

# Automate Business Processes using Copilot Cowork and Copilot Studio (M365-PILOT)

ID M365-PILOT Price CHF 2,490.—(excl. VAT) Duration 4 days

## Who should attend

- Power Platform Makers
- Software Engineers for Agentic AI
- Solution Architects for Agentic AI

## Prerequisites

- GitHub User Account
- Basic Knowledge of the Microsoft 365 Platform

## Course Content

### Module 1: Introduction to Microsoft Copilot & AI Agents

- Copilot & Agents Overview
- Introduction to Agents and Copilots for Microsoft 365
- The Microsoft 365 platform & Copilot for Microsoft 365 Ecosystem
- Copilot & Copilot Studio Licensing Options (Full vs PAYG)
- What is Agentic AI?
- Key Components of an Agent: Knowledge & Tools
- Prompt Engineering, Semantic Index & RAG
- Tools & Model Context Protocol (MCP)
- Microsoft Copilot Extensibility Fundamentals
- Choose a Copilot Extensibility Development path
- Envisioning Planning & Scenarios
- Tools & Environment Configuration

### Module 2: Microsoft Frontier, Copilot Chat & Productivity Agents

- Microsoft Frontier Program Overview
- Introduction to Copilot Chat
- Copilot Tasks
- Build Apps with Microsoft 365 Copilot App Builder
- Implement Workflow using Copilot Workflow
- Memory & Schedules Prompts
- Productivity Agents
- Copilot Studio Light (Agent Builder) for No-Code Agents
- SharePoint Agents

### Module: Microsoft 365 Copilot Cowork

- What is Cowork?
- Getting Started with Cowork
- Core Capabilities: Communication, Documents, Calendar, Research & Automation
- Understanding Skills
- Built-in Skills & the Side Panel
- Creating Custom Skills with SKILL.md
- Scheduling Prompts & Recurring Automation
- Extending Cowork with Plugins
- Human-in-the-Loop: Approving Actions & Staying in Control

### Module 3: Copilot Studio Basics

- Overview Copilot Studio Agents in Copilot Studio
- Creating & Configuring Copilot Studio Agents
- Mastering Knowledge & Starter Prompts
- Bing Custom Search as a Knowledge Source
- Topics, Entities and Variables
- Conversation Design Best Practices
- Collecting Information using Adaptive Cards
- Understanding & Using Power Fx
- Publish Agents to Channels (Teams, Charts)

### Module 4: Extending Copilot Studio Agents Tools

- Prompt Actions & Prompt Library
- Prompt Assistant for faster Prompt Engineering
- Using Code Interpreter in Prompts
- Integrating Dataverse Tables
- Consuming REST Api's & Enterprise Data
- Model Context Protocol (MCP) & Work IQ
- Automating Visual Tasks using Computer Use
- Managed Agents: Document Processor
- Organizing tools using Component Collections

### Module 5: Advanced Copilot Studio Agents

- Autonomous Agents & Triggers
- Multi-Agent Orchestration: Focused- & Connected Agents
- Implementing Routing Patterns
- Use Deep Reasoning models for complex tasks
- Agent Flows and deterministic Task Automation
- Use AI Builder in Flows
- Optimize Agent Flows Savings

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- Adding Voice Support to Agents
- Post-call Actions for Voice Agents
- Integrating Pro-Code Agents

## **Module: Testing & Evaluating Copilot Studio Agents**

- Agent Evaluations (GA)
- Creating Test Sets: Manual, CSV Import & AI-Generated
- Multi-turn Conversation Tests
- Thumbs-up/down Feedback & Activity Maps for Diagnosis
- Viewing & Filtering User Questions and Reactions
- CSAT Values and Session Transcripts
- Exporting Evaluation Data for Further Analysis
- Using Copilot Studio Kit for Advanced Evaluation

## **Module 6: Designing & Implementing Business Processes**

- Defining Scenarios & Envisioning
- Mapping Scenarios to Capabilities
- Designing Conversation Flows
- Human in the Loop
- Evaluate Agents & Processes
- Analytics And Application Insights
- Troubleshooting and Analyzing Conversations

## **Module 7: Publishing & Maintaining Copilot Studio Agents**

- PowerPlatform Admin Center & Architecture
- Introduction to Power Platform Environments & Solutions
- Publishing and Deploying Copilot Studio Agents
- Using Advanced Channels (Whatsapp, Web, ...)
- Application Lifecycle Management for Copilot Studio Agents
- Exporting & Importing Agents between Environments
- Deployment Pipelines & Source Control integration
- Copilot Studio Compliance & Security
- Introduction to Microsoft Purview
- Preventing Agent Sprawl

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## Training Centres worldwide



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