

Digital-First Working with Microsoft 365

Collaboration, workflow automation, reporting and responsible AI

FA-0604 · 3 days — 2 training days plus 1 applied assessment day

Automation, RPA & Power Platform · Data & Analytics · AI for Leaders & Business

Practise an integrated Microsoft 365 workflow using collaboration, automation and reporting tools, with an applied scenario on day three.

Introduction

This three-day course develops practical digital-working habits using Teams, SharePoint, Power Automate and Power BI, with an introduction to responsible use of available Microsoft 365 AI features. Two guided training days prepare participants for a small integrated scenario and review on the third day.

Exercises use a prepared learning tenant and synthetic data. Microsoft 365 E5 alone does not guarantee every Copilot, premium connector, AI Builder or reporting entitlement. Practical features require suitable licences, credits, permissions and administrator settings; unavailable advanced functions are demonstrations or design comparisons. The outcome is a reviewed learning prototype, not a production business system.

Learning outcomes

The course teaches participants to:

- Explain digital-first versus digital-only working and assess a bounded process improvement.
- Organise a small collaboration space using Teams and SharePoint.
- Build and inspect a selected Power Automate flow with review and failure handling.
- Prepare a simple Power BI report from sample data and review sharing/access assumptions.
- Review AI-generated output and data boundaries for available Microsoft 365 features.
- Combine collaboration, automation and reporting in a small scenario and explain its limitations.

Prerequisites

- Basic to intermediate proficiency with Microsoft Office applications (Excel, Word, Outlook)
- Foundational understanding of digital collaboration and communication tools
- General awareness of business processes and organizational workflows
- No coding knowledge is required, but comfort with digital interfaces is important

Access to an authorised training tenant with the required tool entitlements; prepared templates and sample data support the integrated exercise.

Training outline

1. Day 1 – Digital Working, Teams and SharePoint

Mindset, culture and adoption

- Evolution from traditional to digital-first operations
- Possible productivity, agility and cost benefits: define measures and test assumptions.
- Digital-first vs. digital-only: a cultural transformation

1.2 Key Pillars of a Digital-First Organization

- Collaboration with clear access, ownership and sharing boundaries.
- Workflow automation and operational intelligence
- Data-driven decision-making
- Ethical and practical AI integration

1.3 Breaking Resistance and Driving Adoption

- Change management principles
- Psychological safety and digital literacy
- Embedding mindset in leadership and teams

Teams collaboration

- Teams, Channels, Tabs: Planning structure for different types of work
- Private vs. Public Teams, Shared Channels, and Guest Access
- Lifecycle governance of Teams: Creation, archiving, retention

2.2 Effective Communication & Meetings

- Persistent chat vs. video meetings vs. calls
- Scheduling, meeting options, recording, and transcription
- Task management using the available Planner/To Do experience in Teams.

2.3 App Integrations and Extensions

- Integrating SharePoint, Power BI, Power Automate directly within Teams
- Third-party app deployment for HR, IT, CRM scenarios
- Overview of low-code Teams app options, with separate licences/permissions where required.

SharePoint content and governance

- Sites, Site Collections, and Hub Sites
- Libraries vs. Lists vs. Pages: Structuring content

3.2 Designing a Digital Workplace

- Creating and managing communication sites and team sites
- Navigation planning and metadata for discoverability
- Document co-authoring and version control

3.3 Governance, Permissions, and Security

- Understanding roles: site owners, members, visitors
- Best practices for managing access and sharing
- Sensitivity labels, retention and compliance controls as configuration-dependent governance concepts.

Practise a limited team/list/library setup. Enterprise retention, third-party deployment and low-code app extensions are guided overviews subject to permissions.

2. Day 2 – Automation, Reporting and Responsible AI

Power Automate foundations and a selected flow

- Automated, instant and scheduled cloud flows; business-process flows as a related, separately configured capability.

- Key components: triggers, actions, conditions

4.2 Building a Flow

- Using templates vs. custom-built flows
- Common connectors: Outlook, SharePoint, Excel, Teams
- Parallel branches, loops, error handling, and approvals

4.3 Advanced Scenarios

- AI Builder document-processing overview or supported demonstration; premium licences, Dataverse and credits apply.
- Using adaptive cards for Teams-based automation
- Monitoring flow performance and logs

4.4 Process Redesign

- Mapping current workflows
- Identifying automation opportunities and KPIs

Power BI foundations and sample reporting

- Desktop, Service, Mobile App – understanding the components
- Semantic models (formerly datasets), dataflows, reports and dashboards.

5.2 Getting and Shaping Data

- Connecting to Excel, SharePoint, SQL Server, APIs
- Power Query basics: filtering, shaping, combining data

5.3 Visualizing and Publishing

- Building compelling visuals: charts, slicers, KPIs
- Using bookmarks, drill-throughs, filters for interactivity
- Publishing and sharing reports securely

5.4 BI Governance and Security

- Row-Level Security (RLS)

- Workspaces, supported app distribution and report lifecycle; review older content-pack terminology only as legacy context.

Available Microsoft 365 AI capabilities

- Overview of Microsoft Copilot and AI features across 365
- Available summarisation, drafting and suggestions; outputs require checking and feature availability varies.

6.2 Responsible AI Principles

- Fairness, transparency, accountability, privacy
- Approved data, permissions and organisational obligations; product use does not by itself establish compliance.

6.3 Use Case Deep Dive

- Selected supported Copilot demonstrations in Teams, Outlook, Word or Excel; entitlements and rollout may differ.
- Ethical dilemmas in AI-based decisions and data usage

Integration examples

- Case: Automating HR onboarding using Forms, SharePoint, Power Automate, and Teams
- Case: Building a project dashboard using Planner, SharePoint Lists, and Power BI
- Case: Creating an expense approval flow with adaptive cards and Teams notifications

7.2 Embedding Mindset in Daily Practice

- Designing repeatable frameworks for digital innovation
- Establishing "digital champions" in departments
- Continuous improvement loops and low-code culture

Compare onboarding, project-reporting and expense-approval examples; choose one for the assessment. Use synthetic records and keep external actions bounded or mocked.

3. Day 3 – Applied Scenario and Review

Bounded scenario challenge

- Participants are assigned a business problem scenario

Use prepared components to build or refine one small Teams/SharePoint/Power Automate/Power BI learning workflow.

- Solution must demonstrate automation, collaboration, and reporting

Presentation and peer review

- Teams present their digital solution
- Peer evaluation using a rubric aligned to learning outcomes

Evaluation and next steps

- Knowledge check: Quiz covering key concepts
- Instructor feedback: Design logic, use of tools, integration approach
- Reflection session: From learning to execution – next steps in digital-first adoption

Document access assumptions, test results, unresolved issues and further review needed before operational use.