



MS-4019: Transform your everyday business processes with agents

Course ID #: 7000-1087-ZZ-Z

Hours: 7

Course Content

Description:

This course examines no-code agents in Microsoft 365 Copilot Chat and SharePoint and explores how Microsoft 365 business users can create, manage, and use them.

Prerequisites:

- Students should have basic functional experience with Microsoft 365 services.
- Students must have a proficient understanding of general IT practices.

Target Audience:

Administrator, Business User, Developer

Topics:

Lesson 1: Get started with agents

- Introduction
- What are agents?
- Who can create and use agents?
- Explore the benefits of using agents
- Enhance collaboration using agents
- Examine IT governance controls for agents
- Module assessment
- Summary

Lesson 2: Explore prebuilt Microsoft 365 Copilot agents

- Introduction
- Examine the Analyst agent
- Exercise - Use the Analyst agent
- Examine the Researcher agent
- Exercise - Use the Researcher agent
- Examine the Visual Creator agent
- Examine the Prompt Coach agent
- Examine the Idea Coach agent
- Examine the Writing Coach agent
- Exercise - Use an agent of your choice
- Module assessment
- Summary



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Lesson 3: Build and manage an agent

- Introduction
- Examine the tools used to create agents
- Explore the components of an agent
- Create an agent in Copilot Chat - Part 1
- Create an agent in Copilot Chat - Part 2
- Exercise - Create a Copilot Chat agent
- Create an agent in SharePoint
- Exercise - Create a SharePoint agent
- Test and edit your agents
- Manage your agents
- Module assessment
- Summary

Lesson 4: Share and use agents

- Introduction
- Share an agent with other users
- Share an agent in Microsoft Teams
- Interact with agents
- Module assessment
- Summary

Register for this class by visiting us at:
www.tcworkshop.com or by calling us at 800-639-3535



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Microsoft Copilot BYOL

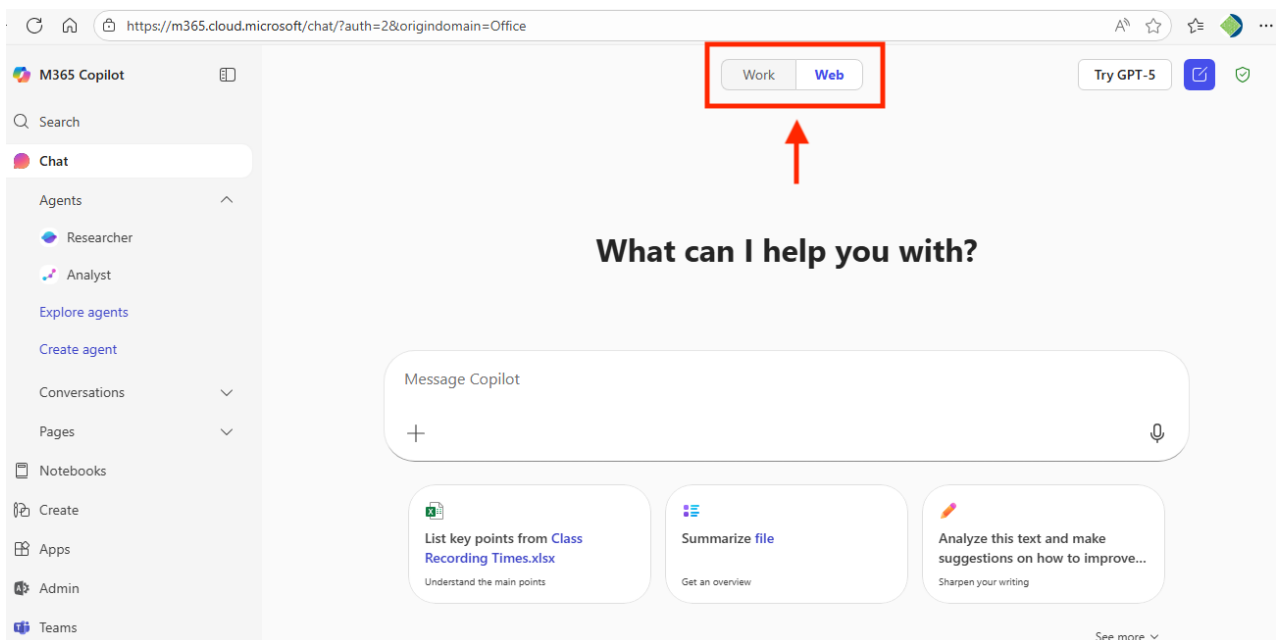
Bring Your Own License (BYOL):

To have this class be the most effective for its students, they must have purchased a Microsoft CoPilot License. They *MUST* check that they have this license more than 24 hours* before the class starts.

How to Check if you have a Copilot license:

Online

1. Navigate to your M365 Copilot chat (<https://m365.cloud.microsoft/chat>)
 - If you have the options “Work | Web” you have a license.
 - If you do not see these options, you only have the free version of Copilot.



Desktop App

1. Open a MS Office application on your desktop.
2. Look for the Copilot icon/button on the Home tab of the top ribbon.
 - Examples of what it could look like:
 - A sparkle or star icon ✨
 - A label like “Copilot”, “Ask Copilot”, or “Draft with Copilot”



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Additional Information:

*After purchasing a license, it may take up to 24 hours to activate. Some users may have an organizational license, but their administration or tech team may have it only available for certain users.

When activated, Copilot usually opens in a sidebar on the right side of the application window, where you can:

- Ask questions
- Generate or rewrite text
- Summarize documents
- Get formatting help

In some versions, Copilot may also appear as a floating suggestion box when you highlight text or start typing, offering to help rewrite, summarize, or expand content.

If you cannot find the icon/button, you can also try typing “Copilot” into the “Tell me what you want to do” search bar at the top of the office application to locate it quickly.



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NASBA Information

Attendance Requirement: To be awarded the full credit hours, you must sign in and attend the entire course.

Recommended Field(s) of Study:

Recommended CPEs: 7.80

Policies: Course Registration, Cancellation, Refund, and Complaint Resolution

For more information regarding administrative policies such as complaint and program cancellation policies, please contact our offices at 800-639-3535 or visit us at: www.tcworkshop.com

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NOTE: Since our information is in multiple places on our website or in PDF format that is sent to clients, we have provided our normal course content with the NASBA Information added along with links to our policy page on the web. We will add our name to the Official National Registry Statement after we are approved.