KOENIG
step forward

KOENIG SOLUTIONS · COURSE OUTLINE

Microsoft 365 Copilot, Agents & Power Automate

A four-day program in Microsoft 365 and Copilot skills baseline: Agents, Pages, Notebooks, Researcher and Analyst, and automation.

4 Days 32 HOURS	27 MODULES	102 TOPICS	37 HANDS-ON LABS

COURSE OVERVIEW

This program teaches participants to use prebuilt agents and to build, share and manage their own no-code agents in Copilot Chat and SharePoint, automating recurring work and approvals with Power Automate.

WHO THIS COURSE IS FOR

Business Users | **Team Leads & Managers** | **Process Owners** | **Operations Teams**

Finance, HR & Admin Staff

LEARNING OBJECTIVES

- Use Microsoft 365 Copilot Chat safely and responsibly with work data
- Write effective prompts and personalise Copilot with memory and instructions
- Save, share and reuse prompts through the Copilot Prompt Gallery
- Create and collaborate with Copilot Pages and Notebooks
- Draft, research, analyse and present with Copilot, Researcher and Analyst
- Delegate multi-step tasks to Copilot Cowork within its guardrails
- Use prebuilt agents and build, test, share and manage no-code agents
- Apply Copilot to real Operations, Finance, HR and Sales scenarios through role-based exercises
- Create agents grounded in SharePoint content
- Explain core data concepts: data formats, storage, databases, transactional and analytical processing
- Automate recurring work and approvals with Power Automate cloud flows
- Build Copilot Studio agents with knowledge, tools, agent flows and autonomous trigger

PREREQUISITES

Licences, Accounts and Lab Environment

REQUIREMENT	DETAILS
Microsoft 365 account	A work or school (Microsoft Entra ID) account for every participant. Personal Microsoft accounts will not work. MFA registered and sign-in tested before Day 1.
Base licence	A Microsoft 365 or Office 365 business licence that includes Exchange Online, OneDrive, SharePoint and Teams (for example Microsoft 365 E3, E5 or Business Standard or Premium).
Microsoft 365 Copilot licence	One Microsoft 365 Copilot add-on licence per participant. Copilot Chat alone is not enough for the Pages, Notebooks, Researcher, Analyst, Cowork and role-based labs.
Power Automate	Power Automate licence or trial per participant, plus a Power Platform environment with Dataverse for the Guided Project. Premium connector labs need a trial or developer plan.
Copilot Studio	Copilot Studio licence or trial , and a Power Platform environment (a developer or sandbox environment) where they can create agents.
Admin roles	One person with Microsoft 365 admin rights (to enable agents and assign licences) and, for Days 3 and 4, Power Platform admin rights (to create environments).

LAB ENVIRONMENT CHECKLIST

- **Tenant:** Microsoft 365 tenant, or a dedicated training tenant. Trainer and participants need accounts in the same tenant.
- **Agents enabled:** agent creation in Copilot Chat and SharePoint, the Agent Store, Researcher, Analyst and Cowork are switched on for the group.
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- **Security:** No conditional access or network rules that block participants from Copilot, Power Automate or Copilot Studio.

PARTICIPANT PREREQUISITES

- **Skills:** Everyday use of Teams, Outlook, Word, Excel and PowerPoint. No coding or prior Copilot experience is needed.
- **Device:** Laptop with Microsoft Edge or Chrome and Microsoft 365 apps (desktop or web), stable internet,

COURSE SYLLABUS

DAY 1 Transform business workflows with generative AI

01

Prepare to use generative AI at work

TOPICS

- What is generative AI
- Understand responsible AI
- Copilot workflow companion

02

Explore how Microsoft Copilot Chat works

TOPICS

- Understand Microsoft 365 Copilot Chat
- Access Microsoft 365 Copilot Chat
- Utilize Microsoft 365 Copilot Chat
- Keep your data safe while using Copilot Chat

03

Write effective prompts to achieve optimal results

TOPICS

- Write an effective prompt
- Review prompting best practices
- Personalize Copilot with memory and instructions
- Discover, share and save prompts in the Copilot Prompt Gallery

04

Work smarter with Microsoft Copilot Chat

TOPICS

- Enhance your productivity
- Create and collaborate with Copilot Pages
- Simplify workflows and automate tasks with Copilot agents
- **Hands-on:** Web prompts

05

Draft and refine business content using Microsoft Copilot

TOPICS

- Draft content using Copilot
- Research and gather information with the Researcher agent
- **Hands-on:** Draft and refine content

06

Analyze and visualize data using Microsoft Copilot

TOPICS

- Analyze data workflows in Excel
- Generate insights with the Analyst agent
- **Hands-on:** Analyze and visualize data

07

Manage meetings and collaboration using Microsoft Copilot

TOPICS

- Streamline meeting prep
- Enhance collaboration with Copilot Chat, Pages and Notebooks
- **Hands-on:** Manage meetings and collaboration

08

Get more done with Copilot Cowork

TOPICS

- Choose the right AI tool
- Understand Cowork usage
- How Cowork works
- Write effective Cowork requests
- See Cowork in action
- Guardrails, limitations and responsible use
- **Hands-on:** Introduction to Cowork

DAY 2 Agents and role-based Copilot use cases

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Get started with agents

TOPICS

- What are agents?
- Access agents in Microsoft Copilot and SharePoint
- Explore the benefits of using agents
- Enhance collaboration using agents
- Examine IT governance controls for agents

10

Explore prebuilt Microsoft 365 Copilot agents

TOPICS

- Examine the Analyst agent
- Examine the Researcher agent
- Examine the Prompt Coach agent
- Examine the Idea Coach agent
- Examine the Writing Coach agent
- **Hands-on:** Use the Analyst agent
- **Hands-on:** Use the Researcher agent
- **Hands-on:** Use an agent of your choice

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Build and manage an agent

TOPICS

- Examine the tools used to create agents
- Explore the components of an agent
- Create an agent in Copilot Chat (Parts 1 and 2)
- Create an agent in SharePoint
- Test and edit your agents
- Manage your agents
- **Hands-on:** Create a Copilot Chat agent
- **Hands-on:** Create a SharePoint agent

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Share and use agents

TOPICS

- Share an agent with other users
- Share an agent in Microsoft Teams
- Interact with agents

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Operations use cases with Microsoft 365 Copilot (MS-4004)

TOPICS

- **Hands-on:** Streamline operational initiatives using Microsoft 365 Copilot
- **Hands-on:** Manage a facility expansion project with Microsoft 365 Copilot

14

Finance use cases with Microsoft 365 Copilot (MS-4004)

TOPICS

- **Hands-on:** Optimize financial reporting and acquisition modeling
- **Hands-on:** Streamline contract analysis and negotiation

15

HR use cases with Microsoft 365 Copilot (MS-4004)

TOPICS

- **Hands-on:** Deliver manager insights
- **Hands-on:** Empower employees with an HR self-service agent

16

Sales use cases with Microsoft 365 Copilot (MS-4004)

TOPICS

- **Hands-on:** Accelerate market growth
- **Hands-on:** Automate sales proposal responses

DAY 3 Create and manage automated processes by using Power Automate

17

Explore core data concepts (Microsoft Azure Data Fundamentals)

TOPICS

- Identify data formats
- Explore file storage
- Explore databases
- Explore transactional data processing
- Explore analytical data processing

18

Get started with Power Automate

TOPICS

- Introducing Power Automate
- Create a cloud flow
- Troubleshoot flows
- Convert a flow to an agent flow
- **Hands-on:** Create recurring flows
- **Hands-on:** Monitor incoming emails
- **Hands-on:** Share flows

19

Build approval flows with Power Automate

TOPICS

- Introduction to approval flows
- Create a business process flow
- Create a business process flow with conditions
- **Hands-on:** Build an approval request

20

Build flows to manage user information

TOPICS

- **Hands-on:** Build a flow that uses information like locations or date
- **Hands-on:** Build a flow that accepts user input when run
- **Hands-on:** Create a flow that blocks time on your calendar

21

Power Automate's deep integration across multiple data sources

TOPICS

- **Hands-on:** Integrate Power Apps, Power Automate and SharePoint
- **Hands-on:** Monitor flows
- **Hands-on:** Build a flow that runs when an event in Dynamics 365 occurs
- **Hands-on:** Build a flow that uses a SharePoint list

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Guided Project – Create and manage automated processes with Power Automate

TOPICS

- Create a data model with custom tables and columns from high-level specifications
- Build the flow for a fictional company scenario
- **Hands-on:** Guided project

DAY 4 Agent in a Day

23

Build agents in Copilot Chat

TOPICS

- Copilot Chat
- **Hands-on:** Use agent templates in Agent Builder
- **Hands-on:** Build custom agents in Agent Builder

24

Build a conversational agent in Copilot Studio

TOPICS

- Set up environment
- Tour your agent in Copilot Studio
- **Hands-on:** Build an agent in Copilot Studio
- **Hands-on:** Add agent knowledge sources

25

Use tools in Copilot Studio

TOPICS

- Overview of tools
- **Hands-on:** Build a custom prompt tool
- **Hands-on:** Build an agent flow

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Make your agent autonomous in Copilot Studio

TOPICS

- Autonomous triggers in Copilot Studio
- **Hands-on:** Make your agent autonomous

WHAT IS INCLUDED

Everything You Need to Succeed

- Microsoft official courseware for AB-730T00, MS-4019, MS-4004, PL-7002 and the DP-900 data concepts module, and the Agent in a Day workshop
- Official Microsoft hands-on lab exercises for every course
- Delivery by Microsoft Certified Trainers
- 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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