

Copilot Studio Training for Custom Agent Development

AI Agents in the Workplace

Course Overview

This AI agent workshop teaches professionals to build structured, trigger-based agents using Microsoft Copilot Agent Studio and Copilot Studio. Learn to identify repeatable workflows, design declarative agents, configure knowledge sources, and deploy automated sequences as they build a custom agent in Copilot Studio. This instructor-led, hands-on workshop is led by an AI expert from AGI Training.

Learning Outcomes

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

- Explain the difference between Copilot Chat, declarative agents, and custom engine agents
- Recognize when a workflow is a good candidate for agent automation
- Configure custom instructions, work profiles, and saved memories in Copilot
- Build and deploy a declarative agent in Copilot Agent Studio
- Connect an agent to a SharePoint or OneDrive knowledge source
- Design and test Workflows (Frontier) for recurring M365 automation
- Build a trigger-based agent in Copilot Studio
- Apply governance best practices for publishing and monitoring agents

Copilot Agent Course Topics

Understanding Copilot Agents: Concepts & Decision Framework

- Chat vs. Agents: What's the Difference?
- When to Build an Agent: Decision Criteria
- What Agents Can and Cannot Do
- Types of Agents: Declarative vs. Custom Engine
- Preventing AI Hallucinations
- Copilot Modes: Quick Response, Think Deeper, Smart Mode, Deep Research
- Custom Instructions
- Work Profile & Saved Memories
- Chat History & Temporary Chat
- Work Mode vs. Web Mode

Built-in Agents:

- The Researcher Agent
- The Analyst Agent (Excel)
- Chat vs. Analyst vs. Agent Mode in Excel
- Knowledge Agents in SharePoint and OneDrive

Workflows (Frontier): M365 Automation

- Understanding Workflows (Frontier)?
- Common Triggers
- Workflow Use Case Examples
- Workflow Best Practices
- Workflow Limitations (as of March 2026)

Building Declarative Agents in Copilot Agent Studio

- What Is a Declarative Agent?
- Agent Studio Interface Tour
- Components of an Effective Agent Configuration
- Configuring Knowledge Sources
- Sharing Your Agent
- Hands-On Lab: Build Your Agent in Agent Studio

Copilot Studio: Trigger-Based Agent Automation

- Copilot Studio vs. Copilot Agent Studio
- What Is a Trigger?
- Copilot Studio Trigger Types
- Agent Instruction Writing for Copilot Studio
- Hands-On Lab: Build a Trigger-Based Agent in Copilot Studio

Governance, Compliance & Next Steps

- Tiered Publishing Model
- Compliance Considerations
- The Seven-Phase Deployment Lifecycle