

Microsoft 365 - Managing SharePoint Copilot, Agents, and Content Services

Course code: GOC224

A hands-on five-day course on deploying and managing SharePoint Copilot, AI agents, and Microsoft 365 content services — from licensing through configuration and governance to operational monitoring and a rollout blueprint. This course takes administrators and architects through the full deployment cycle of Microsoft 365 Copilot on SharePoint: from orientation in the AI landscape and licensing models, through step-by-step tenant configuration, to content services (eSignature, backup, archive) and the governance layer (SharePoint Advanced Management). A dedicated block covers automation — Power Automate and the choice between pro-code and low-code extensibility. The core of the course is agent creation: participants work through every creation path (the creation-path map, Agent Builder, SharePoint agents, Microsoft 365 Agents Toolkit) and their subsequent administration (Copilot Control System, Agent 365, operational monitoring). The course closes with building an agent in Copilot Studio and a personal rollout blueprint for the participant's own organization.

Who is the course for?

SharePoint / Microsoft 365 administrators and solution architects

Governance, compliance and platform owners

Automation specialists (low-code and pro-code)

Assumed entry knowledge

Knowledge within the scope of the courses listed in the **Previous courses** and **Related courses** sections>

SharePoint Online administration basics

Knowledge of Power Automate basics

Overview of Microsoft 365 licensing

Course outline

Foundation

- Onboarding & work rules — introduction to the course environment and rules of collaboration.
- Formats: JSON, MD, YAML — literacy in formats used across the course (configuration, documentation, Skills).
- SharePoint technology introduction — architecture of SharePoint Online as a platform for content and AI.
- AI landscape and positioning of Copilot — history of AI/LLM, principles of responsible AI, web-grounded vs. tenant-grounded, where Copilot in SharePoint fits in.
- Licensing models and cost management — Copilot's license tiers, two PAYG models, license principle vs. permissions.
- Optionally according to group time: SharePoint Online Information Architecture.

Prompting, scripting & configuration

- Prompting basics and agent anatomy — prompt structure, Orchestrator role, Prompt/Context/custom instructions/Memory/Agent Instructions.
- SharePoint PowerShell (SPO module) — installation and connection of SPO Management Shell, reading tenant status, reporting scripts.
- Step-by-step configuration — Copilot in SharePoint activation sequence (PAYG billing > activation > scope > verification), `KnowledgeAgentScope`.

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- Document processing for Microsoft 365 (basics) — service family (OCR, autofill columns, image tagging, etc.) and their PAYG licensing; live configuration and demo.

Content Services, Governance & Automation

- eSignature Scenarios — SharePoint eSignature in the Document processing family, eIDAS signature levels, approval flow.
- SharePoint Advanced Management (SAM) — three pillars of SAM, governance policy selection, licensing as tenant preparation for Copilot.
- Power Automate — incoming invoices — end-to-end flow (receipt > extraction > approval > storage), three extraction paths incl. Azure AI Document Intelligence.
- Pro-code vs. low-code agents and extension patterns — choice of extension layer (connector / Power Automate / SPFx / Graph), current dev tools.

Data protection & agent creation

- Microsoft 365 Backup — scope (SharePoint, OneDrive, Exchange), RPO/RT0, recovery plan.
- Microsoft 365 Archive — cold data strategy, interaction with retention, eDiscovery and Copilot.
- Agents — creation roadmap — overview of all agent creation paths, declarative agent, design with evaluation plan.
- Agent Builder — lightweight creation of a declarative agent directly in the M365 Copilot application (hands-on).
- SharePoint agents — agent built by the content owner directly on the site, inherits its permissions and lifecycle.
- Microsoft 365 Agents Toolkit — agent as a managed configuration, repo-as-code (manifest, versioning, provisioning).

Management, build & rollout

- Tools for managing Copilot and agents — Copilot Control System, Agents section in M365 admin center, Agent 365.
- Operational monitoring and compliance — audit trail in Purview, operational signal sources, incident runbook.
- Skills — Copilot in SharePoint extension — `SKILL.md` anatomy, Skill design and review, governance without admin switch.
- Copilot Studio — build on top of SharePoint — agent with SharePoint knowledge, generative vs. classic orchestration, DLP.
- Final project and next steps — rollout blueprint: design document for Copilot and content services deployment, adoption roadmap.
- Optionally according to group time: Orchestration — third-party governance and provisioning.

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