

MS-4017-A: Manage and extend Microsoft 365 Copilot

Overview

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

Course Duration: 1 Days

About This Course

This course is specific to learning how to manage M365 Copilot, what sort of configurations and enablement to consider if someone wants to manage Copilot across Microsoft tools (Teams, SharePoint, Excel, Doc, etc), Also, what to consider when someone wants to extend Copilot (such as security, users, and access). This course is addressing the gaps for the continued requests we get that admins and technical leaders want more insight into how to best manage M365 Copilot

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.

Course Outline

Module 1: Prepare your organization for 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.

Lesson

- Implement SharePoint Advanced Management tools
- Getting started with the implementation process
- Preparing for the launch of Microsoft 365 Copilot
- Key data preparation tips
- Extending Microsoft 365 Copilot
- Driving Copilot adoption

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.

Lesson

- 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.

Lesson

- 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.

Lesson

- 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.

Lesson

- 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.

Lesson

- 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.

Lesson

- 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.

Lesson

- 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.

Prerequisites

- Students should have basic functional experience with Microsoft 365 services.
- Students must have a proficient understanding of general IT practices.