CONCEPT

Microsoft 365 Copilot and Advanced Microsoft 365 Skills for Administrative Professionals



Microsoft 365 Copilot and Advanced Microsoft 365 Skills for Administrative Professionals

Technical depth: Practitioner · **Practical mode:** Lab

Introduction

Most organisations now license Microsoft 365 and increasingly Copilot, yet administrative teams still chase approvals by email, search for the latest version of a file and retype the same summaries every week. Copilot adds speed only when prompts are well formed, files are well organised and outputs are checked. This Core Concept course takes administrative staff through the Microsoft 365 workspace, structured prompting, Copilot in each core app and Power Automate. Working hands on in the applications, participants leave with a Copilot Prompt Library and an Automated Office Workflow for their own role.

Course Objectives

- Structure SharePoint libraries, Teams channels and Microsoft Lists so that team documents and requests are findable and controlled
- Write Copilot prompts using the goal, context, source and expectations framework and keep them in a reusable prompt library
- Use Copilot in Outlook, Teams, Word, Excel and PowerPoint to draft, summarise and analyse everyday administrative work
- Build Power Automate flows with Forms and Lists that replace manual approvals, reminders and request tracking
- Check Copilot outputs for accuracy, sensitivity labelling and oversharing before they leave the team
- Produce a Copilot Prompt Library and an Automated Office Workflow ready for use in the participant's own role

Target Audience

- Executive and personal assistants who manage managers' mail, calendars and documents
- Administrative officers who run departmental correspondence, records and internal requests
- Office coordinators who maintain shared workspaces, team schedules and meeting logistics
- Secretariat staff who prepare meeting papers, minutes and follow-up actions
- Administrative team leaders responsible for routine reports and approval workflows

Course Outline

Day 1: The Microsoft 365 Workspace and Current Practice

- Microsoft 365 App Roles: Outlook, Teams, SharePoint, OneDrive and Loop
- Office Workload Audit and Automation Opportunity Log
- Microsoft 365 Copilot and Copilot Chat: Work Grounding and Web Grounding
- Microsoft Purview Sensitivity Labels and File Sharing Settings
- Responsible AI Use Principles Drawing on ISO/IEC 42001:2023

Day 2: Collaboration Structures and Prompting Frameworks

- SharePoint Document Library Design: Metadata, Versioning and Permissions
- Teams Channel, Tab and Shared Calendar Structure for Administrative Teams
- Microsoft Lists and Planner for Request and Task Tracking
- Goal, Context, Source and Expectations Prompt Framework
- Prompt Iteration Techniques and Saved Prompt Management

Day 3: Copilot Across the Core Applications

- Copilot in Outlook: Thread Summaries, Draft Replies and Scheduling Assistance
- Copilot in Teams: Intelligent Meeting Recap and Action Item Extraction
- Copilot in Word: Drafting and Summarising from Referenced Files
- Excel for Administrators: XLOOKUP, PivotTables and Copilot Formula Suggestions
- Copilot in PowerPoint: Presentation Build from a Word Brief

Day 4: Automation, Agents and Problem Cases

- Power Automate Cloud Flows: Approval and Reminder Templates
- Microsoft Forms and Bookings Integration for Requests and Appointments
- Researcher and Analyst Agents for Briefing Notes and Data Summaries
- Agent Builder: Scoped Agent Grounded in a SharePoint Site
- Copilot Output Verification Checklist: Inaccuracy, Oversharing and Permission Gaps

Day 5: Lab Work and the Prompt Library and Workflow

- Board Pack Preparation Lab: Agenda, Papers and Recap with Copilot
- Visitor and Room Request Lab: Forms, Lists and Approval Flow
- Copilot Prompt Library Build for an Own Role
- Automated Office Workflow Build and Test Run
- Lab Demonstration and Peer Review

Skills You Will Gain

- Collaborative Workspace Design
- Prompt Engineering for Office Tasks
- AI-Assisted Drafting
- Meeting Summarisation
- Spreadsheet Analysis
- Workflow Automation
- Information Protection Awareness
- AI Output Verification

Why Attend This Course

- Return to work with a Copilot Prompt Library and a working Automated Office Workflow already tested in the lab
- Cut the hours spent on inbox triage, meeting notes and routine reports without losing control of accuracy
- Know which Copilot outputs are safe to send and which need checking for sensitive content or wrong sources
- Compare how administrative teams in other sectors and countries organise their Microsoft 365 workspaces

Conclusion

Copilot and Microsoft 365 repay the licence cost only when files are organised, prompts are precise and outputs are checked before they are sent. This course moves from auditing the current workload and setting up libraries, channels and Lists, through structured prompting and Copilot in each core application, to Power Automate flows, agents and the verification checks that keep AI output safe. The final day is spent in the applications, and participants leave with a Copilot Prompt Library and an Automated Office Workflow they can use from their first day back.