IOWA | Information Technology Services

Enterprise Services
Copilot Agents Reference Sheet

What Are Copilot Agents?
Custom AI-powered assistants within the Microsoft environment that:

- Answer questions using your documents, online references
- Automate repetitive tasks
- Follow your instructions like a personal assistant

Accessible via Teams, Copilot Website, and *SharePoint**.

Who Are Agents Useful For?

- Staff and Faculty managing meetings, documents, or communications
- Admin teams looking to automate daily tasks
- Anyone seeking faster answers from the web, generating images/charts for their data

What Can Agents Do?
Some examples are:

Use Case	How It Helps
*Meeting Prep**	Search meeting invites, fetch and summarize related documents & emails, help prepare for a meeting
*Document Assistant**	Draft or summarize content from your files
Visual Learning	Generate charts, explain concepts by generating images
AI Reference Tool	Direct users to different enterprise AI tools, policies, or websites
Coding Assistant	Generate, debug, or explain code snippets

Requirement for Copilot Agents:

- Basic agents – available to all with a HawkID
- Elevated agents – MS 365 Copilot License

Steps:

1. Pick a template or start from scratch
2. Describe the agent's role
3. Add instructions and starter prompts
4. *Link knowledge base (files, folders, SharePoint URLs, up to 20 sources*)*
5. Optional – Enable web search, image generation, or *code interpreter** features
6. Test your agent live and start using!

What Can Agents Use as Data?

- *URLs (up to 4 public websites)***
- *Files and folders from OneDrive or SharePoint (up to 20 sources)**
- *SharePoint document libraries**
- *Note: Agents only see the content that users have access to*

Agents Capabilities by Subscription:

Capabilities	Copilot	MS 365 Copilot
Custom Copilot Agents	✓	✓
Web Search	✓	✓
Document Search		✓
Image Generation	✓	✓
Code Interpreter	✓	✓
SharePoint Agents		✓

Agents can be built and used on Copilot Website as well as on Microsoft Teams.
*SharePoint agents can be built and used on the respective SharePoint itself**.

Sharing Agents
While Copilot agents can be shared with anyone at the university, MS 365 Copilot agents can only be shared with users who:

- Have a MS 365 Copilot license (if using premium features)
- Have permission to access the documents referenced by the agent

Things to Keep in Mind

- Agents can hallucinate: even with tailored instructions and a *knowledge base**, responses can be inaccurate or creative.
- Copilot may answer differently for the same prompts at different times.
- As the human in loop, always review the AI responses before using them.

Have a Need to Build Something? Ask yourself:

- Do I need recurring task automation?
- Do I want personalized document Q&A?
- Would a chatbot help others get info faster?
- Do I need to pull specific information online?

If you answered yes to any of these, building a Copilot Agent might be the solution!

**Limited to Microsoft 365 Copilot*

***Websites under Knowledge – Add up to 4 public URLs that are searchable by Bing; check in Bing, and if a page isn't discoverable, use its parent URL instead.*

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