

# **55485 - Microsoft 365 Copilot Super User Courseware**

## Content

### **Module 1: An Introduction to Copilot**

This module will cover the benefits of Microsoft Copilot and how it can support you with creative tasks, boost your productivity and enhance your existing content. This will start with a background on artificial intelligence (AI) and its history followed by a summary of Copilot, explaining how it can work with Windows 11, Bing, Microsoft 365, applications (like Word, PowerPoint, Excel, OneNote), the Power Platform and more. We will also examine the licensing for Copilot and understand how the data of your information is used during Copilot sessions. Finally, we will show you how to write effective prompts within Copilot chat and start your AI journey.

#### **Lessons**

- What is AI
  - A history of AI
  - Cortana
- Introducing Microsoft Copilot
  - Large Language Models
  - Copilot Pro
  - Microsoft 365 Copilot
  - Licensing
- Exploring Copilot
  - Web chat-based productivity tool
  - Copilot in Bing
  - Copilot in Microsoft Edge
  - Copilot in Windows 11
  - Copilot mobile apps

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### **Module 2: Getting ready for Microsoft 365 Copilot**

Copilot is a new technology that many businesses are preparing for, but what does it entail? The main issue is that some organizations have a problem called oversharing, which happens when users can easily share files and folders through services like OneDrive, Teams and SharePoint. Users should only have the access they need to do their work, and if this was true, Copilot would not pose any risk as it would only produce responses from properly referenced materials. In this module, we will explore some actions that can improve the security of data sources that Copilot for Microsoft 365 can use, and also some choices that administrators can make that affect Copilot for Microsoft 365.

Although we will discuss some settings and services that are controlled by administrators, this course is focused on the perspective of an end user. Note that there are some options that can be turned on or off that would influence an end user. Knowing what experiences can be changed is important so that you can understand how Copilot will be presented to you, have more informed discussions with Copilot business stakeholders, and also manage the content that you own within your organization to make sure that Copilot has access to the right information to be helpful to you and your colleagues.

## Lessons

- Getting your information ready
    - Data security and compliance
    - Global settings
    - Purview
    - Just enough access
    - Microsoft 365 Groups
    - SharePoint and Teams
    - Sharing
  - End user requirements
    - Setting up Microsoft 365 Copilot
    - Assigning licenses
    - Center of excellence
    - Deleting interaction history
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## Module 3: Using Copilot with Microsoft 365 apps

In this module, you will learn how to use Copilot with various Microsoft 365 apps to boost your productivity and creativity. We will firstly look at how having a Microsoft 365 Copilot license changes the chat experience in copilot.microsoft.com and how you will find the Copilot app around Microsoft 365. You will then explore how to use Copilot in Word, PowerPoint, Excel, OneNote, Outlook, and Microsoft Designer. You will see how Copilot can generate relevant and engaging text, suggest data visualizations, create professional-looking slides, take smart notes, compose effective emails, and more.

Throughout this module we will reference scenarios which we have collated from a range of partners we work with. This will not only help you to understand how to use Copilot in these Microsoft Apps but also understand how these features are changing the way we work.

## Lessons

- Copilot for Microsoft 365 chat
- Copilot in Microsoft 365 apps
  - Word
  - PowerPoint
  - Excel
  - OneNote
  - Outlook
  - Designer

- Copilot Lab
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## **Module 4: Using Copilot in Microsoft Teams**

Microsoft Teams is a versatile application for many workers, combining several existing services into a single platform including instant messenger, file storage, tasks, reporting, managing audiences and more. Copilot works seamlessly with the built-in features of Microsoft Teams but also enhances other Microsoft 365 services that connect with Microsoft Teams as well. In this module we will learn how Copilot can make working in Microsoft Teams much better and how Copilot can help those who use apps within Microsoft Teams.

### **Lessons**

- Copilot in Teams
    - Meetings
    - Chats and channels
  - Copilot in Teams apps
    - Loop
    - Whiteboard
    - Planner
    - Stream
    - Forms
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## **Module 5: Leveraging Copilot in the Power Platform**

In this module we will be looking at the highly accessible and incredibly valuable Power Platform and how Copilot can help its users get started faster, complete their work quicker and resolve issues more intelligently. If you are not experienced with the Power Platform we will start with an overview to give you some awareness of what is on offer. The important thing to take away is that the Power Platform is for everyone of varying skill levels. After we have summarized the Power Platform we will look at each of the products and discover how Copilot will assist you with the creation and maintenance of apps, flows, reports and web pages. Note that Copilot Studio, formerly Power Virtual Agents is not covered in this module. Building copilots is covered in its own separate module to give it the desired focus it needs.

### **Lessons**

- An overview of the Power Platform
  - Using Copilot assistance
    - Power Apps
    - Power Automate
    - Power BI
    - Power Pages
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## Module 6: Copilot Studio

In this module our focus is Copilot Studio and Copilot Studio for Teams and how we can use this app to design copilots. We will begin by introducing you to Copilot Studio and Copilot Studio for Teams and discuss what copilots (chatbots) are and the concept of topics. Once we understand what copilots are, we will show you how copilots work in Teams.

To familiarize yourself with this tool we will discuss its interface and how to use the authoring canvas. We will also talk about designing entities which allows you to define terminology which can be used to enhance a copilot further. Once familiar with the designer, we will setup our first copilot, showing you how to create new topics, set up triggers, add nodes and even call a workflow.

Lastly, we will discuss testing your copilot and then how to publish it to Microsoft Teams, concluding with using and maintaining a copilot. For a full list of topics covered in this module, please read the next page.

### Lessons

- An introduction to Copilot Studio
  - Topics
  - How do copilots work in Teams?
  - The Copilot Studio interface
  - The authoring canvas
- Creating a new copilot
  - Entities
  - Working with topics
  - Setting up triggers
  - Adding nodes
  - Call a flow
  - Testing your copilot
  - Publish a copilot
  - Using a copilot in Teams
  - Maintaining a copilot

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## Module 7: AI Builder

When designing solutions in the Microsoft cloud there may be a requirement to work with data that varies from one item to the next. For example, a series of photos where you are required to identify how many specific product brands appear in each image. Now we could have someone manually check that, however AI Builder is a service that allows you to train your own models to identify key information.

This is not just for photos. Imagine you were at an event, and you needed to have a quick way to take down business card details and add them to a list. Most would either photograph the business card, but then you need to extract the data manually, or others might create a new contact there and then, taking a minute or two to create the data. A custom AI model can allow you to capture the business card using a Power App and then send the data to a

Dataverse table or perhaps a SharePoint list via a Power Automate workflow. It's thoroughly exciting and quite easy to get into. In this module we will show you how to build a model and implement it in apps and flows.

## **Lessons**

- Understanding what AI builder can do
- Licensing
- Create an AI model
- Training a model
- Implementing a model
- Using models with Copilot
- Using models with Power Apps
- Using models with Power Automate