

Microsoft Copilot Business Analytics: Reporting and Automation

Turn business information into clearer analysis, stronger reports and practical automation.

FA-0825 · 1.5 days, delivered over 3 half days

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

Connect Copilot-assisted business analysis with management reporting, Power BI and practical automation through focused exercises and demonstrations.

Introduction

Business information becomes useful when people can question it, interpret it and explain what it means for a decision. Spreadsheets, supplier records, operational reports and market research all contribute to that process, but bringing them together can take considerable effort.

This programme develops practical ways to use Microsoft Copilot for business analysis, research and management reporting. Participants explore Copilot in Excel, Word and PowerPoint, together with Analyst and Researcher, to investigate information, identify meaningful findings and communicate conclusions. Prompt engineering and context engineering help participants provide clear objectives, relevant evidence, business definitions and appropriate boundaries for the work.

The programme connects these analytical activities with reporting and automation. Power BI supports interactive reports and structured data exploration. Power Automate coordinates source-data updates, refreshes and reporting workflows around reports and connections configured in Power BI. Instructor demonstrations introduce Claude Code integration with Power BI and show how Copilot Studio can combine workflow actions with AI-assisted processing.

Microsoft uses overlapping names across its Copilot, agent, workflow and harness offerings. Similar terminology can describe different capabilities, access requirements and billing arrangements. The programme distinguishes rule-based automation, AI-assisted processing and agent orchestration.

Autonomous operation concerns the level of ongoing human intervention; the term alone does not establish whether a process uses AI.

Focused practical activities are integrated throughout the applicable topics, supported by prepared data and examples. The three half days provide an applied introduction across the toolchain rather than advanced mastery of every platform. Copilot Studio and Claude integration are demonstrated by the instructor where participants lack the necessary access, licensing or usage capacity. Other access-dependent capabilities are delivered according to the facilities available in the training environment.

The programme concentrates on practical, industry-demanded content, useful management outputs and realistic organisational constraints.

Learning outcomes

By the end of the programme, participants will be able to:

- Select appropriate Copilot capabilities for analysis, research and reporting.
- Prepare spreadsheets, files and business context for AI-assisted analysis.
- Apply prompt engineering and context engineering to analytical tasks.
- Use Copilot in Excel and Analyst to investigate trends, variances, exceptions and relationships.
- Use Researcher to investigate internal information and external developments.
- Apply AI-assisted analysis to pricing, costs, market intelligence, risk and cross-dataset questions.
- Develop management reports in Word and presentations in PowerPoint.
- Explore Power BI report creation, refinement and natural-language analysis.
- Explain how Power Automate updates data and coordinates refreshes for configured Power BI reports.
- Recognise how Claude Code can assist Power BI model and report authoring.
- Identify opportunities to combine workflow actions with AI processing in Copilot Studio.
- Validate findings and assess permissions, licensing, consumption and governance requirements.

Prerequisites

- Working experience with Excel tables, formulas, filtering and business datasets.
- Ability to prepare business reports in Word and presentations in PowerPoint independently.
- A laptop with a current browser, Microsoft 365 applications and reliable internet access.
- Licensed Microsoft 365 Copilot access, including enabled Analyst and Researcher, for the associated participant activities.
- Power BI Desktop and authorised Power BI service and Power Automate access for participant reporting and automation activities.
- Qualifying organisational capacity and administrator-enabled access for Copilot in Power BI; instructor demonstration where unavailable.

- Appropriate Copilot Studio licensing, environment permissions and Copilot Credits or approved usage billing where required; instructor demonstration where unavailable.
- A supported Claude Code subscription or paid API access, authorised Power BI access and a compatible, prepared authoring environment for participants wishing to follow the Claude demonstration.

Training outline

1. 1. Essential AI Concepts and the Microsoft Copilot Toolchain

1. AI-assisted analysis, limitations and human accountability
2. Copilot Chat, Microsoft 365 applications, Analyst and Researcher
3. Power BI, Power Automate and Copilot Studio
4. Automation, AI actions, agents and Microsoft product terminology

2. 2. Preparing Business Information for Analysis

1. Excel tables, CSV files and multiple-file preparation
2. Data consistency, missing values and normalization
3. Categories, measures, dates, currencies and units
4. Sensitive information and permitted data use

3. 3. Prompt Engineering and Context Engineering

1. Analytical objectives, business perspectives and data scope
2. Metrics, comparison dimensions and decision criteria
3. Relevant files, business definitions and authoritative context
4. Assumption control and output requirements
5. Iterative questioning, validation and reusable instructions

4. 4. AI-Assisted Data Analysis

1. Copilot in Excel and Analyst
2. Data summarisation and multi-file analysis
3. Comparative, trend and variance analysis
4. Exceptions, anomalies and performance segmentation
5. Relationships, potential drivers and follow-up investigation

5. 5. Pricing, Cost and Management Intelligence

1. Pricing and cost data
2. Cost optimisation
3. Market and supplier intelligence
4. Risk and exception information
5. Cross-dataset management analysis

6. 6. Research and External Intelligence

1. Researcher and internal and external information sources
2. Vendor capabilities, supplier landscapes and market comparisons
3. Supply-market developments and external risks
4. Source traceability and research validation

7. 7. From Analysis to Management Communication

1. Decision-focused findings and executive summaries
2. KPI, variance and exception narratives
3. Risk, opportunity and management briefing documents
4. Copilot in Word for report development
5. Copilot in PowerPoint for presentation creation and refinement
6. Audience requirements and supporting evidence

8. 8. AI-Assisted Reporting with Power BI

1. Data connections, semantic models and AI readiness
2. Copilot-assisted exploration and natural-language questions
3. Report creation, visual selection and refinement
4. Narrative summaries and interrogation of existing reports
5. Validation of calculations and AI-generated interpretations

9. 9. Reporting Workflows with Power Automate and Power BI

1. Report authoring, PBIX files and publication in Power BI
2. Flow triggers, connectors and source-data updates

3. Configured data connections, credentials and gateway requirements
4. Dataset refresh actions, completion checks and failure handling
5. Report distribution and capacity-dependent file exports
6. Boundaries between report authoring and workflow automation

10. 10. Instructor Demonstration: Claude Code with Power BI

1. Power BI Authoring plugin setup and MCP connectivity
2. Natural-language assistance for models, measures and reports
3. Report layout refinement and visual validation
4. Permissions, data access and review of generated changes

11. 11. Commercial, Operational and Project Analysis

1. Spend and category information
2. Supplier performance information
3. Demand and consumption data
4. Project and initiative timeline analysis

12. 12. Copilot Studio: Workflows with Embedded AI

1. Workflow triggers, connectors and control actions
2. Dynamic inputs, data operations and downstream outputs
3. Run a prompt in standard-harness agent flows
4. Agent actions in GitHub Copilot harness workflows
5. AI-assisted extraction, classification and summarisation
6. Conditions, human review and exception handling
7. Workflow testing and usage-consumption controls

13. 13. Extending Analysis through Agents and Connected Information

1. Agent instructions, context and knowledge sources
2. SharePoint, structured data and Dataverse considerations
3. Tools, actions, generative orchestration and Power Automate integration
4. Recurring analysis, information retrieval and reporting applications
5. Permissions, grounding and output validation

Disclaimer

This outline provides a guideline for the anticipated scope of the programme. The trainer reserves the right to amend, reorder, consolidate, expand, reduce or substitute topics and activities without prior notice, where reasonably necessary to accommodate participant requirements, available time, practical progress, organisational policies, licensing, usage capacity, platform availability or changes to products and services. Such adjustments will be guided by the overall learning objectives and the effective delivery of the programme.