



# Microsoft 365 Copilot Chat Foundation

We'll get started shortly



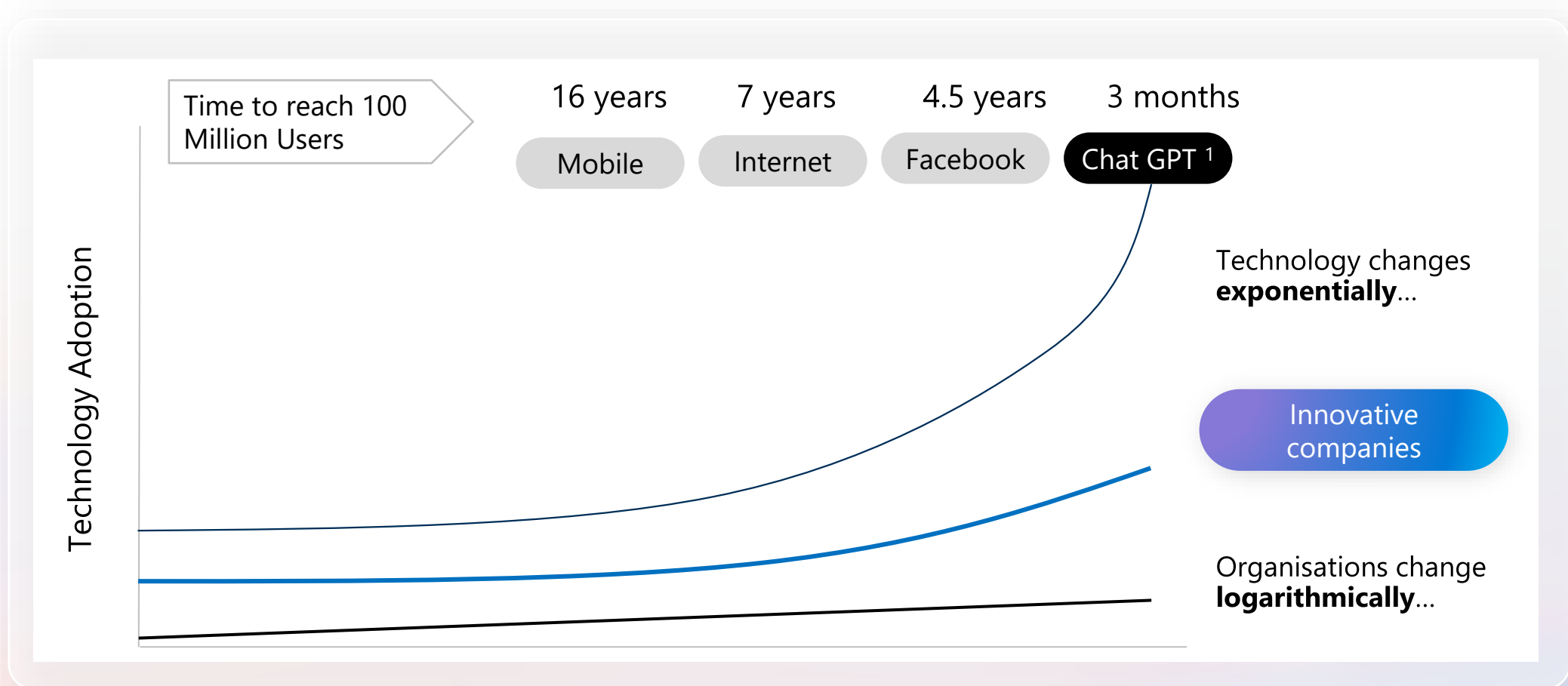


# Microsoft 365 Copilot Chat Foundation

Dewayne Hyatt  
Sr Cloud Solution Architect  
Former EDU Systems Administrator  
Former Microsoft MVP  
Dad, Nerd, Wannabe Disc Golfer  
<https://www.linkedin.com/in/dewaynehyatt>



# While generative AI technology is [here](#), enterprise AI adoption needs a strategy



# Copilot Vocabulary

## Microsoft 365

- A subscription-based service that combines productivity apps like Word, Excel, and PowerPoint with intelligent cloud services and advanced security to help individuals and businesses achieve more.

## Generative AI

- AI that can create new content, such as text, images, or music, based on the data it has been trained on.

## LLM (Large Language Model)

- A type of AI model trained on vast quantities of text that represents a wide range of general subject matter, typically by sourcing data from the Internet and other generally available publications.

## GPT (Generative Pre-trained Transformer)

- A type of LLM developed by OpenAI that generates human-like text based on the input it receives.

# Copilot Vocabulary

## Prompt

- The input or question given to an AI model to generate a response.

## Grounding

- Connecting AI's responses to real-world information and context to ensure accuracy and relevance. Provides the AI with a solid reference point by connecting it to real-world data (e.g., Microsoft Graph or Microsoft Bing).

## Microsoft Graph

- A platform that connects multiple Microsoft 365 services and provides a unified API to access data from these services, such as emails, calendars, and documents. It helps applications interact with the data stored in Microsoft 365.

## Copilot

- Copilot is an AI-powered service within Microsoft 365 apps that enhances productivity and efficiency by assisting with tasks such as drafting emails, summarizing documents, and generating presentations. It uses a complex orchestration to select the best model for each task, ensuring optimal performance and accuracy. This comprehensive solution leverages various AI models and integrates seamlessly with the Microsoft 365 ecosystem to provide real-time intelligence and support.

# What we'll learn today:

- What Copilot Chat is and how it's different from other AI chat tools
- How to use Copilot Chat
- What agents are in Copilot Chat and how to use them
- Example Copilot Chat prompts



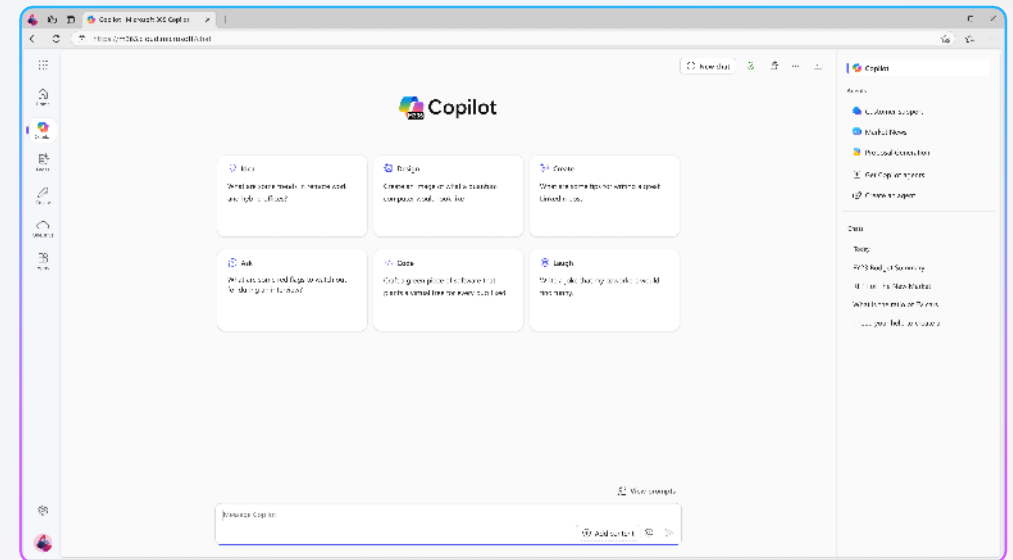
**What is Copilot Chat?**

# An approved AI chat tool

**Microsoft 365 Copilot Chat is an AI chat tool built specifically for work.** It uses the latest AI models and data from the web to answer your questions, generate content and ideas, and find information. It also protects your data so information from your chat conversation does not get exposed to the public.

In addition, with Copilot Chat you can:

- Upload files to get responses based on information from your work documents, presentations, etc<sup>1</sup>.
- Generate images<sup>1</sup> and data visualizations.
- Refine and collaborate on chat responses.
- Connect Copilot Chat to your organization data like team documents and internal SharePoint sites<sup>2</sup>.



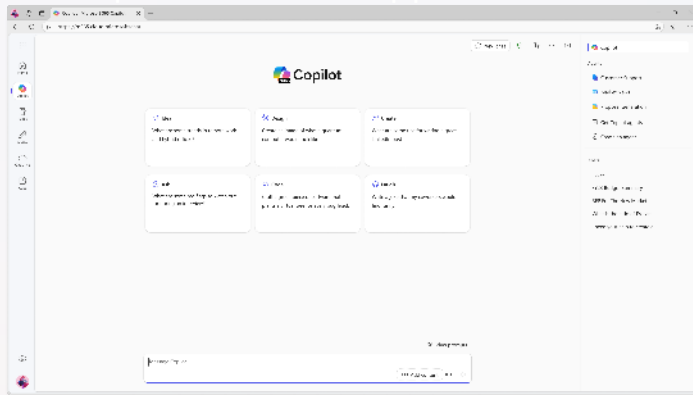
Get started by going to [M365Copilot.com](https://M365Copilot.com)

<sup>1</sup>Image generation and file upload limits apply.

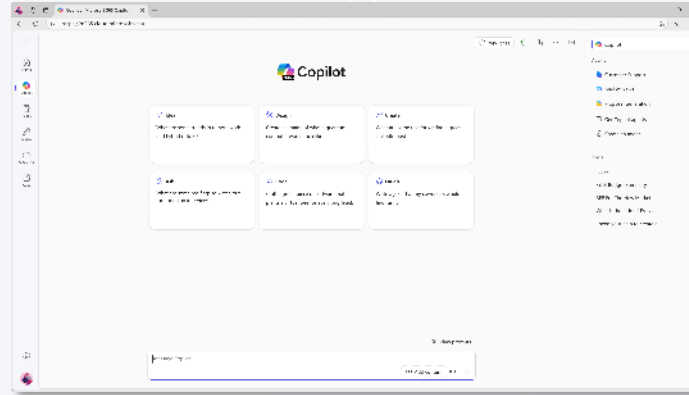
<sup>2</sup>Connecting Copilot Chat to your organization data is only available if your organization admin has enabled this capability.

# Access Copilot Chat from where you're working

M365Copilot.com



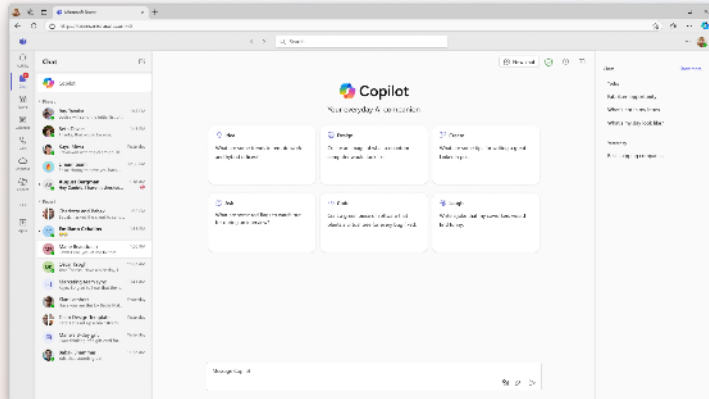
Microsoft 365 Copilot app\*



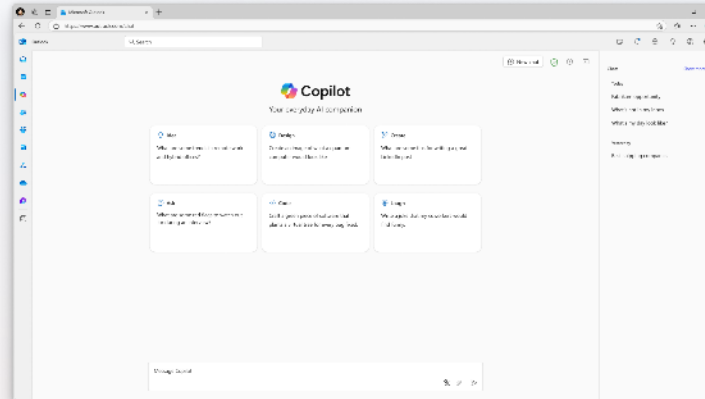
Edge browser sidebar



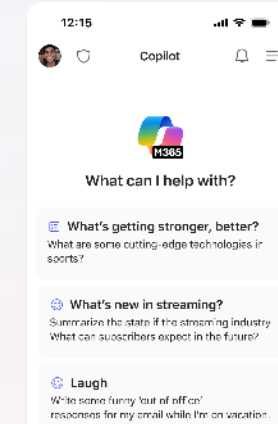
Teams app



Outlook app



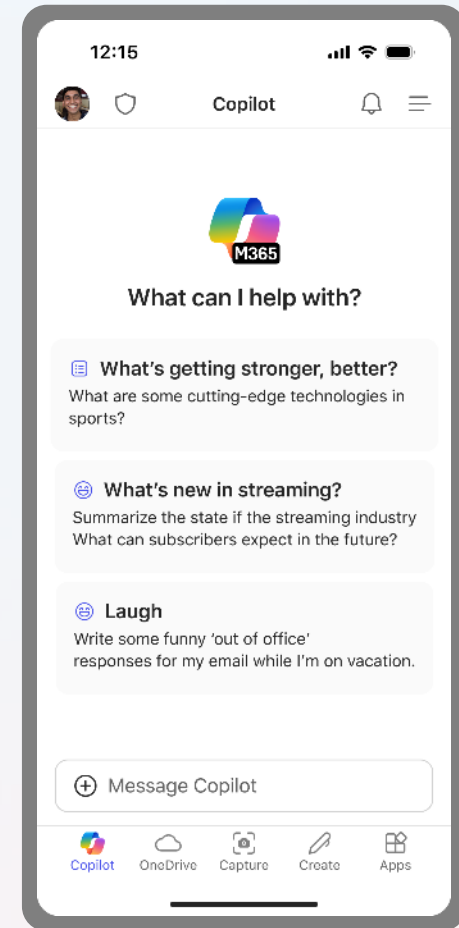
Microsoft 365 Copilot mobile app



\*Ensure Copilot is pinned to your left navigation across Teams, Outlook, and the Microsoft 365 app.

# Use Copilot Chat on the go

Download the Microsoft 365 Copilot mobile app and sign in with your work or school account to access Copilot Chat

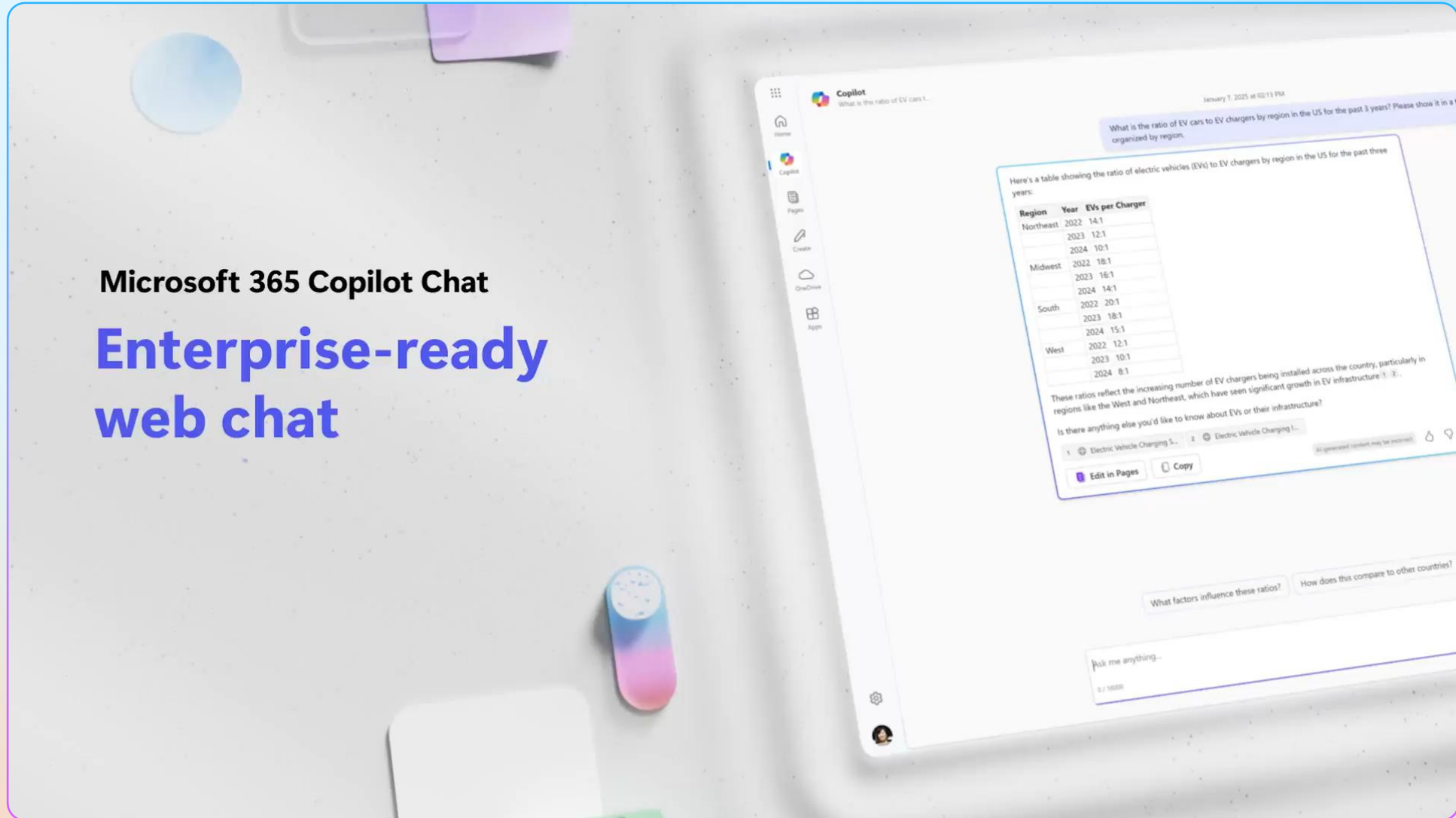


**Get started with Copilot Chat**

# Video: Copilot Chat


Microsoft 365 Copilot Chat

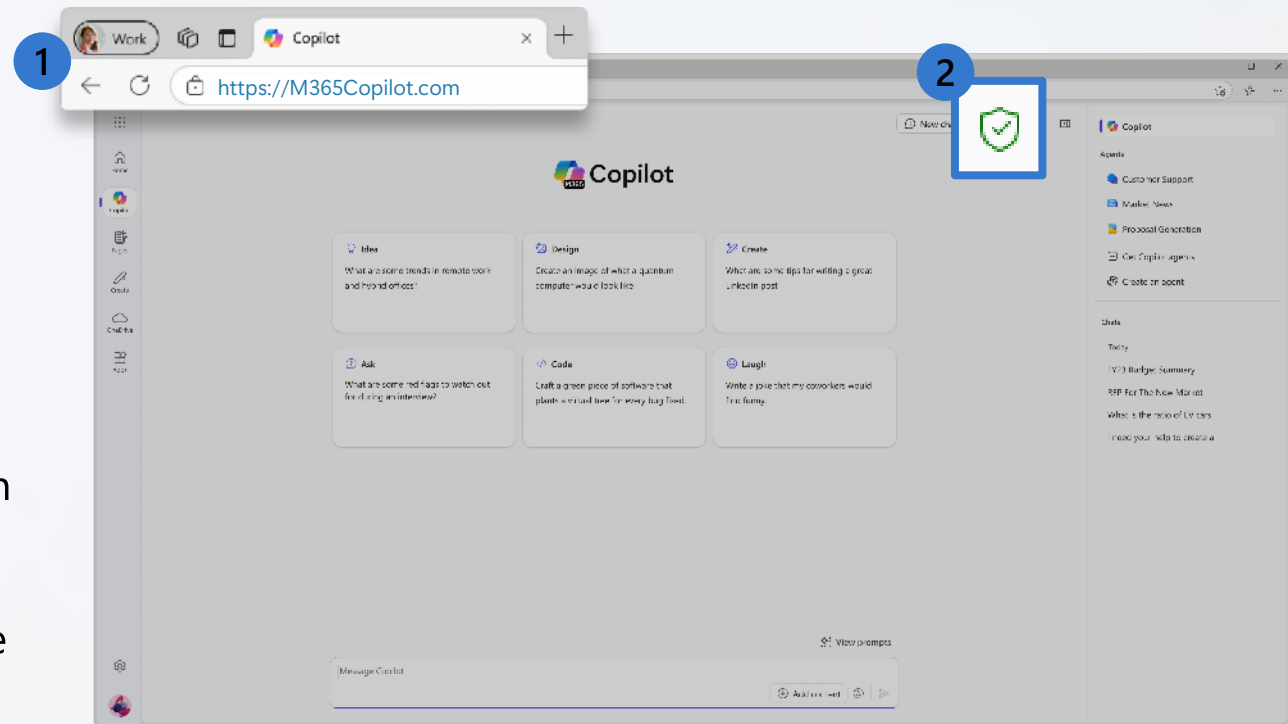
Enterprise-ready  
web chat



# Sign in with your school account

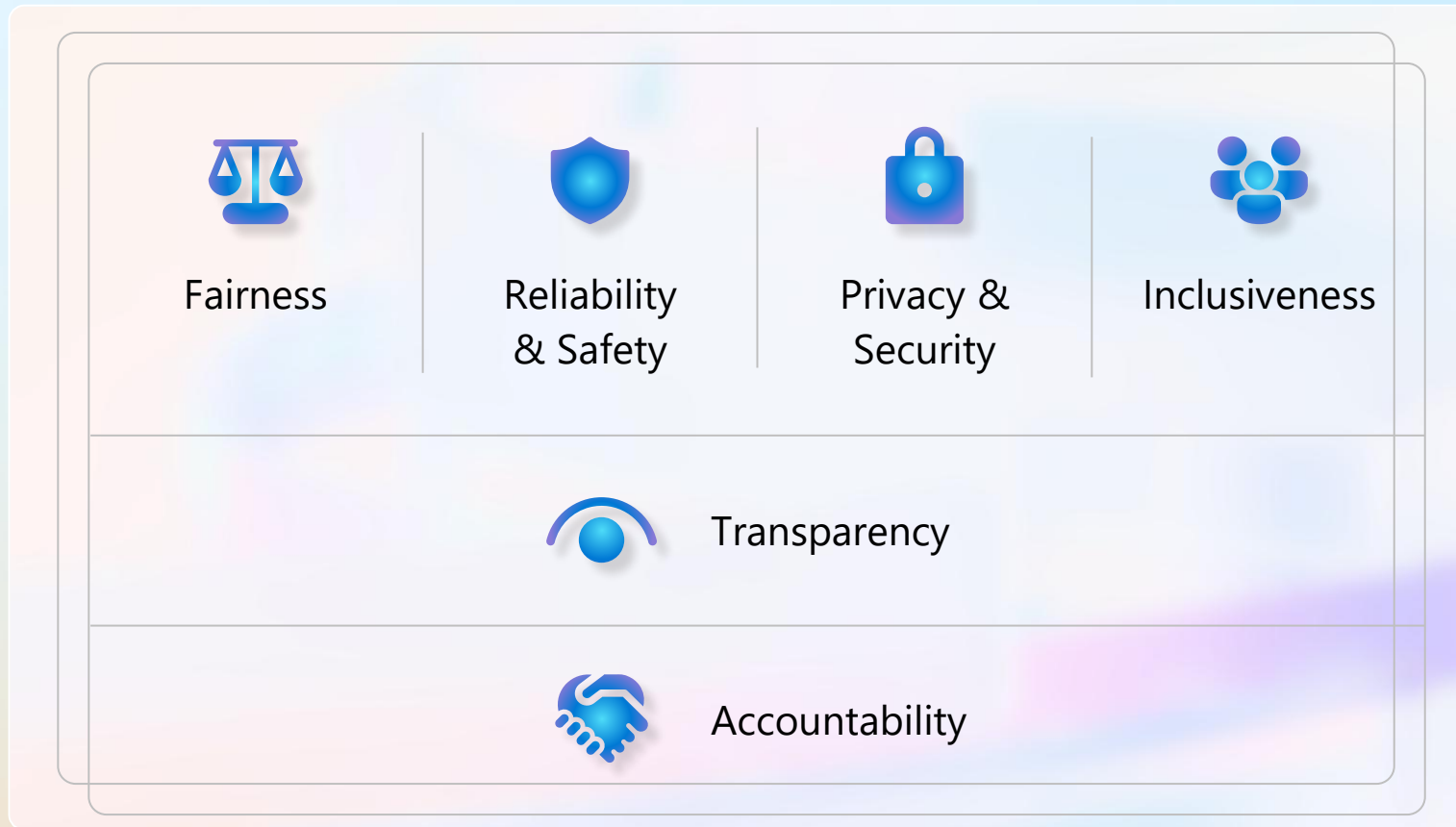
- 1 Navigate to [M365Copilot.com](https://M365Copilot.com) on your preferred browser on your device to get to Copilot Chat.
- 2 Ensure you're signed in with your school account.

You will know you are successfully signed in to Copilot Chat when you see the green shield icon  next to "New chat" and the Microsoft 365 Copilot icon at the top of the page.



 If you are not signed in with your school account, Enterprise Data Protection does not apply.

# Responsible AI



## Microsoft Cloud — AI you can trust

Your data is **your** data.

Your data is **not** used to train the foundation LLMs.

Your data is **protected** by the most comprehensive enterprise compliance and security controls.

We must ensure that AI serves society broadly, not narrowly

[Empowering responsible AI practices | Microsoft AI](#)

# Get to know Copilot Chat

Start at

[M365Copilot.com](https://m365copilot.com)

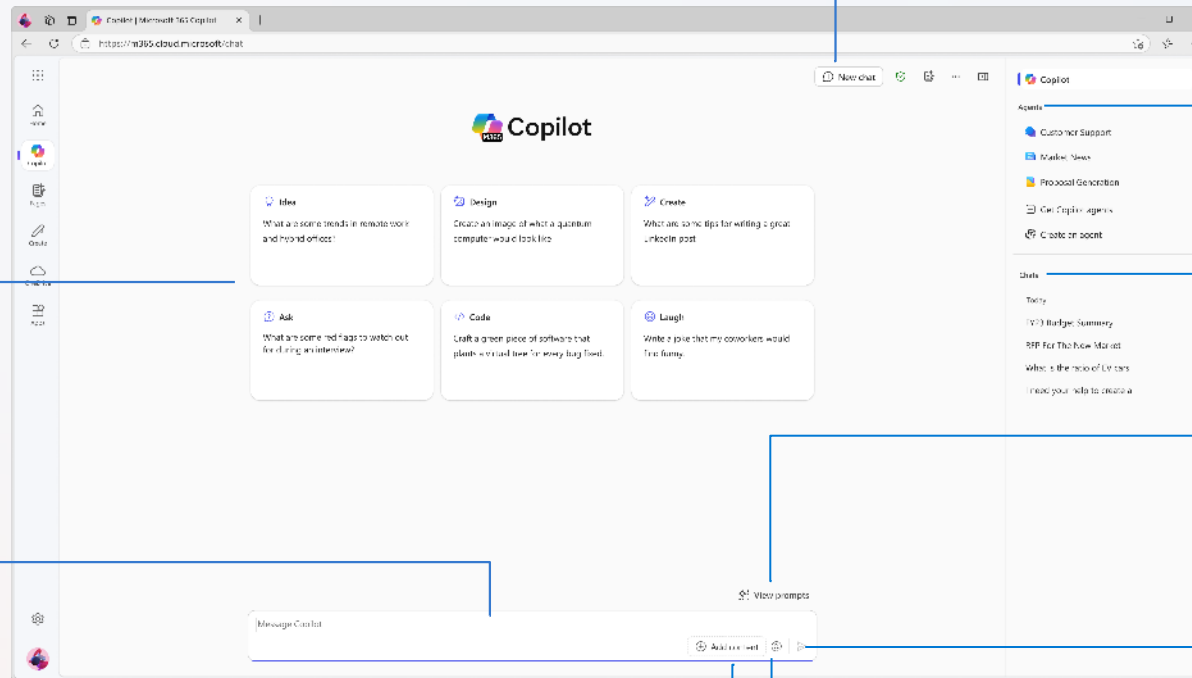
Here is a visual tour of Copilot Chat:

## Suggested prompts

If you're not sure what to ask, try or modify a sample prompt!

## Prompt box

Start your conversation here.



## Start a new chat button

Clear your past chat and start a new conversation.

## Agents

Use existing agents or create new ones<sup>1</sup>. Learn more about agents in [slide 27](#).

## Recent chats

Return to a previous chat to continue the conversation

## Copilot Prompt Gallery

View additional prompt suggestions, including saved prompts.

## Send your prompt!

## Upload files

If you'd like Copilot to source responses from information in specific files, add them here.

## Chat with an agent

Add an agent to your Copilot prompt to chat with it.

# How to chat in 3 steps



## 1. Enter your prompt

Enter your detailed prompt in the text box at the bottom. If you would like Copilot to source information from any reference files, you can upload them in your prompt by selecting the "Add content" button.



## 2. Check sources

Copilot Chat is transparent about the sources of its information. See these sources listed underneath the answer. Vet these sources and validate your answers.



## 3. Continue the conversation

You can ask follow-up questions as you would in a conversation. You can refine the answer too.

For example, try "Write a shorter answer" or "Give me more detail." You can also select suggested prompts.



# Prompt Crafting

An essential Copilot skill



# What is a prompt?

**Prompts** are how you ask Copilot to do something for you — like creating, summarizing, editing, or transforming.

Think about prompting like having a conversation, using plain but clear language and providing context like you would with an **assistant**.

## Tell Copilot what you need

### **Learn** about projects and concepts:

"What is [Project X] and who are the key stakeholders working on it?"

### **Edit** text:

"Check this product launch rationale for inconsistencies."

### **Transform** documents:

"Transform this FAQ doc into a 10-slide onboarding guide."

### **Summarize** information:

"Write a session abstract of this [presentation]."

### **Create** engaging content:

"Create a value proposition for [Product X]."

### **Catch-up** on missed items:

"Provide a summary of the updates and action items on [Project X]."

Break the habit!

# Keywords to Conversations

**Keywords:** For decades, we've been conditioned to search the internet using keywords. This method, while effective, has somewhat limited our ability to communicate naturally with technology. Keyword searching often requires us to think in terms of specific phrases or terms, which can be restrictive and sometimes frustrating.

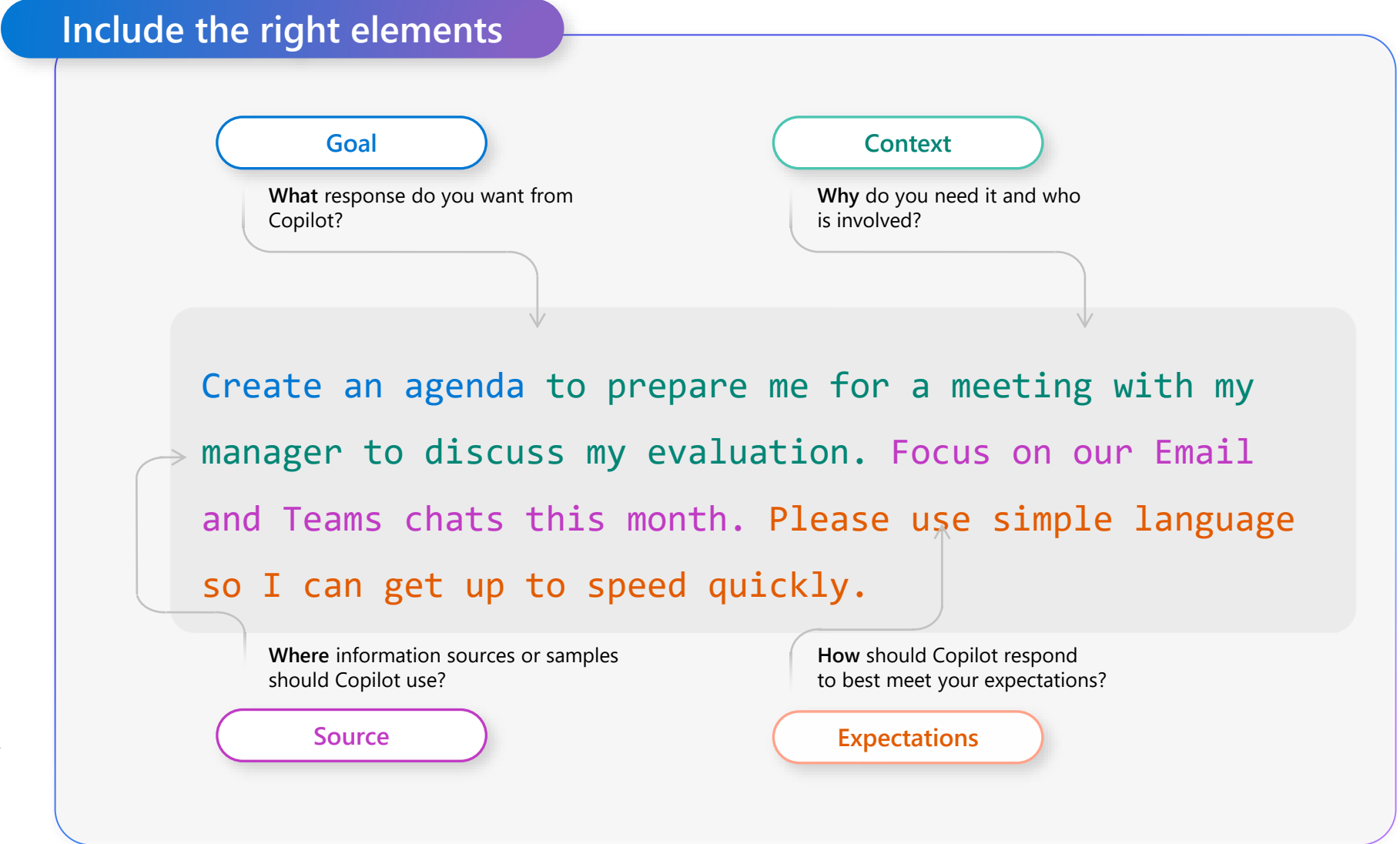
## Search Engine:

A screenshot of a search engine results page for the query "format painter powerpoint". The search bar at the top contains the text "format painter powerpoint". Below the search bar, there are navigation options: "All", "Images", "Videos", "News", "Maps", "Shopping", "Assist", "Chat", and a settings icon. The results are filtered to "Always private", "All regions", "Safe search: moderate", and "Any time". The first result is from Microsoft Support, titled "Use the Format Painter - Microsoft Support", with a sub-heading "Learn how to use Format Painter to copy and paste formatting from one object to another in Excel, Word, and PowerPoint. See tips, shortcuts, and examples of formatting text and graphics." Below this are two links: "Copy the fill and formatting from..." and "Video: Copy formatting - Micros...". The second result is from "artofpresentations.com" titled "Format Painter in PowerPoint - What is it and How to Use it?", dated Feb 24, 2023. The third result is from Microsoft Support titled "Copy the fill and formatting from one shape to another", with a sub-heading "Right-click the shape with the formatting that you want to copy, and on the Mini toolbar, click Format Painter. Your pointer changes to . That means the next object that you click gets the first shape's formatting. Click another shape. The copied formatting is applied to the second shape. The Format...". The fourth result is from "edu.cfglobal.org" titled "Using the Format Painter in PowerPoint and Word". The fifth result is from "pptassist.com" titled "How To Use Format Painter In PowerPoint".

## Answer Engine:

A screenshot of an Answer Engine interface. At the top, it says "You" and "how do I use format painter in PowerPoint". Below this, there is a "Copilot" section. The Copilot section contains a detailed answer: "Using the Format Painter in PowerPoint is a great way to quickly apply the same formatting to multiple objects. Here's a step-by-step guide:" followed by a numbered list of three steps: 1. Select the object, 2. Click the Format Painter icon, and 3. Apply the formatting. Below the list is a tip: "Tip: You can also use keyboard shortcuts for Format Painter. Press Ctrl + Shift + C to copy the formatting and Ctrl + Shift + V to paste it." At the bottom of the Copilot section, there is a "Learn more" link to "support.microsoft.com" and a "+8 more" link. Below the Copilot section, there are icons for liking, sharing, and downloading, and a "2 of 10" indicator. At the very bottom, there is a small screenshot of the Microsoft PowerPoint interface showing the Format Painter tool on the ribbon.

# A Prompt Framework



To get the best response, it's important to focus on some of the **key elements** when phrasing your Copilot prompts.

The quality of your prompt directly influences the quality of the output from Copilot

# ACTIVITY:

Think of a dog playing with a toy.  
Try to imagine or “draw” the entire scene in your mind.

That's a good puppers!



## My prompt:

Create an image of a dog holding a tennis ball in its mouth. The dog should be a mixed breed, primarily hound, with black and white coloring. The dog should appear happy. The setting is a public park in a small suburb, with playground equipment visible in the background. The weather should be clear, indicating a spring day. The perspective of the photo should be head-on, facing the dog, with the background subtly blurred

# Collaborate with Copilot



**Following up** on your prompts helps you collaborate with Copilot, to gain more useful, tailored responses.

## Keep the conversation going



### Generating content ideas

Lead with broader requests, then give specific details about the content.



### Enabling insightful meetings

Request a meeting recap, then ask for more information about what you should know.



### Storytelling assistance

Ask Copilot to write a story, then guide it by giving more specific, relevant details.



### Gaining insights

Ask for a summary of a specific file, then ask relevant questions to gain deeper insights.



### Translating languages

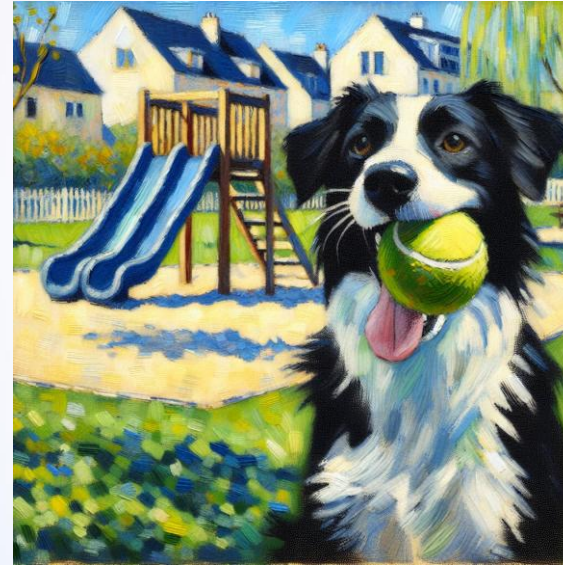
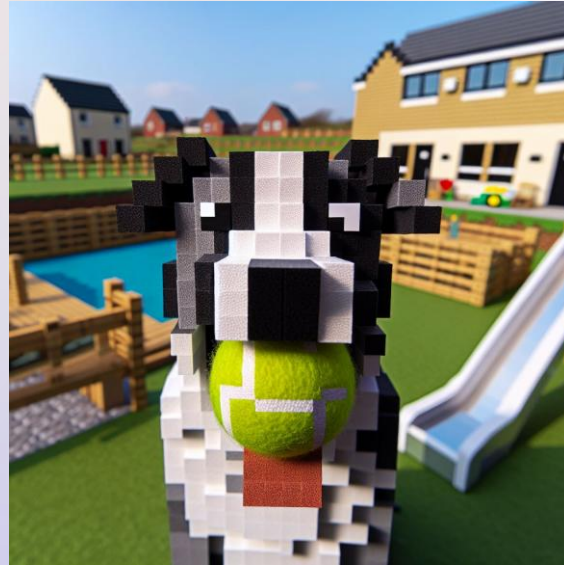
Ask Copilot to translate a sentence to one of the supported languages, then ask for more context or a regional dialect.



### Solving technical problems

Present a technical problem, then narrow it down, or ask for step-by-step guidance.

# Iterate and Regenerate:



Let's flip things around:



## Customer Copyright Commitment

### Use Copilot with confidence

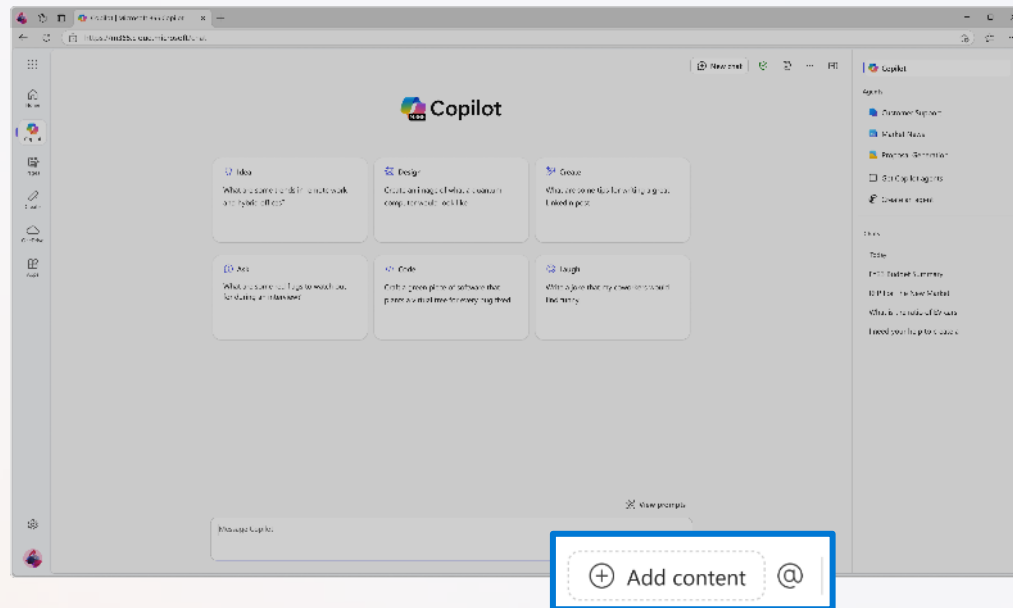
Microsoft stands  
behind Copilot  
customers

Microsoft is  
sensitive to the  
concerns of  
authors

Copyright  
guardrails are built  
into the product

[Copilot Copyright Commitment](#)

# Upload a file to your prompt

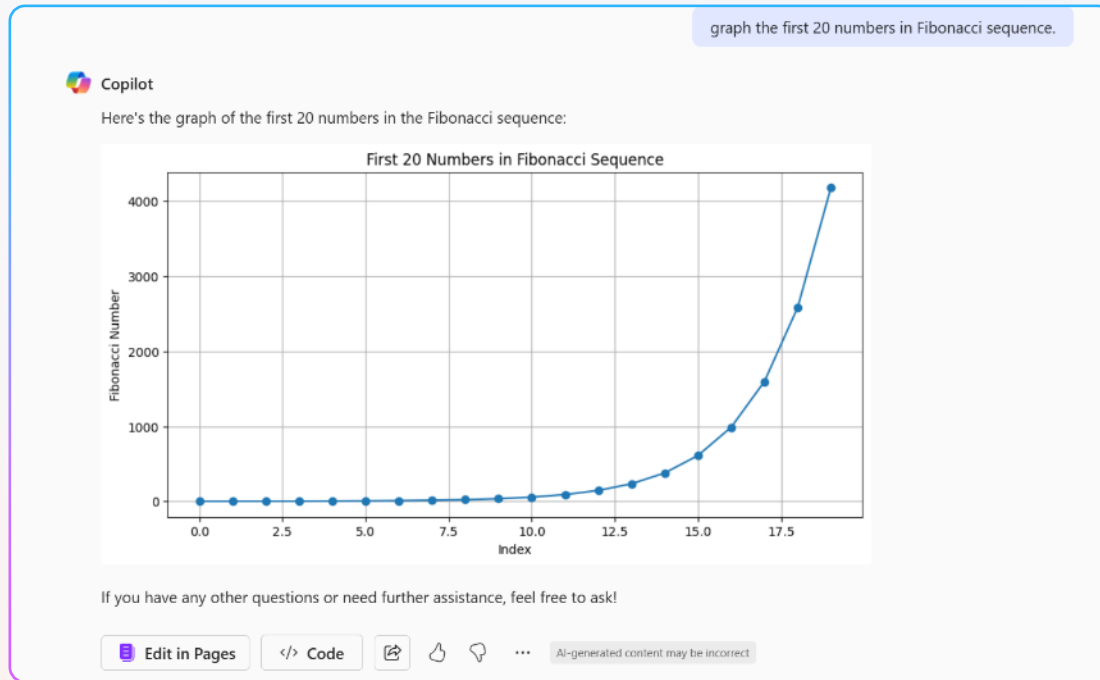


Want Copilot to respond using information from a Word document, PowerPoint deck, or other file? Select the "Add content" button in the Copilot Chat prompt box to upload a file.

*Example prompt: Summarize this document in 5 bullet points. <attach file>*

Note: Copilot Chat supports uploads of Word documents, PowerPoint decks, Excel spreadsheets, PDFs, and more.

# Use Copilot Chat to visualize data



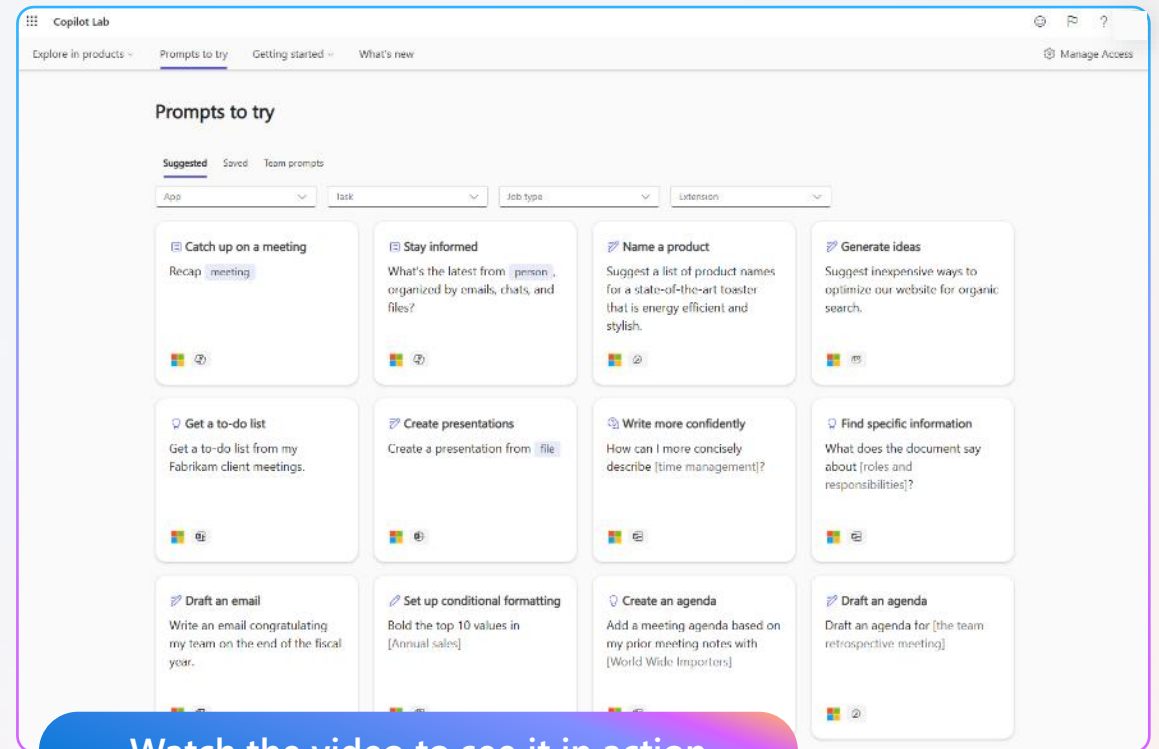
Copilot Chat has built-in capabilities to graph and visualize data as it's relevant to your prompt.

For example, use the prompt: *"Graph the first 20 numbers in Fibonacci sequence"*.

# Discover and share Copilot prompts

**Copilot Prompt Gallery** (formerly known as Copilot Lab) helps you find prompting inspiration so you can take greater advantage of Copilot in your daily work.

- Explore the curated selection of Copilot prompts
- Save your favorite prompts
- Share your favorite prompts with colleagues
- Find prompting inspiration from others

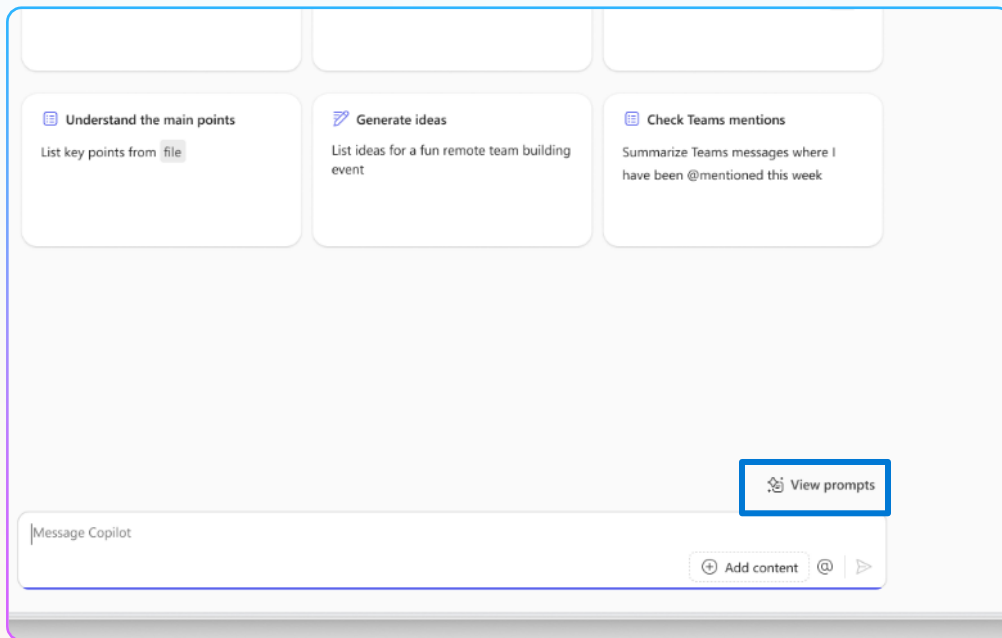


[Watch the video to see it in action](#)

# Navigating to the Copilot Prompt Gallery

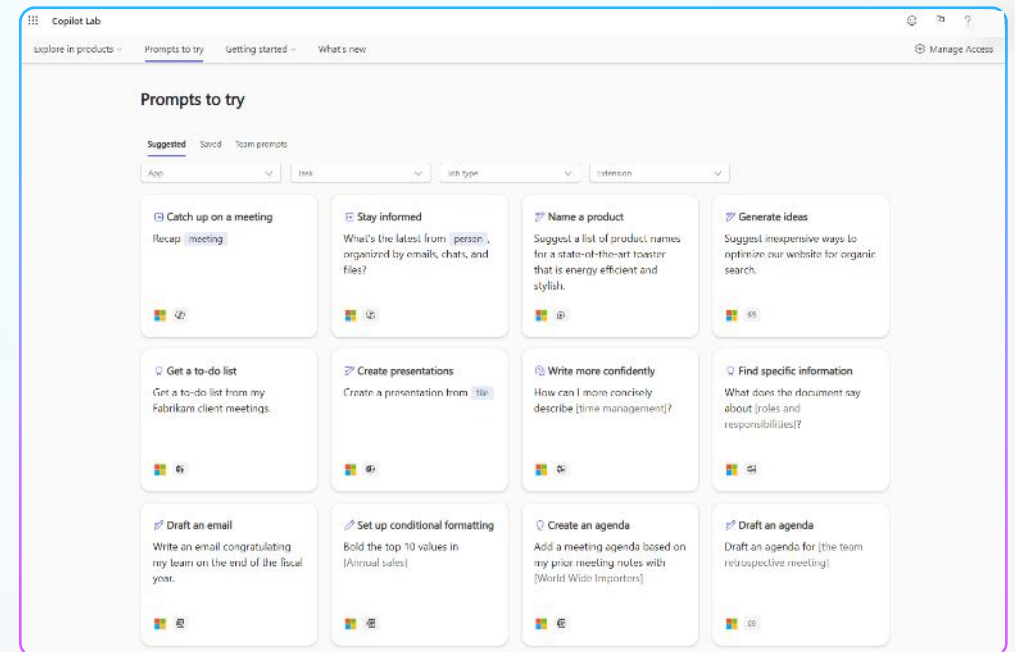
## In-product experience

Select “View prompts” next to the Copilot prompt box. Here, you’ll see suggested Copilot prompts and your saved prompts.



## Prompt Gallery website

Go to [aka.ms/Prompts](https://aka.ms/Prompts) to access the full Prompt Gallery experience. Here, you can find relevant Copilot prompt examples using the filters, view prompts that you and your team saved, and share useful prompts.








# Automate tasks and processes with agents

Agents use AI to make Copilot Chat even more personalized and intelligent for your daily work. Agents automate repetitive tasks and processes – think of them like apps for Copilot. Copilot Chat comes with a set of agent templates to get started with, or you can create custom agents for your own needs<sup>1</sup>.

**Get started with agent templates** by selecting “Get agents” in the right-side pane of Copilot Chat. Search for a specific template or browse the library.

Agents from Microsoft to try today:

<p><b>Prompt coach</b></p>  <p>Create effective Copilot prompts</p>	<p><b>Idea coach</b></p>  <p>Get brainstorming assistance</p>	<p><b>Writing coach</b></p>  <p>Refine your writing</p>	<p><b>Career coach</b></p>  <p>Get personalized career advice and action plans</p>	<p><b>Learning coach</b></p>  <p>Learn about topics and refine your skills</p>
--	--	--	---	---

Besides the agents from Microsoft, your organization may have created agents for you to use as well. You can view these in the “Built for your org” section in the agent library.

<sup>1</sup>Agent creation is only available if your organization admin has enabled this capability.

# Automate tasks and processes with agents

Create a custom agent by selecting “Create an agent” in the right-side pane of Copilot Chat<sup>1</sup>. Describe what you’d like your agent to do or select “Configure” to further customize it. Creating an agent allows you to connect Copilot Chat to your organization’s shared data<sup>2</sup> to further unlock productivity – for example, you can connect the agent to a team SharePoint site and ask the agent questions about team documents.

Top ways to use custom agents:

## Automate contract reviews



Create an agent to identify key clauses, ensure compliance with legal standards, assess potential risk, explain clauses, and summarize lengthy contracts.

## Assist new hires with onboarding



Create an agent to greet new team members, assist them with technical issues, answer questions, and provide helpful resources.

## Review resumes



Create an agent to analyze resumes stored in a SharePoint library, compare them with job criteria, score candidates, and answer questions about candidates.

## Retrieve research materials



Create an agent that connects to a SharePoint link with research documents so you can quickly find relevant information.

## Get answers about company policies



Create an agent to get answers about company policies such as time off, remote work, benefits, workplace conduct, and health and safety.

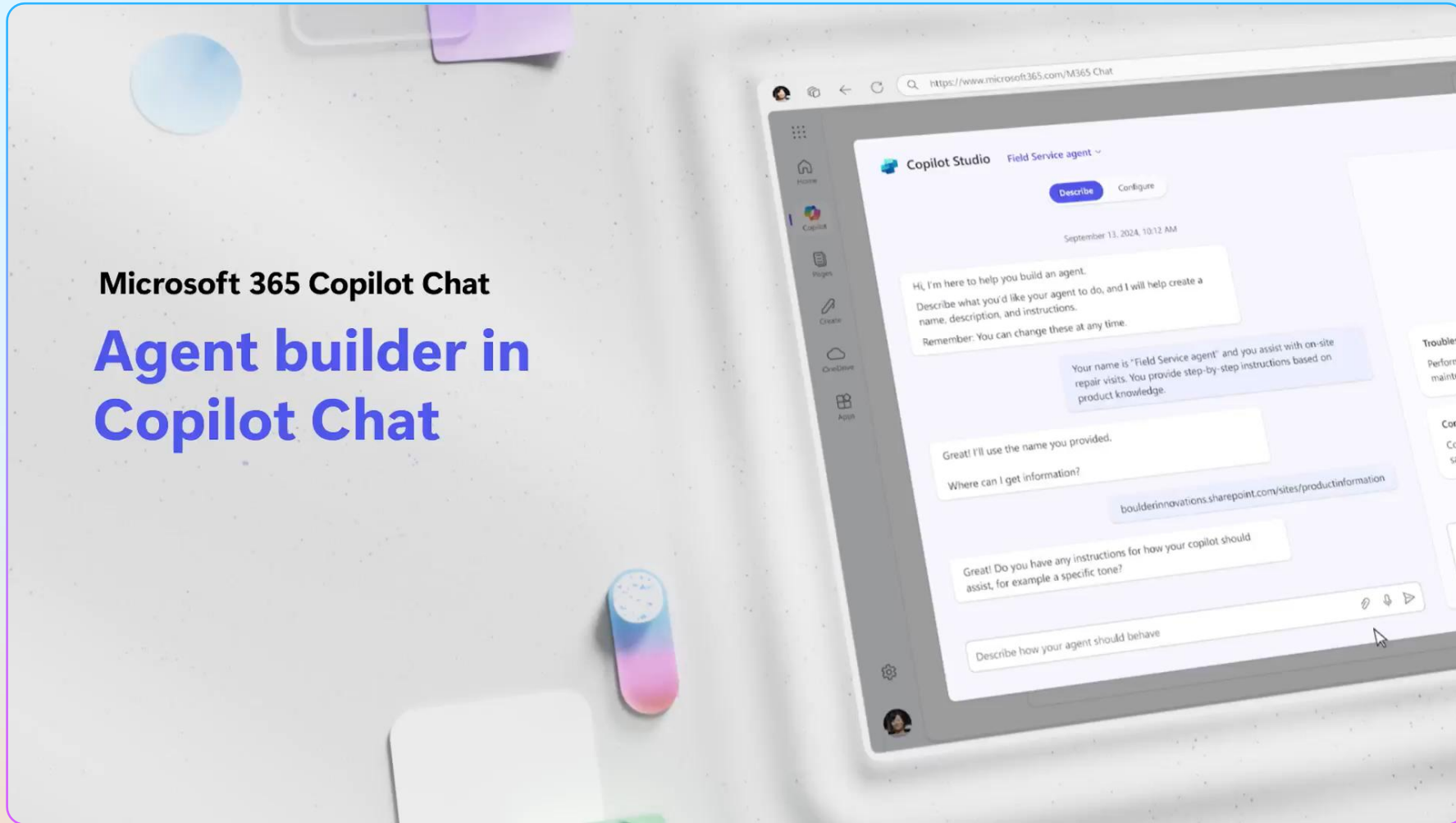
<sup>1</sup>Agent creation is only available if your organization admin has enabled this capability.

<sup>2</sup>Shared data includes SharePoint files and data from your organization’s Microsoft Graph connectors. [Learn more about Microsoft Graph connectors.](#)

# Video: Create an agent

Microsoft 365 Copilot Chat

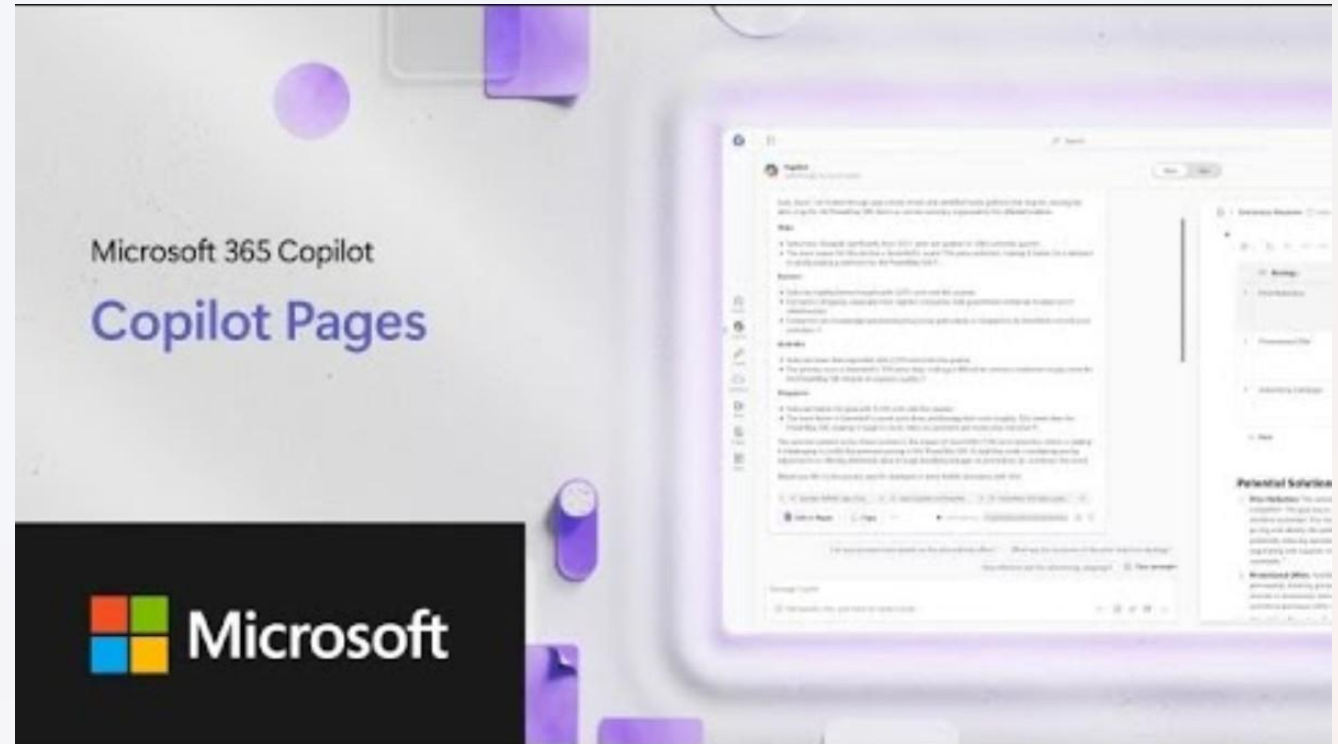
Agent builder in  
Copilot Chat



# Edit and collaborate on Copilot responses with Copilot Pages

Did you know that you can format, fine-tune, and collaborate on Copilot responses directly in Copilot Chat?

With Copilot Pages, Copilot Chat becomes your workspace – so you don't have to jump between surfaces to get a project done. Watch the video to see it in action!



Video

# Copilot Chat prompt examples

# Get the answers you need to move forward

*Get hiring tips*

How can I evaluate an interview candidate's soft skills?

*Summarize a file*

Summarize this document in 5 bullet points. <attach file>

*Start your research*

How have world literacy rates changed in the past 30 years?

*Calculate the answer quickly*

At \$X per unit, how many units to break even if costs are \$Y

*Reach a broader audience*

How do you say [thank you for your time] in Japanese?

*Discover synonyms*

What are some other words for [exciting]?

*Understand trends*

Share some trends in remote work and hybrid offices

*Retrieve buried info*

What are the deadlines mentioned in this file? <attach file>?

*Boost your knowledge*

Help me learn about [topic]. Provide 2 analogies & files to dig in.

*Highlight the differences*

Compare these two paragraphs grouped by differences in formatting, structure, and content: [paste content]

*Monitor your PR*

Give me a concise summary of recent news about [company]

*Stay on top of tech advances*

Summarize the main points of the latest research on AI

*Make informed decisions*

Create a table that compares top-selling office printers

*Make your code better*

Optimize and fix this code: [insert code]

# Brainstorm and draft content quickly

*Co-create with Copilot*

Ask me 3 questions to help me draft an email about [OKRs]

*Going on holiday?*

Write some funny Out of Office email responses.

*Make it stand out*

Suggest a few email subjects for the following email: [body]

*Generate ideas*

List ideas for a fun remote team building event

*Put info in a table*

Organize the world's most valuable companies into a table

*Visualize the data*

Create an image of a bar chart demonstrating growth

*Track changes over time*

Create a line chart showing the relationship between...

*Start a conversation*

Suggest ways to break the ice with my new colleague.

*Jump-start a draft*

Create an FAQ based on this file <attach file>

*Draft an introduction*

Write a compelling intro paragraph for this speech <attach file>

*Make it better*

Improve my writing in: <attach file>

*Disagree gracefully*

Provide a convincing counterargument to the following: [paste content]

*Rally the team*

Draft an exciting email ... using <attach files>

*Get started on a plan*

Draft a business plan based on [idea]



## Microsoft 365 Copilot Chat

# Congratulations!

We want you to grow your skills in AI. We encourage you to keep exploring Copilot Chat with the resources below:

- Check out the [Copilot Prompt Gallery website](#) for more learning videos and prompt examples.
- Join the [Microsoft 365 Copilot Community on LinkedIn](#) to get more Copilot Chat tips and product updates and engage with other users.
- Keep up with what's new on the [Copilot Blog](#) or the What's New monthly [PowerPoint](#)

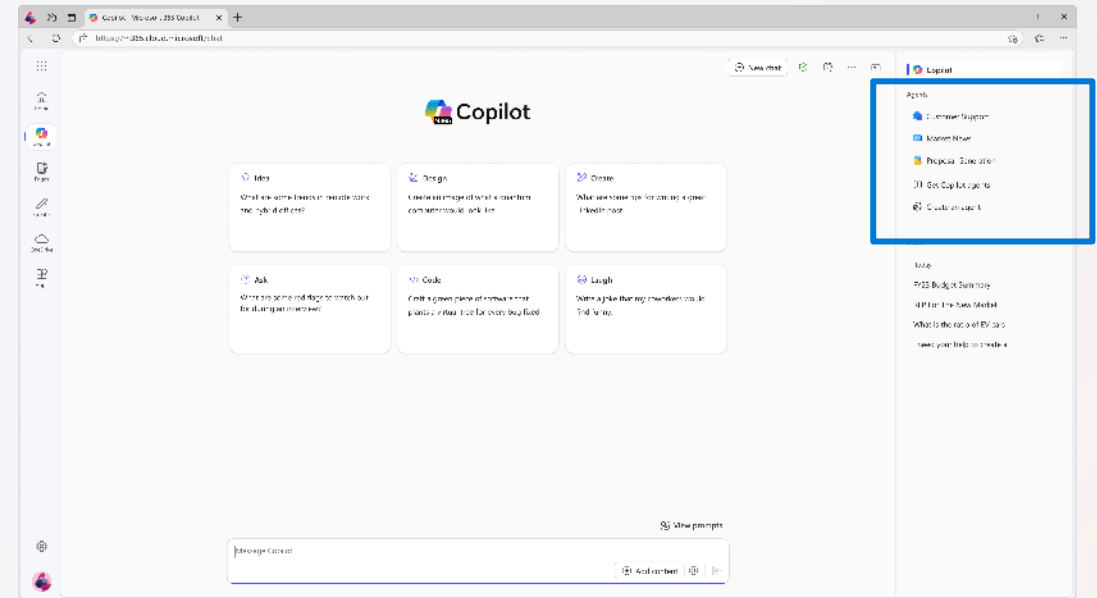
**Additional resources**

# Copilot Chat replaces Microsoft Copilot

Copilot Chat offers the chat experience you're familiar with along with some added features like using and creating agents<sup>1</sup> to connect Copilot Chat to your shared organization data<sup>2</sup>.

Other changes:

- Access the Copilot Chat web app from the new URL: [M365Copilot.com](https://m365copilot.com)
- The app icon has changed from the purple and blue icon to the rainbow icon with a "M365" tag.



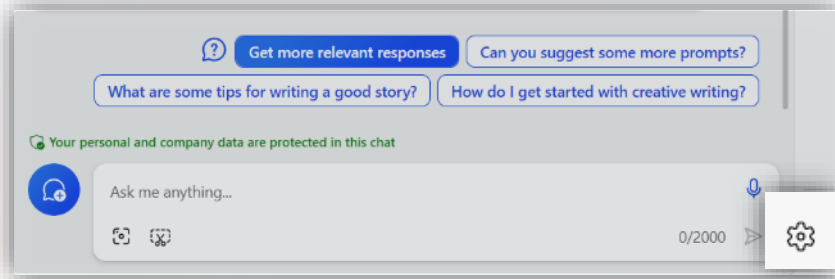
<sup>1</sup>Agent creation is only available if your organization admin has enabled this capability.

<sup>2</sup>Shared data includes SharePoint files and data from your organization's Microsoft Graph connectors. [Learn more about Microsoft Graph connectors.](#)

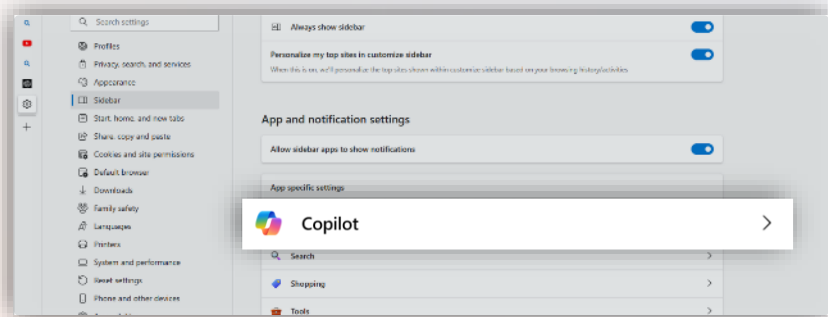
# If Edge sidebar cannot “read” an open PDF or webpage, you may need to change your settings

Follow these steps to enable Copilot Chat to “read” the open PDF or webpage

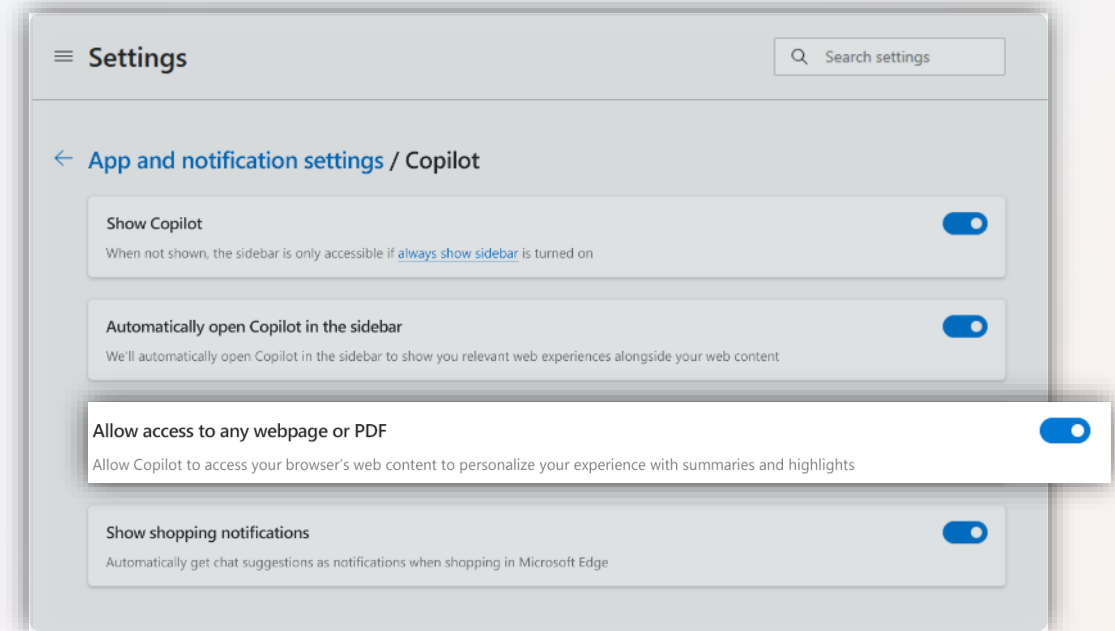
- 1 First, select the gear icon at the bottom right of the Edge sidebar



- 2 Select “Copilot” within the list of apps



- 3 Enable the “Allow access to any webpage or PDF” setting switch (see below)



# FAQ

## **Why is data protection important when using AI chat tools at work?**

Company data and intellectual property are crucial to our competitive advantage. The problem with using generative AI without enterprise data protection is that prompts or content you generate can be exposed to the public as part of another answer. That's where Copilot Chat comes in: it's protected with enterprise data protection, so what you put in and get out is not used to train the underlying AI model. Our company data stays safe.

## **How do I know I'm using Copilot Chat with Enterprise Data Protection?**

You'll know you're using Copilot Chat with Enterprise Data Protection if you see a green shield icon next to the "New chat" button.

## **Can I trust the answers generated when using AI?**

Copilot Chat aims to base all its responses on reliable sources, but AI can make mistakes, and third-party content on the internet may not always be accurate or reliable. Copilot will sometimes misrepresent the information it finds. This is why Copilot is transparent and shows the sources of information behind its answers. Always check the sources before making decisions or taking actions based on

# FAQ Continued

## **What can Copilot Chat access when I use it?**

Copilot Chat leverages the latest web information to respond to your prompts. It does not have access to data from your device or your organization's information. You will need to use an agent to access work data. When using Copilot Chat in the Microsoft Edge sidebar, you can grant it permission to view content on your current page to generate summaries. However, Copilot Chat will not access or use other browser data, such as your browser history.

## **Are there limits for how much I can use Copilot Chat?**

As with other AI tools, there are limits to how many turns (prompts and responses) you can do per chat conversation and per day. If you reach those limits, you will be notified within the experience.