

Extend Microsoft 365 Copilot in Copilot Studio (MS-4022)

Duration: 0,5 day

Audience: Professionnel TI|Analyste d'affaires

Who is this training for?

- IT professionals and consultants working with Microsoft 365 Copilot
- Application developers and solution architects who want to extend the functionality of Copilot
- Business analysts and digital transformation specialists
- Anyone familiar with Microsoft 365 Copilot who wants to build and manage custom agents

Training objectives

- Understand the role of declarative agents in customizing and extending Microsoft 365 Copilot
- Identify scenarios relevant to using declarative agents
- Create a declarative agent in Copilot Studio to meet specific needs
- Add custom knowledge to a declarative agent to improve the relevance and accuracy of responses
- Design and integrate conversation starters into declarative agents
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- Create and configure custom actions in Copilot Studio to extend agent capabilities
- Connect agents to external data sources and customize generative responses
- Use bootstrap actions to further customize responses generated by declarative agents
- Publish and test declarative agents to integrate with Microsoft 365 Copilot

Summary

Build agents that extend Microsoft 365 Copilot with additional knowledge and capabilities. Use Copilot Studio to design declarative agents, add knowledge, add actions, and publish agents in Microsoft 365 Copilot.

Course outline

- Introduction to reporting agents for Microsoft 365 Copilot

- What is a reporting agent?
- How declarative agents work
- When to use declarative agents Create your first declarative agent for Microsoft 365 Copilot with Copilot Studio
- Create a declarative agent
- Add custom knowledge
- Add conversation starters Introduction to actions for declarative agents in Copilot Studio
- Actions and agents • Types of actions in Copilot Studio
- Considerations for developing actions
- Extend declarative agents with Actions
- Extend Declarative Agents with Bootstrap Actions in Copilot Studio

Approach and methodology

Practical and structured approach combining focused theory and guided workshops. Participants gradually extend Microsoft 365 Copilot into Copilot Studio through real-world exercises inspired by professional scenarios, promoting immediate application of learning. They learn how to design, configure, and customize chatbots while integrating feeds and data sources tailored to business needs. Led by a Microsoft certified trainer, the training focuses on interactivity and the development of directly transferable technical skills to enrich Copilot's capabilities in a professional context.

Prerequisites

- Be familiar with Microsoft 365 Copilot
- Know the Microsoft 365 Copilot extension options

Recommendations

- Basics in Microsoft 365 and Copilot
- Knowledge of Copilot Studio / Power
- Virtual Agents (asset) Understanding of conversational agent concepts and generative
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AI Notions of business logic and automation (Power Platform)

- Familiarity with Microsoft Entra ID and security