

MS-MS4014: BUILD A FOUNDATION TO BUILD AI AGENTS AND EXTEND MICROSOFT 365 COPILOT



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

INTRODUCTION

This course explores extending Copilot's capabilities with Microsoft Graph connectors and custom engine copilots, guiding participants to choose the best development path. It concludes with agent management in the Microsoft 365 admin center.

AUDIENCE PROFILE

This course is designed for any learner who wants to learn the basics of extending their Microsoft 365 Copilot functionality. It is role-agnostic, meaning it is suitable for a wide range of professionals, including developers, IT professionals, and business analysts who are interested in enhancing their Microsoft 365 Copilot capabilities through plugins and Microsoft Graph connectors.

PREREQUISITES

Before attending this course, delegates must have:

- Basic functional experience with Microsoft 365 services.

COURSE OBJECTIVES

After completing this course, students will be able to:

- Develop a strategy to enhance Microsoft 365 Copilot with custom skills and organizational knowledge
- Explore options for extending Copilot**, focusing on plugins and connectors to improve efficiency and productivity
- Create prompt actions in Copilot Studio that return generative responses to user prompts
- Create connector actions in Copilot Studio to expand Copilot's knowledge and capabilities with external data
- Build conversational actions in Copilot Studio for tailored conversations in predictable scenarios
- Test and publish Copilot Studio actions to ensure they function correctly and are available for use

COURSE CONTENT

Module 1: Examine the Microsoft 365 Copilot design

This module examines the Microsoft 365 Copilot design, how it works, its service and tenant logical architecture, and how it generates searches and responses.

Lessons

- Introduction
- Examine the Microsoft 365 Copilot logical architecture
- Examine the key components of Microsoft 365 Copilot
- Explore the Microsoft 365 Copilot service and tenant architecture
- Extend Microsoft 365 Copilot with plugins and Microsoft Graph connectors
- Knowledge check
- Summary

After completing this module, students will be able to:

- Describe the prerequisites for Microsoft 365 Copilot.

- Explain how Microsoft 365 Copilot works.
- Understand the Microsoft 365 Copilot service and tenant logical architecture.
- Describe how Microsoft Copilot generates searches.
- Explain how Microsoft 365 Copilot generates responses.

Module 2: 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 3: 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 4: Introduction to Graph connectors

This module describes how you can use Microsoft Graph connectors to enhance search within Microsoft 365 Copilot by configuring connections and integrating external data sources and improving query understanding.

Lessons

- Introduction
- Add a connection
- Configure the connection settings
- Set up the search schema attributes
- Set the refresh and crawl schedules
- Deploy and monitor your connection
- Knowledge check
- Summary

After completing this module, students will be able to:

- Understand how to set up and configure connections for Microsoft Graph connectors to enhance search within Microsoft 365 Copilot.
- Understand what the semantic search index is, and how it relates to Microsoft Graph connectors.
- Describe the importance of search schema attributes, refresh intervals, and crawl scheduling for efficient data synchronization.

Module 5: Introduction to declarative agents for Microsoft 365 Copilot

Determine the scenarios which declarative agents are suitable for customizing and extending

Microsoft 365 Copilot. Describe the function of custom knowledge and custom actions.

Lessons

- Introduction
- What are declarative agents?
- How declarative agents work
- When to use declarative agents
- Knowledge check
- Summary

After completing this module, students will be able to:

- Evaluate whether a declarative agent is appropriate to extend Microsoft 365 Copilot for your scenario.
- Describe how the components of a declarative agent work together to create agents that run on Microsoft 365 Copilot.

Module 6: Manage agents for Microsoft 365 Copilot

This module describes how to manage your agents using the Microsoft 365 admin center, ensuring that you have the knowledge to tailor Copilot, limiting or granting permissions to data based on your organization's needs.

Lessons

- Introduction
- Manage agents for Copilot in the Microsoft 365 admin center
- Enable or disable Copilot extensibility
- Knowledge check
- Summary

After completing this module, students will be able to:

- Describe how to enable or disable Copilot extensibility.
- Understand how to manage permissions and control data access to your extensions.

ASSOCIATED CERTIFICATIONS & EXAM

There is no associated Certification or Exam for this course.