



Microsoft 365

Copilot Chat

Welcome to M365 Copilot Chat



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



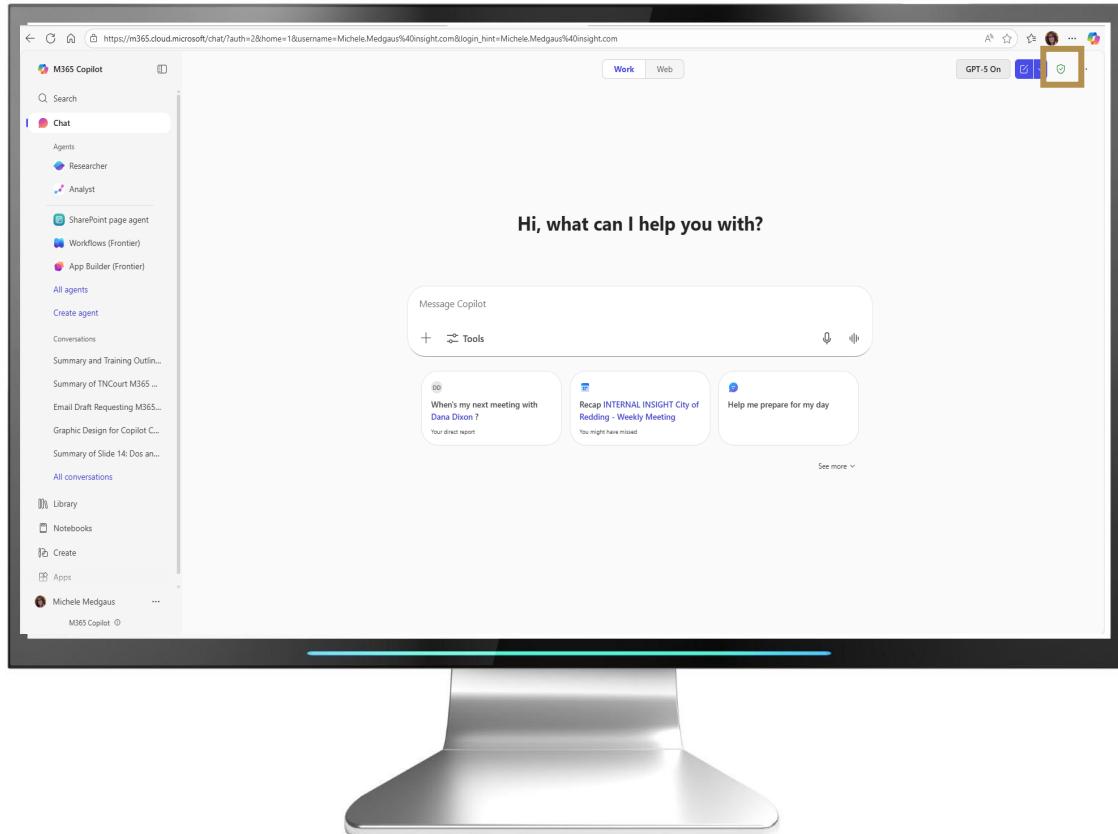
Lesson 1

What is Copilot Chat

- Copilot Chat Overview
- How to Access Copilot Chat



What is Copilot Chat?



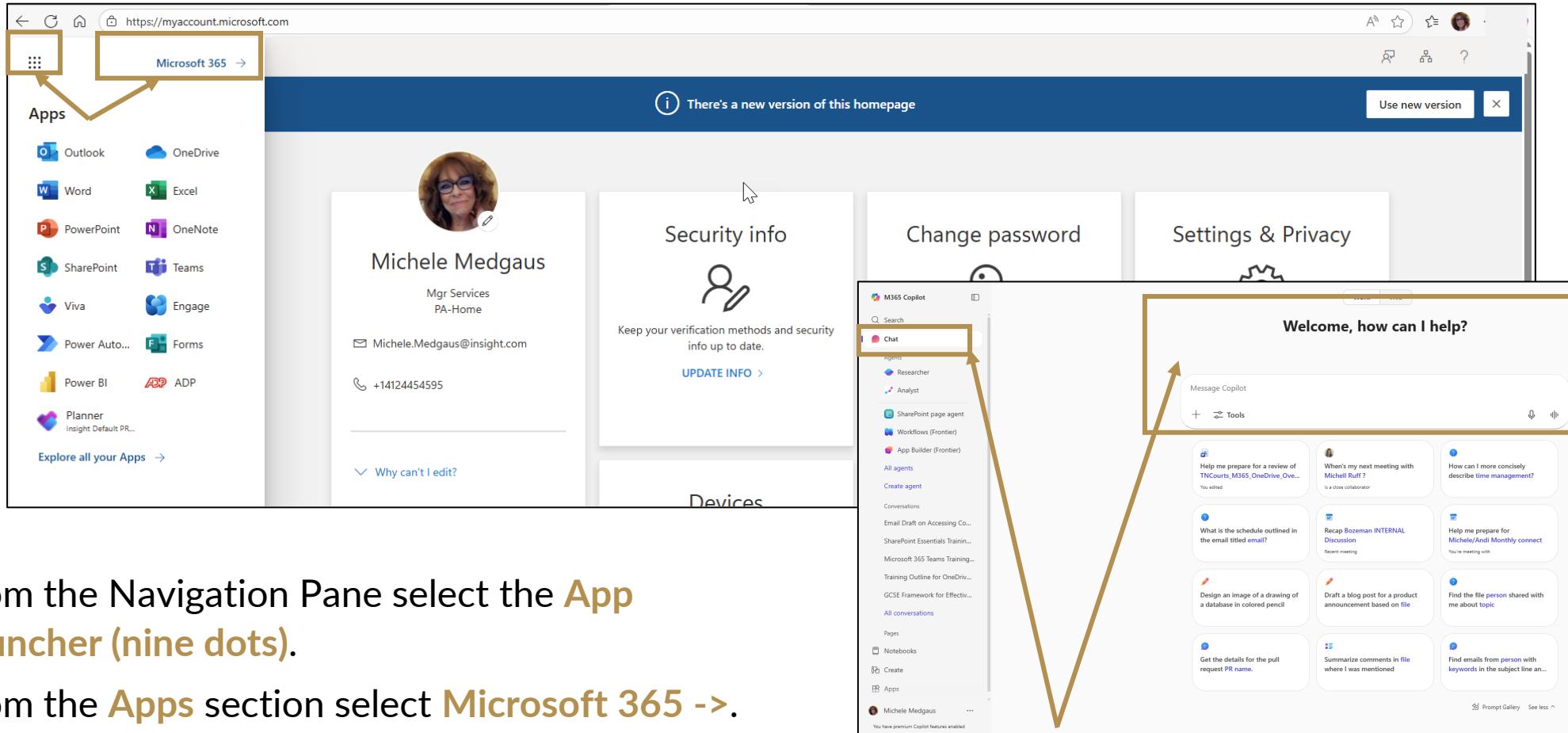
Copilot Chat

- 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

The image shows a screenshot of the Microsoft Copilot Chat interface. The main area features a large text input field with the placeholder "Type your prompt in the prompt window". Above the input field is a "Welcome, how can I help?" message. To the right, a sidebar titled "Copilot Chats and more" contains "Recent pages" and "Settings" options. The left sidebar includes sections for "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), and a user profile for Michele Medgaus. Premium features are indicated with "You have premium Copilot features enabled".

Type your prompt in the prompt window

Welcome, how can I help?

Copilot Chats and more

Add a reference

Your previous prompts

Prompting samples

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 ^

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

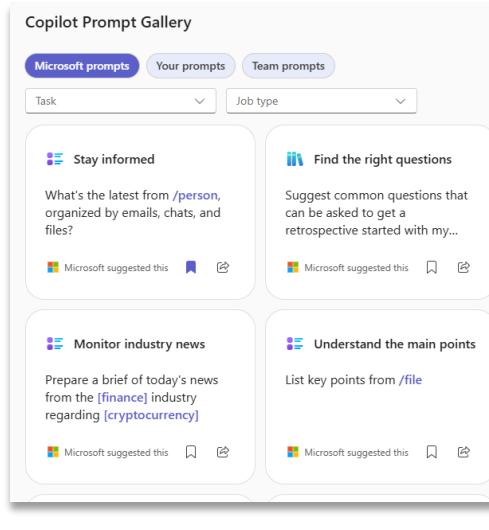
SEAL OF THE TENNESSEE JUDICIARY 1796

M365 Copilot Chat Overview



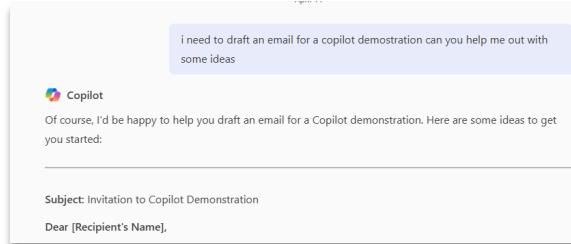
Copilot Chat is a conversational interface for quick help, brainstorming, and cross-app queries.

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

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

Include the right prompt ingredients

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



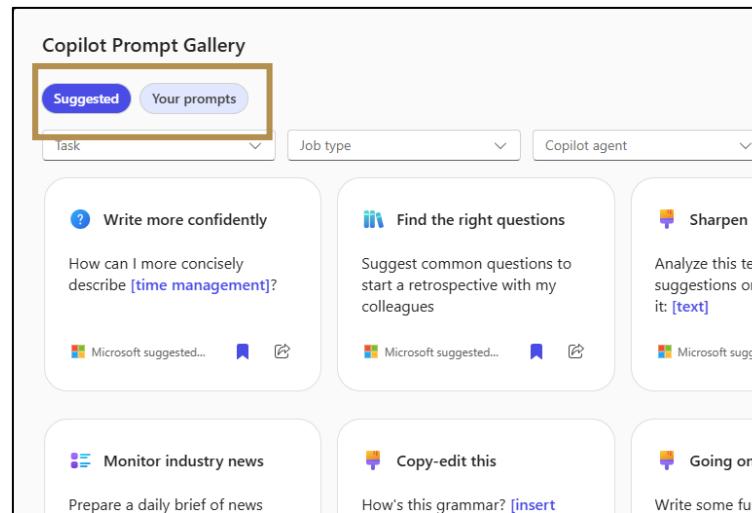
Today

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

Toolbar icons: edit, copy, schedule, save, share.

1 2 3 4 5

Copilot Chat Prompt Gallery



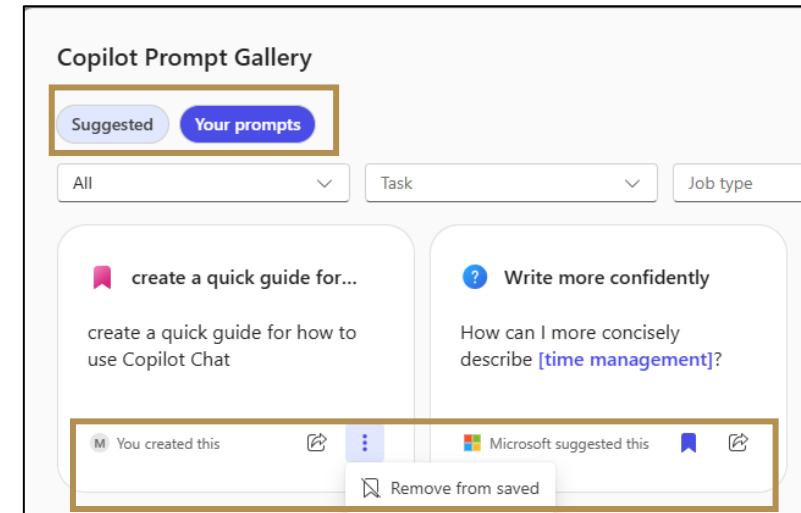
Copilot Prompt Gallery

Suggested Your prompts

Task Job type Copilot agent

- Write more confidently
- Find the right questions
- Sharpen yo
- Microsoft suggested...
- Microsoft suggested...
- Microsoft suggested...

- Monitor industry news
- Copy-edit this
- Going on h
- Microsoft suggested...
- How's this grammar? [insert]
- Write some funn



Copilot Prompt Gallery

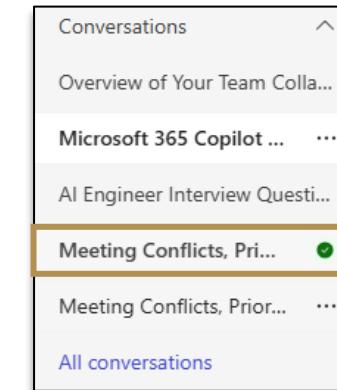
Suggested Your prompts

All Task Job type

- create a quick guide for...
- Write more confidently

You created this Microsoft suggested this Remove from saved

- 1 • Edit 
- 2 • Copy 
- 3 • Schedule 
- 4 • Save 
- 5 • Share 



Conversations

Overview of Your Team Colla...

Microsoft 365 Copilot ...

AI Engineer Interview Quest...

Meeting Conflicts, Pri... 

Meeting Conflicts, Prior... 

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 look 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

Ask yourself these questions when prompting

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



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.

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.

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.

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.

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.

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 ...

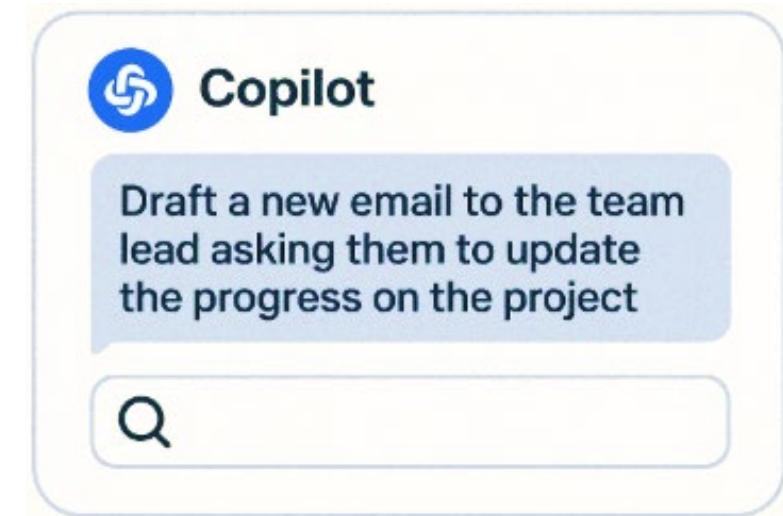


- What did **person** say about **topic**



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.

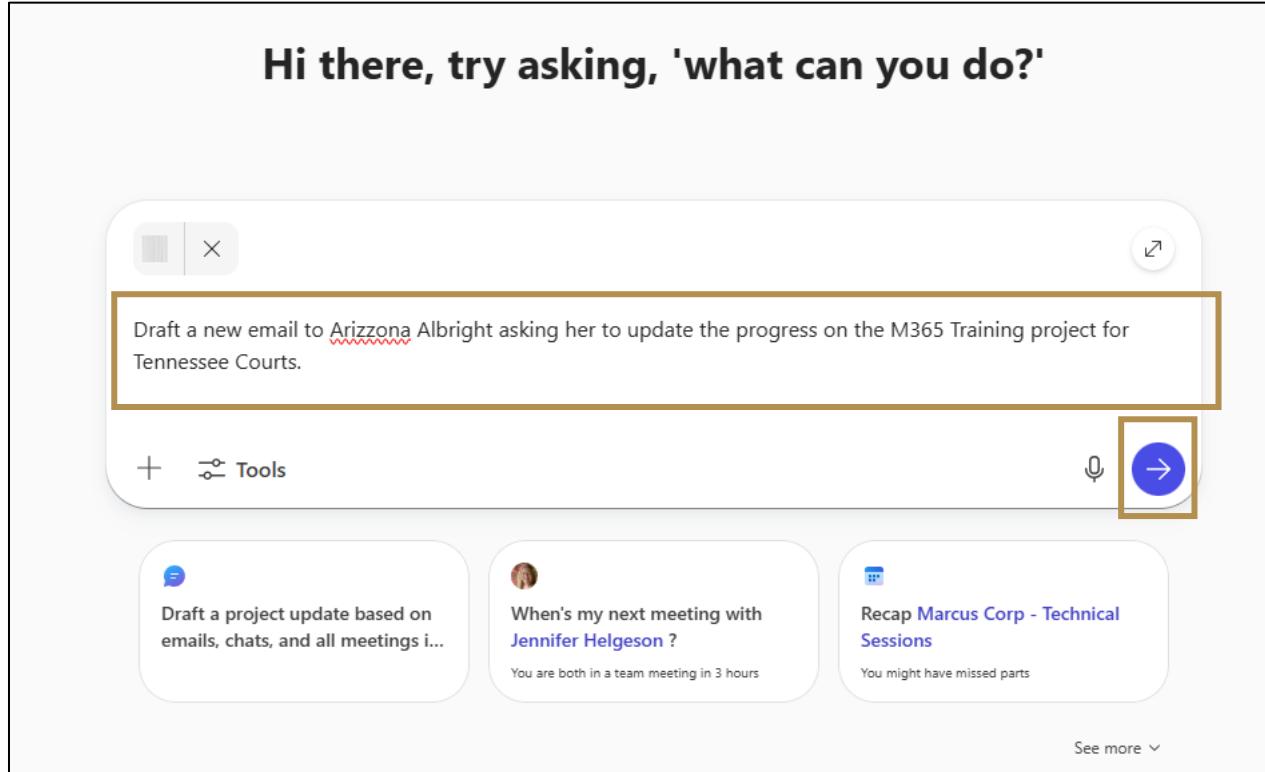


Other prompts to try

- 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.



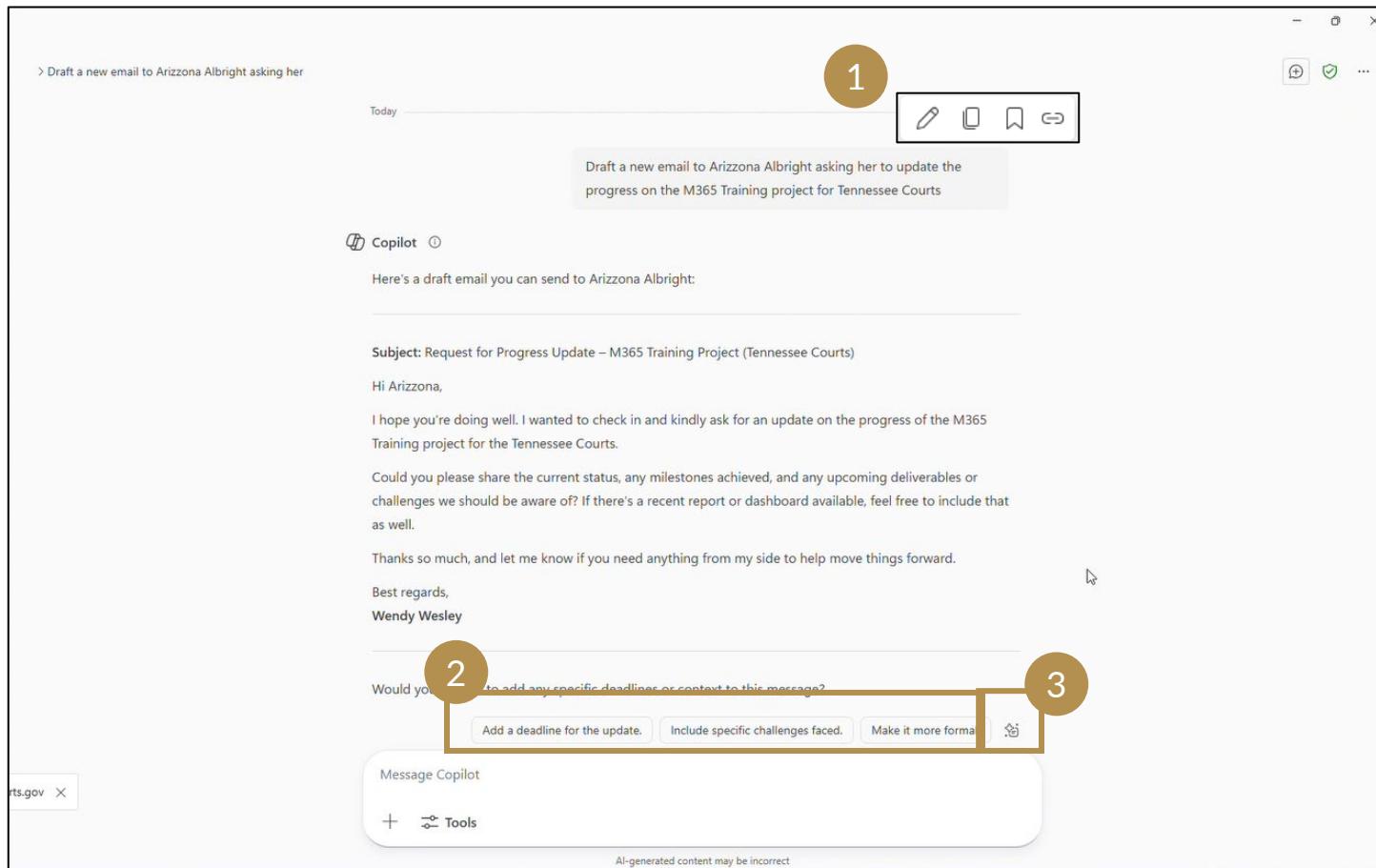
Create an eMail Using Copilot Chat



- 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 Arizzona Albright:

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.

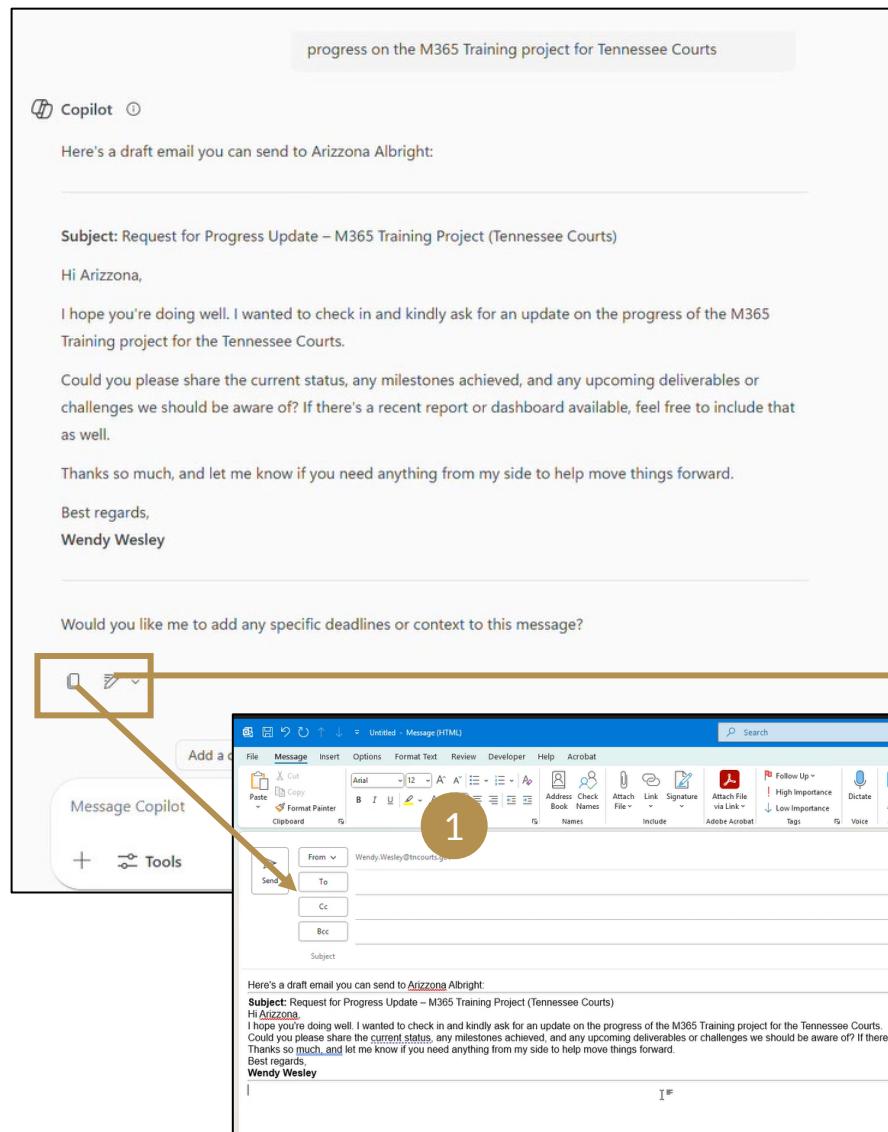
Could you please share the current status, any milestones achieved, and any upcoming deliverables or challenges we should be aware of? If there's a recent report or dashboard available, feel free to include that as well.

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

Best regards,

Wendy Wesley

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



1

2

3

Open in Word

Draft a new email to Arizzona Albright asking her

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

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

Best regards,

Wendy Wesley

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.

1

2

3

Open in Word

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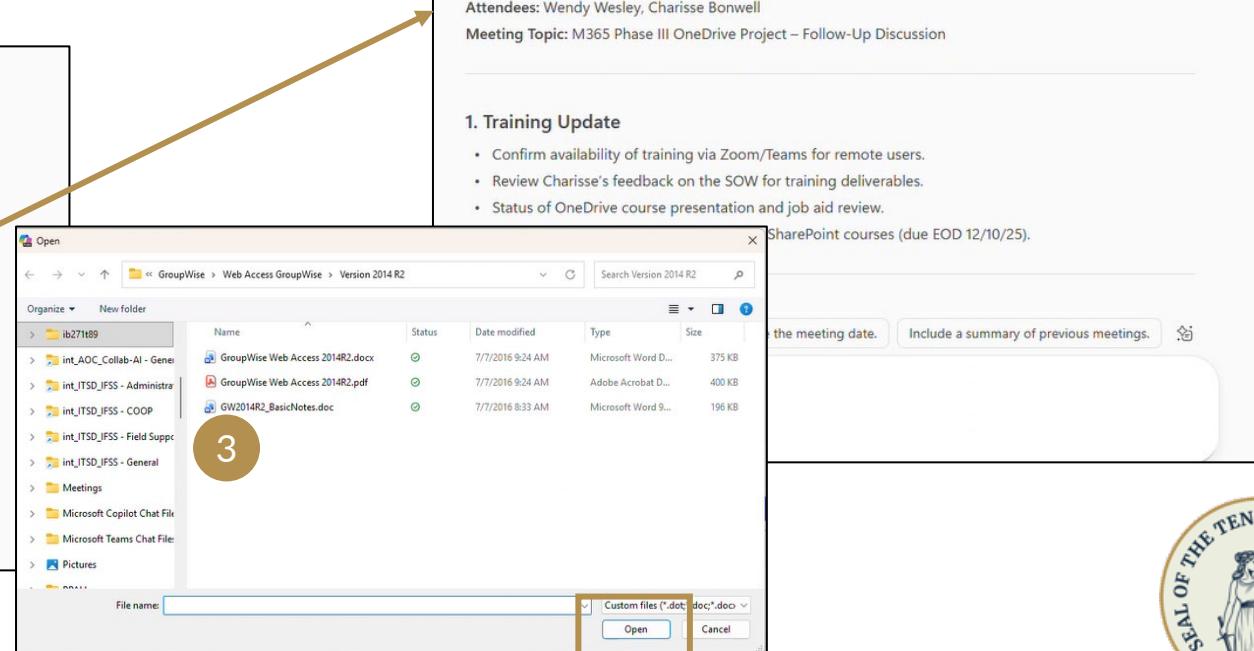
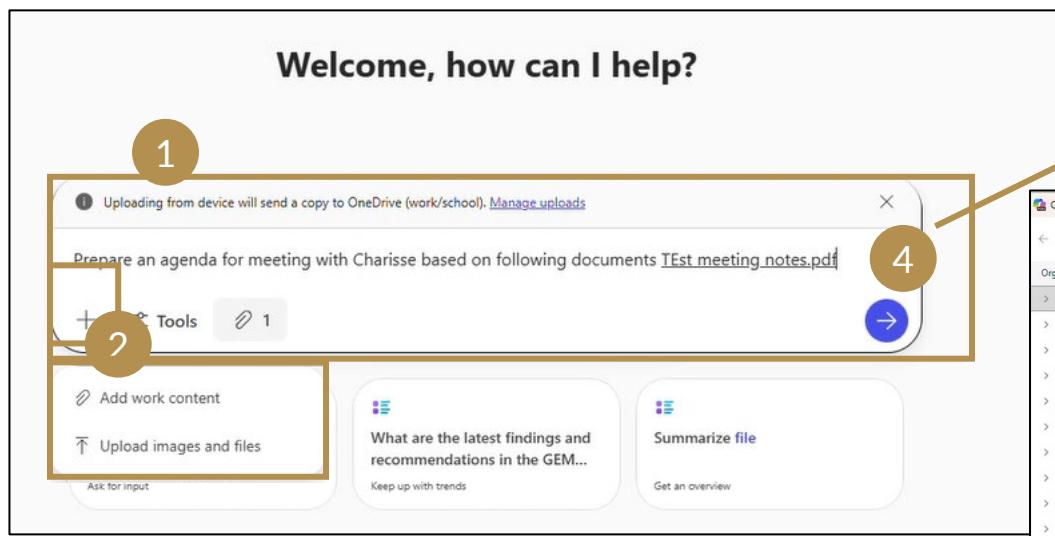
Wendy Wesley



Prepare for a Meeting Using Copilot Chat

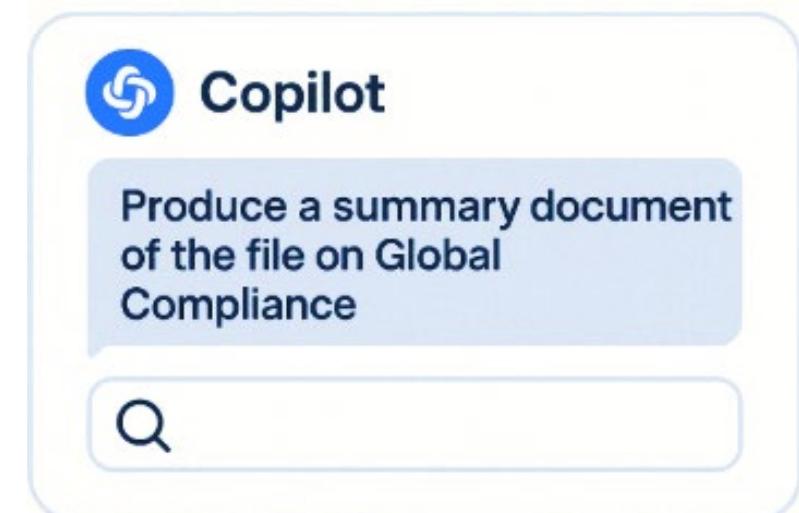
Copilot Chat can assist you to prepare for meetings by pulling details from agendas or related files.

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.



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

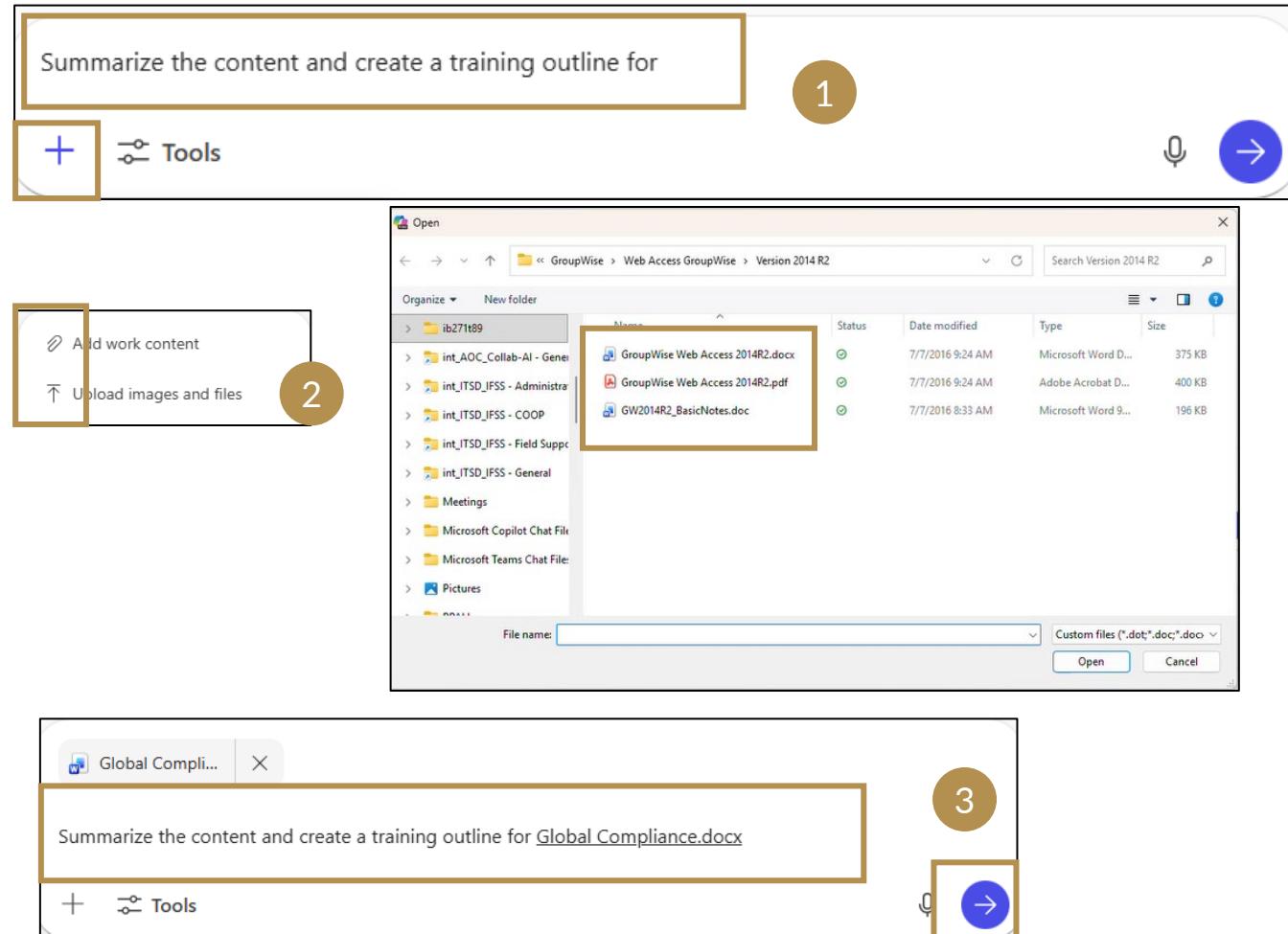
Give me specific examples from this document on how I can improve it for leadership review.

What does the document say about roles or responsibilities?

Does the document list any specific training needs?



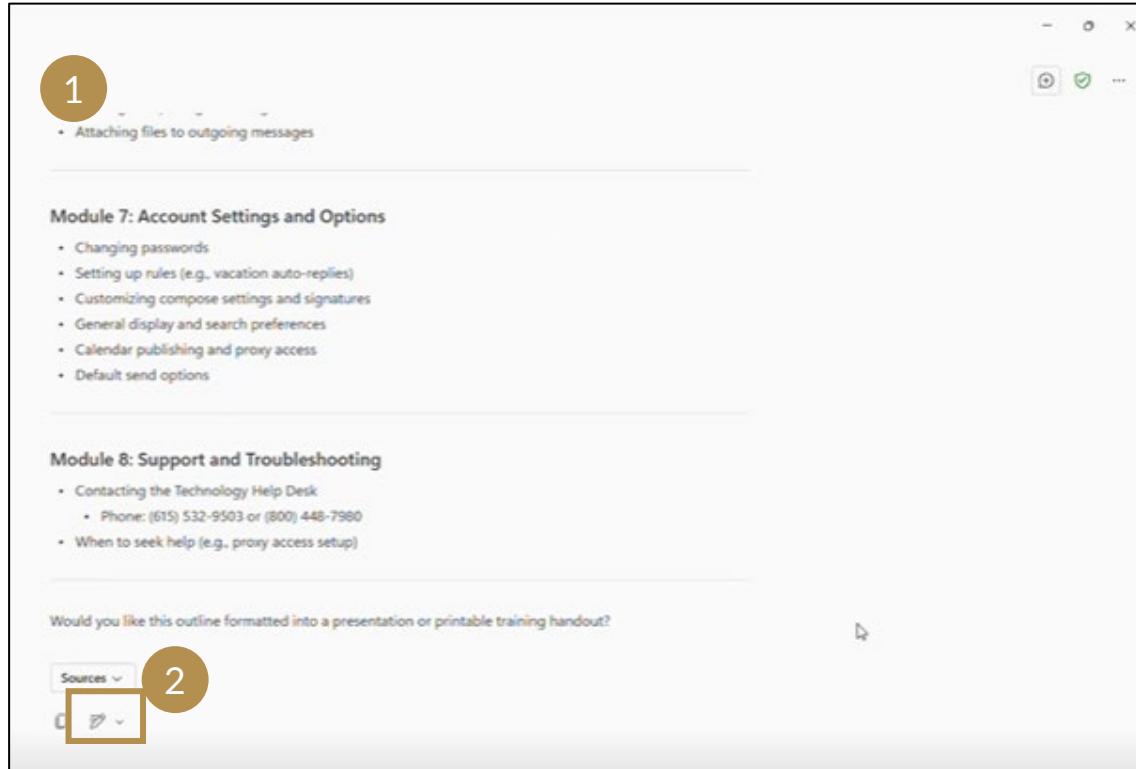
Use Copilot Chat to Summarize Documents



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

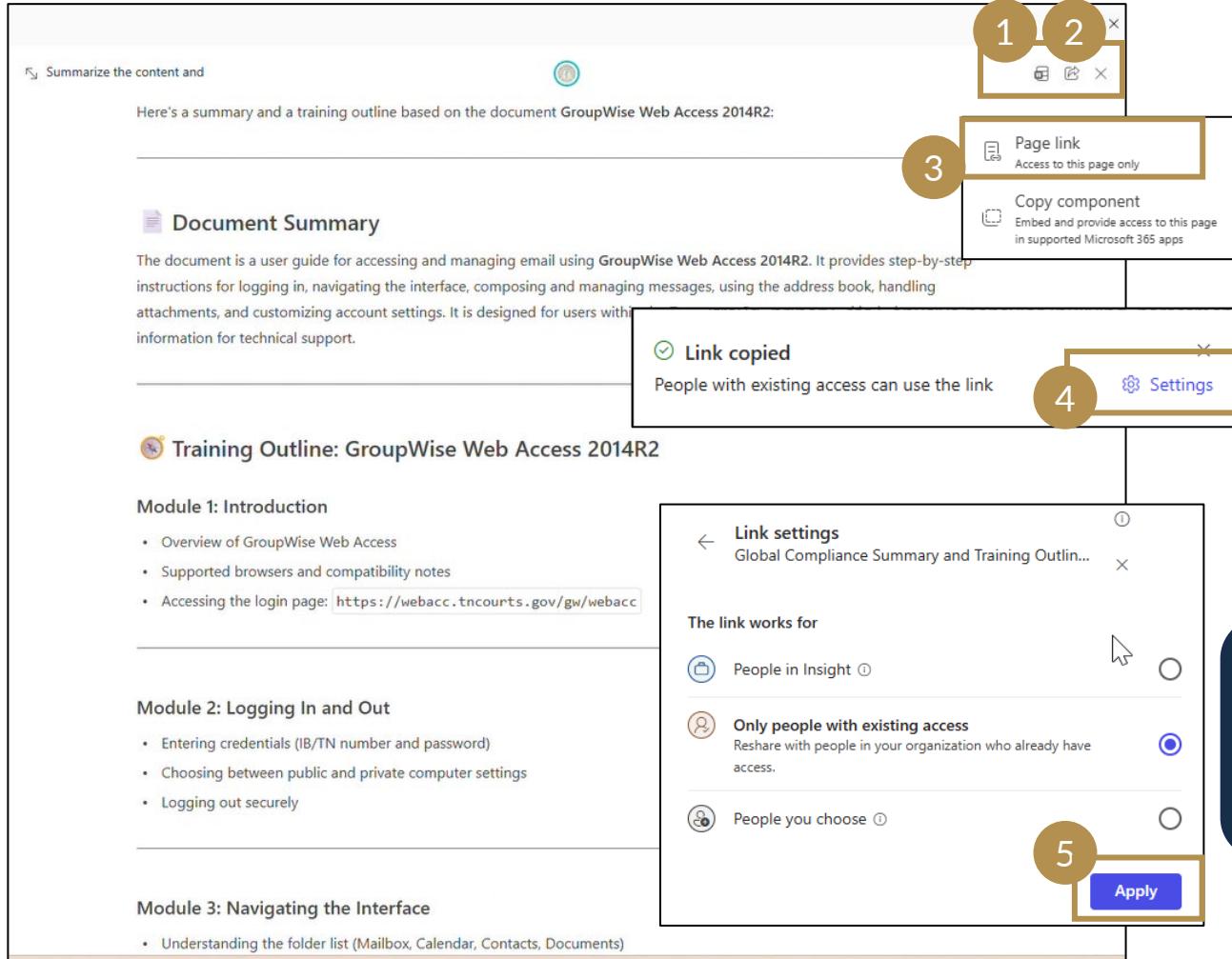


1. Once Copilot Chat summarizes the file referenced in the prompt, you can review, continue to prompt Copilot Chat to elaborate on specific sections, clarify details, or generate actionable items based on the summarized content.
2. Click the **Edit in Pages (pencil)** to edit the content in pages which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



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.dox

+

Tools

Microphone icon

Blue circular arrow icon

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

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

Copilot

GROUPWISE WEB ACCESS 2014R2
https://webacc.tncourts.gov/gw/webacc

LOGGING IN

User Name: 187/TN number
Password:

Sign in

MANAGING EMAIL

Inbox, Calendar, Contacts, Documents

COMPOSING EMAIL

Compose, General, Attachments

ACCOUNT SETTINGS

Filter, Help Desk (615) 532-9503 or (800) 448-980

LOGGING OUT

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