

AI Foundations Using Copilot

Days: 1

Prerequisites: Basic familiarity with Microsoft 365 applications. Participants should have access to Microsoft Copilot and the Microsoft 365 applications used during the course.

Audience: Business professionals, federal employees, managers, team members, and other workplace learners who want **a foundational understanding** in artificial intelligence and Microsoft Copilot.

Description: This hands-on course introduces the foundations of artificial intelligence, generative AI, large language models, responsible AI, and effective prompting. Participants explore Microsoft Copilot and apply AI-powered productivity techniques in Word, Excel, PowerPoint, Copilot Chat, and Agent Builder. Guided demonstrations, practice activities, and a capstone exercise help participants use Copilot more confidently, responsibly, and effectively in the workplace.

Course Objectives:

- Explain foundational AI, generative AI, and large language model concepts using workplace-relevant language.
- Differentiate Microsoft Copilot from other AI tools and select an appropriate tool for a business task.
- Recognize common AI risks and apply responsible AI, privacy, security, and verification practices.
- Create clear, specific prompts using role, task, context, format, and constraint elements.
- Use Copilot Chat and grounding sources to improve the relevance and usefulness of AI-generated responses.
- Apply Copilot capabilities in Word, Excel, and PowerPoint to create, analyze, summarize, and present information.
- Design and validate a basic Copilot agent for a defined workplace need.

OUTLINE:

LESSON 1: COURSE OVERVIEW

The instructor will spend the first part of the day getting to know participants, reviewing course expectations, and discussing how artificial intelligence and Microsoft Copilot can support workplace productivity. Participants will identify personal learning goals and examples of AI they already use.

LESSON 2: INTRODUCTION TO ARTIFICIAL INTELLIGENCE

- What artificial intelligence is and how it appears in everyday work and life
- Narrow AI and general AI
- The evolution from rule-based systems to machine learning, deep learning, and generative AI
- Key terminology: model, token, training, inference, dataset, fine-tuning, grounding, and hallucination

LESSON 3: HOW LARGE LANGUAGE MODELS WORK

- How prompts are converted into tokens and used to generate predicted responses
- A high-level view of training data, neural networks, pattern recognition, and probability
- Why AI may produce inaccurate, incomplete, or fabricated information
- How context, specificity, and grounding improve output quality

LESSON 4: THE GENERATIVE AI ECOSYSTEM

- Common generative AI tools and their workplace strengths
- Copilot Chat compared with Copilot in Microsoft 365 applications
- When to use an AI assistant, a grounded workplace tool, or a traditional search engine

AI Foundations Using Copilot

- Selecting an appropriate AI tool for a business scenario

LESSON 5: RESPONSIBLE AI

- Common risks involving hallucinations, bias, security, privacy, and copyright
- The human-in-the-loop principle: AI assists; people review and decide
- Methods for checking sources, currency, accuracy, relevance, and reasonableness
- Organizational policies and responsible use expectations

LESSON 6: PROMPT ENGINEERING FUNDAMENTALS

- Core prompt elements: role, task, context, output format, and constraints
- Turning vague prompts into clear, purposeful instructions
- Using examples, source material, and follow-up prompts to guide Copilot
- Iterating from a basic prompt to a stronger, more precise prompt

LESSON 7: MICROSOFT COPILOT OVERVIEW

- Copilot Chat, Copilot Pages, and Copilot agents
- Work-grounded and web-grounded experiences
- Using files and organizational content to provide relevant context
- Reviewing and refining Copilot responses before use

LESSON 8: COPILOT IN WORD

- Summarizing and analyzing documents
- Drafting, rewriting, and adjusting tone or structure
- Creating executive summaries and organizing information into tables
- Verifying facts, preserving meaning, and completing a human review

LESSON 9: COPILOT IN EXCEL

- Preparing clean data with tables, consistent headers, and complete ranges

- Using natural language to explore data and generate formulas
- Identifying trends and creating charts
- Validating calculations, projections, and AI-generated analysis

LESSON 10: COPILOT IN POWERPOINT

- Creating a presentation from a prompt or source document
- Organizing and refining slide content
- Developing speaker notes and improving presentation flow
- Writing effective prompts for AI-generated visual concepts

LESSON 11: BUILDING COPILOT AGENTS

- The purpose and appropriate use of a Copilot agent
- Core agent components: instructions, knowledge, and starter prompts
- Design principles for a focused and useful workplace agent
- Testing, validating, and improving agent responses

LESSON 12: CAPSTONE EXERCISE

- Apply Copilot Chat, Word, Excel, PowerPoint, and Agent Builder to a workplace scenario
- Develop an expansion plan, financial projection, executive summary, presentation, and task-focused agent
- Review outputs for accuracy, completeness, responsible use, and professional quality
- Present key results and reflect on practical workplace applications

WORKSHOP WRAP UP

At the conclusion of the workshop, participants will have the opportunity to ask final questions, complete a training satisfaction survey, and develop a Personal Action Plan for applying Microsoft Copilot responsibly and effectively in their work.

AI Foundations Using Copilot



Baton Rouge | Lafayette | New Orleans

www.lantecctc.com