

Create and Use M365 Copilot Agents

This hands-on, live virtual session teaches you how to build declarative Copilot Agents directly inside the Microsoft 365 Copilot app — no coding required. You'll go from using pre-built agents to creating, customizing, testing, and sharing your own agents that ground themselves in your organisation's SharePoint/OneDrive data, automate repetitive tasks, and act as specialised assistants inside Copilot.

Snapshot

Duration: 90 Minutes

Audience: Business users, team leads, and power users who want to create practical Copilot agents for everyday work.

Course Outline

1. How Copilot works (plain English)

- What AI / Large Language Models (LLMs) are
- How Copilot uses your instructions + context to respond
- What Microsoft Graph does
- Why permissions matter

2. Copilot agents — the basics

- What a Copilot agent is
- When to use an agent instead of normal Copilot chat
- Where agents are used inside Microsoft 365
- How licensing affects what agents can do

3. Using Microsoft's built-in agents

- Overview of Microsoft agents already available in Copilot, such as:
 - Researcher – helps gather and structure information
 - Analyst – helps analyse data and explain insights
- When to use built-in agents vs creating your own
- Practical examples of using these agents at work

4. Building agents (all users)

- Where to create agents in Copilot
- Using Agent Builder (no coding)
- Designing a good agent

5. What Free users can create

- Agents based on based on Instructions or Public Websites
- Personal and small team helpers

6. What Paid users can create

- Agents that use internal work content, such as:
 - Knowledge-based agents for real business tasks

7. Sharing your Copilot M365 agent

- Create agents for yourself or small teams
- Share agents with specific people or groups
- Limitations of Copilot M365 Agent Usage
- When to Consider Copilot Studio

By the end of this course, participants will be able to:

- Understand what Copilot agents are and when to use them
- Build their own agent using Copilot's Agent Builder
- Know exactly what can be created with Free Copilot Chat vs Paid Microsoft 365 Copilot