



Microsoft 365

# Copilot Chat

# Welcome to M365 Copilot Chat

**BE PRESENT**  
Multi-tasking is a myth



**CLOSE EMAIL**  
They'll be there for you later.



**BE CURIOUS**  
Ask questions and be interested in what others have to say.



**RAISE YOUR HAND**  
Raise your hand for real, or virtually, or post a smiley face or thumbs up.



**PHONE AWAY**  
Move it out of reach so you won't be distracted.



**TAKE NOTES**  
Capture important key points as you learn.



**SUGGEST IT**  
If you have any great ideas, share them.



**ENGAGE**  
Participate and engage with others. It may not be your thing, but it may help them to learn.



# What You'll Learn Today

## Overview of Microsoft Copilot Chat

- Topics covered include:
  - What is Copilot Chat
  - Anatomy of a Good Prompt
  - Prompting Do's and Don'ts
  - How Can Copilot Chat Help You?
  - TN Courts Copilot Chat Policies





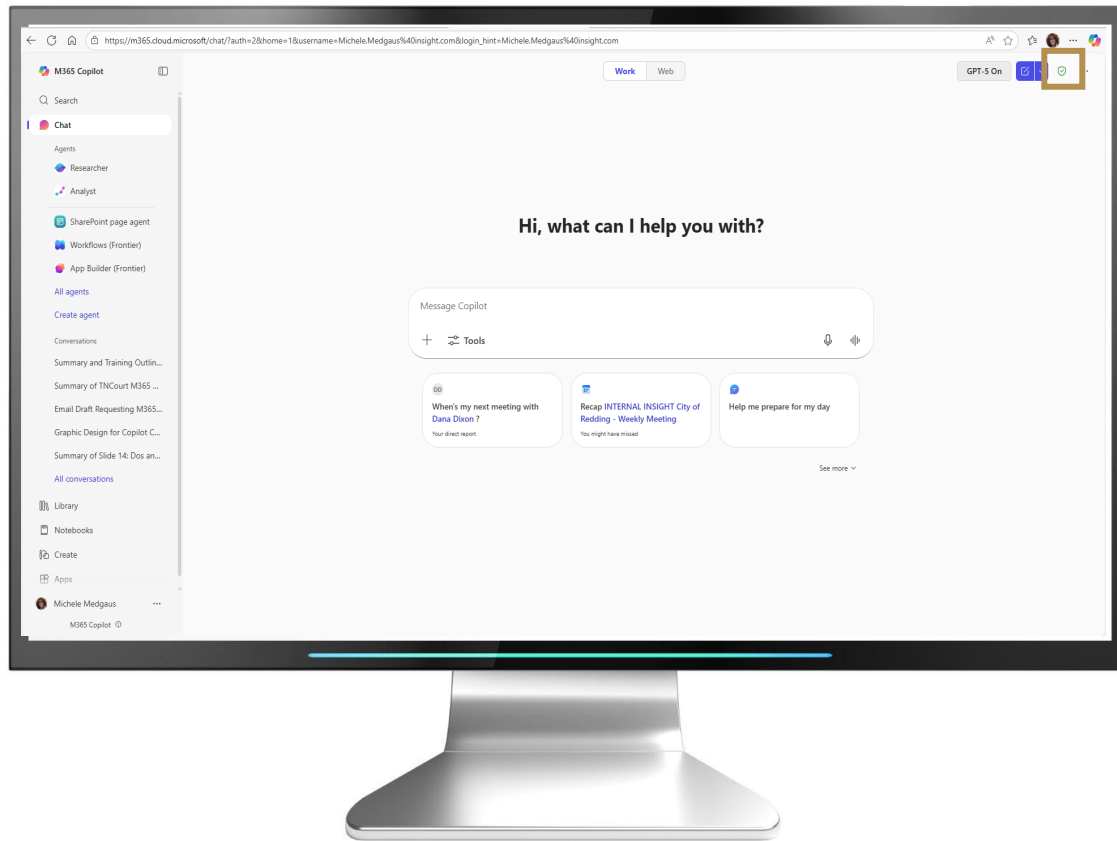
## Lesson 1

# What is Copilot Chat

- Copilot Chat Overview
- How to Access Copilot Chat



# What is Copilot Chat?



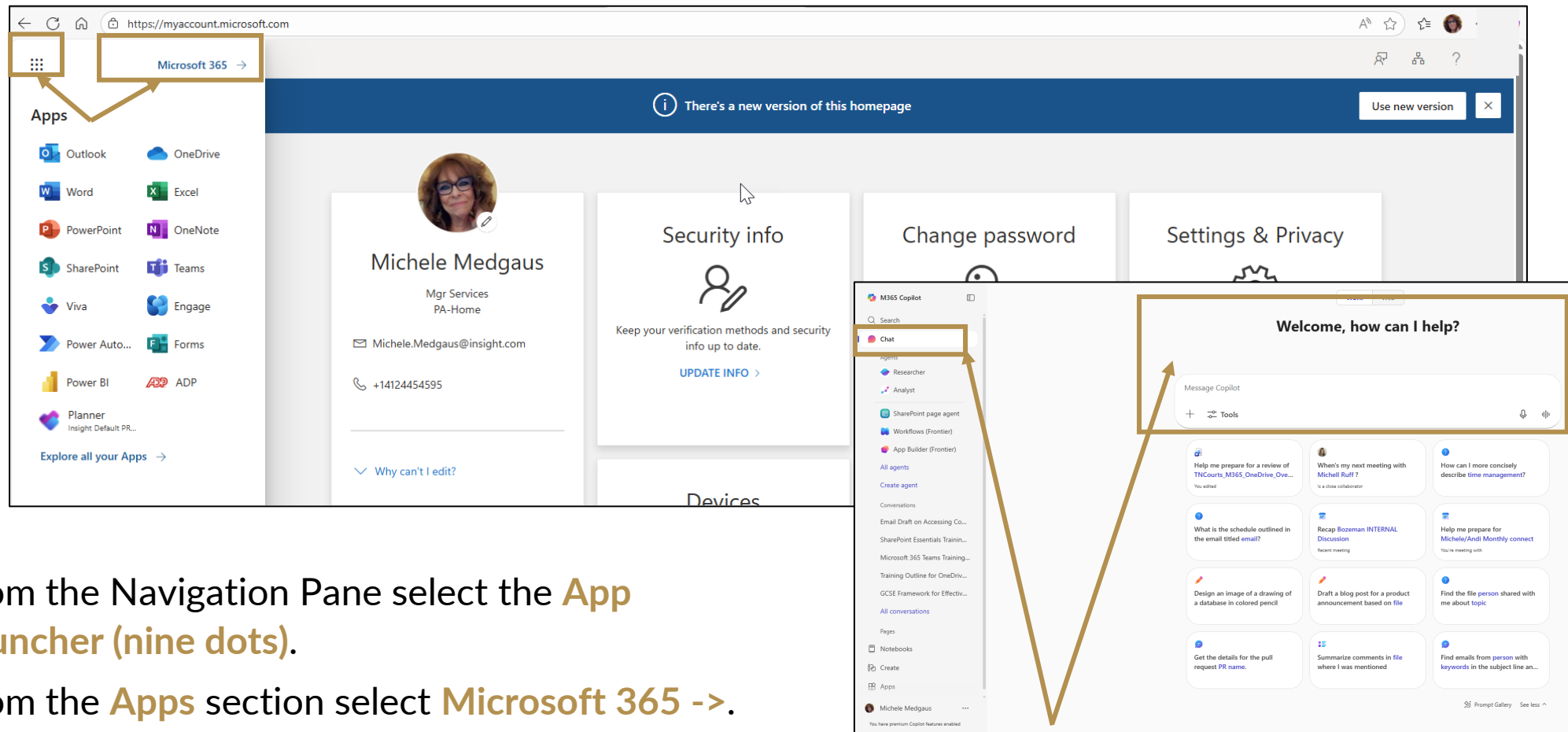
## 🗨️ Copilot Chat

- Your everyday AI assistant for quick help and creative ideas.
- Available through web and mobile, it's perfect for casual use whether you're brainstorming, learning something new, or getting help with everyday tasks. No subscription needed!
- Built with enterprise-grade security, it ensures data privacy by keeping information within our organization and never using your data to train the AI.



# Access Copilot Chat

Type **myaccount.Microsoft.com** into your internet browser, M365 opens.



- From the Navigation Pane select the **App Launcher (nine dots)**.
- From the **Apps** section select **Microsoft 365 ->**.

- **Copilot Chat** displays



# Copilot Chat Overview

M365 Copilot

Search

Chat

Agents

Researcher

Analyst

SharePoint page agent

Workflows (Frontier)

App Builder (Frontier)

All agents

Create agent

Conversations

Email Draft on Accessing Co...

SharePoint Essentials Trainin...

Microsoft 365 Teams Training...

Training Outline for OneDriv...

GCSE Framework for Effectiv...

All conversations

Pages

Notebooks

Create

Apps

Michele Medgaus

You have premium Copilot features enabled

Welcome, how can I help?

Message Copilot

+ Tools

Add work content

Upload images and files

Attach cloud files

When's my next meeting with **Michell Ruff** ?  
Is a close collaborator

How can I more concisely describe **time management**?

What is the schedule outlined in the email titled **email**?

Recap **Bozeman INTERNAL Discussion**  
Recent meeting

Help me prepare for **Michele/Andi Monthly connect**  
You're meeting with

Design an image of a drawing of a database in colored pencil

Draft a blog post for a product announcement based on **file**

Find the file **person** shared with me about **topic**

Get the details for the pull request **PR name**.

Summarize comments in **file** where I was mentioned

Find emails from **person** with **keywords** in the subject line an...

Prompt Gallery See less ^

Try GPT-5

Recent pages

Settings

Copilot Chats and more

Type your prompt in the prompt window

Add a reference

Your previous prompts

Prompting samples

Click to view the Copilot Chat Prompt Gallery for suggested prompts to get you started

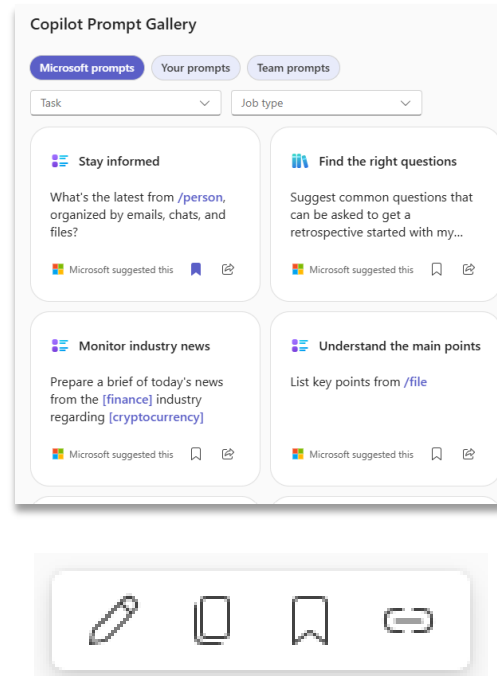


# M365 Copilot Chat Overview



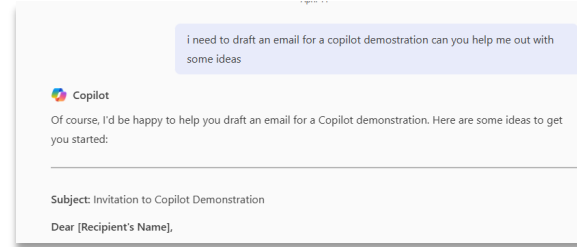
**Copilot Chat** is a conversational interface for quick help, brainstorming, and cross-app queries.

## Copilot Chat Prompt Gallery



It includes **gallery prompts** for common business tasks, **your prompts** personalized to your workflow, and **shared prompts** for team-wide use and collaboration.

## Create & Ideation



Copilot Chat helps draft emails, reports, proposals, and more, and can rewrite or improve existing content with Copilot Chat ideation with suggested prompts

## Enterprise Protection



Copilot Chat enforces tenant isolation, RBAC, and data residency. Customer data is never used for model training.

No Shield  
No Deal





## Lesson 2

# Anatomy of a Good Prompt

- The Art and Science of Prompting



# Copilot Chat Actions and Verbs

|             |              |
|-------------|--------------|
| • Summarize | • Rewrite    |
| • Draft     | • Highlight  |
| • Generate  | • Explain    |
| • Create    | • Calculate  |
| • Design    | • Recommend  |
| • Analyze   | • Schedule   |
| • Compare   | • Prioritize |
| • Visualize | • Convert    |
| • Translate | • Extract    |
| • Format    | • Identify   |
| • Organize  | • Automate   |
| • Outline   | • Tell me    |
| • Review    | • What       |
| • Edit      | • Give me    |



# The Art and Science of Prompting

**Prompts** are how you ask Copilot Chat 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 Chat 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]."





# Prompt Ingredients

Include the right prompt ingredients

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

**Goal**

**What** response do you want from Copilot Chat?

**Context**

**Why** do you need it and who is involved?

**Source**

**Which** information sources or samples should Copilot Chat use?

**Expectations**

**How** should Copilot Chat respond to best meet your expectations?



# Prompt Ingredients

Include the right prompt ingredients

The **GCSE** framework is a structured approach to crafting prompts that help Copilot Chat deliver accurate, relevant, and useful responses.

## Goal

**What** response do you want from Copilot Chat?

## Context

**Why** do you need it and who is involved?

**Generate 3-5 bullet points to prepare me for a meeting with Client X to discuss their “Phase 3+” brand campaign. Focus on documents. Please use simple language so I can get up to speed quickly.**

Which information sources or samples should Copilot Chat use?

## Source

**How** should Copilot Chat respond to best meet your expectations?

## Expectations





# Edit, Copy, Schedule, Save and Share Prompts

## Copilot Chat Prompt

Today

Write an overview of how Microsoft 365 Copilot can help improve productivity in enterprises. Generate 3 bullet points.






1

2

3


4

5




1

• Edit




2

• Copy




3

• Schedule




4

• Save



5

• Share



## Copilot Chat Prompt Gallery

Copilot Prompt Gallery


Suggested

Your prompts

Task


Job type

Copilot agent

 Write more confidently


How can I more concisely describe [\[time management\]](#)?

Microsoft suggested...

 Find the right questions


Suggest common questions to start a retrospective with my colleagues

Microsoft suggested...


 Sharpen your suggestions

Analyze this text suggestions on how to use Copilot Chat


Microsoft suggested...

 Monitor industry news

Prepare a daily brief of news

 Copy-edit this

How's this grammar? [\[insert\]](#)

 Going on holiday

Write some funny prompts

Copilot Prompt Gallery


Suggested

Your prompts

All



Task

Job type


 create a quick guide for...

create a quick guide for how to use Copilot Chat

You created this





Remove from saved

 Write more confidently

How can I more concisely describe [\[time management\]](#)?

Microsoft suggested this



Conversations

Overview of Your Team Collaboration

Microsoft 365 Copilot ...

AI Engineer Interview Questions

Meeting Conflicts, Priorities

Meeting Conflicts, Priorities

All conversations



## Lesson 3

# The Dos and Don'ts of Prompting

- Copilot Chat Prompting Dos and Don'ts



# Keep Iterating to Improve Your Prompts

You are an HR Manager who needs to prep for an upcoming Candidate hiring interview for a new position within the IT department for an AI Engineer. Create a prompt that will help you prepare for the interview.

Good

Help me prepare for an upcoming candidate interview for a new AI Engineer role in our IT department by creating a list of questions

Better

I'm an HR Manager who needs to prepare for a candidate interview for our new AI Engineer role in IT. Please prepare a list of appropriate questions for the candidate, so that I looked prepared during the interview

Best

I'm an HR Manager who needs to prepare for a candidate interview for our new AI Engineer role in IT. Please review the candidate's resume here: [/\[resume file\]](#) and the position detail here: [/\[position doc\]](#) and provide me a comprehensive list of questions that I can use to determine the candidate's fit against the position

Goal

Context

Source

Expectations



# Questions to Ask

Consider how to make your prompts more **impactful** by thinking about how Copilot Chat can help in your **entire** workflow.

## Ask yourself these questions when prompting



Why am I using this prompt?

What is the context for this task.



What will I do with the output of this prompt?

Am I going to send it on to someone else?  
Transform it into a different format?



Can I extend Copilot Chat's remit to save more time

Can I ask Copilot Chat to do a bigger task to automate more work?



# Practice - Provide Specific Instructions

Copilot Chat is built to act, so telling Copilot Chat what “to do” or what “not to do” can be very effective.

- *Prompt 1:* Write an overview of how Microsoft 365 Copilot Chat can help improve productivity in enterprises. Generate 3 bullet points.
- *Prompt 2:* Summarize the latest Microsoft AI announcements for a keynote speech on stage at Ignite, Microsoft's annual conference. Do not include any announcements from before January 2025 and ensure to highlight the impact of these innovations.

Goal

Context

Source

Expectations





# Keep it Conversational

**Following up** on your prompts helps you collaborate with Copilot Chat, 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 Chat 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 Chat 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.



# Copilot Chat Best Practices



## Check your facts:

AI generated content may be incorrect at times.

## Keep, modify, or disregard:

Revise and refine your prompts.

## Copilot Chat is not autopilot:

Be specific about what you want and use common language.

## Do

- Keep it conversational
- Give examples or a background story
- Check for accuracy

## Don't

- Give conflicting instructions
- Interrupt or change topics abruptly
- Use acronyms
- Be vague



# Prompting Best Practices -1



1

Prompt **length** and **clarity** matters

If it's too short, you will get generic results.

---

If it's too long, AI might not follow all your instructions.



# Prompting Best Practices -2



2

**Break down** a problem into **multiple** steps

**Single-Step Approach:** Write a comprehensive report on the impact of digital transformation in commercial banking, including key trends, statistics, and case studies.

---

**Step-by-Step Approach:**

Step 1: "Generate an outline for a report on the impact of digital transformation in commercial banking."

Step 2: "Expand the section on key trends in digital transformation within the commercial banking sector." Step 3: "Provide statistics and case studies for each key trend."



# Prompting Best Practices -3

3

**Persona** based prompting



This approach offers specialized guidance, providing solutions tailored to each persona's unique characteristics.

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It results in more satisfying interactions, with responses aligned to users' expectations and needs.





# Prompting Best Practices -4

4

Ask Copilot Chat what they need from you



Instead of guessing, ask Copilot Chat what information you need to provide for success.

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**Example:** "Copilot Chat, what specific details or context do you need from me to create an effective strategy for improving customer satisfaction in our banking services?"



# Prompting Best Practices -5

5

Take a **Holistic Approach** with Copilot Chat



Don't limit Copilot Chat to specific tasks. Consider entire processes like Risk Management, Stakeholder Communication or improving the overall customer experience at your bank.

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Break them into individual tasks to see where Copilot Chat can transform the whole process for greater impact.



# Prompting Best Practices -6

6

Be **Curious**



Experiment! Explore different prompt structures and approaches.

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Curiosity fuels creativity and helps you discover Copilot Chat's capabilities.



# Prompting Best Practices -7

7

Test and refine



Like any collaboration, **iterate**. Adjust prompts based on results.

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Test variations, observe outcomes, and fine-tune your approach.



## Lesson 4

# How Can Copilot Chat Help You?

- Drafting eMails
- Preparing for Meetings
- Summarizing Documents





# 10 Best Options to Explore with Copilot Chat

## Recap a meeting



- Draft an email with notes and action items from **meeting**

## Summarize an email thread



- Click on the Summarize icon

## Draft an email



- Draft an email to **[name]** that informs them that Project X is delayed two weeks. Make it short and casual in tone.

## Summarize a document



- Give me a bulleted list of key points from **file**.



## How can Copilot Chat help you with your work?

### Revise this content



- Rewrite with Copilot Chat

### Translate a message



- Translate the following text into French

## Tell me about a topic/project



- Tell me what's new about **topic** organized by emails, chats, and files?

## Give me some ideas for ...



- Suggest 10 compelling taglines based on **file**

## Help me write...



- Generate three ways to say **[x]**

## What did they say ...



- What did **person** say about **topic**

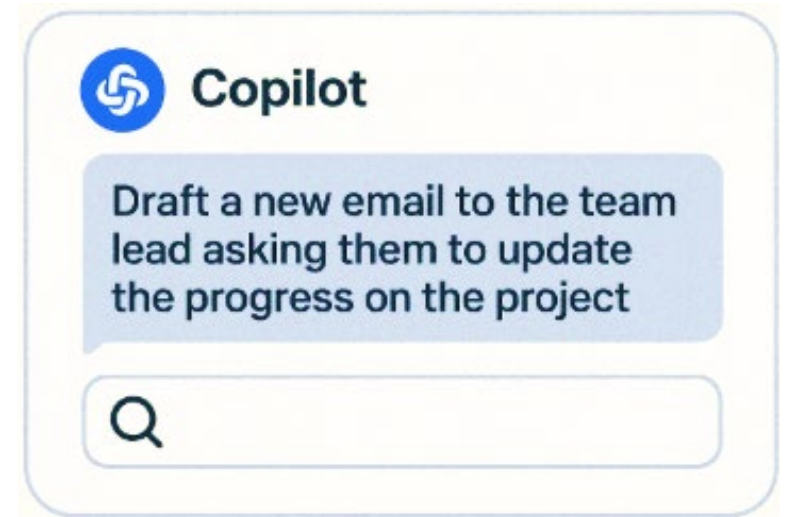


# Sample Outlook Prompts

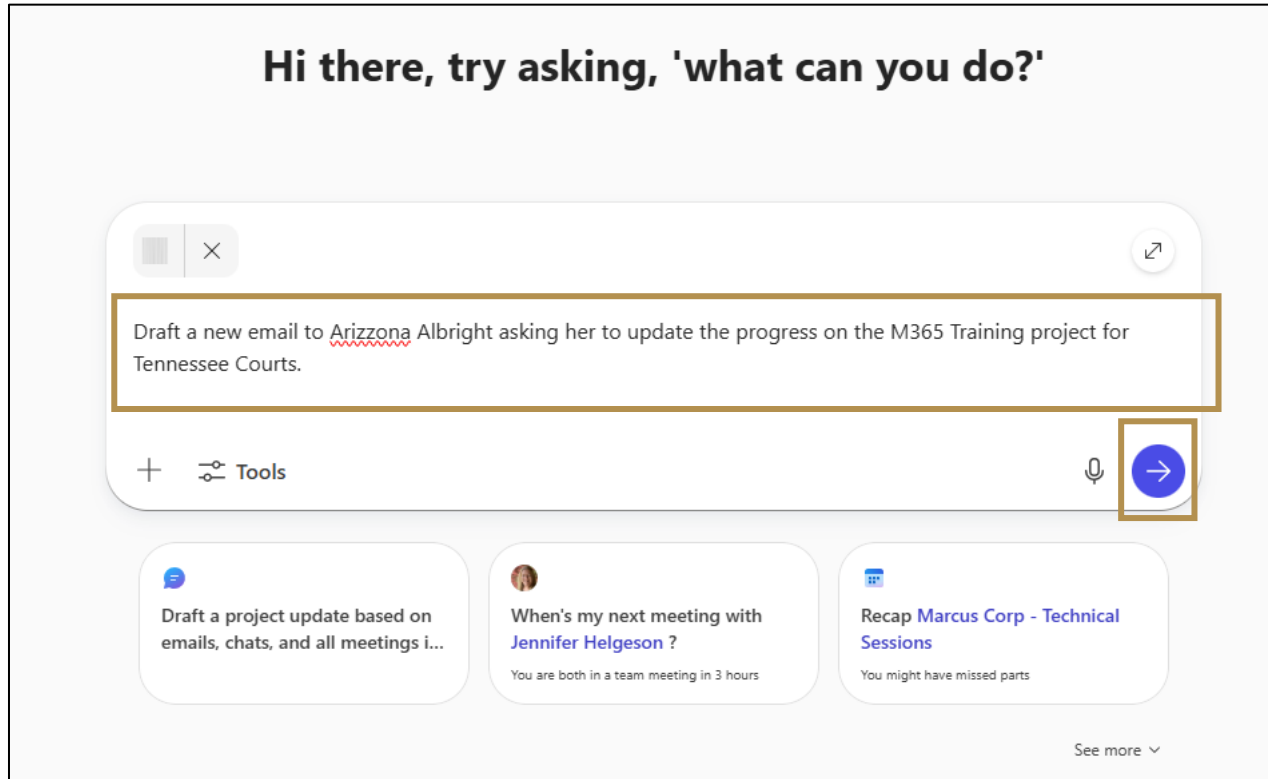
1. Summarize unread emails in a table with topic, summary, action items, and suggested follow-ups. Bold the topic if I'm directly mentioned.
2. Draft a new email to (person) asking them to update the progress on (project).
3. Show me all emails related to (project) that contain attachments since Monday.
4. Prepare for a new meeting with (people) next week, except Friday.

## Other prompts to try

- Generate a 3-5 bullet point list of items that will prepare me for the meeting with (people), using agenda of meeting.
- Please reword this email to be a friendlier tone.
- Find recent emails from (company) and extract action items.



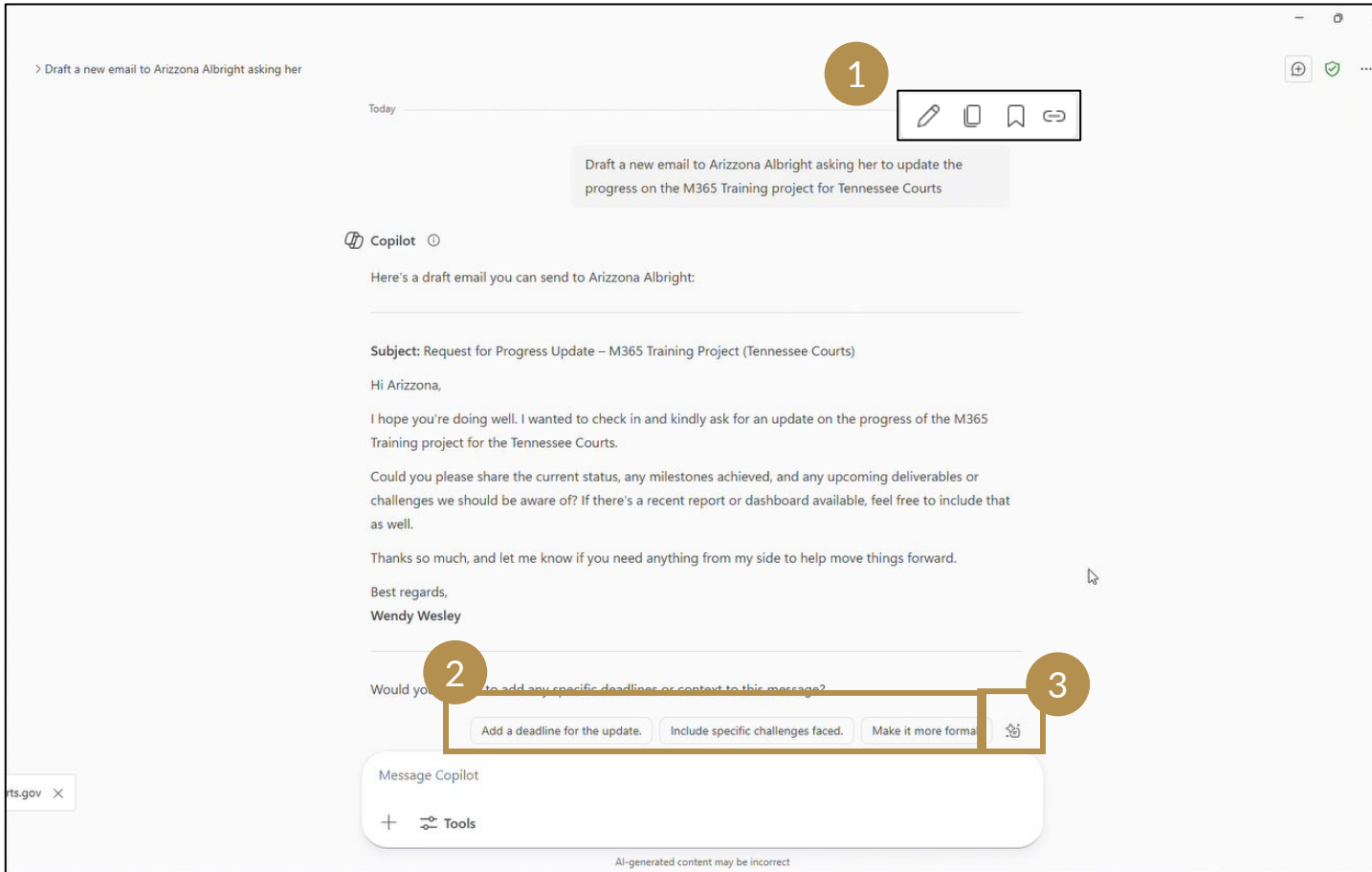
# Create an eMail Using Copilot Chat



- Enter your prompt.
- Click the **Arrow** to send.



# Create an eMail Using Copilot Chat



**Copilot Chat** creates a draft for the email.

1. Hover over the prompt to **Edit**, **Copy**, **Save prompt** or **Copy prompt link**.
2. Select additional prompt suggestions.
3. Select the **Prompt Gallery** to access additional prompt suggestions or prompts that you have saved.



# Copilot Chat Copy and Edit in Pages

progress on the M365 Training project for Tennessee Courts

Copilot ⓘ

Here's a draft email you can send to Arizzone Albright:

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**Subject:** Request for Progress Update – M365 Training Project (Tennessee Courts)

Hi Arizzone,

I hope you're doing well. I wanted to check in and kindly ask for an update on the progress of the M365 Training project for the Tennessee Courts.

Could you please share the current status, any milestones achieved, and any upcoming deliverables or challenges we should be aware of? If there's a recent report or dashboard available, feel free to include that as well.

Thanks so much, and let me know if you need anything from my side to help move things forward.

Best regards,

Wendy Wesley

---

Would you like me to add any specific deadlines or context to this message?

Message Copilot

Tools

1

1. Click the **Copy icon** to copy the email content to the clipboard and then paste into an email.
2. Click the **Edit in Pages (pencil)** icon to move the content from Copilot Chat directly into Word for more advanced editing.
3. You can open Word or Share and co-edit the document with others using Word's collaboration features.

A screenshot of a Microsoft Word document showing a draft email. The title bar at the top says "Draft a new email to Arizzona Albright asking her". The email content is as follows:

Subject: Request for Progress Update – M365 Training Project (Tennessee Courts)

Hi Arizzona,

I hope you're doing well. I wanted to check in and kindly ask for an update on the progress of the M365 Training project for the Tennessee Courts.

Could you please share the current status, any milestones achieved, and any upcoming deliverables or challenges we should be aware of? If there's a recent report or dashboard available, feel free to include that as well.

Thanks so much, and let me know if you need anything from my side to help move things forward.

Best regards,

Wendy Wesley



# Prepare for a Meeting Using Copilot Chat

Copilot Chat can assist you to prepare for meetings by pulling details from agendas or related files.

1. Ask Copilot Chat to prep the meeting.
2. Click the **+** sign to reference related files to pull the agenda & likely topics.
3. Locate your files and click **Open**.
4. Once the file is attached to the prompt, click the **Arrow** to send.

The image is a composite of three screenshots illustrating the process of using Copilot Chat to prepare for a meeting.

**Top Left Screenshot: Copilot Chat Interface**

The chat window displays the prompt: "Prepare an agenda for meeting with Charisse based on following documents TEst meeting notes.pdf". Below the prompt, there are three numbered callouts:

- 1**: Points to the "Tools" button (a plus sign) used to attach files.
- 2**: Points to the "Add work content" button.
- 3**: Points to the "Upload images and files" button.
- 4**: Points to the blue arrow button used to send the message.

**Bottom Left Screenshot: File Explorer**

A file explorer window is open, showing a folder named "GroupWise" containing several files. A file named "GW2014R2\_BasicNotes.doc" is selected. A callout **3** points to the "Open" button at the bottom of the window.

**Right Screenshot: Copilot Chat Response**

The chat window shows the response from Copilot:

Based on the meeting notes from the M365 Phase III OneDrive Project Technical Discussion held on December 9, 2025, here's a proposed agenda for your follow-up meeting with Charisse Bonwell:

**Meeting Agenda: Follow-Up with Charisse Bonwell**

Date: [Insert Date]  
Attendees: Wendy Wesley, Charisse Bonwell  
Meeting Topic: M365 Phase III OneDrive Project – Follow-Up Discussion

**1. Training Update**

- Confirm availability of training via Zoom/Teams for remote users.
- Review Charisse's feedback on the SOW for training deliverables.
- Status of OneDrive course presentation and job aid review.

Below the agenda, there are input fields for "the meeting date." and "Include a summary of previous meetings."





# Sample Word Prompts

1. Produce a summary document of (file).
2. How do I add a table of contents?
3. Please provide questions and discussion points for an upcoming meeting with a colleague.
4. Help me create a short elevator pitch using clear, simple wording on why to use Copilot Chat.

## Other prompts to try

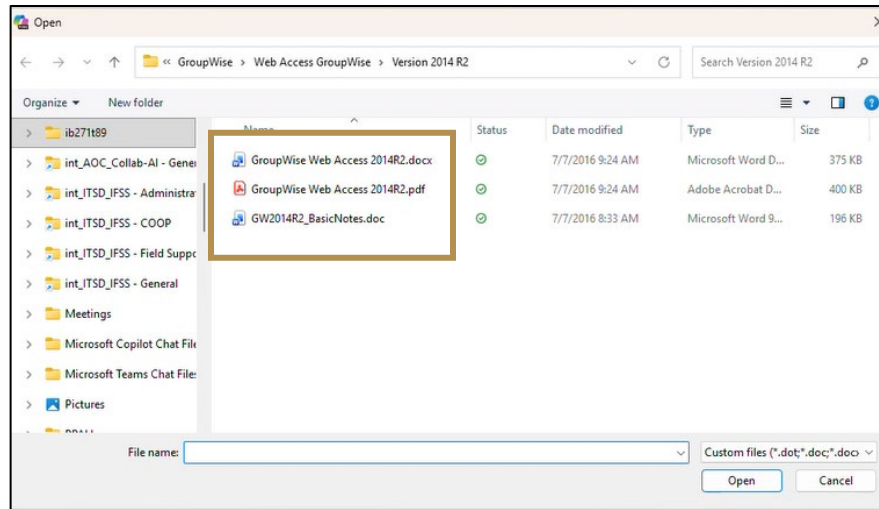
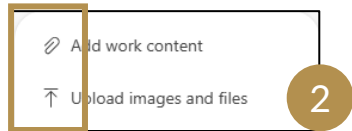
Give me specific examples from this document on how I can improve it for leadership review.

What does the document say about roles or responsibilities?

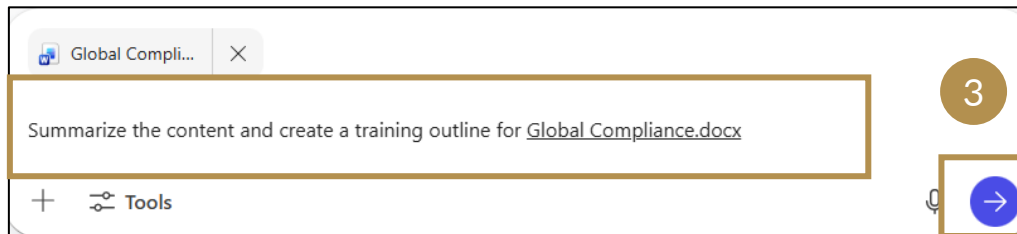
Does the document list any specific training needs?



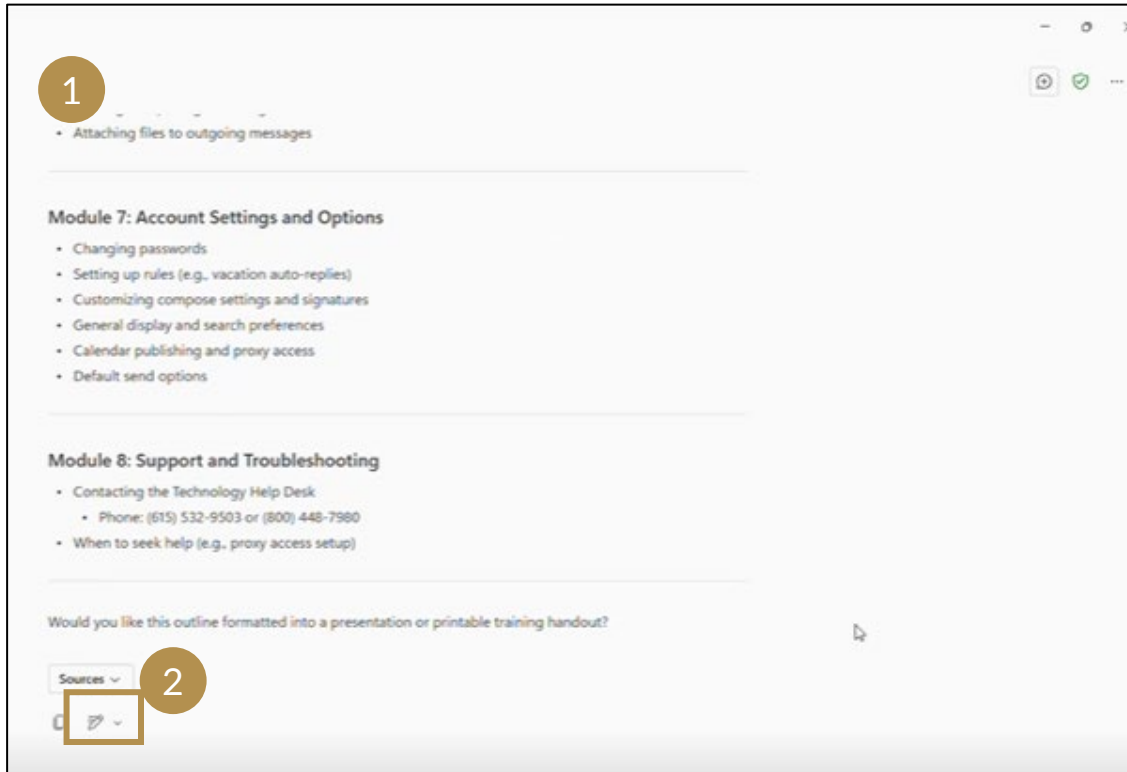
# Use Copilot Chat to Summarize Documents



1. Enter your prompt and click the **Add content +** to attach a file.
2. Click the **paperclip** to reference recent content or click to **Upload images and files** from your device or Attach cloud files.
3. Once the file is attached, click the **Arrow** to send.



# Use Copilot Chat to Summarize Documents



1. Once Copilot Chat summarizes the file referenced in the prompt, you can review, continue to prompt Copilot Chat to elaborate on specific sections, clarify details, or generate actionable items based on the summarized content.
2. Click the **Edit in Pages (pencil)** to edit the content in pages which will allow you to share the chat output and collaborate with teammates.



# How to Use Edit in Pages

**Edit in Pages** lets you move the content created in Copilot Chat into MS Word's editing environment, allowing you to continue refining, formatting, and collaborating on your document without having to exit Copilot Chat.

Summarize the content and

Here's a summary and a training outline based on the document GroupWise Web Access 2014R2:

**Document Summary**

The document is a user guide for accessing and managing email using GroupWise Web Access 2014R2. It provides step-by-step instructions for logging in, navigating the interface, composing and managing messages, using the address book, handling attachments, and customizing account settings. It is designed for users with information for technical support.

**Training Outline: GroupWise Web Access 2014R2**

**Module 1: Introduction**

- Overview of GroupWise Web Access
- Supported browsers and compatibility notes
- Accessing the login page: <https://webacc.tncourts.gov/gw/webacc>

**Module 2: Logging In and Out**

- Entering credentials (IB/TN number and password)
- Choosing between public and private computer settings
- Logging out securely

**Module 3: Navigating the Interface**

- Understanding the folder list (Mailbox, Calendar, Contacts, Documents)

**Link settings**  
Global Compliance Summary and Training Outlin...

The link works for

- ☐ People in Insight
- ☒ Only people with existing access  
Reshare with people in your organization who already have access.
- ☐ People you choose

**Apply**

1. Click on the **Edit in Word** icon in the upper right to open in MS Word.
2. Click the **Share** icon in the upper right to collaborate without leaving Copilot Chat.
3. Select **Page link**.
4. Click the **Settings** icon to refine permissions.
5. Click **Apply**.

Recipients of the link can open the document directly in Word, where they can review, edit, and collaborate in real time if they have the appropriate permissions.



# How to Create a Graphic

You can prompt Copilot Chat to analyze specific sections or the entire referenced file and request a visual representation, such as a chart, diagram, or infographic, based on the content.

Create a graphic to illustrate the Content Groupwise Web Access 2014R2.docx

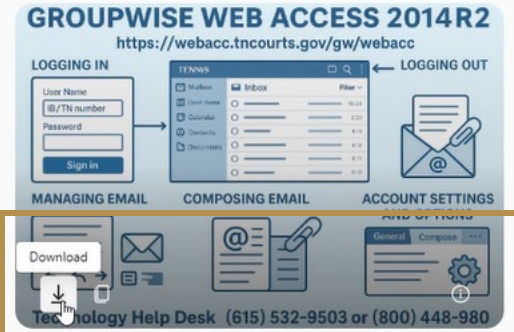
+ Tools

→

Click on the graphic to edit, download or copy the graphic.

Create a graphic to illustrate the content Groupwise Web Access 2014R2.docx

Copilot ⓘ



Here is a graphic illustrating the key content from Groupwise Web Access 2014R2. It visually represents:

- **Logging In/Out:** Username, password, and session options.
- **Managing Email:** Inbox navigation, reading, replying, and deleting.
- **Composing Email:** Writing messages, adding attachments.
- **Account Settings:** Options for password, rules, and preferences.
- **Help Desk Contact:** Support phone numbers.

Would you like me to add this graphic into a PowerPoint training slide deck or create a printable quick reference guide (PDF)?

Yes, create a PowerPoint slide. Please make a quick reference guide (PDF).

Message Copilot

+ Tools

AI-generated content may be incorrect





## Lesson 3

# TN Courts Copilot Chat Policies

- TN Courts Copilot Chat Policies





# TN Courts Recommended Guidelines

Please follow all Prompting Do's and Don'ts when using approved AI tools. As a rule of thumb, the following are recommended guidelines for Copilot Chat.

1. Review and fact-check all generated content, especially if used in public communication or decision-making.
2. All personnel should obtain supervisory approval before use.
3. Tailor use for the following purposes:
  - a. Preparing Training materials
  - b. Writing Improvement
  - c. AI-powered searches
  - d. Assisting with transcription, meeting notes or translation (for non-sensitive content)
  - e. Drafting standard forms, presentation templates, or boilerplate language.



# Quick Recap

- What is Copilot Chat
- Anatomy of a Good Prompt
- Prompting Do's and Don'ts
- How Can Copilot Chat Help You?
- TN Courts Copilot Chat Policies





**QUESTIONS?**





**THANK YOU**