

## MS Copilot 365 – Driving Efficiencies Course

This virtual 3-hour course, delivered via Microsoft Teams, is designed for up to 8 delegates who already have experience using Microsoft 365. The session focuses on maximising the productivity features available within the Microsoft 365 environment, helping participants make full use of the tools included in their existing subscriptions.

The workshop is recorded and made available to delegates for 90 days. It is delivered through a blend of presentation, live demonstration, and hands-on activities. Delegates also receive complimentary one-month access to a Bite Size online learning membership, which includes an online Copilot course, assessment, and interactive game.

### Getting the most out of Teams

- Adding and Pinning Apps including Copilot Chat
- Using Planner to manage and organise tasks for yourself and others
- Using Workflow and Approvals
- Checking documents out and back in
- Checking permissions

### Working with Files

- Difference in OneDrive and SharePoint
- One source of truth
- Use Links not attachments
- Rescind permissions
- Forwarding an email with attachment to a Teams Channel

### Prompts Best Practice

- Sharing Prompts
- Do's and Don'ts
- Accessing Chat history
- Accessing the Prompt Gallery
- Risks
- Deleting History

### Agents explained

- Automate data collection
- Faster insights
- Improves accuracy and consistency
- Can streamline processes
- Creating an Agent

### Ideas to use in

- MS Excel
- MS Word
- MS Outlook
- MS PowerPoint

### Bite Size online learning library

Free access to Bite Size Online Library Copilot course, Test and Game for a month

The **basic** version of Copilot is a general-purpose AI assistant using web-grounded data only. Does not access your organisation's internal data (emails, OneDrive/SharePoint files, Teams chats, calendar, etc.) unless you manually paste information in.

The **pro** for version requires a licence and is fully integrated with your workplace data pulling information you have permission to access across Outlook, Word, Excel, Teams, SharePoint and more. Provides context-aware responses using your work emails, documents, meetings, calendar, chats, and files.