

MS 365 Copilot Advanced Topics and Integrations

Instructor-Led Course Guide and Trainer Run-of-Show

A seamless facilitation guide for the complete hands-on course

Use with the supplied lab library, supplied practice files, Text Pack, and workshop deck.

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1 Course at a glance

This guide supports the official instructor-led course, **MS 365 Copilot: Advanced Topics and Integrations**. It is designed for a trainer to move a mixed-access group through the full experience with a clear purpose, shared language, and a practical fallback whenever a feature is unavailable.

Official course description Welcome to a hands-on, instructor-led course on how to use Microsoft 365 Copilot features. The course explores advanced features available with the Microsoft 365 version of Copilot. Learners should confirm with their department IT unit that the correct version of Copilot is available.

AI-policy prerequisite This training course uses AI. Before registering for or joining the course, learners must review and comply with their department's policy on AI. The practice site uses supplied training materials only. A prompt is not a security, permission, records, retention, or authorization control.

1.1 Learning objectives

By the close, each learner should be able to use the supplied training materials to:

- Identify and correct errors in Copilot-generated content.
- Conduct deep research across documents, data, and the web.
- Analyze files and screenshots directly in Copilot.
- Generate and refine content in Word and PowerPoint.
- Use Excel to explain trends, model data, and clarify formulas.
- Summarize and manage communication in Outlook and Teams.
- Organize and search content with OneNote and OneDrive.
- Use built-in and custom agents for tailored task automation.
- Explore Copilot Studio for building agent-driven workflows.
- Integrate references and generate audio briefings using Notebooks.

1.2 The course habit

The sequence is deliberately practical: **ask clearly** → **ground in permitted sources** → **generate** → **verify** → **refine** → **let the authorized person decide**. The practice site calls the review step the [Source, Verify, Context, Stand-alone accuracy, and Decision owner \(Five Checks\)](#). Use it consistently throughout the day:

Check	Trainer prompt
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Source	Which current, permitted document, sheet, note, image, or web source supports the claim?
Verify	Did the learner open the exact section, date, name, number, or cell?
Con- text	What condition, scope, effective date, or limitation could change the claim?

Check Trainer prompt

Stand-alone accuracy Would another reader understand what is known, unknown, and uncertain?

Decision owner Which person or role retains the authority to interpret, approve, release, or decide?

2 Before learners arrive

2.1 Trainer preparation checklist

- ☐ Confirm the room, projection, audio, accessibility needs, and the session time.
- ☐ Open the portal, the supplied workshop deck, the lab library, and the practice-file bundle.
- ☐ Confirm the organization's AI-policy reminder and the approved training-environment language.
- ☐ Ask learners to confirm their Microsoft 365 Copilot version with department IT; do not assume every advanced feature is enabled.
- ☐ Download the Text Pack and offer it immediately to anyone without upload, agent, or integration access.
- ☐ Open the trainer's [practice evidence-of-practice record \(evidence record\)](#) example so learners can see the expected learning artifact.
- ☐ Decide how the group will capture questions. Do not ask learners to enter real work, personnel, customer, health, legal, or restricted information into the portal.

2.2 Access routes to explain once, then honor all day

Route	What the learner does	Same learning outcome
Full access	Uses an enabled, or-organization-approved Microsoft 365 Copilot experience with the supplied training materials.	Checks a source and records the evidence.
Chat-only	Uses the supplied Text Pack and approved chat alternative when an upload, integration, agent, or app feature is unavailable.	Checks the same source and records the evidence.

Route	What the learner does	Same learning outcome
Watch & verify	Observes the demonstration or walk-through, then independently checks the supplied source.	Checks the same source and records the evidence.

Trainer language “The route changes the interface, not the standard. Everyone names the source, shows a check, states a limitation, and leaves the consequential decision with a person.”

3 Full-day trainer flow

The timebox below creates a complete 9:00 AM–4:00 PM experience. Adjust pacing for the group, but preserve the opening policy/access check, source checks, two breaks, capstone, and close.

Time	Block	Trainer flow and learner output
9:00–9:20	Welcome, policy, and access	State the course title and outcomes. Read the AI-policy prerequisite. Confirm the approved tenant route with IT, then group learners by Full access, Chat-only, or Watch & verify. Output: route selected and Safe Practice boundary confirmed.
9:20–9:40	Prompting and output validation	Model a training CHATPROMPT prompt and its separate Guardrails. Have learners identify the source, verification action, limitation, and Authorized Owner before accepting an output. Output: one corrected or qualified scenario statement.
9:40–10:30	Researcher, files, and screenshots	Run Labs 1–3 as a focused sequence: validate a draft, research sources, and compare a screenshot with data. Output: source-cited correction or comparison. Where Researcher is unavailable, use the supplied file-only Text Pack and mark web evidence unavailable.
10:30–10:40	Break	Keep the Text Pack and route guidance visible for the return.
10:40–11:25	Word and PowerPoint	Run Labs 4–5. Draft/refine a source-grounded memo, then turn the sample memo into a five-part deck or outline.

Time	Block	Trainer flow and learner output
		Output: grounded memo/deck with one documented refinement.
11:25–12:00	Excel	Run Lab 6. Calculate the two measures, hand-check consequential rows, and check the chart or its text equivalent. Output: checked analysis with one limitation.
12:00–1:00	Lunch	Invite learners to retain only training or sanitized notes.
1:00–1:45	Outlook, Teams, OneNote, and OneDrive	Use Labs 7–10 as concise rotations. Preserve proposals, missing owners, open questions, and meaning-changing edits. Output: one route-neutral recap, task table, or comparison evidence record.
1:45–2:15	Analyst and agent testing	Run Labs 11–12. Test a source-bounded analysis and an agent response, log a limitation, make one instruction refinement, and retest. Output: verification note or Agent Test Record.
2:15–2:25	Break	Preview the boundary question: “What must still stay with an Authorized Owner?”
2:25–3:10	Copilot Studio workflow map and Copilot Notebooks	Use the Studio demonstration and Lab 13. Annotate the supplied six-test workflow map, then create or audit a source-grounded Notebook briefing. Audio is optional and availability-dependent. Output: workflow-map classification and briefing verification note.
3:10–3:45	Capstone evidence record	Complete the canonical six-source capstone: three exact-anchor findings, one hand-check, limitation, permitted-input boundary, Authorized Owner, and correction log. Output: complete practice evidence record.
3:45–4:00	Knowledge check and close	Run a short objective-mapped knowledge check. Re-practice any missed check with the supplied source, record a sanitized 30-day practice commitment, invite evalu-

Time	Block	Trainer flow and learner output
		ation, and close. Output: one next practice date and any unresolved access question for IT.

3.1 Make the transitions feel seamless

Keep the learner focused on the same outcome as the interface changes. Use short, repeated transition language rather than introducing a new method after each break.

Moment	Suggested trainer language
After route selection	“You may use a different screen today. You are still practicing the same evidence habit: source, check, limitation, and decision owner.”
Before a break	“Leave the supplied source open. When we return, we will use it to check—not just admire—the next answer.”
After a demo	“What did the tool prepare? What still needs a person to verify or decide?”
Before the capstone	“The goal is not to choose the policy answer. The goal is to show the source trail, the limitation, and the right owner for the decision.”

4 Objective-to-lab map

Use this map whenever a learner asks, “Why are we doing this lab?” Each short section stays together for a trainer to scan while facilitating.

4.1 Objectives 1–5 — Validate, research, analyze, and create

Learning objective	Primary lab or activity	What good practice looks like
Identify and correct errors in Copilot-generated content	Lab 1 + Check 12 claims	Compare a draft against the controlling supplied source and correct unsupported language.
Conduct deep research across documents, data, and the web	Lab 2	Separate supplied-file findings, public-source findings, and recommendations requiring local review.
Analyze files and screenshots directly in Copilot	Lab 3	Compare a visible screenshot value with the supplied data and mark uncertainty rather than guessing.
Generate and refine content in Word and PowerPoint	Labs 4–5	Create a grounded memo and concise presentation without introducing new facts.
Use Excel to explain trends, model data, and clarify formulas	Lab 6	Explain a formula, hand-check a consequential calculation, and state what the data cannot establish.

4.2 Objectives 6–10 — Communicate, organize, automate, and integrate

Learning objective	Primary lab or activity	What good practice looks like
Summarize and manage communication in Outlook and Teams	Labs 7–8	Distinguish decision, proposal, owner, target, and unresolved question.
Organize and search content with OneNote and OneDrive	Labs 9–10	Build a traceable task list and separate wording changes from meaning changes.
Use built-in and custom agents for tailored task automation	Labs 11–12	Test whether an agent cites approved supplied sources and routes gaps or decisions to a person.
Explore Copilot Studio for building agent-driven workflows	Copilot Studio demonstration	Identify what a workflow can prepare or route—and what still needs human authorization.
Integrate references and generate audio briefings using Notebooks	Lab 13	Create a fixed-source briefing that shows agreement, conflict, limitation, and unanswered questions.

5 Module facilitation guide

5.1 Module 1 — Validate, research, and inspect files

PURPOSE Build the habit of opening the source before forwarding the answer.

Show	Do	Debrief
A polished but incorrect training summary be-	Pairs locate the source section, correct one high-risk statement, and mark missing support as Not stated.	“A citation tells you where to look; opening the source tells you what controls.”

Show	Do	Debrief
side the signed procedure.		
A research response that mixes documents, data, and web findings.	Learners label each point by source type and flag what requires local policy review.	“Research is useful when the source trail stays visible.”
A screenshot and a corresponding workbook.	Learners compare one visible metric and identify what cannot be read or concluded from the screenshot alone.	“If you cannot read it confidently, do not make it a fact.”

5.2 Module 2 — Generate and refine content

PURPOSE Use Copilot to prepare content while preserving sources, conditions, and human review.

Show	Do	Debrief
A supplied source brief and a concise memo request.	Learners draft a memo that labels unsupported content as requiring confirmation.	“A draft can accelerate writing; it cannot create evidence.”
A grounded memo and a five-slide request.	Learners turn the memo into slides, then remove text that is not supported by the memo.	“The slide is shorter, not less accountable.”
A sample workbook formula and	Learners explain a formula, hand-check a value, and state one limitation.	“A chart shows a pattern, not necessarily a cause.”

Show	Do	Debrief
a trend chart.		

5.3 Module 3 — Manage communication and knowledge

PURPOSE Turn communication and notes into useful work without inventing commitments.

Show	Do	Debrief
A training message thread or meeting note with mixed certainty.	Learners sort statements into decision, proposal, owner, target, or unresolved question.	“Uncertainty is information, not a defect to smooth away.”
A page of notes with incomplete task details.	Learners create a task list and use Not stated for missing owner or date.	“A clean list must still be a truthful list.”
Three supplied file versions.	Learners identify changes to a deadline, role, exception, approval, or other meaning.	“Not every edit changes the rule; name the edits that do.”

5.4 Module 4 — Automate and integrate

PURPOSE Use agents and workflows for preparation and routing, not for unsupported or consequential decisions.

Show	Do	Debrief
An analyst response from a sample workbook.	Learners inspect the cited data, calculation, and limitation before using a trend statement.	“The model can calculate; a person still checks what the calculation means.”
An agent with named	Learners use a small test set: answerable, conflicting, out-of-scope, and	“A useful agent knows when the source does not answer.”

Show	Do	Debrief
training knowledge files.	decision-request questions.	
A Copilot Studio workflow and a Notebook source set.	Learners identify the workflow boundary and create a briefing that shows reference agreement, conflict, and gaps.	“Automation may prepare and route; people retain authorization.”

6 Capstone and close

6.1 Capstone prompt

Present the scenario conflict briefing: an older email, a current signed procedure, and an agreement excerpt point to different deadline language. Learners must not resolve the interpretation for the organization. Instead, ask them to produce a local [evidence record](#) with:

- ☐ Three distinct findings, each with a source title/version and exact anchor.
- ☐ One reproducible hand-check of a date, number, formula, or comparison.
- ☐ One stated limitation or unresolved interpretation.
- ☐ A permitted-input boundary: what would be minimized, redacted, or kept out of a separate service.
- ☐ The human role that retains interpretation, exception, approval, or release authority.

6.2 Close the course

1. Revisit the ten objectives and invite each learner to identify one capability they can now explain with an evidence check.
2. Ask each learner to choose a training or sanitized practice pattern for Day 1, a peer review for Day 7, a manager or subject-matter-expert conversation for Day 14, and reflection on Day 30.
3. Remind learners that access to [Microsoft 365 Copilot \(Microsoft 365 Copilot\)](#) capabilities is not universal. It depends on the organization [organization tenant \(tenant\)](#), version, license, configuration, permissions, sources, and policy.
4. Point learners to the lab library, Text Pack, practice bundle, workshop deck, and this guide. Reinforce that the downloadable materials are training aids—not a substitute for departmental AI policy or authorized review.

7 Trainer quick reference

7.1 If a learner cannot access a feature

- ☐ Do not troubleshoot access for so long that the class loses the learning objective.
- ☐ Move the learner to the Chat-only Text Pack or Watch & verify route immediately.

- ☐ Keep the same outcome: supplied source, exact anchor, check, limitation, and decision owner.
- ☐ Capture the access question for department IT; do not promise that a feature should be enabled.

7.2 If a learner asks whether Copilot can decide

Use this response: “Copilot can help prepare, compare, summarize, calculate, route, and flag. It does not receive the authority to approve, deny, prioritize, interpret a policy, or release work. Show the source, state the limitation, and route the consequential decision to the authorized person.”

7.3 Glossary

Microsoft 365 Copilot – **Microsoft 365 Copilot**: The organization-provided Microsoft 365 experience used in this course. Features vary by version, tenant, license, configuration, permissions, and policy.

evidence record – **practice evidence-of-practice record**: A learning artifact that records the source, exact anchor, check, limitation, and human owner. It is not certification or an operational record.

Five Checks – **Source, Verify, Context, Stand-alone accuracy, and Decision owner**: A repeatable review method for checking a Copilot-assisted draft before it is used or shared.

grounding – **source grounding**: Using named, permitted sources and checking the result against those sources instead of relying on a fluent answer.

tenant – **organization tenant**: The organization-managed Microsoft 365 environment that controls available features, permissions, and policy settings.