

What Are Microsoft 365 Copilot Agents?

Custom AI-powered assistants within Microsoft 365 that:

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

Accessible via Teams, Copilot Website, Word Web, and PowerPoint Web

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 a defined set of documents

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 MS 365 Copilot Agents:

- Microsoft 365 Copilot License

Types of MS 365 Copilot Agents:

- Copilot Website/ Teams Agents
- SharePoint Agents

Who Needs Access?

Anyone using the agent must:

- Have a MS 365 Copilot license
- Have permission to access the documents referenced by the agent

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 for Copilot website/ Teams agents: Enable web search, image generation, or code interpreter
6. Test it live and start using!

What Can Agents Use as Data?

- Files and folders from OneDrive or SharePoint (up to 20 sources)
- URLs (up to 3 public websites)
- SharePoint document libraries
- *Note: Agents only see the content that users have access to*

Where to Build and Use Agents:

Location	Build	Use
Copilot Website	✓	✓
Copilot in Teams	✓	✓
Word (Web only)		✓
PowerPoint (Web only)		✓

SharePoint agents can be built and used on the respective SharePoint itself.

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, be sure to 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?

If yes, building a MS 365 Copilot Agent might be the solution!

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