1 DAY

BUILDING AI AGENTS WITH MICROSOFT COPILOT STUDIO



Corporate IT Course

COURSE OVERVIEW

This practical one-day course introduces delegates to creating AI agents with Microsoft 365 Copilot Chat and Microsoft Copilot Studio. Through short presentations and guided exercises, delegates will build and test agents that use organisational knowledge, perform actions and respond automatically to events. The course also considers security, governance, licensing and suitable workplace applications. No coding experience is required.

LEARNING OUTCOMES

- Explain what AI agents are and where they fit within Microsoft 365.
- Identify suitable workplace processes that could be supported by an agent.
- Build, test and refine an agent in Microsoft 365 Copilot Chat.
- Create a conversational agent in Copilot Studio using organisational knowledge.
- Extend an agent with tools, connectors, actions and flows.
- Configure an autonomous agent that responds to an event trigger.
- Describe the main security, governance and licensing considerations.
- Plan practical next steps for introducing agents within their organisation.

TOPICS COVERED IN THIS COURSE

Understanding AI Agents
Understand what AI agents are, how they differ from individual Copilot prompts and how they can support everyday workplace tasks and processes.

Agents in Microsoft 365
Explore where agents fit within Microsoft 365, including the differences between building agents in Copilot Chat and using the wider capabilities of Copilot Studio.

Planning an Effective Agent
Identify a suitable purpose for an agent and write clear instructions that define what it should do, how it should respond and who will use it.

Building Agents in Copilot Chat
Create, test and improve a first working agent within Microsoft 365 Copilot Chat, before considering how it can be shared with other users.

Using Organisational Knowledge
Add relevant knowledge sources so that an agent can provide more accurate, useful and contextually appropriate answers.

Adding Tools and Actions
Extend an agent with tools, connectors and flows so that it can complete actions and support multi-step workplace processes.

Creating Autonomous Agents
Configure an agent to respond automatically to an event, such as an incoming email, and test the actions it performs when the trigger occurs.

Governance and Organisational Use
Consider security, permissions, licensing, ownership and responsible use before identifying suitable first applications for AI agents within the organisation.

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