
Microsoft 365 Copilot Training Outline

Module 1: Overview of Microsoft 365 Copilot

- **Introduction to Copilot**
 - What is Microsoft 365 Copilot?
 - Core functionalities and technical architecture
 - Copilot applications in Microsoft 365 products (Word, Excel, PowerPoint, Outlook, Teams, etc.)
- **Value and Use Cases of Copilot**
 - Real-world examples of efficiency improvements
 - Copilot applications across different industries (e.g., finance, manufacturing, healthcare)

Module 2: Practical Applications of Copilot in Microsoft 365

Word: Intelligent Document Assistant

- Auto-generate text, summaries, and outlines
- Grammar and writing suggestions
- Content creation techniques using prompts

Excel: Data Analysis and Visualization

- Automated formula and calculation generation
- Data pattern analysis and forecasting
- Interactive data visualization (e.g., automatic chart creation)

PowerPoint: Smart Presentation Creation

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- Generate presentations from text input
 - Content optimization and layout suggestions
 - Speech-to-text and automatic summarization

Outlook: Smart Email Management

- Auto-compose and optimize emails
- Summarize long email threads
- Schedule management and meeting organization

Teams: Intelligent Collaboration

- Automatic meeting summaries
- Task assignment and tracking
- Organizing and summarizing chat conversations

Module 3: Customization and Integration of Copilot

- **Customizing Copilot for Business Needs**
 - Using Microsoft Graph API and Copilot Studio for customization
 - Connecting enterprise data (SharePoint, OneDrive, Teams, Dataverse)
- **Integration with Business Applications**
 - Integration with Power Platform (Power Automate, Power BI)
 - Connecting to ERP, CRM, and other enterprise systems

Module 4: Security and Compliance

- **Data Security and Access Management**

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- Understanding how Copilot processes enterprise data
 - Data access control and compliance requirements
 - **Preventing Information Leakage and Misuse**
 - Data Loss Prevention (DLP) policies
 - Best security practices for Copilot usage

Module 5: Best Practices and Optimization

- **Prompt Optimization Techniques**
 - Writing effective prompts for better responses
 - Case studies on prompt design
- **Enterprise Adoption and Implementation of Copilot**
 - Typical user training strategies
 - Business process optimization use cases

Module 6: Hands-on Exercises and Q&A

- **Real-World Business Scenarios**
 - Copilot applications in different industries
 - Addressing daily business challenges
- **Q&A Session**
 - Participant questions and answers
 - Experience sharing and best practice discussions

Microsoft 365 Copilot 培训大纲

模块 1: Microsoft 365 Copilot 概述

- Copilot 介绍

- 什么是 Microsoft 365 Copilot?
- Copilot 的核心功能与技术架构
- Copilot 在 Microsoft 365 产品中的应用（如 Word、Excel、PowerPoint、Outlook 和 Teams 等）
- Copilot 的价值与使用场景
- 提高办公效率的实际案例
- Copilot 在不同行业的应用（如金融、制造、医疗等）

模块 2: Copilot 在 Microsoft 365 应用中的实践

- Word: 智能文档助手

- 自动生成文本、摘要和大纲
- 语法与写作建议优化
- 基于提示词的内容创作技巧

- Excel: 数据分析与可视化

- 公式与数据计算自动生成
- 数据模式分析与预测
- 交互式数据可视化（如自动生成图表）

- PowerPoint: 智能演示文稿

- 依据文本快速生成演示文稿

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- 内容优化与排版建议
 - 语音转文字与自动摘要
 - **Outlook：智能邮件管理**
 - 自动撰写和优化邮件
 - 总结长邮件线程
 - 会议安排与日程管理
 - **Teams：智能协作**
 - 会议摘要自动生成
 - 任务分配与跟踪
 - 自动整理聊天记录

模块 3：Copilot 的定制与集成

- **如何根据企业需求定制 Copilot**
 - 使用 Microsoft Graph API 和 Copilot Studio 自定义功能
 - 连接企业数据（如 SharePoint、OneDrive、Teams、Dataverse）
 - 与企业应用集成
 - 与 Power Platform 结合（如 Power Automate、Power BI）
 - 与 ERP、CRM 及其他业务系统的对接

模块 4：安全性与合规

- **数据安全性与权限管理**
 - 了解 Copilot 如何处理企业数据

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- 数据访问控制与合规性要求
 - 防止信息泄露与误用
 - DLP（数据丢失防护）策略
 - Copilot 使用的安全最佳实践

模块 5：最佳实践与优化

- Copilot 提示词优化技巧
 - 如何撰写高效的 Prompt 以获得最佳响应
 - Prompt 设计案例分析
 - Copilot 在企业中的落地与推广
 - 典型用户培训方案
 - 业务流程优化案例

模块 6：实践演练与问答

- 真实业务场景演练
 - 针对不同行业的 Copilot 应用演练
 - 解决日常办公挑战
- Q&A 互动
 - 参与者提问与解答
 - 经验分享与最佳实践讨论