

# Learning Path 1: Transform your everyday business processes with agents



# Learning Path agenda



- Get started with agents
- Explore prebuilt Microsoft 365 Copilot agents
  - Exercise – Use the Analyst agent
  - Exercise – Use the Researcher agent
  - Exercise – Use the agent of your choice
- Build and manage an agent
  - Exercise – Create a Microsoft 365 Copilot Chat agent
  - Exercise – Create a SharePoint agent
- Share and use agents
- Learning Path review

# Module 1: Get started with agents



# Introduction

Agents empower business users with no programming or technical background to transform their everyday business processes

This module includes the following topics that introduce you to agents and examine how they act as AI-powered assistants embedded within Microsoft 365 Copilot Chat and SharePoint:

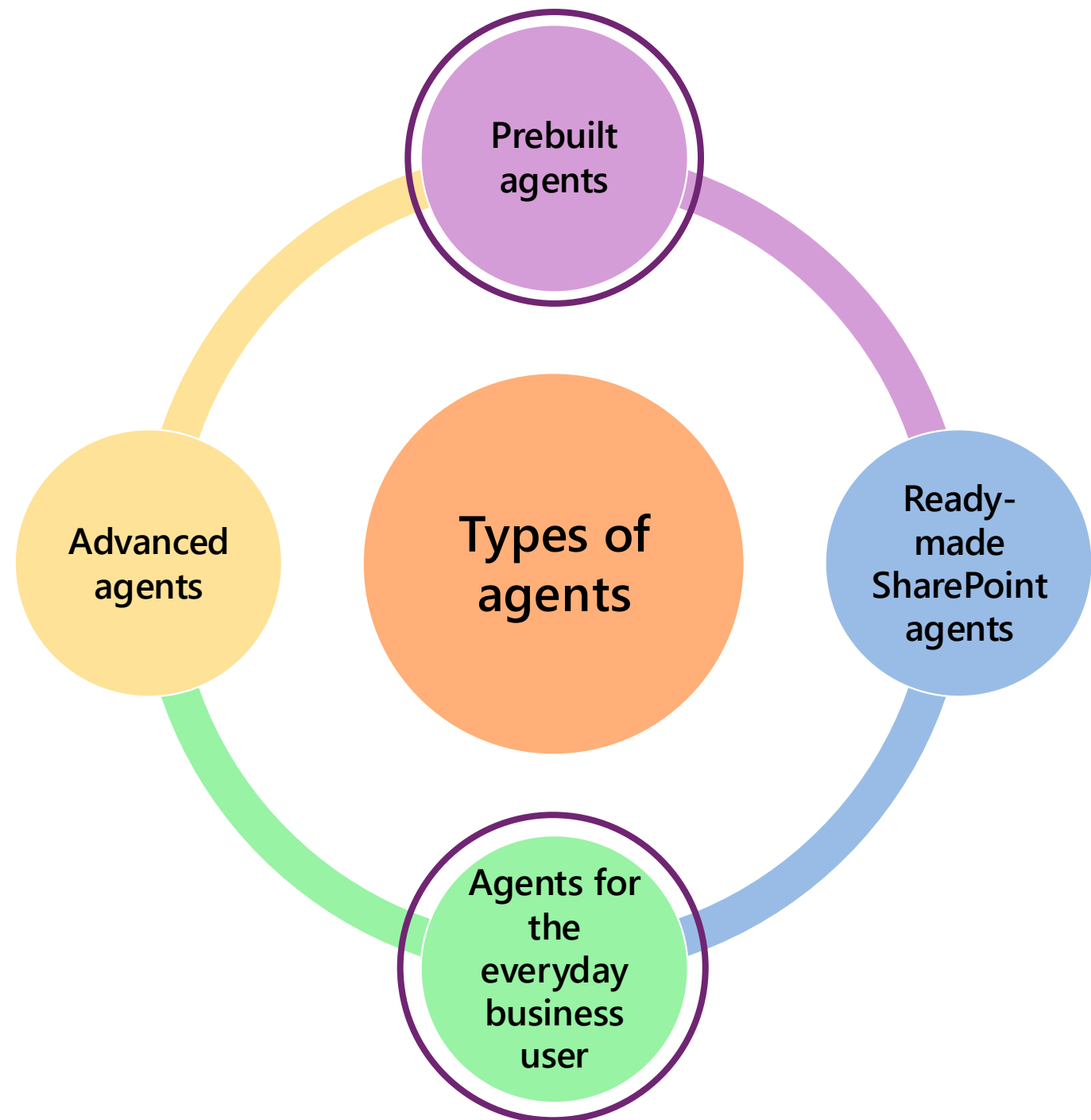
- 1 What are agents?
- 2 Who can create and use agents?
- 3 Explore the benefits of using agents
- 4 Enhance collaboration using agents
- 5 Examine IT governance controls for your agents

# What are agents?

The diagram shows the various types of agents that are available in Microsoft 365 Copilot

This course focuses on prebuilt agents and agents for the everyday business user

- Prebuilt agents are available in Microsoft 365 Copilot Chat
- Everyday business users can create custom agents in SharePoint and Microsoft 365 Copilot Chat
  - Everyday business users with no technical or programming expertise can create and manage them
  - Copilot Chat agents can be based on predefined templates and rules
  - They can be shared with other users



# Video – Microsoft 365 Copilot | SharePoint agents



# Discussion – Video review

- What are your key takeaways from this video, and why?
- Were there any features related to SharePoint agents that you found interesting?

# Agents and Access in Microsoft 365 Copilot

Copilot Chat gives everyone access to AI in Microsoft 365, while a full Microsoft 365 Copilot license extends that experience with organizational data, app integration, and no extra usage costs

Both options support agents, letting every organization start simple (Copilot Chat and SharePoint agents created by everyday business users) and grow their AI capabilities over time (advanced agents created by software developers)

## Copilot Chat – “AI for Everyone”

- Included at no extra cost with Microsoft 365
- Default chat experience for all users
- Uses Web grounding (public data through Microsoft Bing)
- Foundation for building the “AI habit”

## Microsoft 365 Copilot – Full Experience

- Licensed, app-integrated personal AI assistant
- Adds access to Work data through tenant Graph grounding (personal data isn’t included)
- Leverages organization’s SharePoint, OneDrive, and Teams data
- No metered billing for grounded responses

## Copilot Agents

- Both plans support creating and using agents
- Web grounding included at no cost
- Work data access requires:
  - Pay-as-you-go billing (for Copilot Chat users)
  - or
  - Microsoft 365 Copilot license (included)

## Flexible Licensing Model

- Mix of licensed and pay-as-you-go users allowed
- Pay only for grounded usage (Copilot Credits)
- Supports internal and selected external collaborators

# Agents and Access in Microsoft 365 Copilot (continued)

SharePoint agents are AI-driven chatbots embedded in SharePoint sites that retrieve and summarize site-specific information

- The ability to create and use agents in SharePoint depends on the user type, which includes site members, site visitors, and external users

## Site members

- They can create SharePoint agents for a site if they're assigned Edit permission or higher for the site
- They create agents to extend site functionality to meet their needs

## Site visitors

- Typically assigned Read permission for a site
- With Read permission, they can use SharePoint agents that are shared with them, but they can't create agents

## External users

- Typically treated as a site visitor unless they're added as a site member
- Can be treated as an internal employee with a Copilot license



## Explore the benefits of using agents

- Task simplification
- Improved data search
- Better collaboration
- Personalized user experience
- Security and compliance monitoring

# Enhance collaboration using agents

## Agent features that enhance cross-team collaboration

- Real-time assistance
- Enhanced search capabilities
- Collaboration and communication
- Configuration and personalization
- Intelligent search

## Security considerations when using agents to improve collaboration

- Permissions management
- Data privacy
- Compliance reviews
- Centralized administration
- Training and awareness

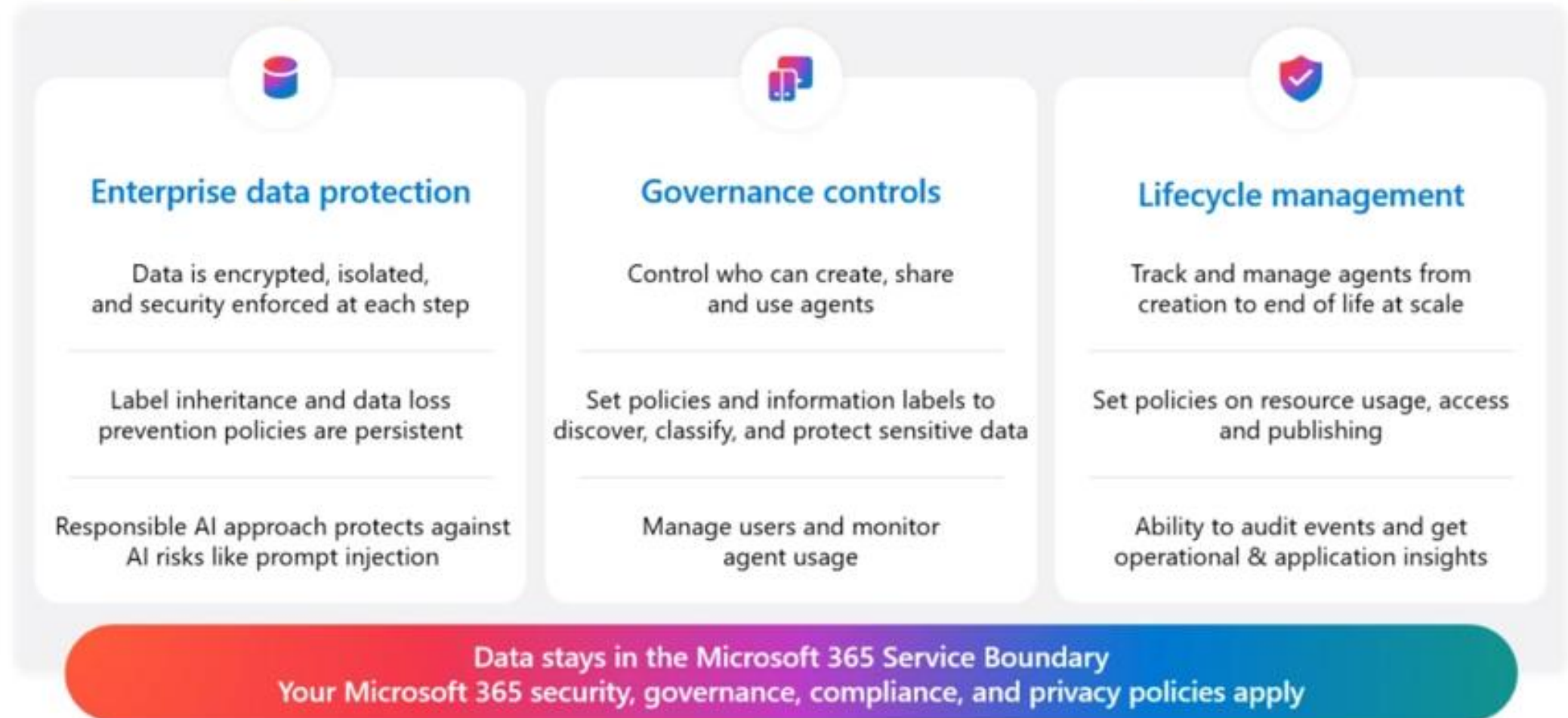
# Discussion – Using agents in your organization

**Now that you've reviewed the benefits of using SharePoint agents and Copilot Chat agents and how they can increase collaboration across an organization, let's discuss how you envision using them in your company**


- What types of tasks or processes do you foresee automating with agents in SharePoint and Copilot Chat?
- How do you envision agents enhancing collaboration and productivity within your team or department?
- What specific benefits do you hope to achieve by implementing agents in your daily processes?

# Examine IT governance controls for your agents

## Agents run on a secure and trusted platform



# Examine IT governance controls for your agents (continued)



**Implementing IT governance controls for agents is crucial for several reasons:**

- Ensuring compliance
- Enhancing security
- Maintaining quality
- Facilitating accountability

**To establish effective IT governance for agents, organizations should consider implementing the following controls:**

- Policy development
- Risk management
- Access control
- Data management
- Performance monitoring
- Training and awareness

**To successfully implement IT governance controls for agents, organizations should follow these best practices:**

- Engage stakeholders
- Establish a governance framework
- Regular audits and reviews
- Continuous agent improvement

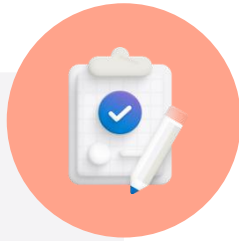
# Module Assessment



Test your knowledge by answering the module assessment questions at the end of this Learn module.



# Summary



**This module introduced you to agents and examined the following topics related to how they act as AI-powered assistants embedded within SharePoint and Copilot Chat**

- What are agents?
- Who can create and use agents?
- The benefits of using agents
- Using agents to enhance collaboration
- IT governance controls for your agents

# Module 2: Explore prebuilt Microsoft 365 Copilot agents



# Introduction

Microsoft 365 Copilot's prebuilt agents perform selected functions or answer questions related to specific aspects of your work. These agents are specialized helpers that come with deep knowledge of the Microsoft 365 environment and common business processes.

You don't need to configure or train prebuilt agents; in fact, they're ready to go as soon as you open Copilot Chat. They're designed with everyday users in mind, so you can just ask questions or give instructions in plain language.

1

This module examines several of the key prebuilt agents in Microsoft 365 Copilot Chat, including:

- Analyst agent
- Researcher agent
- Prompt Coach agent
- Idea Coach agent
- Writing agent

2

This module includes the following lab exercises:

- Use the Analyst agent
- Use the Researcher agent
- Use any other agent of your choice

# Examine the Analyst agent

The Analyst agent assists you with exploring, interpreting, and summarizing your work data through your use of natural language prompts

- It can scan data in files you have access to (such as Excel spreadsheets, Word documents, and Power BI dashboards) and provide helpful summaries, charts, and insights based on your questions
- It can run Python to tackle your most complex data queries, and you can view the code it's running in real time and check its work
- One of its most powerful features is its ability to connect data across files you recently worked with in Microsoft 365
  - For example, if you collaborated on a shared Excel sheet or reviewed a PowerPoint deck with embedded tables, Analyst can reference that content to answer your questions more completely
- It also respects your file permissions, so it only accesses data you're authorized to see



# Lab exercise



## Exercise 1: Use the Analyst agent

You're tasked with analyzing the survey results that pertain to an internal company initiative called "Project Nexus."

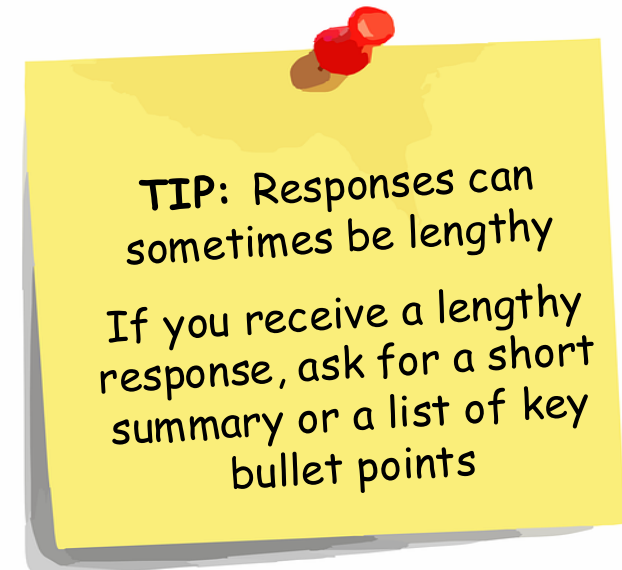
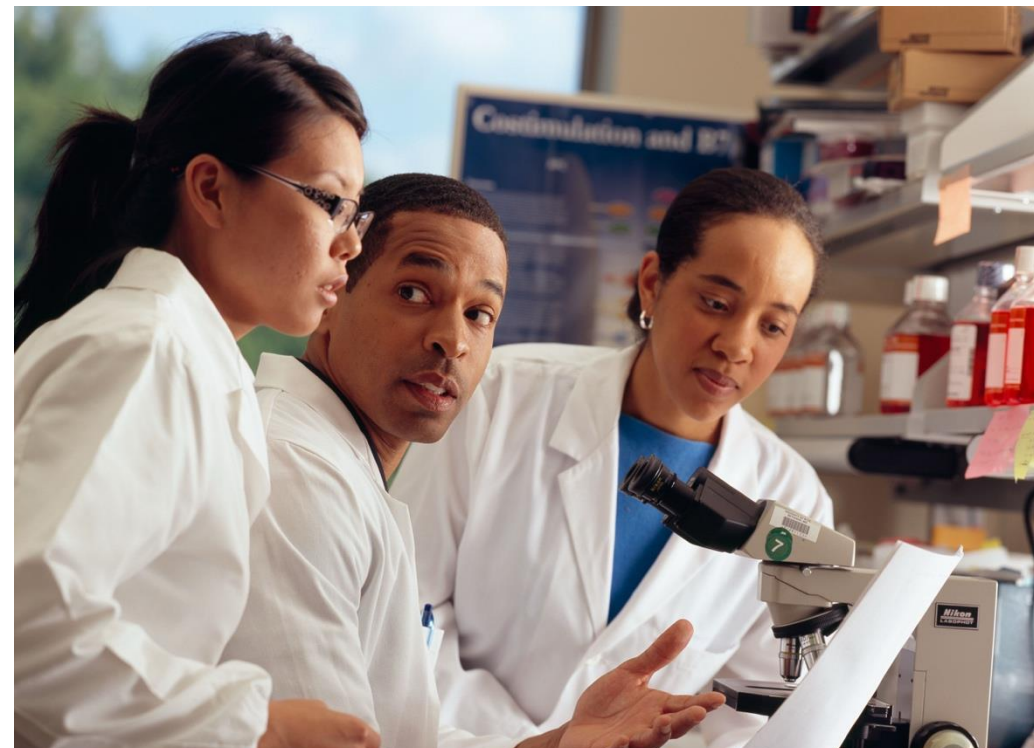
You'll begin by downloading the spreadsheet containing the Project Nexus survey results.

You'll then use the Analyst agent to explore the survey results.

# Examine the Researcher agent

The Researcher agent helps business users quickly and accurately find the information they need, without the manual effort and time-consuming searches

- It can scan recent files, trusted sources, and the web (where enabled) to deliver high-quality, well-structured answers
- It follows a methodical, chain-of-thought approach, so it can break down complex questions, identify relevant sources, and refine results to meet your specific needs
- It can quickly:
  - Locate key facts, trends, and insights
  - Summarize long documents
  - Extract the most relevant points
  - Provide citations so you can easily follow up or share your findings
- You don't need to dig through dozens of articles or reports because Researcher does the legwork for you



# Lab exercise



## Exercise 2: Use the Researcher agent

This lab offers a hands-on opportunity to explore how the Researcher agent can help you uncover insights, organize information, and generate polished outputs from your own data, all within the familiar Microsoft 365 environment.

This course doesn't include a Microsoft 365 lab tenant with fictitious Outlook and Teams data. Instead, you must complete this lab exercise using your own personal data.

You'll use the Researcher agent to synthesize information across Outlook, OneDrive, and Teams to prepare insights on a topic from your own data.

# Examine the Prompt Coach agent

The Prompt Coach agent is your guide to writing clearer, more effective prompts, which can help you get the most out of Microsoft 365 Copilot

- It's optimized for prompt tuning and instruction refinement
  - It offers tailored suggestions, examples, and explanations to help you improve how you ask questions or give instructions to Copilot
- Prompt Coach is especially helpful for:
  - Rewriting unclear or underperforming prompts to be more specific or action-oriented
  - Learning prompt patterns that work well for different types of tasks, such as writing, data analysis, and brainstorming
  - Troubleshooting prompts when Copilot doesn't give the results you expected
  - Exploring new ways to ask for help in natural language
  - Building your confidence in using Copilot more effectively across Word, Excel, Teams, and more



# Examine the Idea Coach agent



The Idea Coach agent acts like a smart sounding board, helping you think through your ideas, build on them, and make them stronger

- It doesn't just tell you if something sounds good - it also challenges, expands, and improves your thinking
- You can use it to evaluate a plan from multiple perspectives, explore alternatives, or find the strongest version of your message or idea
- Idea Coach is especially helpful for:
  - Refining early-stage ideas into more structured, actionable concepts
  - Stress-testing proposals or plans by identifying risks, gaps, or unseen factors
  - Expanding on creative ideas for projects, campaigns, or initiatives
  - Reworking messaging to make it clearer or more compelling
  - Exploring the implications or potential impact of a decision

# Examine the Writing Coach agent

The Writing Coach agent helps you craft better, more impactful content, whether you're writing an email, report, presentation, or anything in between

- It's optimized for professional writing
- It elevates your rough drafts into polished, coherent pieces of writing
- Writing Coach is especially helpful for:
  - Improving the clarity, structure, and tone of your writing
  - Rewriting or refining drafts to enhance readability
  - Generating ideas for introductions, conclusions, or transitions
  - Suggesting how to make your writing more persuasive or engaging
  - Checking for consistency in style, format, and punctuation
  - Adapting your writing for different audiences or communication goals



# Lab exercise



## Exercise 3: Use a prebuilt agent of your choice

This course doesn't include a Microsoft 365 lab tenant with fictitious data. Instead, you must complete this lab exercise using your own personal data.

Think back to a project you were involved with over the past 90 days—something that required coordination, communication, or follow up.

Your task is to use a prebuilt Microsoft 365 Copilot agent that you feel can help resolve or gain insights into your project.

If time permits, repeat the lab with other agents to see the types of responses they can provide.

**Note:** Use agents other than the Analyst and Researcher agents, which you've already used in previous lab exercises.

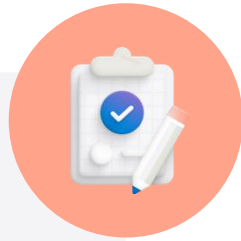
# Module Assessment



Test your knowledge by answering the module assessment questions at the end of this Learn module.



# Summary



**This module introduced you to the following prebuilt agents in Microsoft 365 Copilot:**

- Analyst agent
- Researcher agent
- Prompt Coach agent
- Idea Coach agent
- Writing agent

# Module 3: Build and manage an agent



# Introduction

This module guides you through the steps required to build, test, and manage agents

- 1 Examine the tools used to create agents
- 2 Explore the components of an agent
- 3 Create an agent in Copilot Chat - Part 1
- 4 Create an agent in Copilot Chat - Part 2
- 5 Exercise - Create a Microsoft 365 Copilot Chat agent
- 6 Create an agent in SharePoint
- 7 Exercise - Create a SharePoint agent
- 8 Test and edit your agents
- 9 Manage your agents

# Explore the components of an agent

A Copilot Chat agent created by everyday business users includes the following fields:

Field	Description
Name	The name of your agent (30 characters max)
Icon	You can manually upload an image to represent your agent and give it a unique personality. The image must be a .png file and it can't exceed 1MB in size
Description	The description helps the Large Language Model (LLM) identify and use your agent for a specific task or situation (1,000 characters max)
Instructions	Specific instructions for the LLM to direct the behavior of the agent, including its tasks and how it completes them (8,000 characters max). Copilot generates detailed instructions for your agent based on the description you enter
Knowledge	Knowledge sources define the information an agent can access—such as SharePoint sites, files, and Microsoft Graph connectors—to provide relevant, grounded responses
Capabilities	You can enhance a Copilot Chat agent by enabling two advanced features: Code Interpreter and Image Generator. These features are not available in SharePoint agents
Suggested Prompts	You can optionally add predefined suggestions or questions designed to help users initiate a task or conversation

# Create an agent in Copilot Chat – Part 1

**Business users with no programming or technical background can create their own Copilot Chat agents using Agent Builder**

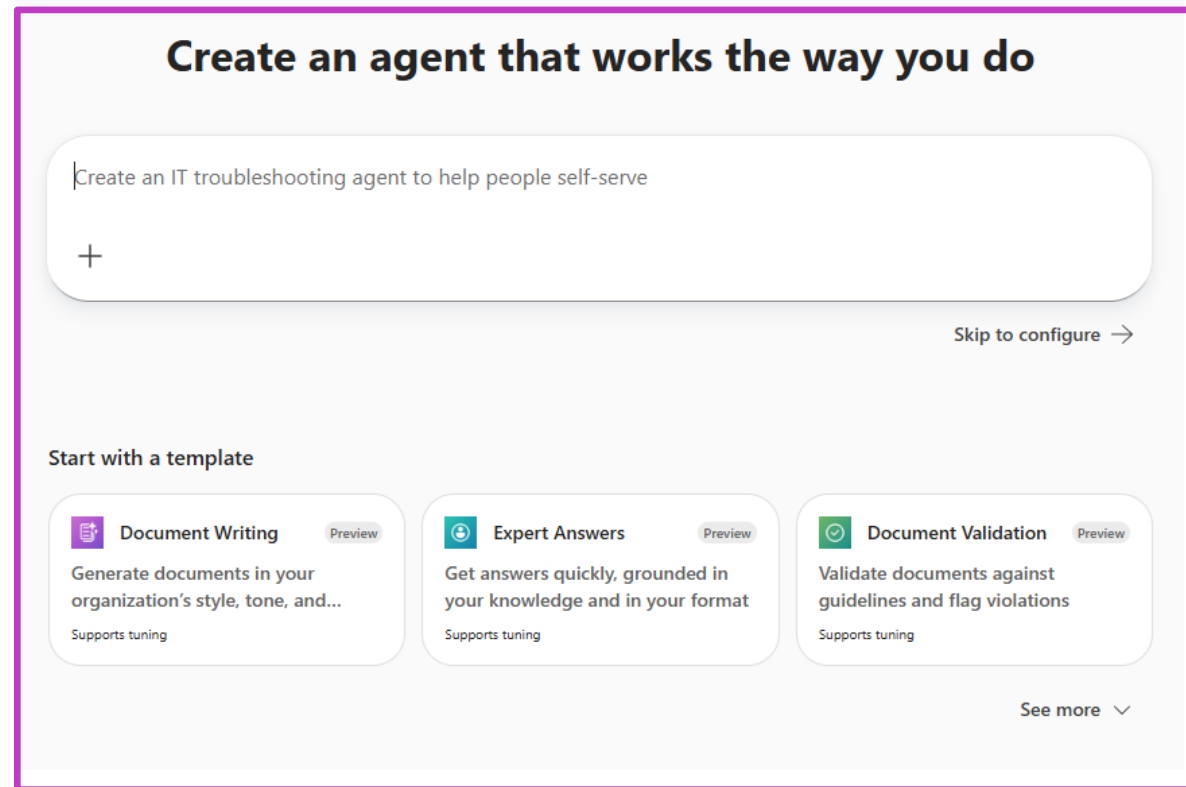
- Agent Builder is the lightweight, built-in authoring experience inside Microsoft 365 Copilot Chat

**When you select the “New agent” option in Copilot Chat, you can initiate the agent building process in one of three ways:**

- Provide an initial description of the agent that you want Agent Builder to automatically configure for you
- Select the **Skip to configure** option to manually configure the agent yourself
- Select a template from a list of predefined agent templates

**If you select a template, Agent Builder configures your new agent based on the selected template**

- Agent Builder prepopulates the fields in your agent with values from the template, such as icon, name, description, instructions, and suggested prompts
- You can edit these values to fit the requirements of your agent



# Create an agent in Copilot Chat – Part 1 (continued)

Agent Builder enables you to create agents in either of two ways: through the Describe tab or the Configure tab

If you entered a description on the New agent form, Agent Builder creates a draft agent based on your description and displays the Describe tab in response (the chat portion of the tab is displayed in this screenshot)

- Agent Builder converts your natural language description into detailed, programmatic instructions that guide the agent's actions
  - As you converse with Agent Builder about how the agent should act, what its knowledge sources should be, and so on, it continuously refines the agent's instructions based on your requests
- The **Describe** tab might not be available in all regions or languages, depending on feature availability and rollout status
  - You can build your agent solely through the **Configure** tab if the **Describe** tab isn't supported in your region or preferred language
- Agent Builder creates suggested prompts for your draft agent
  - These conversation starters, which appear in the **Describe** tab's Preview pane (not shown here), enable you to test the agent
  - You can then request changes based on the agent's responses

The screenshot shows the 'Agent Builder' interface for 'Contoso HR Policy Helper'. At the top, there are two tabs: 'Describe' (selected) and 'Configure'. Below the tabs, a message box says: 'Create an agent that provides answers to employee questions related to Contoso's HR policies'. Underneath, a 'Copilot' section shows a green checkmark and the text: 'Your agent is now set up to answer employee questions about Contoso's HR policies!'. Below this, the 'Agent Name' is 'Contoso HR Policy Helper' and the 'Description' is 'Answers employee questions about Contoso's HR policies, including time off, benefits, remote work, and workplace conduct.' A 'What's Next?' section follows with two bullet points: 'If you want the agent to reference specific HR policy documents, SharePoint sites, or URLs, just provide those links here.' and 'You can add conversation starters, such as "What is our vacation policy?" to help employees get started.' Below this, there is a tip: 'When you're ready, use the Create button (top-right) to publish your agent, and try testing it in chat!'. At the bottom, there is a text input field with the placeholder 'Message Copilot' and an 'Add content' button. A microphone icon is also visible in the bottom right corner of the input area.

# Create an agent in Copilot Chat – Part 2

This screenshot shows the top portion of the **Configure** tab in Agent Builder:

- It allows you to create an agent manually by entering the values for each field in the agent
- This tab enables you to view and edit information about the agent
- This gives you more control and more precision than when you create an agent using the **Describe** tab
- If you entered a description on the **Describe** tab, Agent Builder converts them to a more detailed format that you can review and edit if needed in the **Instructions** field

The **Describe** and **Configure** tabs are in sync:

- The fields in the **Configure** tab update to reflect the latest changes from the **Describe** tab
- You can switch between the tabs to use the experience that's most comfortable for you to create the agent

The screenshot displays the 'Agent Builder' interface for 'Contoso HR Policy Helper'. At the top, there are two tabs: 'Describe' and 'Configure', with 'Configure' being the active tab. Below the tabs, a 'Template' dropdown menu is set to 'None'. The main content area is divided into two sections: 'Details' and 'Instructions'. The 'Details' section includes a profile icon (a blue square with a white 'C' and 'H' logo) and an edit icon. Below the icon, the 'Name' field contains 'Contoso HR Policy Helper'. The 'Description' field contains the text: 'Provides clear, accurate answers to employee questions about Contoso's HR policies, including leave, benefits, performance reviews, and workplace conduct.' The 'Instructions' section is titled 'Instructions' and contains a list of instructions: '# Purpose: Assist Contoso employees with questions and guidance about HR policies and procedures.', '## General Guidelines: Respond in a professional, friendly, and clear manner. Reference official Contoso HR policies in answers. Avoid offering legal or medical advice; direct employees to appropriate contacts if necessary. Do not make policy interpretations beyond documented guidance.', '## Skills: Answer common HR queries (leave, benefits, performance reviews, workplace conduct). Summarize relevant HR procedures or requirements. Clarify definitions for terms used in Contoso's HR documentation.', and '## Step-by-Step Instructions: ...'.

# Lab exercise



## Exercise 1: Create a Microsoft 365 Copilot Chat agent

Be creative and design an agent that's of significant interest to you.

For example, you might want to solve a real-world business problem, improve productivity in a specific area at your company, or address a personal topic that interests you.

# Create an agent in SharePoint

Rather than using Agent Builder to build a SharePoint agent, you use a Copilot agent tool that's designed specifically for SharePoint

While this SharePoint tool creates an agent just like Agent Builder, it looks a little different (see the screenshot), and there are some differences in how it operates:

- The tool has 3 tabs:
  - **Overview**. Enter the agent's name and description
  - **Sources**. Define the agent's knowledge sources
  - **Behavior**. Define a Welcome message, starter prompts, and instructions
- The Capabilities section isn't available
- You can't configure the agent based on a template
- You enter your instructions using natural language, just like in Agent Builder, but the tool doesn't carry on a conversation to fine tune the instructions
- You're limited to 3 suggested prompts
- You can enter a Welcome message

Create your new agent

Overview Sources Behavior

Name \*

HR demo site agent

Hd

Change

Purpose \*

Provide a brief description of the agent's objective.

This is an agent curated based on the content from the HR demo site site.

Add advanced customization in Copilot Studio

Save and close

Agent preview Give Feedback

HR demo site agent

Welcome! Ask a question or get started with one of these prompts:

- Summarize any key highlights
- Create an FAQ based on these resources
- How can I use these resources?

Ask questions or type / to add files or people.

# Lab exercise



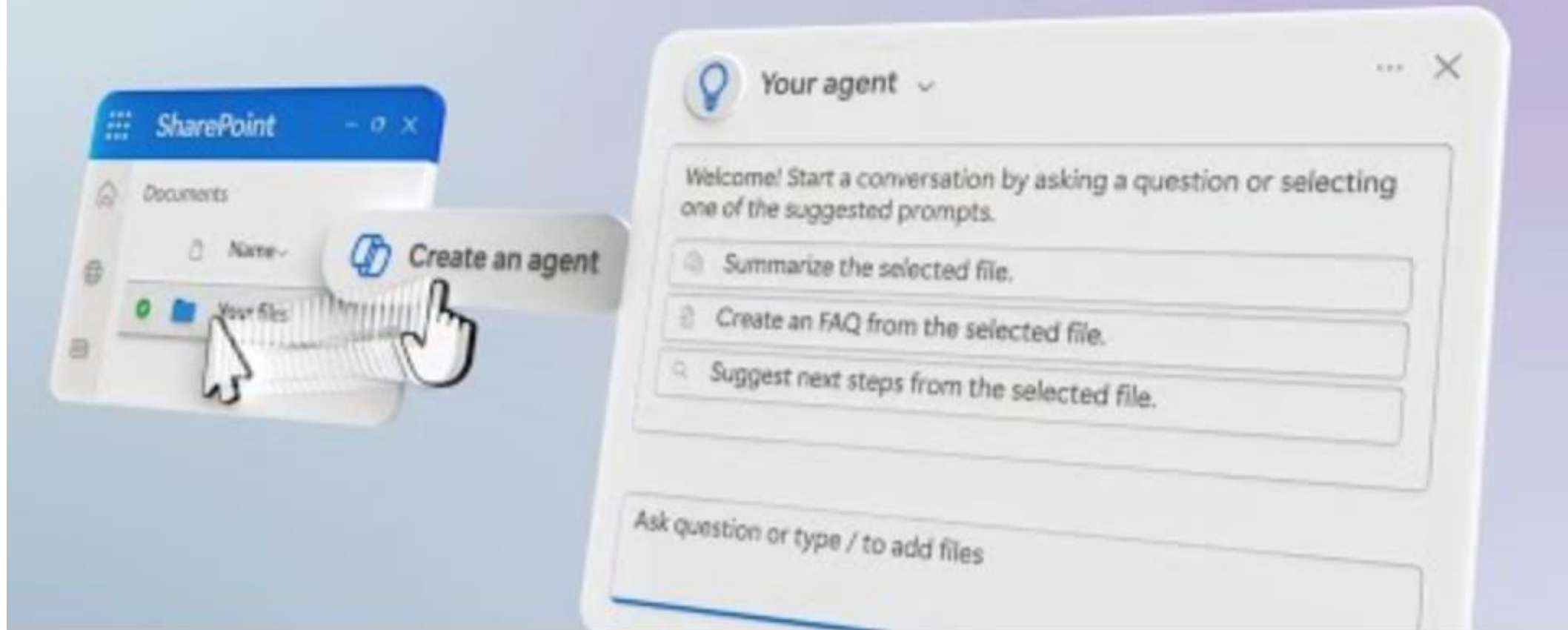
## Exercise 2: Create a SharePoint agent

In this exercise, you'll create a SharePoint agent to help you get quick answers or perform useful actions that are related to a SharePoint site.

- If you have access to a SharePoint site, such as a team site, project site, or resource hub, then you can use the site in this exercise.
- If you don't have access to a SharePoint site, then you can perform this exercise within a simulated lab environment that's provided. The simulation uses a fictitious Fabrikam team site.

# Video – One-click AI Agents

## One-click AI Agents



# Discussion – Video review

- What are your key takeaways from this video, and why?
- What features related to creating agents in SharePoint did you find interesting?

# Test and edit your agents

## Test the Instructions

- **Experiment with tones and styles**
  - Such as professional tone vs. casual tone; see which resonates best
- **Clarity and accuracy**
  - Verify you can follow the instructions and the response is accurate
- **Consistency**
  - Ask similar questions in different ways to ensure consistent answers
- **Adaptability**
  - Modify the instructions to see how well the agent adapts to changes
- **Edge cases**
  - Evaluate responses to instructions that are less common or more complex
- **User Feedback**
  - Use feedback to refine instructions

## Test the Knowledge Sources

- **Verify knowledge base integration**
  - Ensure the agent is correctly integrated with the knowledge base
  - Ask questions that should be answered using the knowledge base to verify accuracy
- **Update and test**
  - Regularly update the knowledge base with new information
  - Test the agent's responses to ensure it reflects the latest updates
- **Cross-reference testing**
  - Test the agent's ability to cross-reference information from different sources
  - If a SharePoint hub site is included as the source for the agent, verify that it uses information from both the hub site and its associated sites when responding to user requests

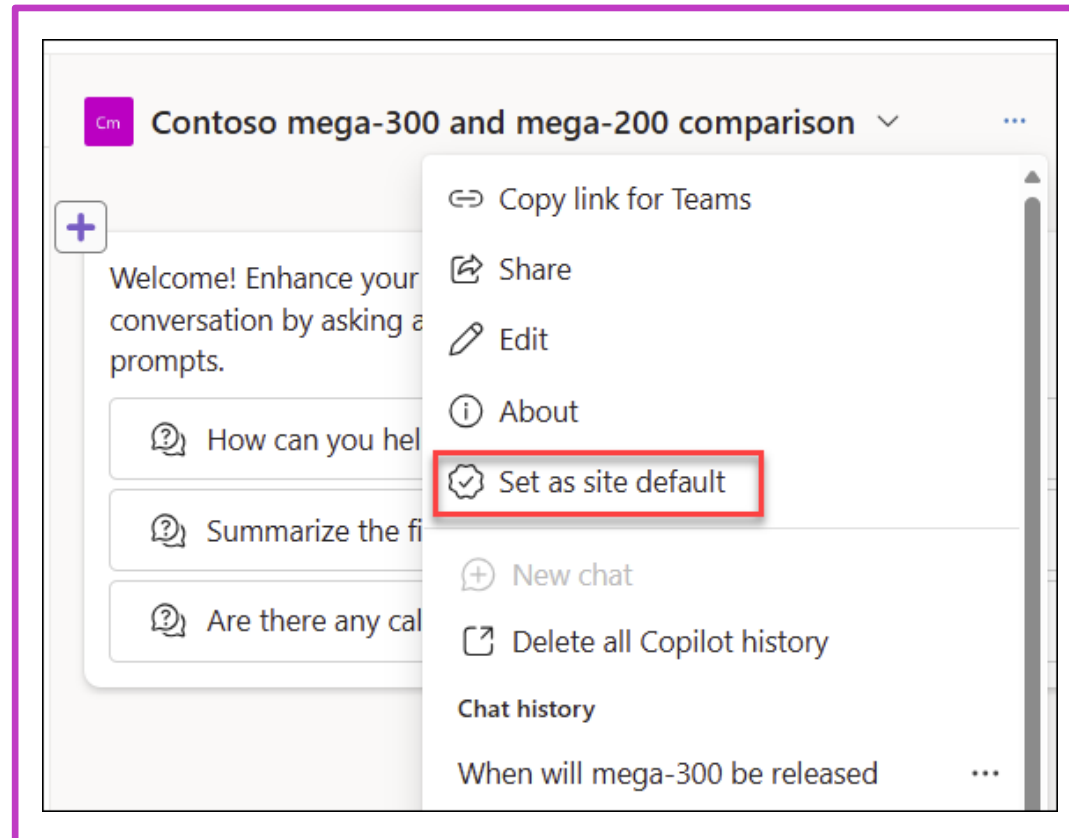
## Edit agents

- **How do you edit an agent?**
  - When you edit an agent in SharePoint or Copilot Chat, you use the same tool to edit the agent as you did to create it
- **How are shared agents affected when they're later edited?**
  - When you edit an agent, shared users of that agent can't see the latest changes until the agent is reshared with them
  - When an agent has SharePoint files and/or folders as knowledge sources and the agent is shared with specific users, Microsoft recommends that you reshare the agent with the same group of users
  - Doing so automatically shares the files and folders again with the users to ensure consistent agent experience

# Manage your agents

## Set an agent as a SharePoint site's default agent

- By default, every site's ready-made agent is automatically set as the site's default agent at the time the site is created
  - The default agent is the first agent that loads up for site members and visitors when they launch the site's chat pane
- A site owner or admin can change the default agent for a site by setting an approved agent as the site's default agent
- A site's original ready-made-agent can always be reset as the default agent for the site



## Uninstall and delete agents

- Uninstalling a Copilot Chat agent removes it from the user's My Agent gallery
  - Uninstalling an agent preserves the option to reuse the agent in the future without having to reconfigure it again
- Deleting a Copilot Chat agent is an admin task in Copilot Studio and not covered in this training
- You can delete a SharePoint agent, but there's no uninstall option
- You can't delete the ready-made agent that comes with the SharePoint site
- You can delete all the chat history for an agent, or just the chat history for a specific conversation

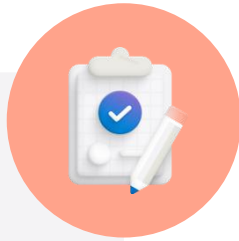
# Module Assessment



Test your knowledge by answering the module assessment questions at the end of this Learn module.



# Summary



**This module guided you through the following foundational concepts and practical steps required to build and manage agents in Microsoft 365 Copilot and SharePoint:**

- The tools used to create agents in Copilot Chat and SharePoint
- The components of an agent
- Creating an agent in Copilot Chat and SharePoint
- Testing and editing your agents
- Managing your agents

# Module 4: Share and use agents




# Introduction

This module explores how to share your Copilot Chat and SharePoint agents in order to extend their benefits of a broader audience within your organization, as well as how to use them yourself

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

# Share an agent with other users



## Agents in SharePoint and Copilot Chat can be shared with other users after they're created

- Users that you share your agent with must also have a Microsoft 365 license
- In Copilot Chat, the user who created an agent can share it by selecting one of the following options to indicate who they want to share it with:
  - Anyone in your organization
  - Specific users in your organization
  - Only you
- In SharePoint, the user who created the agent can't share it; instead, the site's owner or admin must approve the agent, which makes it available for other site members or site visitors to use
  - This approval process ensures the agent is appropriate for the site and its users
- When you share an agent in Copilot Chat or approve an agent for sharing in SharePoint, the people who use the shared agent can't edit it

## Agents only return information from knowledge sources that the shared users can have permission to access

- If a Copilot Chat agent contains knowledge sources from SharePoint files and folders, Microsoft recommends that you share the agent with users through security groups
- Only files and folders added to the agent can be automatically shared; SharePoint sites can't be automatically shared

# Share an agent in Microsoft Teams

Once you create an agent in SharePoint or Copilot Chat, you can share it within Microsoft Teams

- When you're on a SharePoint site or in a Copilot Chat, you can choose an agent, grab a share link, and share it in Teams (or any other Microsoft 365 app)
- This provides a seamless environment for teams to access and manage SharePoint content directly within Teams
- It allows team members to interact with the agent and benefit from the agent's automated workflows
- When you share an agent within Teams, users can only access the agent's knowledge sources for which they have permissions
- The permissions for the sites, pages, and files included in the agent don't automatically adjust when the agent is shared
- As such, you might need to update the sharing permissions on the agent's resources to ensure others can fully utilize the agent



# Share an agent in Microsoft Teams (continued)



Integrating SharePoint and Copilot Chat agents with Microsoft Teams boosts collaboration by embedding the agent directly into group chats or channels

- Team members can use the '@' mention feature to interact with the agent, seamlessly incorporating it into their daily workflow

**Practical use case examples of sharing agents in Microsoft Teams include:**

- Daily stand-up meeting reminders
- Project status updates
- Onboarding new team members
- Customer support ticket management
- Event planning and coordination
- Content approval workflows
- Employee recognition programs
- Resource booking and management

# Discussion – Sharing an agent

When should you share an agent, and when shouldn't you?

Discussion points:

- What types of tasks or workflows justify sharing a Copilot or SharePoint agent?
- Are there scenarios where sharing an agent could pose risks (for example, access to sensitive data, confusion over agent intent)?
- How can organizations balance collaboration with data governance when sharing agents?

Shared agents in Microsoft Teams:  
Collaboration booster or distraction?

Discussion points:

- Does integrating agents into Microsoft Teams improve collaboration or create noise?
- How can you ensure the shared agent provides value without overwhelming the conversation?
- What strategies can teams use to govern or “train” their use of shared agents effectively?

# Interact with agents

When you interact with agents in SharePoint and Copilot Chat, you should keep in mind the following considerations:

- Agents only respond to your questions using information from sites, pages, and files that you already have access to and are included as the agent's knowledge sources
- How does this affect you?
  - Your answer from an agent might sometimes be limited
  - You should contact the site administrator if you need more access



- When a SharePoint hub site is included as the knowledge source for an agent, the hub's associated sites are automatically included as part of the agent's knowledge sources
- Agents currently don't use data from SharePoint lists
- You can't add pages from the Site Pages library as knowledge sources for an agent

# Interact with agents (continued)

Only you can see your chats with agents in SharePoint and Microsoft 365 Copilot Chat

You can manage your chat history through the following tasks:

- You can rename a chat history item
- When you choose a chat history, the current agent switches to the agent used in the chat history
- You can delete your chat history from the chat pane
- You can choose to delete chat history for a specific conversation, or you can delete chat history for all chats

# Video – A real-life use case of using agents in SharePoint



# Discussion – Video review

- What are your key takeaways from this video, and why?
- What features related to this real-life story of using agents in SharePoint did you find interesting?

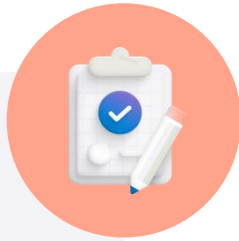
# Module Assessment



Test your knowledge by answering the module assessment questions at the end of this Learn module.



# Summary



This module explored the powerful capabilities of agents within Microsoft 365 Copilot Chat and SharePoint and how they can enhance your productivity and collaboration

You examined:

- Sharing agents with other users
- Sharing agents in Microsoft Teams
- Interacting with agents

# Module 5: Learning Path review



# Discussion – Learning Path review

- What are your key takeaways from this learning path, and why?
- What are the key features discussed in this learning path related to agents in Copilot Chat and SharePoint that were of special interest to you?

