

MS-MS4009: EXTEND MICROSOFT 365 COPILOT WITH COPILOT STUDIO ACTIONS AND CONNECTORS



| DURATION | LEVEL | TECHNOLOGY | DELIVERY METHOD | TRAINING CREDITS |
|----------|----------|---------------|-----------------|------------------|
| 1 Day | Beginner | Microsoft 365 | Instructor-led | NA |

INTRODUCTION

Learn how to create Copilot Studio actions that extend the knowledge and capabilities of Microsoft 365 Copilot with external data, tailored conversations, automated flows, and custom prompts.

AUDIENCE PROFILE

This course is designed for individuals aiming to integrate external data sources and automate workflows and those who wish to enhance their skills in building plugins and connectors to streamline organizational workflows.

PREREQUISITES

Before attending this course, delegates must have:

- Familiarity with Microsoft Copilot for Microsoft 365.

COURSE OBJECTIVES

After completing this course, students will be able to:

- Describe ways to extend Microsoft 365 Copilot to fit unique business needs, enriching user workflows.
- Describe how Graph connectors can be used to enhance Copilot's data access and discoverability for real-time engagement.
- Describe how plugins can expand Copilot's skills, allowing interaction with real-time data across Microsoft 365 apps.
- Describe ways to build custom copilots using foundational models for specialized user interactions within Microsoft 365 Copilot.

COURSE CONTENT

Module 1: Microsoft 365 Copilot extensibility fundamentals

This module explores how extending Microsoft 365 Copilot with agents, connectors, and plugins can help organizations address the challenges of increasing productivity and reducing costs by leveraging AI to orchestrate business processes more effectively.

Lessons

- Introduction
- What is Copilot extensibility?
- What are agents?
- What are declarative agents?
- What are custom engine agents?
- Add knowledge with Graph connectors
- Add skills with plugins
- Knowledge check
- Summary

After completing this module, students will be able to:

- Explain how Copilot and agents work together to create

a personalized, intelligent assistant with the knowledge and skills unique to your business.

- Describe the types of agents and the wide spectrum of capabilities with which they can be customized.
- Explain how to ground your Copilot responses with multiple enterprise data sources for more relevant and reliable responses.

Module 2: Introduction to Copilot Studio Actions

Explore the core considerations and requirements for creating, testing, and publishing Copilot Studio actions to extend Microsoft 365 Copilot.

Lessons

- Introduction
- Copilot Studio actions user experience
- Types of Copilot Studio actions

- Develop Copilot Studio actions
- Test and publish Copilot Studio actions
- Knowledge check
- Summary

After completing this module, students will be able to:

- Describe the capabilities of Copilot Studio for extending Microsoft 365 Copilot.
- Describe the requirements for creating Copilot Studio actions.
- Describe the user requirements for using Copilot Studio actions in Microsoft 365 Copilot.
- Decide which type of action is appropriate for a given scenario.

Module 3: Create prompt actions for Microsoft 365 Copilot in Copilot Studio

Use Copilot Studio to create prompt actions that return generative

responses to user prompts in Microsoft 365 Copilot.

Lessons

- Introduction
- What are prompt actions?
- Create a prompt action
- Exercise - Create a prompt action
- Knowledge check
- Summary

After completing this module, students will be able to:

- Describe the requirements for building and using prompt actions.
- Write or identify an effective prompt that yields expected results.
- Test a prompt action in Copilot Studio.
- Use a prompt action in Microsoft 365 Copilot.

Module 4: Create connector actions for Microsoft 365 Copilot in Copilot Studio

Use Copilot Studio to create connector actions that expand the knowledge and capabilities of Microsoft 365 Copilot with external data.

Lessons

- Introduction
- What are connector actions?
- Create connector actions
- Exercise - Create a connector action
- Knowledge check
- Summary

After completing this module, students will be able to:

- Identify scenarios appropriate for connector actions.
- Create connector actions in Copilot Studio.
- Test connector actions in Microsoft Copilot.

Module 5: Create conversational actions for Microsoft 365 Copilot in Copilot Studio

Build conversational actions in Copilot Studio that extend Microsoft

365 Copilot with tailored conversations for predictable scenarios that require specific responses.

Lessons

- Introduction
- Explore conversational actions
- Create a conversational action
- Build a topic for a conversational action
- Publish and test a conversational action
- Exercise - Create a conversational action
- Knowledge check
- Summary

After completing this module, students will be able to:

- Describe the requirements for building and using conversational actions.
- Create a conversational action for Microsoft 365 Copilot.
- Publish a conversational action to Microsoft 365 Copilot.

ASSOCIATED CERTIFICATIONS & EXAM

This course has no associated Certification or Exam.