

Microsoft Copilot for M365: Studio & AI Builder

Learn to implement, secure and extend Copilot for Microsoft 365, and build custom copilots with Copilot Studio and AI Builder.

7

MODULES

57

TOPICS

COURSE OVERVIEW

This comprehensive course is designed to help organizations leverage the power of Microsoft Copilot for 365 to enhance productivity, streamline workflows, and drive user adoption. Participants will gain a deep understanding of Copilot's applications across key business functions, its integration with Microsoft Teams and Power Platform, and the essential steps for implementing, securing, and extending Copilot capabilities in their organizations.

WHO THIS COURSE IS FOR

IT Administrators

Microsoft 365 Administrators

Power Platform Developers

Security and Compliance Officers

Business Process Owners

PREREQUISITES

Required Prerequisites

- Familiarity with Microsoft 365: Basic knowledge of Microsoft 365 apps and services, including Teams, Word, Excel, and PowerPoint.
- Understanding of AI Concepts: A general understanding of artificial intelligence and its business applications is recommended.
- IT and Data Governance Knowledge: Experience with IT administration, security, data governance, and compliance within an organizational context.
- Experience with Power Platform (Optional): Some familiarity with Microsoft Power Platform (Power Apps, Power Automate) will be beneficial, particularly for the modules covering Copilot and AI integration.

What You Will Learn

- Explain Copilot for Microsoft 365 and its related applications
- Describe security, governance and data access considerations for Copilot
- Plan an implementation and user adoption strategy for Copilot
- Apply data classification and trainable classifiers to sensitive data
- Configure sensitivity labels for a data classification framework
- Extend Copilot capabilities using plugins and Graph Connectors
- Build a custom copilot in Copilot Studio and publish it to Teams
- Develop and train AI models with AI Builder for Power Apps and Automate

COURSE SYLLABUS

7 Modules, 57 Topics

01

Introduction to Copilot for Microsoft 365, Implementation Overview and Driving Adoption

TOPICS

- Introduction
- AI at work with Copilot
- Copilot for Microsoft 365
- Copilot for Sales
- Copilot for Service
- Copilot for Finance
- **Better Together:** Teams Premium & Copilot for Microsoft 365
- Copilot Pricing and Comparison
- Security and Trust Overview
- Implementation Overview
- Driving User enablement and adoption
- Resources and Next Steps

02

Get Your Organization Ready and Secured for Copilot for Microsoft 365

TOPICS

- Getting your organization ready
- Technical readiness
- Get Ready – Optimization Assessment
- Address security, governance, and data access questions
- How Copilot works
- Semantic Index for Copilot
- Data security and compliance
- Privacy and data residency
- How to prepare for Copilot
- Build Copilot for Microsoft 365 implementation plan
- Onboard and Engage
- Deliver Impact – Analyze Usage

03

Implement Data Classification of Sensitive Information

TOPICS

Data classification in Microsoft 365 · Trainable classifiers · Viewing sensitive data · Document fingerprinting

04

Implement Sensitivity Labels

TOPICS

- Sensitivity label requirements
- Developing a data classification framework
- How to create and publish sensitivity labels
- How to remove and delete sensitivity labels Document fingerprinting

05

Extend and Optimize Copilot for Microsoft 365 Capabilities

TOPICS

The Copilot Stack · Build vs Buy · Ways to extend and customize Copilot · Plugins · Graph Connectors · Introduction to Copilot Studio · Copilot Studio – Functional Overview

06

Leveraging Copilot in the Power Platform

TOPICS

- Creating a new copilot
- Entities
- Working with topics
- Setting up triggers
- Adding nodes
- Call a flow
- Testing your copilot
- Publish a copilot
- Using a copilot in Teams
- Maintaining a copilot

07

AI Builder

TOPICS

Understanding what AI builder can do · Licensing · Create an AI model · Training a model · Implementing a model · Using models with Copilot · Using models with Power Apps · Using models with Power Automate

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

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