# Day 3 Outline: Advanced Agents with Copilot Studio

The third day of Applied AI at TIYA Services. Day 2 built agents that wait for a person to ask. Day 3 builds agents that start themselves: on an incoming email, on a schedule, and by handing work to other agents. It also covers how to run them safely once no one is watching.

DAY 3 [Date TBD] HOURS 8:00 AM – 4:00 PM TOOL Microsoft Copilot Studio

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## Audience and prerequisites

- **Who:** TIYA staff who completed Day 2 and will design or own agents for their team: facilities leads, the work order desk, business management, and supervisors. About 30 per cohort, with limited remote seats.
- **Prerequisite:** Day 2, Agentic AI with Microsoft Copilot. Day 3 assumes participants can write agent instructions from the template, write tests before building, and rate an agent's risk tier. It opens with a 15-minute Day 2 review and doesn't depend on any agent built on Day 2.
- **Accounts:** a Copilot Studio license and maker access to a training environment (section 5).

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# Learning outcomes

On completing Day 3, participants will be able to:

| | OUTCOME | PRACTICED IN |
|---|---|---|
| LO1 | Decide whether an agent should run on demand, on an event, or on a schedule, and design its trigger, conditions, actions, and human check. | Builds 2 and 3 |
| LO2 | Build and test event-triggered and scheduled agents in Microsoft Copilot Studio that hand their output to a person for review. | Builds 1–3 |
| LO3 | Design and build a multi-agent solution with an orchestrator and specialist agents, and judge when one agent is enough. | Build 4 · One agent or many? |
| LO4 | Operate autonomous agents safely, including untrusted input, credentials, cost, monitoring, and a documented off switch. | Red team · Runbook · Shutdown check |

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# The day, 8:00 to 4:00

About 5¼ hours at the keyboard. Every build ends with a person checking what the agent produced.

| TIME | BLOCK | TOPICS | ACTIVITY | LO |
|---|---|---|---|---|
| 8:00 – 8:30 | **Welcome & Day 2 in Review** 30 min | Copilot Studio login check · the autonomy ladder, rungs 4 and 5 · what changes when no one is watching: untrusted input, real actions, real cost | Login check · show of hands on agents built since Day 2 | |
| 8:30 – 9:45 | **From Agent Builder to Copilot Studio** 75 min · hands-on | A tour of Copilot Studio · tools and connectors as the way an agent acts · general-knowledge and web settings as a lock · the activity view · publishing for other agents | **Build 1** SOP Navigator, rebuilt and retested against the Day 2 tests, then published | LO2 |

| TIME | BLOCK | TOPICS | ACTIVITY | LO |
|---|---|---|---|---|
| 9:45 – 10:00 | Morning break | | | |
| 10:00 – 11:45 | **Event-Triggered Agents**<br>105 min · hands-on | Trigger, condition, payload, action, human check · agent vs. payload instructions · the email is data, not instructions · fixed tool inputs · leaving out the send-email tool | **Build 2** Work Order Intake: eight sample emails, triage cards posted to Teams for a Facilities Lead | LO1 · LO2 · LO4 |
| 11:45 – 12:30 | Lunch | | | |
| 12:30 – 1:30 | **Scheduled Agents**<br>60 min · hands-on | Scheduled prompts in Copilot Chat vs. recurrence triggers in Copilot Studio · let the flow count, let the agent write · testing on a short schedule, then turning it off | **Build 3** Monday Backlog Briefing from an Excel table, checked against the answer key | LO1 · LO2 |
| 1:30 – 2:45 | **Multi-Agent Orchestration**<br>75 min · hands-on | Orchestrators and specialists · child vs. connected agents · descriptions drive routing · the cost of a team of agents | **Build 4** Facilities Desk with six routing tests · "One agent or many?" sort | LO3 |
| 2:45 – 3:00 | Afternoon break | | | |
| 3:00 – 3:45 | **Operating Autonomous Agents**<br>45 min | Five new risks: injection, credentials, silent failure, cost, chained errors · the off switch · risk tiers for triggered agents | Red-team the intake agent with three attack emails · write its runbook | LO4 |
| 3:45 – 4:00 | **Closing & Assessment**<br>15 min | What to propose at TIYA, and who approves it | Knowledge check · trigger shutdown check · evaluation · certificates | |

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# The four builds

Each build adds one capability on top of the last, using the same fictional SOPs and work order data as Day 2. Step-by-step instructions are in the Day 3 workbook.

BUILD 1 · 8:30

### SOP Navigator (Studio)

- **Rung:** 3, on-demand
- **Knowledge:** the four sandbox SOPs
- **Teaches:** the Copilot Studio workspace, settings as locks, publishing for reuse
- **Human check:** the person asking

BUILD 2 · 10:00

### Work Order Intake

- **Rung:** 4, event-triggered
- **Trigger:** a new email with `[WO-TRAIN]` in the subject
- **Tools:** post to Teams, to the owner only; no send-email tool
- **Teaches:** payloads, untrusted input, tools as locks
- **Human check:** a Facilities Lead reads every card

BUILD 3 · 12:30

### Monday Backlog Briefing

- **Rung:** 4, scheduled
- **Trigger:** recurrence; 5 minutes for testing, then Monday 7:00, then off
- **Tools:** read the Excel table, post to Teams
- **Teaches:** schedules, cost, checking AI arithmetic
- **Human check:** the lead verifies numbers before sharing

BUILD 4 · 1:30

### Facilities Desk

- **Rung:** 5, orchestrated
- **Agents:** SOP Navigator (connected), Priority Advisor and Notice Drafter (child)
- **Teaches:** routing by description, child vs. connected, when not to split
- **Human check:** the person asking; notices are drafts

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# Environment requirements

Day 3 needs more of TIYA's tenant than Days 1 and 2 did. Confirm each item with TIYA IT, in writing, at least 14 days before.

- [ ] A Copilot Studio license for every participant and both instructors, and maker access to one training environment.
- [ ] Which cloud TIYA is on (commercial, GCC, or GCC High), and that event triggers, agent flows, and child and connected agents are available there.
- [ ] Data policies allow the Office 365 Outlook, Microsoft Teams, Excel Online (Business), and SharePoint connectors in the training environment.
- [ ] Enough Copilot Studio capacity for the day. Estimate: 30 participants × (8 inbox + 3 red-team emails + about 6 scheduled runs + about 20 test messages per build).
- [ ] The AI Training Sandbox SharePoint site from Day 2, with the four SOPs, still in place with read access for every participant.
- [ ] A plan to switch off or delete every training agent and trigger after the day.

IF COPILOT STUDIO ISN'T AVAILABLE

Run Builds 2–4 as instructor demos on screen. Participants complete the trigger canvas, triage log, routing tests, and runbook on paper from the demo output. Build 1 can run in the Copilot agent builder instead. The outcomes shift from "build" to "design and evaluate".

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# Assessment and certificate

- **Formative:** an eight-question knowledge check, self-scored. Instructors collect anonymous per-question scores.
- **Evidence of work:** the triage log from Build 2, the red-team log, and the runbook.
- **Certificate (proposed):** full attendance (up to 30 minutes excused), Build 2 run against the sample inbox, a completed runbook, and every trigger shown turned off before leaving.

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# Materials

| ITEM | FOR |
|---|---|
| Day 3 slides (HTML, PowerPoint, PDF) | Instructors · participants |
| Day 3 workbook: Day 2 review, four builds, sample inbox, red-team log, runbook, shutdown checklist | Participants |
| Day 3 agenda | Everyone |
| Day 3 assessment kit: certificate criteria, answer keys, knowledge check, exit checklist, evaluation | Instructors |
| Facilitator guide, Day 3 section: run sheet, talking points, demos, watch-fors, debriefs | Instructors |
| Sample inbox (Word): eight request emails and three red-team emails | Participants |
| Work order export as an Excel table ( `WorkOrders` , 80 rows) | Participants |
| The four sandbox SOPs, also on one web page | Participants |

# Decisions for the program owner

1. **Date.** Day 3 has no date yet. Every Day 3 document shows "[Date TBD]".
2. **Copilot Studio access.** Day 3 depends on it (section 5). If TIYA can't license participants, decide between instructor-demo delivery and postponing.
3. **Who attends.** Day 3 suits people who will own agents, not everyone who took Day 2. Consider a smaller cohort of 15–20.
4. **Who approves triggered agents at TIYA.** The closing asks participants to name the person who would approve a triggered agent. TIYA should name that role before the day.
5. **Certificate criteria.** Confirm the proposal in section 6.