CompTIA Copilot 365 Essentials

Overview

Copilot 365 Essentials is a hands-on course designed to equip non-technical professionals with the practical skills to use Microsoft Copilot effectively across everyday workplace activities. The course focuses on integrating AI capabilities into Microsoft 365 applications, including Word, Excel, PowerPoint, Outlook, and Teams, to streamline tasks, improve productivity, and enhance collaboration.

Participants will learn effective prompting techniques, how to provide relevant context, refine AI-generated outputs, and verify information before applying it in their work. The course also covers responsible AI usage, data privacy, and security practices to ensure sensitive organisational information is protected. Through practical workplace scenarios, participants will explore reusable workflows and AI agents to simplify repetitive tasks and improve operational efficiency.

Upon successful completion of the competency assessment, participants can earn a CompTIA CompCert to validate their Microsoft Copilot skills.

Duration

7 hours

Learning Outcomes

Upon completion of this course, participants will be able to:

- Apply responsible AI practices when using Microsoft Copilot while maintaining data privacy, security, and human oversight.
- Construct and refine effective prompts using appropriate context to generate relevant and reliable outputs.
- Utilise Microsoft Copilot across Microsoft 365 applications to draft documents, manage emails, analyse data, develop presentations, and support collaboration.
- Apply Copilot agents and reusable workflows to simplify recurring tasks and improve operational efficiency.

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Course Objectives

The objectives of this course are to:

- Develop participants' understanding of Microsoft Copilot capabilities, limitations, and responsible AI practices within an organisational environment.
- Equip participants with effective prompting and context management techniques to generate relevant and accurate AI outputs.
- Enhance participants' ability to utilise Microsoft Copilot across Word, Excel, PowerPoint, Outlook, and Teams for everyday workplace activities.
- Enable participants to leverage Copilot agents and reusable workflows to streamline repetitive tasks, improve collaboration, and increase workplace productivity.

Target Audience

This course is suitable for:

- Administrative and Office Support Personnel.
- Business and Operations Executives.
- Human Resource Professionals.
- Finance and Accounting Professionals.
- Marketing and Sales Professionals.
- Project Coordinators and Project Managers.
- Business Analysts and Management Professionals.
- Team Leaders, Supervisors, and Managers.
- Other non-technical professionals who regularly use Microsoft 365 applications.

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OUTLINE

Module	Topic Coverage
Module 1: Using Copilot Responsibly in the Enterprise	Understanding how to use Microsoft Copilot safely, securely, and responsibly within an organisational environment. • Introduction to Microsoft Copilot and its workplace capabilities. • Understanding Copilot's capabilities, limitations, and potential risks. • Identifying AI-generated inaccuracies and hallucinations. • Understanding the importance of human verification and oversight. • Applying data privacy, security, and responsible AI practices. • Protecting sensitive and confidential organisational information.
Module 2: Prompt Effectively and Manage Context	Developing effective prompting techniques and understanding how context influences the quality of Copilot responses. • Understanding the fundamentals of prompt engineering. • Creating structured prompts with clear goals, context, and expectations. • Refining AI-generated responses using follow-up instructions. • Breaking complex tasks into smaller and manageable requests. • Understanding Copilot Web mode and Work mode. • Using referenced files, emails, and meetings to improve response relevance. • Managing conversations and selecting appropriate information sources.
Module 3: Using Copilot Across Microsoft 365 Applications	Developing effective prompting techniques and understanding how context influences the quality of Copilot responses. • Understanding the fundamentals of prompt engineering. • Creating structured prompts with clear goals, context, and expectations. • Refining AI-generated responses using follow-up instructions. • Breaking complex tasks into smaller and manageable requests. • Understanding Copilot Web mode and Work mode. • Using referenced files, emails, and meetings to improve response relevance. • Managing conversations and selecting appropriate information sources.

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Module 4: Streamlining Work with Reusable Workflows and Copilot Agents	Exploring AI agents and reusable prompting techniques to simplify recurring tasks and improve workflow efficiency. • Introduction to Microsoft Copilot agents and their workplace applications. • Using Researcher for guided research and information gathering. • Using Analyst for structured data analysis and insights. • Exploring People Agent to retrieve relevant work information from colleagues. • Creating and saving reusable prompts for recurring activities. • Developing repeatable AI-assisted workflows. • Applying Copilot agents to improve productivity and business operations.

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Module	Topic Coverage
Module 5: Applying AI Skills in Real-World Contexts	Applying AI skills to practical workplace scenarios involving learning, collaboration, and decision-making. • Using AI as a learning assistant or personal tutor. • Leveraging AI as a brainstorming and collaboration partner. • Applying AI to support problem-solving and decision-making. • Using AI as a coach or reviewer to improve work quality. • Applying AI prompting techniques to real-world business tasks.