MS-4009: Extend Microsoft 365 Copilot with Copilot Studio actions and connectors

Overview

Course Duration: 1 Days

About This Course

Learn how to create Copilot Studio actions that extend the knowledge and capabilities of Microsoft 365 Copilot.

In this learning path, 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.

This course has been created by Microsoft as a "Bring Your Own Environment" course, allowing individuals to use their personal devices and settings. If a student wants to complete the hands-on activities, the individual must bring their own CoPilot environment. Otherwise, demonstrations and lectures will be conducted by the instructor.

Audience Profile

Learners Students who wants to create Copilot Studio actions that extend the knowledge and capabilities of Microsoft 365 Copilot.

Course Outline

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.

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.
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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.

Lesson

- 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 3
- 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.

Lesson

- 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.
Lesson
- Identify scenarios appropriate for connector actions.
- Create connector actions in Copilot Studio.
- Test connector actions in Microsoft 365 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..
Lesson
- 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.

Prerequisites
Before attending this course, students should have:

- Familiarity with Microsoft Copilot for Microsoft 365.