



SECURITY FACT SHEET

# Adobe Marketing Agent for Microsoft 365 Copilot

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# About Adobe Marketing Agent for Microsoft 365 Copilot

Adobe Marketing Agent for Microsoft 365 Copilot is an AI-powered assistant built in partnership with Microsoft that brings Adobe's marketing intelligence capabilities directly into the Microsoft 365 Copilot experience. [Adobe Marketing Agent](#)<sup>1</sup> enables marketing teams to work with their customer data, campaign insights, content, and planning inside Microsoft applications, without switching between apps or tools.<sup>2</sup>

Powered by [Adobe Experience Platform Agent Orchestrator](#), Adobe Marketing Agent for Microsoft 365 Copilot delivers intelligent, context-aware responses that connect a company's marketing data within Adobe Experience Platform and applications and insights with Microsoft's productivity suite.

## Adobe Marketing Agent for Microsoft 365 Copilot components

Leveraging Microsoft 365 Copilot as the conversational interface through which marketing teams interact with it, Adobe Marketing Agent for Microsoft 365 Copilot consists of the following key components:

- **Adobe Marketing Agent** – Answers questions about customer data, campaign insights, content, and planning inside Microsoft applications. The agent includes a service that manages conversation flow between Microsoft 365 Copilot and Adobe Experience Platform Agent Orchestrator, handling state management, authentication, and response formatting, while continuously preserving conversation context to ensure seamless, uninterrupted interactions.
- **AEP Agent Orchestrator** – Invokes and coordinates specialized AI agents, dynamically routing user requests to the appropriate agent based on customer goals and intent. Agent Orchestrator includes three (3) general-purpose functional agents that are leveraged by Adobe Marketing Agent for Microsoft 365 Copilot. For more information, see the [AEP Agent Orchestrator and Agents security overview](#).
- **Domain-specific Functional Agents** – Execute expert tasks within a specific domain. Adobe Marketing Agent for Microsoft 365 Copilot may invoke [Adobe Audience Agent](#), [Adobe Data Insights Agent](#), and/or [Adobe Journey Agent](#), depending on the context of the user's query.
- **Knowledge Base** – Powers agents with secure access to customers' business intelligence, which is composed of structured and unstructured data sources, including customer metadata about business objects and analytics data, and Adobe product documentation.

1 Currently available in Microsoft 365 Copilot in Web, Teams, Word, PowerPoint, and Excel.

2 [Microsoft Bot Framework](#) enables the connection between Microsoft 365 applications and Adobe's backend services via the Direct Line API, routing marketer requests over HTTPS to the Adobe Marketing Agent Copilot Service.

# User authentication and authorization

Adobe Marketing Agent for Microsoft 365 Copilot implements a two-stage authentication flow. When a user opens Adobe Marketing Agent for Microsoft 365 Copilot, they are first authenticated transparently via Azure Active Directory (Azure AD) to confirm the request originates from a legitimate Microsoft surface.

Once Microsoft identity is established, the user is prompted to sign into Adobe using [Adobe Identity Management Services \(IMS\)](#). All users are authenticated by Adobe IMS, and authorizations are enforced by the AEP [access control service](#) or the Customer Journey Analytics (CJA) access control service, depending on the context of the user's query.

To enable a user to access Adobe Marketing Agent for Microsoft 365 Copilot and use one or more Experience Platform Agents, the customer's Adobe Admin must grant relevant permissions in the [Permissions UI](#). CJA Data Insights requires additional permissions, please review the instructions [here](#). For more information on permissions and access control, see [Adobe Experience Platform Agent Orchestrator Security Overview](#).

## Data encryption

- **In Transit** – All data is encrypted in transit over HTTPS using TLS 1.2 or greater.
- **At Rest** – Any data stored is encrypted at rest using AES 256-bit encryption.

# Adobe Marketing Agent for Microsoft 365 Copilot security architecture and data flow

The following example illustrates the data flow for all interactions with Adobe Marketing Agent for Microsoft 365 Copilot:

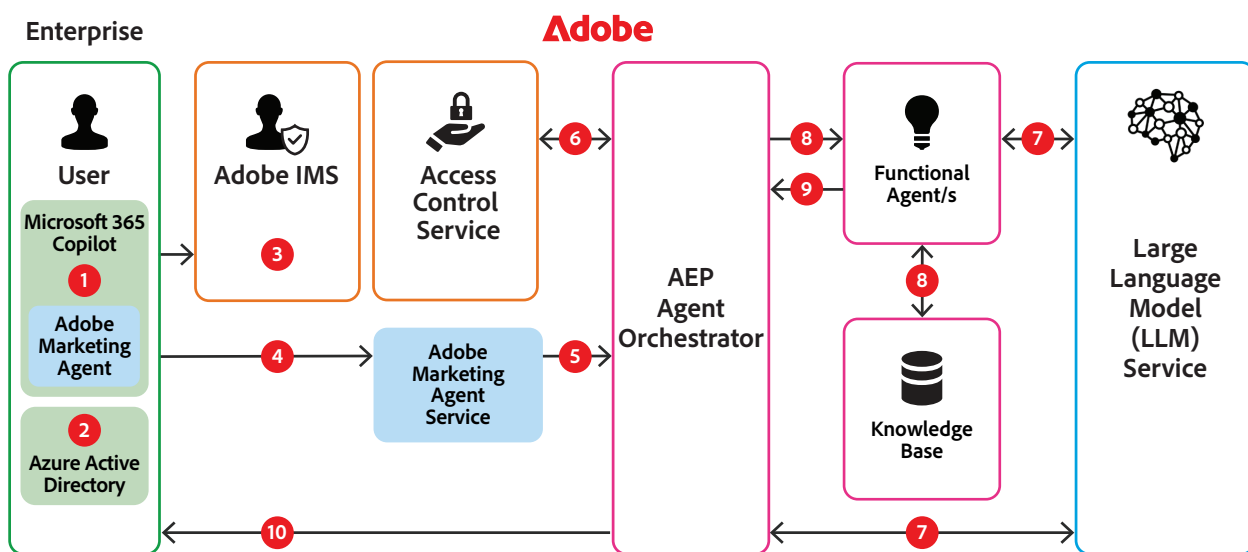


Figure 1: Adobe Marketing Agent data flow diagram

# Data flow narrative

**Step 1:** The user opens the Adobe Marketing Agent within Microsoft 365 Copilot (web or desktop) Microsoft Teams, Microsoft Word, Microsoft Excel, or Microsoft PowerPoint.

**Step 2:** The user is transparently authenticated via Azure Active Directory (Azure AD) to confirm the request originates from a legitimate Microsoft surface.

**Step 3:** Once authenticated by Azure AD, Adobe Marketing Agent prompts the user to sign in using their Adobe credentials. Adobe Identity Management Services (IMS) authenticates the user and checks that they are entitled to use Adobe Marketing Agent with the access control service relevant to the context of the user's query.

**Step 4:** The user enters a question in the Microsoft 365 Copilot chat interface, which forwards the prompt to Adobe Marketing Agent.

**Step 5:** In turn, Adobe Marketing Agent forwards the prompt to AEP Agent Orchestrator, which determines if the prompt adheres to [Adobe's Generative AI User Guidelines](#). If any part of the prompt violates these guidelines, the user will receive an error message.

**Step 6:** If the prompt does not violate the user guidelines, AEP Agent Orchestrator checks with the appropriate access control service to confirm that the user is entitled to ask the question type in their prompt. If the user is not authorized, they will receive an error message. If they are authorized, the data flow moves to Step 7.

**Step 7:** AEP Agent Orchestrator sends the prompt to the LLM service, which determines the appropriate domain-specific functional agent/s to invoke. If the question is out of scope, the user receives an out-of-scope message. If it is in scope, the LLM informs AEP Agent Orchestrator which functional agent(s) it should invoke to answer the user's question. (Note: See the Components section above for relevant functional agents).

**Step 8:** AEP Agent Orchestrator invokes the appropriate functional agent/s, which then retrieve/s the relevant data from the customer's AEP Knowledge Base.

**Step 9:** The functional agent/s return/s a grounded, context-aware response to AEP Agent Orchestrator.

**Step 10:** AEP Agent Orchestrator then returns the response to the user via the Microsoft 365 surface.

# Data retention

## Chat History

Users can access their chat history through Microsoft 365 Copilot, including the prompt text and response, for a default duration of 28 days.

For more information on Microsoft's retention policies, see [Microsoft 365 Copilot Chat History](#).

## Data Usage

Adobe uses customer-agnostic annotated data to fine-tune Adobe internal models, including linguistic models and various classification models. The responses from these models are not shown directly to the users.

Adobe does not use any customer data to train or fine-tune LLMs.

## Content Filtering

Adobe uses internally developed content filters to determine if the customer input (prompt) adheres to [Adobe's Generative AI User Guidelines](#) before sending the prompt text to the LLM.

Adobe leverages Azure OpenAI's content filtering service to moderate both input (prompts) before processing by Azure OpenAI and output (responses) before returning the response to Experience Platform Agent Orchestrator. The service uses Microsoft's collection of proprietary models for content filtering that has both contextual and semantic understanding of text. Adobe has configured the content filter to filter "medium" and "high" severity outputs from Azure OpenAI. Adobe has disabled logging for Azure OpenAI content moderation.

## Testing

Adobe teams conduct testing to reduce the potential for biased and harmful outcomes in our generative AI products. For more information on the development and testing processes for our generative AI solutions, please see the [Generative AI Built for Business solution brief](#).

## Data processing and storage locations

All data processing and storage<sup>3</sup> for Adobe Marketing Agent follows the same principles as Adobe Experience Platform Agent Orchestrator. For details on data processing locations, LLM services, and storage infrastructure, please refer to the [Adobe Experience Platform Agent Orchestrator Security Overview](#).

## Questions?

If you have any additional questions about the security posture and capabilities of this or any Adobe solution, please contact your Adobe account manager. For detailed information about Adobe's security programs and processes and compliance certifications, see the [Adobe Trust Center](#).

<sup>3</sup> Any processing and storage for Adobe Marketing Agent on the Microsoft side is governed by Microsoft's policies.