

MS-MS4017: MANAGE AND EXTEND MICROSOFT 365 COPILOT



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

INTRODUCTION

This course examines how administrators can manage and extend Microsoft 365 Copilot to meet their business needs. The course introduces you to Copilot, examines how to implement and administer it, and then explores the fundamentals of Copilot extensibility.

AUDIENCE PROFILE

This course is designed for administrators, Microsoft 365 administrators, and IT professionals who are interested in learning how to manage and extend Microsoft 365 Copilot.

PREREQUISITES

Before attending this course, delegates must have:

- General IT business knowledge
- General IT technical knowledge

COURSE OBJECTIVES

After completing this course, students will be able to:

- Prepare your organization for Microsoft 365 Copilot.
- Examine data security and compliance in Microsoft 365 Copilot.
- Apply principles of Zero Trust to Microsoft 365 Copilot.
- Manage Microsoft Copilot.
- Extend Microsoft 365 Copilot.
- Manage Microsoft 365 Copilot extensibility

COURSE CONTENT

Module 1: Implement Microsoft 365 Copilot

This module examines the key tasks that administrators must complete when implementing Microsoft 365 Copilot, such as completing prerequisites, preparing data for searches, assigning Copilot licenses, and extending Copilot.

Lessons

- Introduction
- Get ready for Microsoft 365 Copilot
- Implement SharePoint Advanced Management tools to prepare for Microsoft 365 Copilot
- Prepare your data for searches in Microsoft 365 Copilot
- Protect your Microsoft 365 Copilot data with Microsoft 365 security tools
- Assign your Microsoft 365 Copilot licenses
- Extend Microsoft 365 Copilot

- Drive Microsoft 365 Copilot adoption throughout your organization
- Knowledge check
- Summary

After completing this module, students will be able to:

- Identify the prerequisites for Microsoft 365 Copilot.
- Implement SharePoint Advanced Management to prepare for Microsoft 365 Copilot.
- Prepare your data for Microsoft 365 Copilot searches.
- Assign your Microsoft 365 Copilot licenses.
- Identify Microsoft 365 security features that control oversharing of data in Microsoft 365 Copilot.
- Explain how Copilot agents extend Microsoft 365 Copilot.
- Drive adoption by creating a Copilot Center of Excellence.

Module 2: Examine data security and compliance in Microsoft 365 Copilot

This module examines how Microsoft 365 Copilot adheres to existing privacy and compliance obligations, how it ensures data residency and compliance boundary, and how it protects sensitive business data.

Lessons

- Introduction
- Examine how Microsoft 365 Copilot uses your proprietary business data
- Examine how Microsoft 365 Copilot protects sensitive business data
- Examine how Microsoft 365 Copilot uses Microsoft 365 isolation and access controls
- Examine how Microsoft 365 Copilot meets regulatory compliance mandates
- Knowledge check
- Summary

After completing this module, students will be able to:

- Describe how Microsoft 365 Copilot uses proprietary business data.
- Understand how Microsoft 365 Copilot protects sensitive business data.
- Describe how Microsoft 365 Copilot uses Microsoft 365 isolation and access controls.
- Understand how Microsoft 365 Copilot meets regulatory compliance mandates.

Module 3: Apply principles of Zero Trust to Microsoft Copilots

This module equips learners with the knowledge and skills necessary to implement a robust Zero Trust security framework for their Microsoft 365 Copilot deployments.

Lessons

- Introduction
- Prepare for Microsoft Copilot using Zero Trust security
- Apply Zero Trust principles to your Microsoft Copilot deployment
- Explore Zero Trust recommendations for your Copilot configuration
- Apply Zero Trust principles to your Microsoft 365 Copilot deployment
- Deploy or validate your data protection
- Deploy or validate your identity and access
- Deploy or validate your App Protection policies
- Deploy or validate your device management protection
- Deploy or validate your threat protection services
- Deploy or validate secure collaboration for Microsoft Teams
- Deploy or validate minimum user permissions to data
- Knowledge check
- Summary

After completing this module, students will be able to:

- Prepare for Microsoft Copilots using a Zero Trust security framework.
- Apply Zero Trust principles to your Microsoft Copilot and Microsoft 365 Copilot deployments.
- Understand Zero Trust recommendations for your Copilot configuration.
- Deploy and validate your data protection, identity and access, App Protection policies, device management protection, threat protection services, secure collaboration for Microsoft Teams, and minimum user permissions to data.

Module 4: Manage Microsoft Copilot

This module explores the various aspects of managing Microsoft Copilot, including its key features, integration capabilities, and security measures.

Lessons

- Introduction
- Compare Microsoft Copilot and Microsoft 365 Copilot
- Explore Microsoft Copilot with commercial data protection
- Manage commercial data protection in Microsoft Copilot
- Manage Microsoft Copilot in Microsoft Edge
- Manage Microsoft Copilot on mobile devices
- Knowledge check
- Summary

After completing this module, students will be able to:

- Identify the differences between Microsoft Copilot and Microsoft 365 Copilot.
- Understand how Microsoft Copilot employs commercial data protection.
- Manage commercial data protection in Microsoft Copilot.
- Manage Microsoft Copilot in Microsoft Edge.
- Manage Microsoft Copilot on mobile devices.

Module 5: Manage Microsoft 365 Copilot

This module focuses on how to effectively administer Microsoft 365 Copilot, which is vital for optimizing the performance and security of an organization's digital infrastructure.

Lessons

- Introduction
- Manage Microsoft 365 Copilot settings
- Manage web access for Microsoft 365 Copilot
- Manage Copilot for Microsoft Teams meetings and events
- Explore Microsoft Purview data protections for AI apps
- Secure data for AI apps using the Microsoft Purview AI Hub
- Monitor the value of Microsoft 365 Copilot through the Copilot Dashboard
- Track Microsoft 365 Copilot readiness and usage across your organization
- Monitor your Copilot interactions using a communication compliance policy
- Delete your Microsoft 365 Copilot interaction history
- Knowledge check
- Summary

After completing this module, students will be able to:

- Manage Microsoft 365 Copilot settings.
- Manage web access for Microsoft 365 Copilot.
- Manage Copilot for Microsoft Teams meetings and events.
- Identify Microsoft Purview data protections for AI apps.
- Manage Microsoft Copilot on mobile devices.
- Secure data for AI apps using the Microsoft Purview AI Hub.
- Monitor the value of Microsoft 365 Copilot through the Copilot Dashboard.
- Track Microsoft 365 Copilot readiness and usage across your organization.
- Monitor Microsoft 365 Copilot interactions using a communication compliance policy.
- Delete your Microsoft Copilot interaction history.

Module 6: 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 7: Choose a Microsoft 365 Copilot extensibility development path

This module provides a comprehensive guide to choosing the right approach for extending

Microsoft 365 Copilot, covering various extensibility options, development tools, and methods, while emphasizing the importance of data privacy and security practices.

Lessons

- Introduction
- Why extend Copilot?
- Which path for extensibility should you choose?
- Which development approach should you take?
- What development tools are available to extend Microsoft 365 Copilot?
- How are companies extending Microsoft 365 Copilot?
- How can I secure my data and ensure privacy?
- Knowledge check
- Summary

After completing this module, students will be able to:

- Decide whether to extend Microsoft 365 Copilot using its existing orchestrator or to build a custom engine agent, based

on their specific needs and goals.

- Gain insights into the various development tools and methods available, whether they prefer pro-code or low-code/no-code solutions, and how to set up their development environment for building these extensions.
- Understand the different ways to extend Microsoft 365 Copilot, including using declarative agents, custom engine agents, plugins, and connectors.
- Explain data privacy and security considerations for developing each extensibility option.

Module 8: Manage Microsoft 365 Copilot extensibility

This module examines the tasks that administrators must perform to manage Microsoft 365 Copilot extensibility, such as managing

Copilot agents and creating and monitoring connectors.

Lessons

- Introduction
- Manage Copilot agents in integrated apps
- Create a connection between a data source and a Microsoft Graph connector
- Monitor your Microsoft Graph connectors
- Manage how Microsoft Graph connector content is displayed in Microsoft 365 Copilot
- Knowledge check
- Summary

After completing this module, students will be able to:

- Manage Copilot agents in integrated apps.
- Create a connection between a data source and a Microsoft Graph connector.
- Monitor your organization's Microsoft Graph connectors.
- Manage how Microsoft Graph connector content is displayed in Microsoft Copilot.

ASSOCIATED CERTIFICATIONS & EXAM

There is no associated Certification or Exam for this course.