

ENTERPRISE PROGRAM BRIEF

AI Workflow Engineering with Copilot Studio and Power Automate

Design and implement a bounded business workflow that combines structured intake, AI assistance, deterministic routing, human review, and business-system updates. Participants use one Microsoft implementation path and assess the result against the original process.

VNode ITes

VAI-202

Coming soon

DURATION

24 hours

LEVEL

Intermediate

FORMAT

Private cohort

AUDIENCE PROFILE

Built for these roles

Power Platform developers, automation engineers, technical business analysts, solution consultants, and experienced makers.

OVERVIEW

Executive overview

Design and implement a bounded business workflow that combines structured intake, AI assistance, deterministic routing, human review, and business-system updates. Participants use one Microsoft implementation path and assess the result against the original process.

READINESS

Prerequisites

- Basic Power Automate and data-table experience, JSON familiarity, and understanding of connectors and environment permissions. Business analysts without maker experience should complete a separate readiness lab.

PROGRAM OUTCOMES

Capabilities your teams will gain

- Map a process and select suitable AI intervention points.
- Build a structured workflow with valid inputs and outputs.
- Apply explicit review and access boundaries.
- Handle exceptions and duplicate events.
- Package a workflow with user and operational guidance.

ENTERPRISE CUSTOMIZATION

Enterprise customization

Tailor this program to your organization's priorities: Turn business processes into tested AI-assisted workflows with clear ownership

- 3 learning days of 8 hours, or 6 sessions of 4 hours. Learning hours exclude breaks and include module exercises and capstone time. Setup is completed before the course.

CURRICULUM

Curriculum roadmap

1 MODULE 1 · 2 PROPOSED HOURS Process analysis and automation choices

Map the current process before adding AI. Stable calculations and policy thresholds belong in deterministic steps when possible. Reserve generation for tasks such as summarisation or classification where a controlled review can manage uncertainty.

- Workflow boundaries and process owners
- Rules versus probabilistic assistance
- Baseline and verification effort

Planned lab: Map a training-request intake process and identify which fields, decisions, and approvals need human ownership.

Expected output: Workflow map and proposed intervention.

2 MODULE 2 · 3 PROPOSED HOURS Data and integration contracts

A workflow needs a dependable record of what was requested, reviewed, and completed. Define statuses and identifiers before building screens or prompts. Connector availability does not establish that the caller is authorised for every downstream action.

- Dataverse tables, statuses, and identifiers
- Connector identity and connection references
- Input validation and data minimisation

Planned lab: Create synthetic request and review tables with required fields and a stable request ID.

Expected output: Data model and connection inventory.

3 MODULE 3 · 4 PROPOSED HOURS AI-assisted intake and knowledge

Separate extracted or generated suggestions from confirmed business data. Keep source references where users need to verify a response. When the evidence is insufficient, route the case for clarification instead of filling fields with invented detail.

- Copilot Studio intake and structured inputs
- Approved knowledge and response boundaries
- Clarification and no-evidence handling

Planned lab: Build an intake agent that captures a training request, proposes a summary, and asks for missing information.

Expected output: Agent intake path and validation cases.

4 MODULE 4 · 4 PROPOSED HOURS Routing and human review

A flow should expose its state and decision path clearly. Bind a reviewer decision to the specific request version. If the content changes after approval, the workflow needs a defined rule for requesting review again.

- Conditions and approval stages
- Review ownership and audit records
- State changes and resubmission rules

Planned lab: Implement deterministic routing and a human approval before committing an approved request. Test rejection and changed-content cases.

Expected output: Review flow and decision history.

5 MODULE 5 · 4 PROPOSED HOURS Exceptions and integration reliability

Design for failure in individual steps. Distinguish an operation that never ran from one that completed but returned an uncertain response. Use stable identifiers to investigate duplicates and choose a safe retry strategy.

- Validation and connector failure branches
- Retry scope and duplicate events
- Notifications without leaking sensitive content

Planned lab: Simulate an unavailable downstream operation and a repeated trigger; verify the request is not silently lost or duplicated.

Expected output: Exception paths and recovery evidence.

6 MODULE 6 · 3 PROPOSED HOURS Packaging and adoption

A workflow is useful only if its users and owners understand what it does. Package dependencies and connection instructions alongside the solution. Pilot measures should include completed useful tasks, rework, and support burden.

- Solutions and environment-specific settings
- User onboarding and pilot measures
- Ownership, monitoring, and handover

Planned lab: Export a solution package, document required connections, and rehearse the operator checklist in a test environment.

Expected output: Solution package and adoption plan.

7 MODULE 7 · 4 PROPOSED HOURS Workflow capstone

Integrate intake, review, and state changes into a complete bounded process. Demonstrate one normal case and representative exceptions. Explain what the AI suggests and what the business workflow actually authorises.

- End-to-end integration
- User acceptance and exception review
- Demonstration and handover

Planned lab: Deliver a training-request assistant that stores a reviewed request in Dataverse and records the reviewer decision.

Use a local/mock integration if a downstream service is unavailable and label it clearly.

Expected output: Working workflow and user acceptance report.

CAPSTONE

Capstone

A training-request intake and approval assistant with structured data, verified review stages, exception paths, and operational ownership.

ASSESSMENT

Assessment

Workflow correctness 30%; data and approval controls 25%; exception handling 25%; adoption and handover 20%. Critical unauthorised updates block completion.

DELIVERABLES

Participant deliverables

- Process and data model
- Agent and flow solution
- Exception and approval test evidence
- User guide and operating checklist

SCOPE

Scope boundaries

Full tenant administration, legal/compliance certification, premium SaaS access not supplied by the client, and unattended high-impact decisions. **Delivery options:** 3 learning days of 8 hours, or 6 sessions of 4 hours. Learning hours exclude breaks and include module exercises and capstone time. Setup is completed before the course.

DELIVERY

Delivery options

3 learning days of 8 hours, or 6 sessions of 4 hours. Learning hours exclude breaks and include module exercises and capstone time. Setup is completed before the course. Proposed hours exclude breaks and are subject to pilot validation.

PRIVATE DELIVERY**Plan a private cohort for your team**

Scope delivery format, role mix, and rollout timeline with our solutions team.

[Plan Private Delivery](#)[Book advisory call](#)