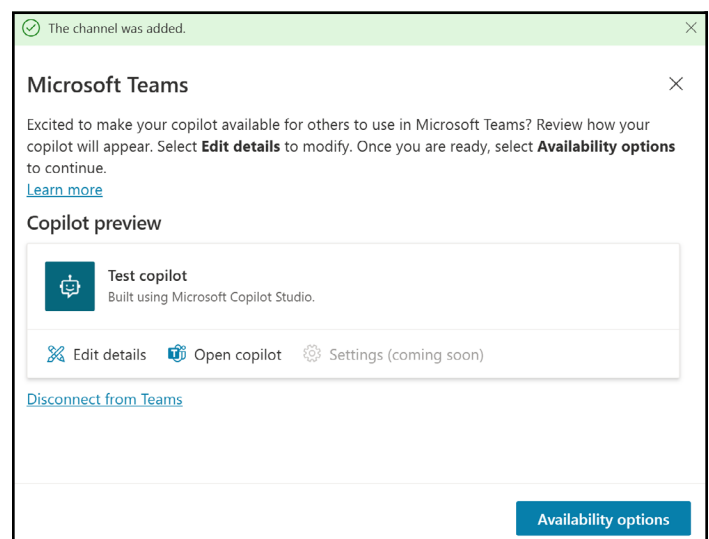


Step 8 – Deploy the copilot

Navigate to Channels to configure the authentication requirements for the copilot. For this deployment, Microsoft Teams will be used, as it automatically sets up Azure Active Directory (AAD) authentication for Teams and Power Apps.



- Choose to "Turn on Teams"
- Choose to "Edit details"



Edit the details that should be visible for the custom chatbot.

(It is possible to scroll down to configure other settings, such as the author.)

The channel was added.



Edit details

Review and make updates to your copilot before sharing it with others. If the copilot has already been approved by your admin, you'll need to resubmit it to see any changes you've made. [Learn more](#)


Details for Teams

Name
Test copilot

Icon



Change color



Change icon

Icon should be in PNG format and less than 30 KB in size. Use a white transparent image that has no extra padding. Don't upload confidential icon in your copilot icon [Learn more](#)

Short description *

Built using Microsoft Copilot Studio.

Up to 80 characters

Long description *

Help employees stay informed, productive, and connected. Create copilots and add important topics for your organization using an intuitive, graphical interface. No code required. Create your own at <https://aka.ms/microsoftcopilotstudio>.

Save

Cancel

After choosing “Save”, choose “Availability options” to see the distribution options for Teams.


← Microsoft Teams

×

Make your bot available to users in Microsoft Teams so they can find and use it. [Learn more](#)

Share link

Shared users can open the bot in Microsoft Teams with this link. [Manage sharing](#)

 **Copy link**

Show in Teams app store


Make your bot appear in the Teams app store.

Show to my teammates and shared users
Appear under the Built by your colleagues section.


Show to everyone in my org
Submit to your admin for approval to appear under Built by your org section.


Download as .zip

You can upload the bot directly as a custom app into Microsoft Teams. [Learn more](#)

 **Download .zip**

The easiest option is to share a link. When logged in, clicking the link will prompt a confirmation to install the copilot.



Test copilot 

Your developer name

Add

Overview

Permissions

Built using Microsoft Copilot Studio.

Help employees stay informed, productive, and connected. Create copilots and add important topics for your organization using an intuitive, graphical interface. No code required. Create your own at <https://aka.ms/microsoftcopilotstudio>.

App features

Bots
Chat with the app to ask questions and find info

Copilot extension Preview
Use with Copilot or add to a chat or meeting. Some plugins will be turned on automatically.

Created by: [Your developer name](#)
Version 1.0.0

By using Test copilot, you agree to the [privacy policy](#), [terms of use](#), and [permissions](#).

A custom copilot leveraging Nasuni data has now been successfully deployed. Congratulations!

Let's talk

Want to find out more about how Nasuni can provide your business with a fluid data infrastructure designed for the hybrid cloud world?

Nasuni's hybrid cloud platform unifies file and object data storage to deliver effortless scale and control at the network edge.

[Learn more](#)

Nasuni is a scalable data platform for enterprises facing an explosion of unstructured data in an AI world, eliminating the choice between expensive tinkering or an overwhelming transformation of your entire data infrastructure.

The Nasuni File Data Platform delivers effortless scale in hybrid cloud environments, enables control at the network edge, and meets the modern enterprise expectation for protected, insight- and AI-ready data. It simplifies file data management while increasing access and performance.

Consolidate data, cut costs, and empower users – all while transforming your data from obstacle into opportunity.

