

M365 Copilot Agents – IT Setup Instructions (No Copilot Licence)

These instructions outline what your IT team needs to enable so users can build simple agents in **Microsoft 365 Copilot Agent Builder** without requiring a full Microsoft 365 Copilot licence.

This guidance is intended for:

- lightweight agents,
- public website grounding,
- and simple declarative agents created directly inside Microsoft 365 Copilot Chat.

It does **not** cover advanced Copilot Studio scenarios such as:

- custom connectors,
- workflows/actions,
- Dataverse,
- Power Platform solutions,
- or organisation-wide enterprise integrations.

1. What users need

Users must have:

- A **work or school Microsoft Entra ID account**
- An **eligible Microsoft 365 or Office 365 subscription**
- Access to **Microsoft 365 Copilot Chat**
- Access to a supported Teams/web experience
- Agent Builder enabled by the tenant administrator

Eligible subscriptions include:

- Microsoft 365 Business Basic / Standard / Premium
- Microsoft 365 E3 / E5
- Office 365 E1 / E3 / E5
- Microsoft 365 F1 / F3

- Education A1 / A3 / A5
 - Teams Essentials / Teams Enterprise
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2. What is NOT required for public website-only agents

The following are **NOT required** if users are only creating agents grounded on public websites:

- Microsoft 365 Copilot licence
- Copilot Studio licence
- Copilot Studio PAYG billing
- Copilot Credits
- Dataverse
- SharePoint grounding
- Graph connectors
- Power Platform environments
- Teams Admin permissions

These are only needed for advanced organisational or enterprise-grounded agent scenarios.

3. Required IT configuration

Enable Microsoft 365 Copilot Chat

Ensure Microsoft 365 Copilot Chat is enabled for users.

Enable Agent Builder experiences

Ensure Agent Builder / agent creation experiences are enabled within Microsoft 365 admin controls.

Allow users to create agents

Ensure users or groups are permitted to:

- create agents,
- share agents,
- and use agent experiences.

Without this, users may not see the **Agents** option in the Microsoft 365 Copilot navigation.

Ensure Teams policies are not blocking agents

Confirm Teams or Microsoft 365 app policies are not blocking:

- custom apps,
 - agents,
 - Microsoft 365 apps,
 - or Power Platform apps.
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4. Supported user experiences

Agent Builder currently works in:

- Teams desktop client
- Teams web client
- microsoft365.com/chat
- office.com/chat

Agent Builder is not currently supported on:

- mobile clients,
 - unsupported Teams experiences,
 - or classic Teams surfaces.
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5. Optional advanced configuration (tenant-grounded agents)

If your organisation later wants users to build agents grounded on:

- SharePoint,
- Teams,
- Microsoft Graph data,
- or Copilot connectors,

additional configuration is required.

This may include:

- Copilot Studio PAYG billing / Copilot Credits
- SharePoint and Teams data access
- Graph connectors
- Copilot Studio environments
- additional governance policies

6. Troubleshooting – Users cannot see “Agents” in the navigation

If users have an eligible subscription but cannot see the **Agents** option, ask IT to confirm the following:

- User has an eligible Microsoft 365 or Office 365 subscription
- User is signed into the correct Entra ID work account
- Microsoft 365 Copilot Chat is enabled
- Agent Builder / agent experiences are enabled
- Teams app policies are not blocking agents or custom apps
- User is using a supported Teams or web client
- The feature rollout has reached the tenant/user group

7. What users can do once enabled

Once configured, users can:

- create simple declarative agents,
- ground agents on public websites,

- test agents directly in Copilot Chat,
- and share agents with colleagues or teams.

For advanced automation, workflows, or enterprise integrations, use Microsoft Copilot Studio.

Official Microsoft References

- [Agent Builder in Microsoft 365 Copilot \[learn.microsoft.com\]](https://learn.microsoft.com/en-us/microsoft-copilot-studio/agents/agent-builder)
- [Minimum requirements for Microsoft 365 Copilot Chat \[learn.microsoft.com\]](https://learn.microsoft.com/en-us/microsoft-copilot-studio/agents/minimum-requirements)
- [Agents admin guide for Microsoft 365 \[learn.microsoft.com\]](https://learn.microsoft.com/en-us/microsoft-copilot-studio/agents/admin-guide)
- [Microsoft 365 agents deployment checklist \[learn.microsoft.com\]](https://learn.microsoft.com/en-us/microsoft-copilot-studio/agents/deployment-checklist)