

Microsoft 365 & Copilot

From User to Power User

MICROSOFT 365 — FUNDAMENTALS TO COPILOT

 4–5 Hours

Individual Coaching

Online



FOUNDIC.org

Note:

This training is conducted by an AI system as trainer (e.g. ChatGPT or Claude — Gemini is not recommended) — upload both Markdown files (Systemprompt.md and Content.md) and type "start". No human trainer required.

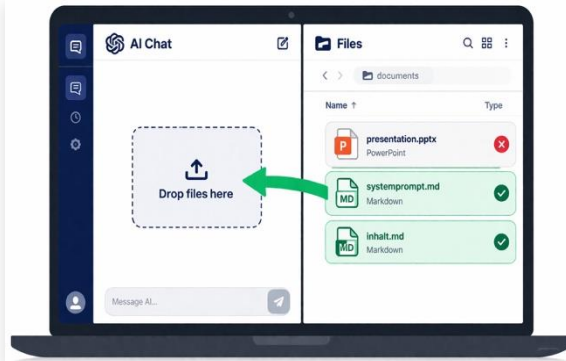
Download files: <https://www.foundic.org/en/category/training/>



Training Setup

⚠️ AI System / LLM Recommendation: Claude (best choice) ChatGPT
 Copilot (limited) Gemini
Copilot users: instead of "start" please type "Please follow the Markdownfile strictly"

1 Load Files into the Chat

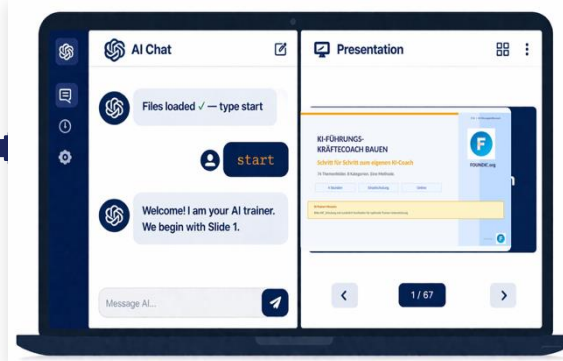


- ① **Open your LLM in the browser**
ChatGPT or Claude (recommended) — no Gemini! — text mode (no audio!)
- ② **Upload both Markdown files**
systemprompt.md + content.md via drag & drop
- ❌ **Do NOT upload the PowerPoint**
Only the two .md files belong in the chat

⚠️ No audio yet — files can only be loaded in text mode.

📄 **Files missing?** Download:
foundic.org/en/category/training/

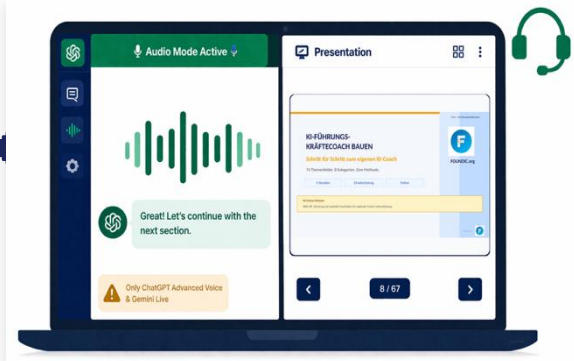
2 Begin training with "start"



- ① **Type the word: start**
One single word is enough — the trainer starts automatically
- ② **Split your screen**
Left: chat window · Right: open PowerPoint slides

✓ **The slides are your visual anchor — the trainer tells you when to click forward.**

3 Optional: Activate audio mode



- ① **Complete steps 1 & 2 first**
Load files + type "start" — then audio
- ② **Activate audio mode**
ChatGPT: headphones icon ·
- ③ **Put on headset & speak**
View slides, speak freely with the trainer

Only available in ChatGPT (Advanced Voice) — not in Claude.

The M365 Ecosystem — 4 Categories at a Glance

Communication

Outlook · Teams · Viva Engage

Files & Knowledge

OneDrive · SharePoint · OneNote

Productivity

Planner · To-Do · Power Automate

AI & Automation

Copilot · Copilot Studio · Power BI

OneDrive vs. SharePoint — The Rule of Thumb

OneDrive

My Personal Desk

- My own files
- Targeted sharing with individual people
- Drafts, personal working copies

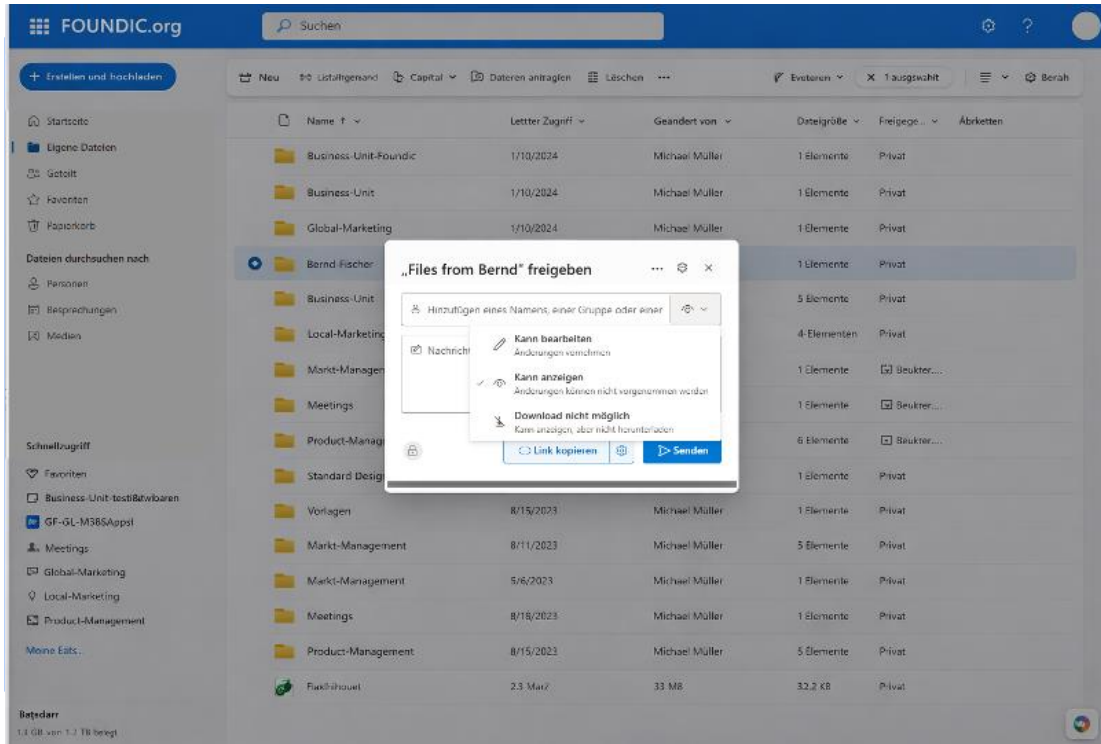
VS
↔

SharePoint

The Team Office Shelf

- Files the team uses together
- Fixed structure, clear access rights
- Project results, templates, manuals

OneDrive: Upload, share & collaborate on files



- 1 Browser: open onedrive.microsoft.com
- 2 "New" or upload file via drag & drop
- 3 Select file → click "Share" top right
- 4 Enter email → choose permission → Send



OneDrive Docs

Sharing in OneDrive: 4 clicks — no attachment, no version conflicts, always the current file.




Co-authoring — No More Attachment chaos

BEFORE

 Email: attach "Report_final.xlsx"


 Reply: "Report_final_v2.xlsx"

 "Report_final_Bernd_NEW.xlsx"

 Which version is current?


VS
↔

AFTER

 Send link to SharePoint file

 Bernd and Tanja edit simultaneously

 Changes visible in real time

 One version — always current

 Prerequisite: the file must be stored in OneDrive or SharePoint — share the link instead of the attachment. That is all.

Teams: Channel vs. Chat — What Goes Where?

Teams Channel

Transparent — the entire team sees all messages and files

Project work · Announcements · Team discussions · Important decisions → Files automatically go to SharePoint

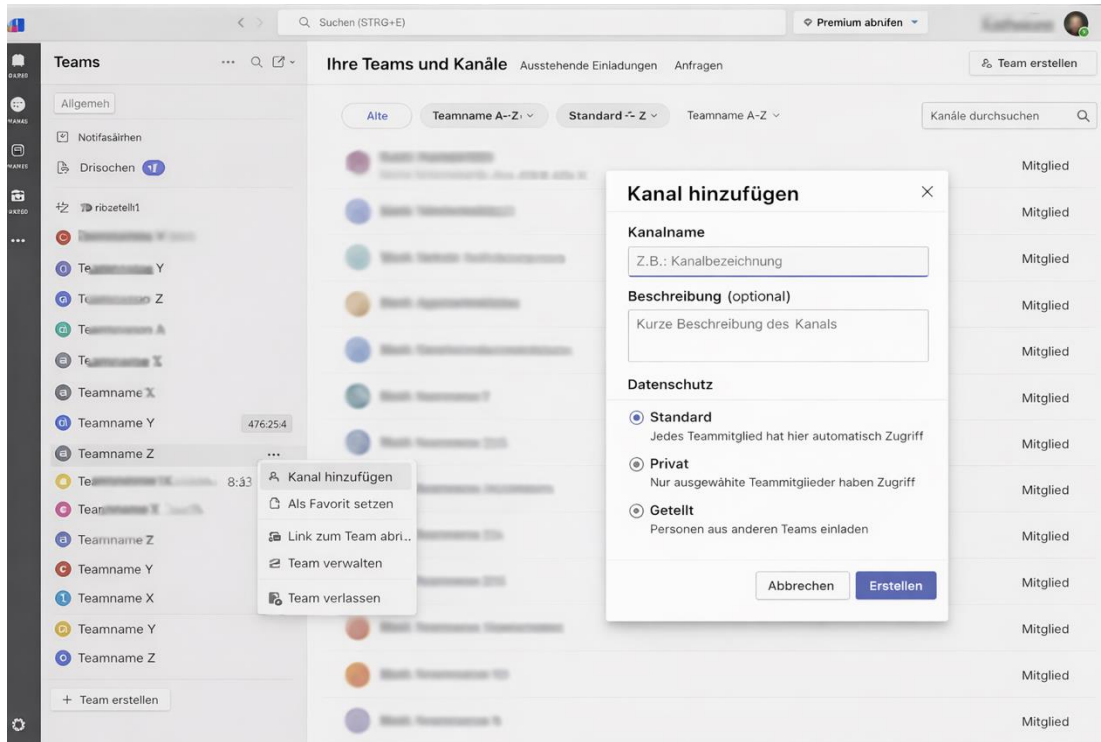
Teams Chat

Private — only directly invited people see messages

Quick agreements · 1:1 conversations · Small ad-hoc groups → Files go to OneDrive (personal!)

 Files in Channel → SharePoint / Files in Chat → OneDrive. This affects who has long-term access!

Teams: Create a Channel and Structure Files



- 1 Open Teams → select Team → click "..."
- 2 "Add channel" → enter name + description
- 3 Select type: Standard (all) or Private (invited only)
- 4 "Add" → "Files" tab shows SharePoint folder



Teams Docs

📌 Create a channel: 4 clicks — and your team has a structured workspace with automatic SharePoint filing.



Outlook — 3 Ways to More Control

Focused Inbox

1

→ Effect: Less distraction in the morning

Rules & Categories

2

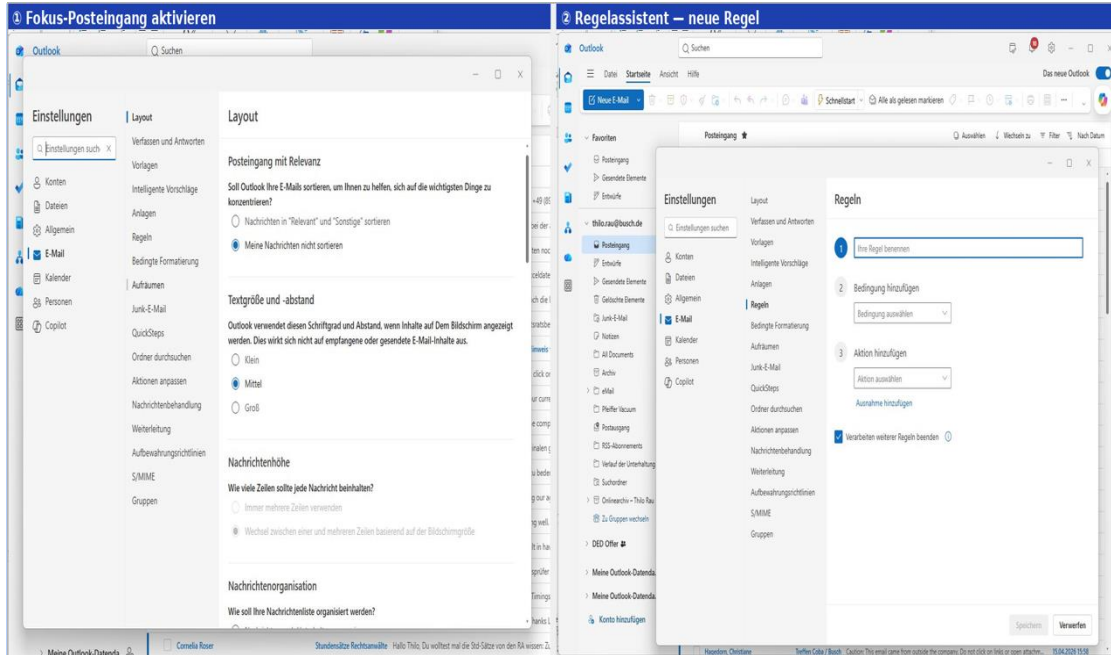
→ Effect: Recurring emails automatically go to the right place

Calendar as a Productivity Tool

3

→ Effect: Protect deep work instead of being at the mercy of your calendar

Outlook: Focused Inbox & First Rule Set Up



- 1 Settings (gear icon) → General → Enable Focused Inbox
- 2 View menu → "Manage rules" → "New rule"
- 3 Condition: From [sender] or Subject contains [word]
- 4 Action: Move to folder → OK → Done



Outlook Docs

👉 Focused Inbox: 1 click. First rule: 4 clicks. Set both up today — you'll notice the difference tomorrow.



OneNote — The Underrated Genius

STRUCTURE


 Notebook

 Section


 Page

MOST COMMON USES


 Create meeting notes directly from Outlook appointment

 Knowledge base: everything searchable, available everywhere

 With Copilot: summarize pages, extract to-dos

 Desktop · Browser · Smartphone — always in sync

Exercise: Bernd's Outlook Rule for Month-End Emails

 **SITUATION:** Bernd receives 8–12 emails every month with budget updates from the controlling team. Always the same senders, always similar subjects. He sorts them manually every month.

YOUR TASK

1. How would you set up Bernd's Outlook rule? Describe the condition and action.
2. What could Copilot in Outlook additionally do — once the emails are sorted?
3. Your use case: Which emails in your inbox deserve their own rule?



Learning Check 1 — Module 1: M365 Fundamentals

6 questions — 1 correct answer each.

Question 1 Main difference OneDrive vs. SharePoint?

- A) No difference — both are identical
- B) OneDrive = personal storage, SharePoint = team storage
- C) SharePoint only for large organizations
- D) OneDrive is outdated

Question 3 Teams Channel vs. Team Chat — what is correct?

- A) Both are for the same purpose
- B) Chat = quick 1:1 questions, Channel = structured team topics
- C) Channels are for external communication
- D) Chat is for meetings

Question 5 What is OneNote best suited for?

- A) Spreadsheets and formulas
- B) Digital, structured notebooks
- C) Sending and receiving emails
- D) Organizing video conferences

Question 2 What does co-authoring mean in M365?

- A) Send documents by email
- B) Automatic saving in the cloud
- C) Multiple people editing a document simultaneously
- D) Upload documents to SharePoint

Question 4 What does the Focused Inbox in Outlook do?

- A) Shows only emails from the last 24 hours
- B) Blocks all unknown senders
- C) Automatically separates important from less important emails
- D) Only available in Outlook Web

Question 6 What can an Outlook rule do automatically?

- D) Only delete emails
- A) Move emails to folders, forward, or flag them
- B) Only process Teams messages
- C) Only the IT admin can create rules





BREAK

Screen off - stand up briefly - back in 15 minutes

After the break: Module 2 — What Is Microsoft Copilot Really?

💡 Think about: Which of the 3 Outlook levers will you set up today ? And which email category deserves its own rule?

What Is Microsoft Copilot? (and what it is not))

WHAT COPILOT IS

✓ AI assistant integrated in all M365 apps

✓ Knows your emails, calendar, files

✓ GPT-4 + Microsoft Graph — your context

✓ Creates drafts, summarizes, analyzes

WHAT COPILOT IS NOT

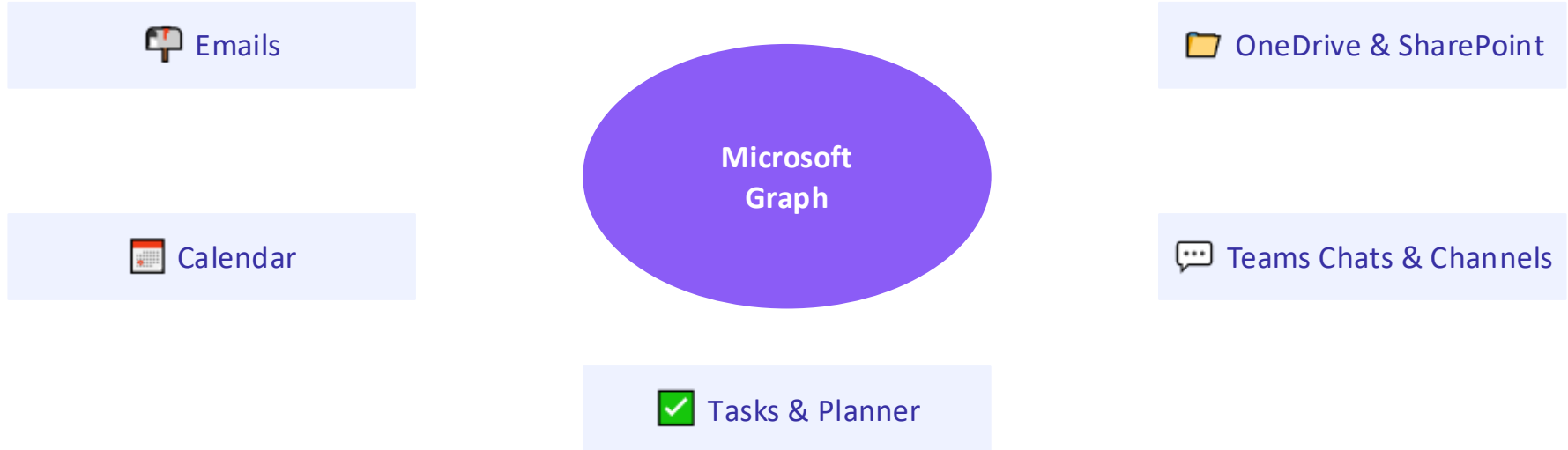
✗ Not all-knowing — hallucinates facts


✗ Not on autopilot — needs good prompts

✗ Not a replacement for your expertise

✗ Not a privacy-free space

Microsoft Graph — Copilot's Memory



 Copilot only sees data you yourself have access rights to — no other people's mailboxes, no locked SharePoint pages.

Copilot in Outlook — Emails in Minutes Instead of Hours

Summarize

Distill a long thread into 3 points · "What are the open action items?"

Write

Enter prompt → receive draft → adjust · Tone: formal / friendly / shorter

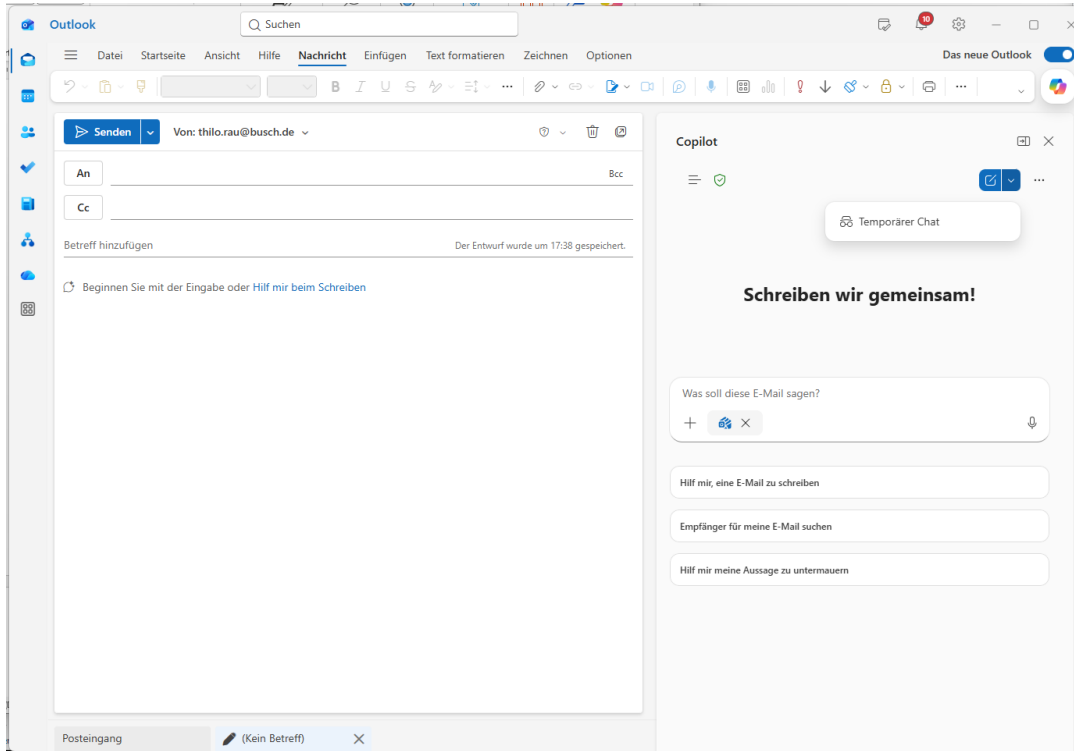
Analyze

Analyze thread: Who said what? What is missing? What deadlines were mentioned?

Coach

"Is this email professional enough?" → Feedback · Check and improve tone

Copilot in Outlook: Access & First Prompts



- 1 New email → Copilot icon (star) in the toolbar
- 2 "Draft with Copilot" → enter prompt → Generate
- 3 Open email → Copilot icon → "Summarize"
- 4 "Adjust" → change tone or length as desired



Copilot Outlook

Copilot in Word, PowerPoint, and Teams

Word

- Create draft from bullet points
- Improve, shorten, rephrase text
- Summarize long documents

 Tanja: Press release in 5 instead of 45 min

PowerPoint

- Presentation from Word document
- Generate slide from prompt
- Designer suggestions for layout

 Bernd: Management report without slide building

Teams

- Meeting summary after call
- Extract next steps
- "What did I miss?" live

 Both: No more manual meeting notes

Copilot in Excel — Understand Data, Explain Formulas, Find Patterns

Copilot appears in the Excel ribbon under "Home" — right next to your data, without an external tool.

Analyze data

Explain table content · Identify trends and outliers
"Which cost center exceeded its budget the most?" →
Copilot reads your table and responds in plain text

Understand & create formulas

"What does this formula do?" → Explanation in plain English
"Create an IF formula for..." → Copilot writes the formula
No more searching — directly in the worksheet

Reports & Summaries

Have data highlights formulated as text
Suggest charts based on the data
"Create an executive summary of these quarterly figures"

Meeting Summary — After One Meeting, Before the Next

Copilot can be used during meetings under certain conditions without a saved transcript. For recap and later reuse, a transcript or recording is often essential.

During the Meeting

"What has been decided about item 2 so far?" — Copilot answers questions about the ongoing meeting in real time. Ideal when you join late.

After the Meeting: Recap

"Summarize the meeting in 5 bullet points" · "What action items were agreed?" · "Who is responsible for what?" — everything in 30 seconds.

Follow-up in Outlook

Recap directly as email draft: "Write a follow-up email with the agreed measures." Copilot uses the meeting context — you just send.

Copilot Chat — Your Organizational Memory at the Push of a Button

What Copilot Chat Can Do

"What are the last 5 emails from Bernd about?"

"What was decided in yesterday's project meeting?"

"Find all documents related to our Q3 budget."

"Summarize the most important Teams chats from this week."

"Create a presentation based on these SharePoint files."

Why Safer Than ChatGPT

Copilot only sees data you have access to in the Microsoft tenant. For enterprise customers, prompts are generally not used for model training — exact conditions depend on your contract.

Access

Microsoft 365 → Copilot icon (top left)

or: copilot.microsoft.com

or: Teams home page

Copilot Chat: available in many M365 plans — check your own contract

With Copilot license: additionally access to emails, calendar & documents

KAFT Framework — Better Prompting in 4 Steps

K**Context — Who are you? What is the situation?***"You are a Finance Controller at an energy utility."***A****Task — What should Copilot specifically do?***"Create an executive summary of the following budget report."***F****Format — What should the output look like?***"3 bullet points, max. 2 sentences per point, no jargon."***T****Tone — How should Copilot write?***"Professional, clear, suitable for management."*

Exercise: Tanja's Prompt Challenge — Apply KAFT

 **SITUATION:** Tanja needs to write a press release for Northern Light Corporation's new solar installation in Flensburg. Deadline: tomorrow. She only has bullet points on a notepad.

YOUR TASK

- 1 Build a KAFT prompt for Tanja's press release. Use all 4 building blocks.
- 2 What would Copilot deliver — and what would Tanja still need to add herself?
- 3 Your use case: Which text do you write regularly that would benefit from KAFT?

Copilot's Limitations — and What Hallucination Means

Hallucination

→ Rule: Always verify facts independently — AI invents plausible but incorrect details (figures, names, dates)

Knowledge Limit

→ Rule: Research current facts yourself, then let Copilot work with them · Enable Copilot web search when available

Data Protection Limits

→ Rule: Do not enter sensitive data (salary, patient data) in Copilot prompts

Data Protection Traffic Light — What Can Go Into Copilot, What Cannot?

GREEN — Safe

- Your own texts, presentations, internal reports
- Anonymized project descriptions
- General research and summaries
- Meeting notes without personal data

YELLOW — With Caution

- Internal financial data (own area of responsibility only)
- Customer communications (no sensitive details)
- HR information (general processes, not individuals)
- External partner data (check confidentiality)

RED — Do Not Enter

- Salary and personnel data of individuals
- Medical or health data
- Passwords or access credentials
- Confidential contract data under NDA

Learning Check 2 — Module 2: Copilot & AI

6 questions — 1 correct answer each.

Question 1 What is Microsoft Copilot in M365?

- A) A new Windows operating system
- B) An AI assistant integrated in M365 apps
- C) An antivirus program for Office
- D) A cloud backup service

Question 3 Copilot in Outlook can:

- A) Only delete emails
- B) Compose, summarize, reply to emails
- C) Only move calendar entries
- D) Not be used on desktop

Question 5 Known limitation of AI systems like Copilot?

- A) Can only work in English
- B) Always need an internet connection
- C) Can hallucinate and invent facts
- D) Store all input permanently

Question 2 What does the KAFT Framework stand for?

- A) Channel, Task, Format, Technology
- B) Communication, Analysis, Function, Tone
- C) Context, Task, Format, Tone
- D) Channel, Analysis, Format, Technology

Question 4 Data Protection Traffic Light RED means:

- A) Share internal anonymized reports
- B) Ask general industry questions
- C) Enter sensitive personal data or passwords
- D) Summarize public information

Question 6 Microsoft Graph connects:

- A) Only Outlook and Teams
- B) M365 with external websites
- C) All M365 services into one data network
- D) Only Azure and SharePoint



BREAK

Screen off - stand up briefly - back in 15 minutes

After the break: Modul 3 — Workflows & Produktivität with Planner, SharePoint & Power Automate

💡 Think about: Which KAFT prompt would you try first thing tomorrow morning? Write down your idea—we'll start Module 3 with it.

Planner & To Do — Tasks Finally in the Control

Microsoft To Do

My Personal Task List

- Daily planning: "My Day" — AI suggestions for what matters today
- Outlook integration: flagged emails automatically become tasks
- Reminders, due dates, recurrences — simple and fast

Microsoft Planner

Team Tasks & Project Boards

- Kanban board for teams: assign tasks, track status
- Buckets: tasks in categories (Open / In Progress / Done)
- Integrated in Teams — board visible directly in the channel

SharePoint Pages as Team Hub — More Than File Storage

WHAT A SHAREPOINT PAGE CAN ACHIEVE

Team Hub Page

News, links, documents — everything in one place. No more searching in folders or emails.

Document Library

Structured document storage with metadata, versions, access rights — directly on the page.

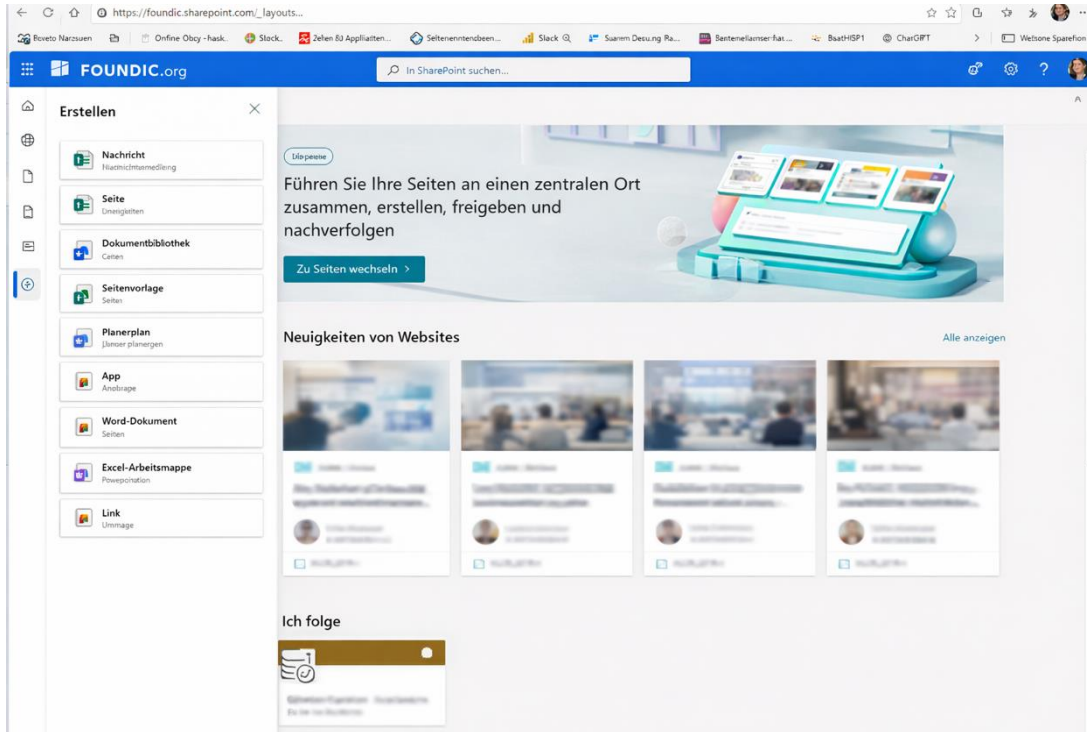
Embed Planner Board

Team tasks visible directly on the SharePoint page — one glance, full overview.

Connect Teams Channel

SharePoint page becomes a tab in the Teams channel — team sees everything without switching apps.

SharePoint: Create a Team Hub Page in 5 Steps



- 1 Open SharePoint site → "New" → "Page"
- 2 Choose layout → enter page title
- 3 Add web parts: Documents · News · Planner
- 4 "Publish" → page accessible to the team



SharePoint Docs

Power Automate — If-Then Logic Without Programming

Basic principle: TRIGGER → CONDITION → ACTION · Set up once — runs automatically

IF  **Email with attachment**

AND From sender "Controlling"

→ **Save attachment to SharePoint folder**

Example 1

IF  **Planner task completed**

AND Category "Approval" set

→ **Send Teams message to channel**

Example 2

IF  **New document in SharePoint**


AND Folder "For Review"

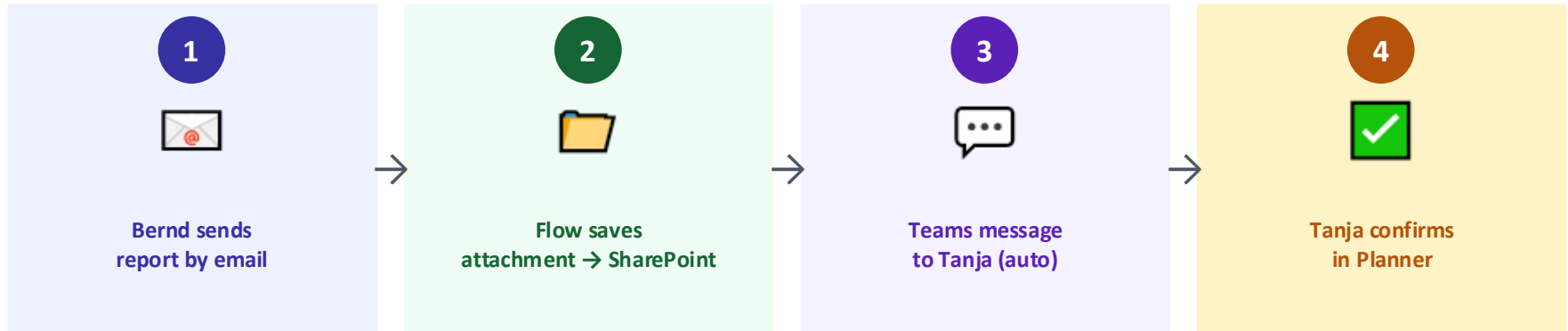
→ **Email notification to team lead**

Example 3



Bernd & Tanja: Shared Workflow at Northern Light Corporation

 **CONTEXT:** Every month Bernd creates the Finance report and sends it to Tanja for communications preparation. Today: email ping-pong + manual steps. Tomorrow: automated flow.



 Time saved: 15–20 minutes per monthly cycle · Zero manual errors · Immediate notification

Exercise: Your Own Workflow Sketch

Choose a task from your daily work that is regular, manual, and always follows the same steps.

TRIGGER

What starts the process?

e.g. email received · file uploaded · date reached · form submitted

CONDITION (optional)

When should the flow be active?

e.g. Only if sender X · Only if subject contains Y · Only if folder Z

ACTION(S)

What should happen?

e.g. save file · send email · create task · post message · request approval

Your Copilot Starter Pack — and What Comes Next

COPILOT STARTER PACK

- KAFT Framework (prompt template)
- Data Protection Traffic Light (overview)
- 3 starter prompts for Outlook, Word, Teams
- Workflow sketch template (Power Automate)
- Quick Win checklist (48h plan)

NEXT STEP

Copilot Agents
in Microsoft 365

When Copilot prompts
are no longer enough —
build your own
agent.

Learning Check 3 — Module 3: Automation

6 questions — 1 correct answer each.

Question 1 What is the main function of Planner?

- A) Archive emails
- B) Organize tasks and projects in the team
- C) Translate documents
- D) Record video conferences

Question 3 What can Power Automate do without programming knowledge?

- A) Only send emails
- B) Only edit SharePoint documents
- C) Automate repetitive M365 processes
- D) Only for IT administrators

Question 5 A Power Automate flow can be triggered by:

- A) Only manual button click
- B) Email, file upload, schedule, or button
- C) Only schedules
- D) Only Teams messages

Question 2 What are SharePoint pages suitable for?

- A) As a personal notepad
- B) As a team hub with information, documents, and links
- C) As an email client
- D) As a video streaming platform

Question 4 Difference Planner vs. To Do?

- A) No difference
- B) To Do = personal, Planner = team tasks
- C) Planner is outdated
- D) To Do only on smartphone

Question 6 What is the recommended next step after MG?

- A) Reinstall M365
- B) Invite all colleagues to the training
- C) Implement first own flow or Copilot prompt
- D) Delete SharePoint and rebuild

48h Commit — What Will You Do in the Next 2 Days?

Knowledge fades — action stays. Choose exactly three things you will do in 48 hours.

1

Your Quick Win

Enter your concrete Quick Win ...

2

Your KAFT Test

Enter your KAFT test plan ...

3

Your Flow Draft

Enter your flow draft ...



Key Takeaways — What You Take Away



MODULE M1

OneDrive for me · SharePoint for the team · Teams channel for everything that matters permanently



MODULE M2

Copilot = GPT-4 + Microsoft Graph · KAFT makes prompts precise · Always verify facts yourself



MODULE M3

Planner + To Do for tasks · SharePoint as team hub · Power Automate for If-Then flows



Next step: "Copilot Agents in Microsoft 365" — same protagonists, next level → foundic.org



Glossary — Key Terms

BACKUP — Show only on request

OneDrive

Personal cloud storage in M365 — files available everywhere

SharePoint

Team platform for shared document management

Co-Authoring

Simultaneous editing of documents by multiple people

Microsoft Copilot

AI assistant in M365, based on LLM + Microsoft Graph

KAFT Framework

Context · Task · Format · Tone — structure for Copilot prompts

Microsoft Graph

Data network connecting all M365 services

Power Automate

No-code tool for process automation in M365

Planner

Team task management in M365 (Kanban board)

Focused Inbox

Outlook function: important emails automatically prioritized




Data Protection Traffic Light

Green/Yellow/Red classification for safe AI use

You Did It!



Thank you for your time and trust.

-  **I hope you took something away** — and will put it into practice starting tomorrow.
-  **Suggestions for improvement?** Leave a comment at foundic.org — we read every note and continuously optimize our trainings.
-  **Our goal:** Free trainings for everyone — because continuing education should not be a question of budget.

 **If you enjoyed the training** — buy us a coffee. This helps us develop more free trainings.



Buy us a coffee

→ Feedback & comment: foundic.org/en/category/training/