

Copilot Chat in Microsoft 365

“Copilot for All”

Prepared for PSU
April 2026



Ask a work question, or use / to reference people, files and more

Agenda

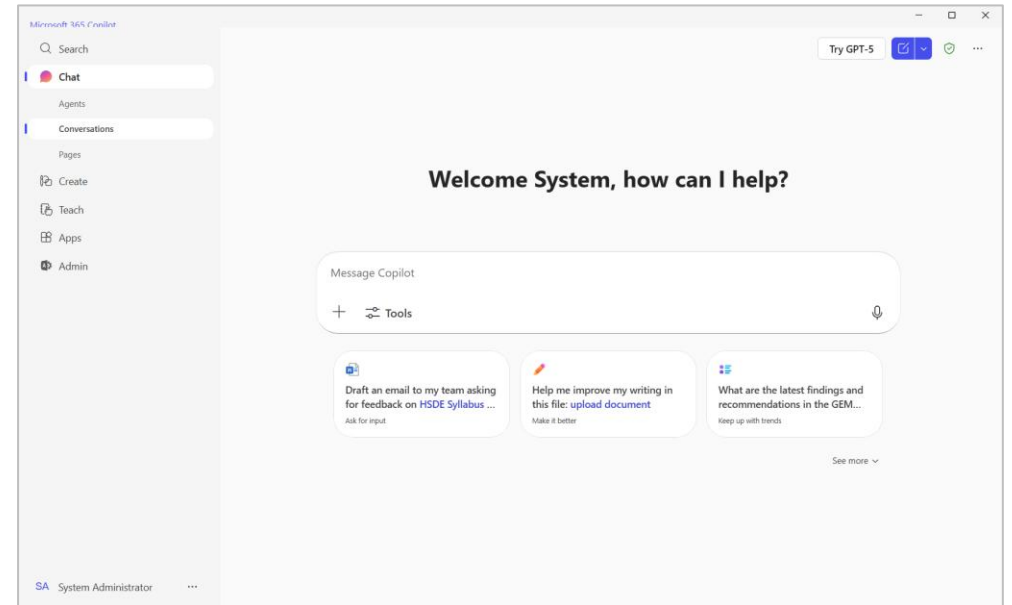
- What is Copilot Chat and why should I use it
- Basic vs Premium
- How do I get to Copilot Chat
- Prompting – How do you talk to Copilot Chat
- A few best practices to know about Copilot Chat
- Practice using Copilot Chat – Follow Along Examples
- Up and coming features
- Questions

What is Copilot Chat? - An approved internal and secure 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.

With Copilot Chat you can:

- Ask questions, research, and brainstorm
- Quickly draft text and content
- Reference files to get responses based on information from your work documents, presentations, etc.
- Generate images and data visualizations.
- Refine and collaborate on chat responses.



Get started by going to M365Copilot.com

A quick summary of WHY Copilot Chat

Your data is **your** data

All of your data lives in your Microsoft 365 environment and all processing occurs inside of your Microsoft 365 environment.

Your data, prompts and responses are **never** used to train the foundational AI models.

The “brain” of Microsoft Copilot AI capabilities uses pre-trained large language models (LLMs). Copilot uses **GPT 4o** as the primary model, with **GPT 5** newly available!

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

Enterprise Data Protection for all things Copilot and AI operate in the same environment that hosts your email, Teams meetings, file sharing and collaboration

Built based on [Microsoft’s Responsible AI principles](#)

Privacy & Security, Inclusiveness, Accountability, Transparency, Fairness, Reliability & Safety

You (the Human) are in total control of what you use and what you don’t

Copilot is here to assist you, not replace the full task

Copilot Chat Limitations – “Basic” versus “Premium”

(when you need more capabilities)

The capability you have is called **Copilot Chat** and are a great secure way to get started with generative AI [BASIC]

- ✓ Ask questions
- ✓ Conduct research and brainstorm
- ✓ Create text and content
- ✓ Create documents (basic)
- ✓ Reference documents
- ✓ Reference websites
- ✓ Generate images and diagrams

Important: Copilot Chat can't see your work files — unless you specifically attach or paste content into the chat

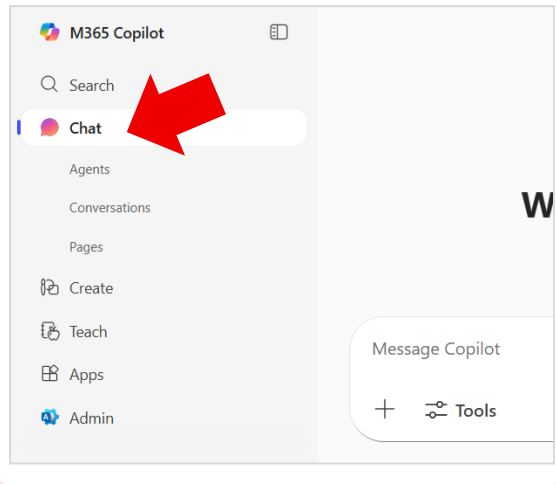


The following capabilities are only available if you have the full **Microsoft 365 Copilot License** [PREMIUM]

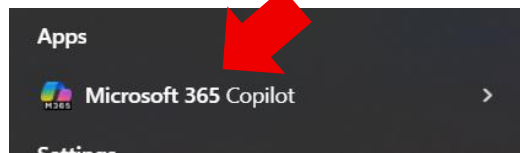
- ✗ Use Copilot to search emails in your mailbox
- ✗ Use Copilot to analyze your calendar and help you organize your day
- ✗ Directly search for and use documents in SharePoint, OneDrive, and Teams
- ✗ Use Copilot inside Teams Meetings, including summarizing meeting transcripts.
- ✗ Use Copilot to actually create and update physical Word, PowerPoint, or Excel documents.
- ✗ Access to advanced Reasoning tools such as Researcher and Analyst.
- ✗ Unlimited use of custom Agents

How do I get to Copilot Chat?

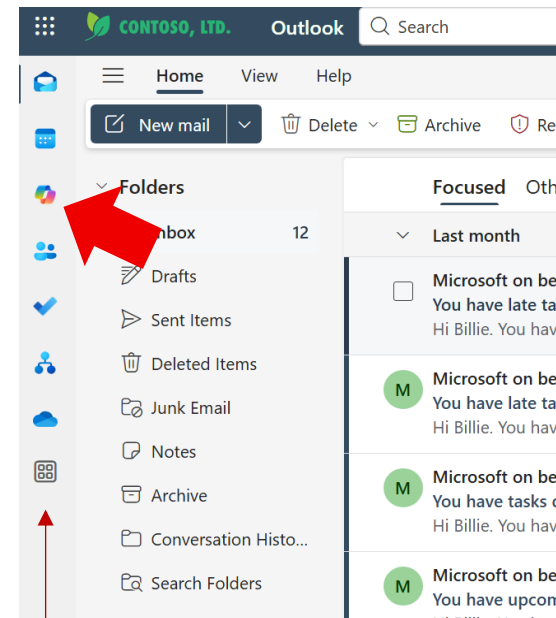
- 1 Go directly to the Copilot Chat website M365Copilot.com



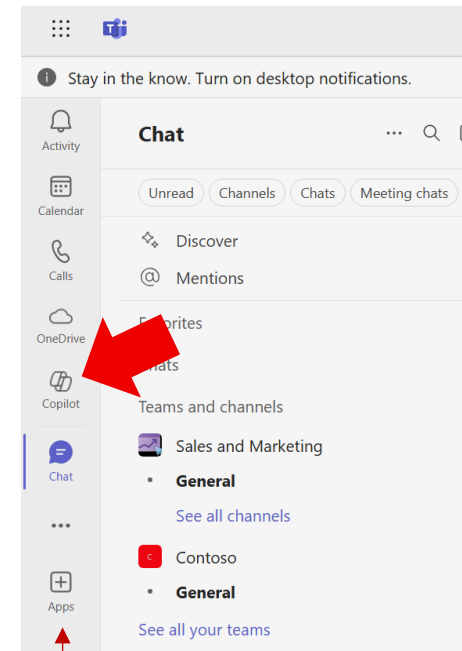
- 2 Look for the Microsoft 365 Copilot app installed on your computer



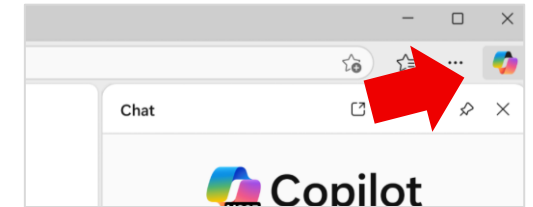
- 3 Find the Copilot Chat button next to your inbox and calendar in Outlook



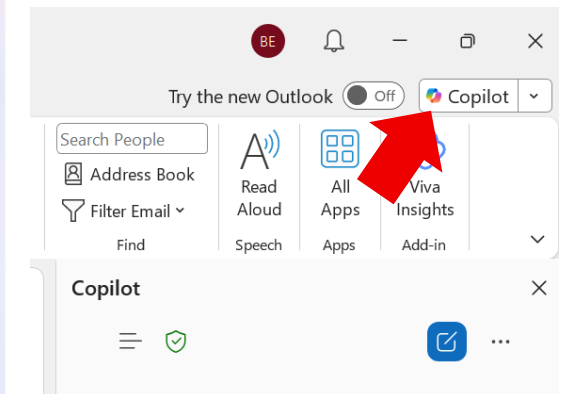
- 4 Find the Copilot Chat button in the left menu of Teams



- 5 Open Copilot Chat in the Edge browser sidebar (make sure you are signed in!)



- 6 Copilot Chat in the menu ribbon of Outlook



If you don't see Copilot Chat in these locations, click on the Apps icon to add it in!

What does Copilot Chat look like?

Here is a visual tour of Copilot Chat:

Copilot Chat Menu

AI tools to support content discovery and creation.

Agents

Reusable tools you can build

Recent chats

Return to a previous chat to continue the conversation

Attach files

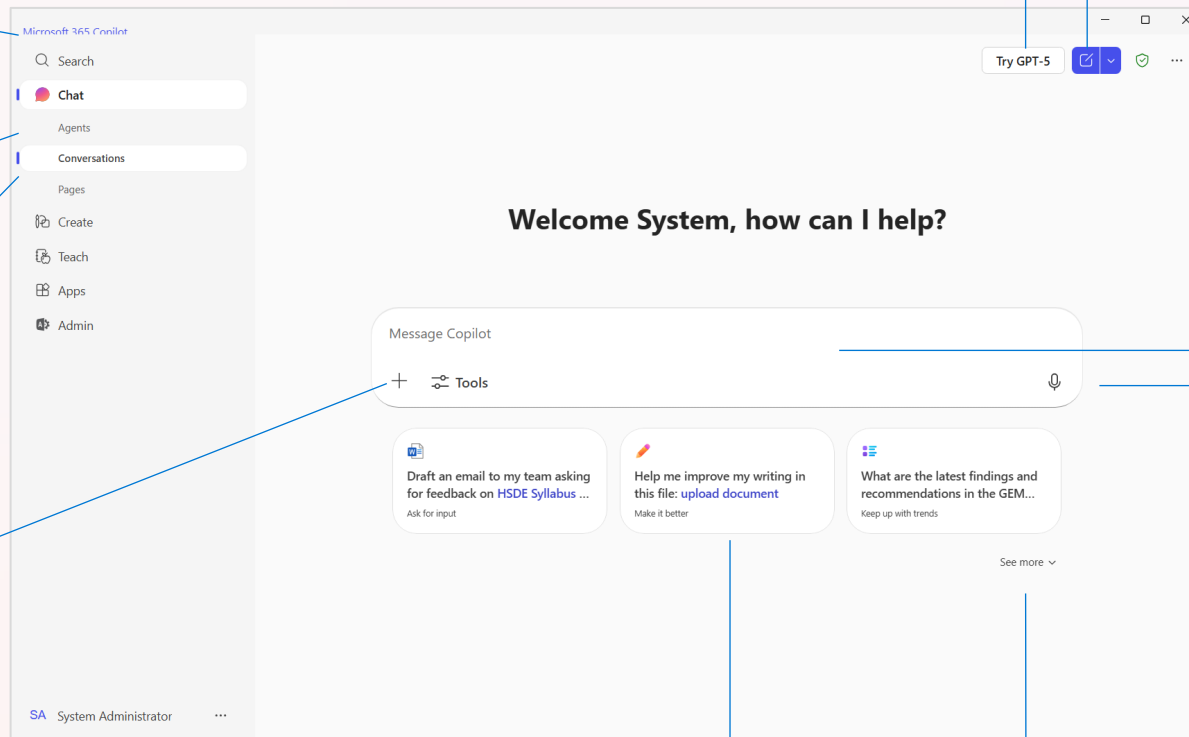
Reference specific documents in your prompt

Choose your model

Use the newest / deeper AI model for your answer

Start a new chat button

Clear your past chat and start a new conversation.



Prompt box

Start your conversation here.

Windows Key + H to activate Voice Typing

Suggested prompts


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

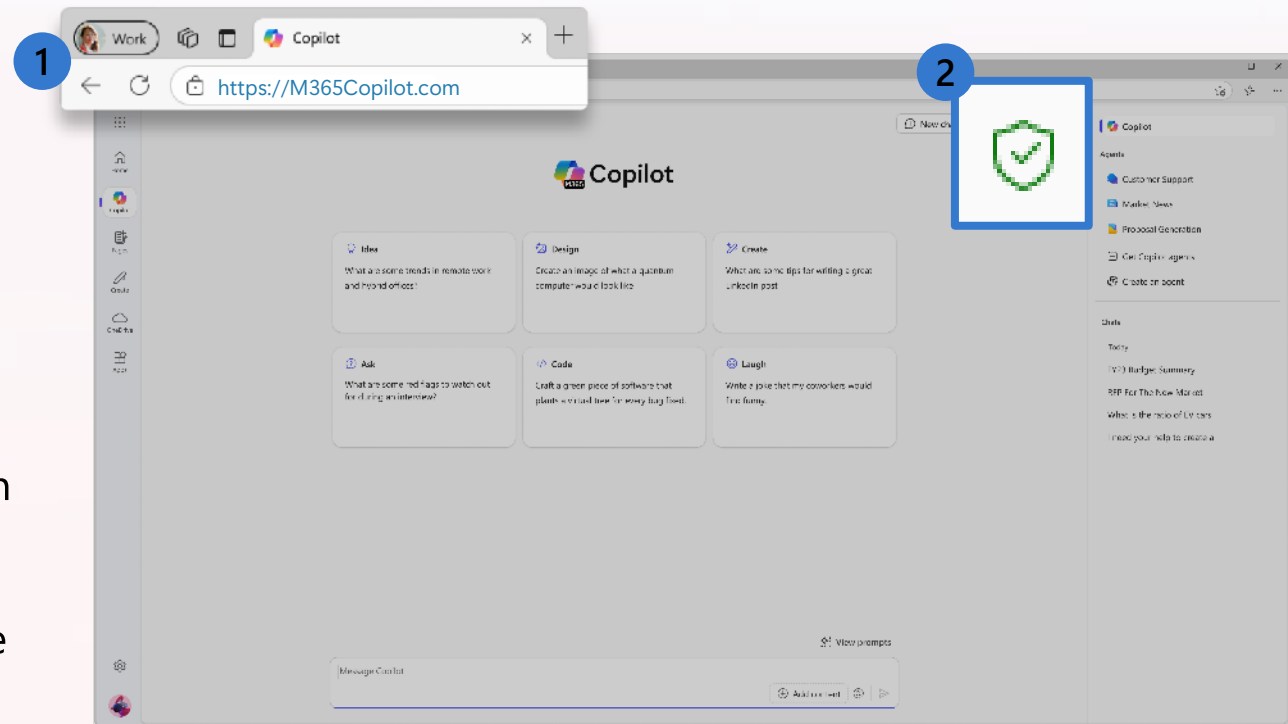
Copilot Prompt Gallery

View additional prompt suggestions, including saved prompts.

Make sure you are signed in with your work/school account

- 1 Navigate to M365Copilot.com on your preferred browser on your device to get to Copilot Chat.
- 2 Ensure you're signed in with your work 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 work/school account, your organization's Enterprise Data Protection does not apply!**

Which one is the right Copilot?

- **“just” Copilot**

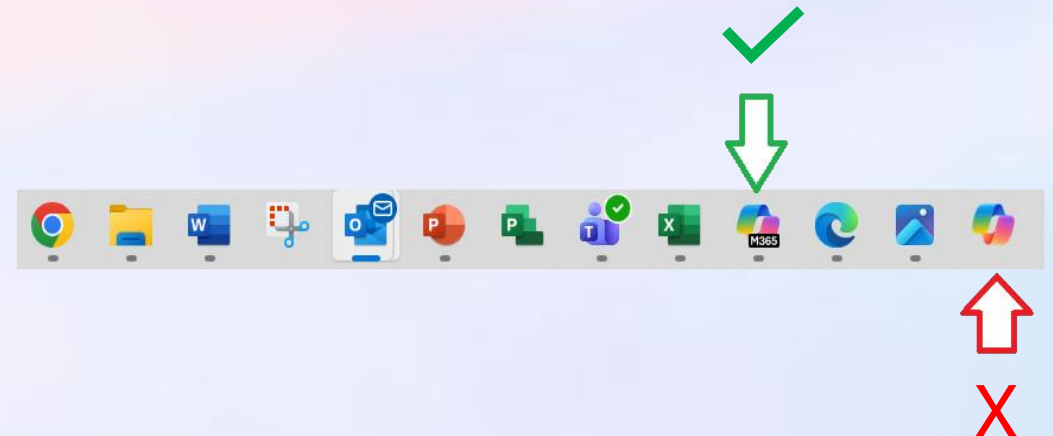
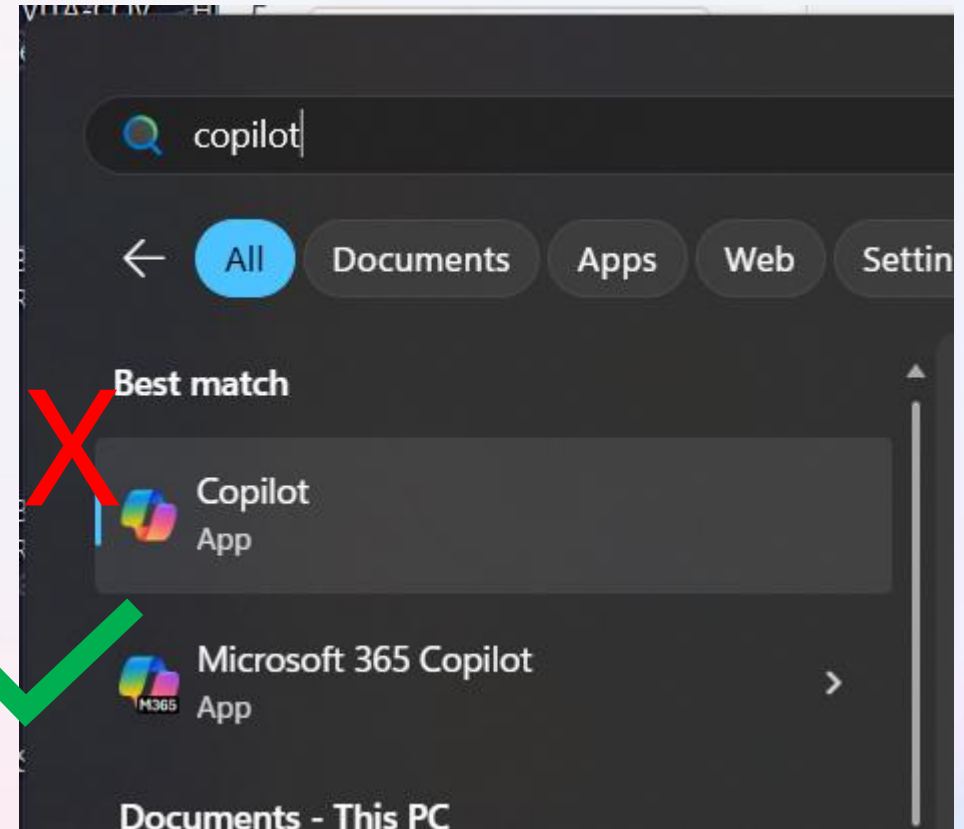
The general Copilot app will use the **Consumer** Copilot service (not your work/school account) – this should not be used for work purposes.

Yes, even though we Microsoft built this, think about this like any other unsanctioned AI product.

- **M365 Copilot**

The M365 Copilot app, users will sign in with their work/school account and all activities will occur inside of your environment, with Enterprise Data Protection

- Always look for the Green Shield



How to use Copilot 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 response and sources

Review the response.

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.

Building Blocks of an Effective Prompt

A **prompt** is how you ask Copilot to do something for you.

WHAT
do I want?



Goal (Objective)

What response do you want from Copilot?
(Desired outcome)

+

WHY / WHO
do I need it?



Context, Persona & Audience

Why do you need it?
Who is involved?
Act as a <Persona>

+

WHERE
to look?



Source (Grounding)

Which information sources should Copilot use (ground against)?

+

HOW
do I need it?



Expectations

How should Copilot respond to meet your expectations?

Prompt Building Blocks

Goal

Context

Source

Expectations

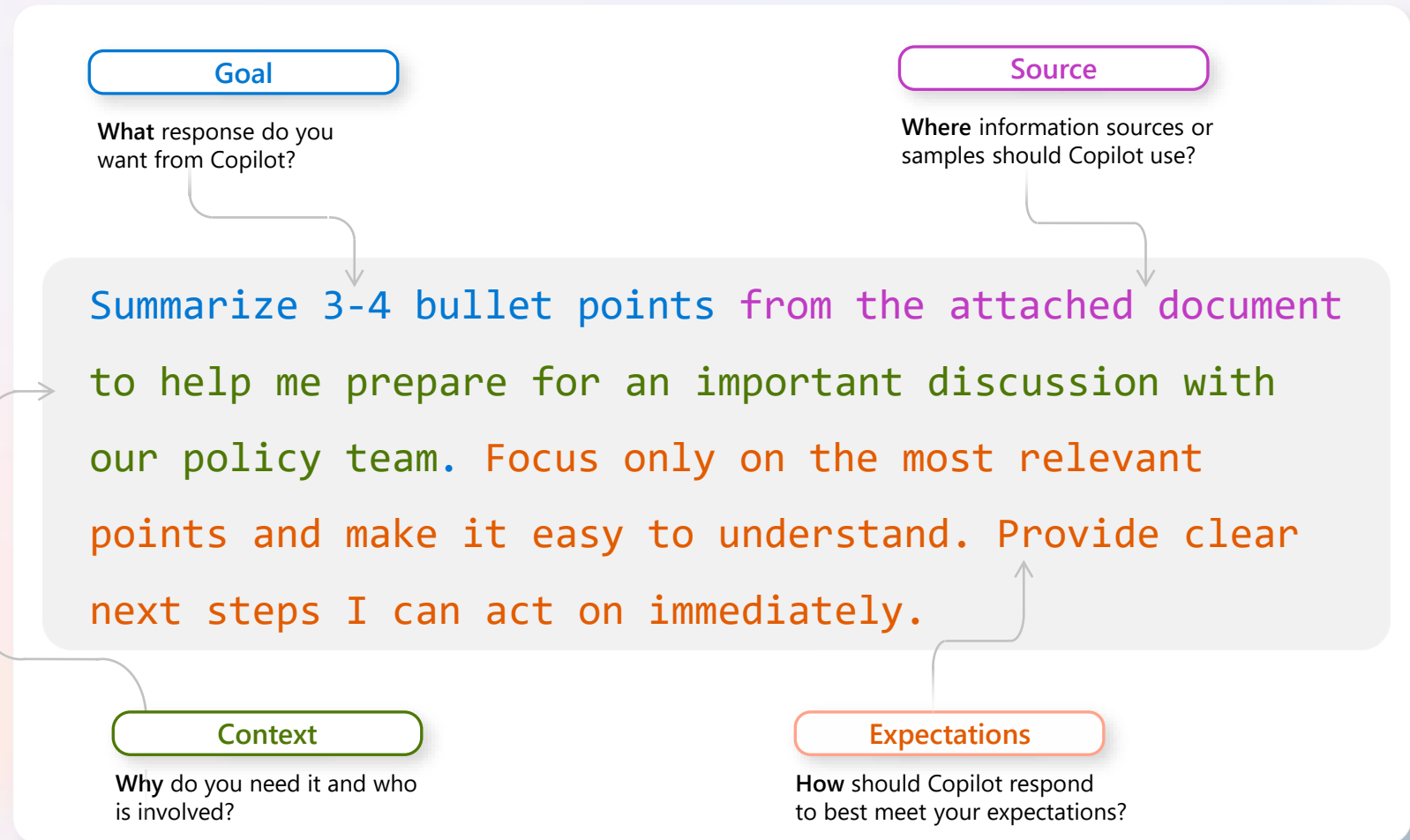
What Does a Prompt Look Like? (more words = better)

Prompts are how you ask Copilot to do something for you.

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

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

You **don't have to use each element** every time, and they **don't have to be in order**, but you should try to make it habit to use all four!



Best Practice: Keep iterating to improve your prompts

Good

Help me prepare for an upcoming candidate interview for a new Lab Specialist by creating a list of questions

Better

I'm an HR Manager who needs to prepare for a candidate interview for our new Lab Specialist. 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 Lab Specialist. 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

Best Practice: Create a New Chat every time you change topics

The screenshot shows the Microsoft Copilot chat interface. At the top, there is a search bar with the text "What grants are available for medical centers?". Below the search bar, there is a "Today" section with a scrollable chat history. The chat history contains a single message: "What grants are available for medical centers?". Below the chat history, there is a "Copilot" section with a plus icon and a question mark. The main content area displays the response to the search query, starting with "Medical centers in the U.S. have access to a wide range of grants from federal agencies, state programs, private foundations, and nonprofit organizations. Here's a breakdown of the most relevant opportunities available in 2025:". Below this, there is a section titled "Federal Grants for Medical Centers" with a list of grants. The list includes "1. HRSA (Health Resources and Services Administration)" and "2. CMS (Centers for Medicare & Medicaid Services)". The HRSA section offers grants for rural hospitals, maternal and child health, HIV/AIDS programs, and graduate medical education. The CMS section includes the "Rural Health Transformation Program" and the "Innovation in Behavioral Health Program". At the bottom of the interface, there is a "Message Copilot" input field with a plus icon and a "Tools" button. A "Try GPT-5" button is visible in the top right corner of the chat area.

1

Select the New chat button to start a brand new chat interaction.

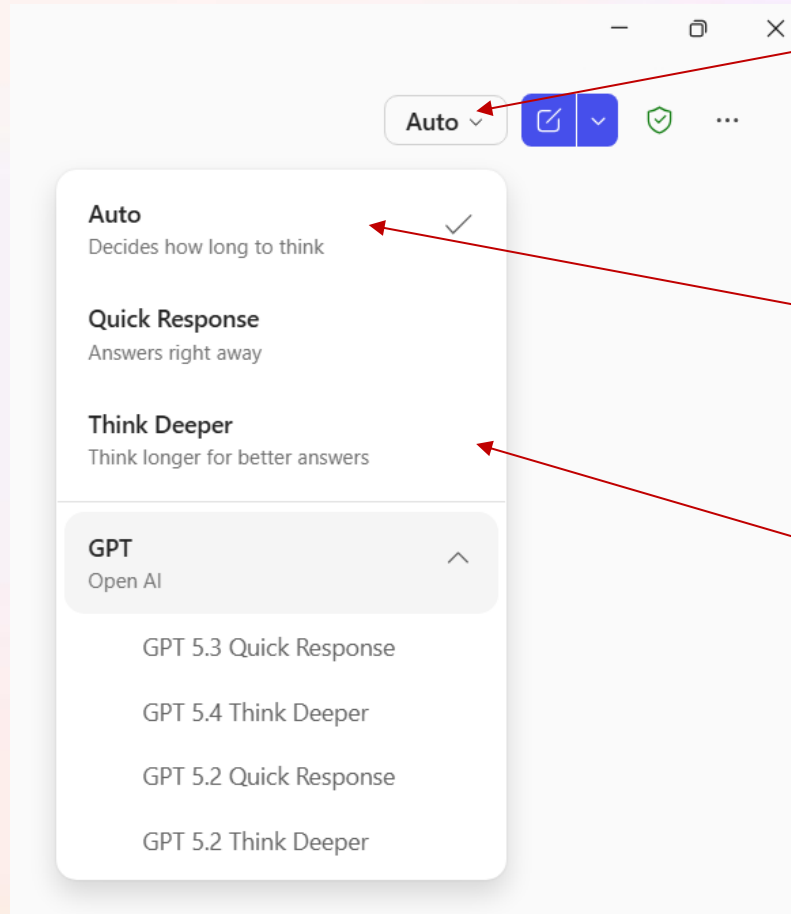
2

This will clear out the responses (but you can still get back to them in your Copilot Chat history)

3

Then you can start a new prompt without the context of your previous prompt potentially "confusing" Copilot Chat.

Best Practice: Choose the AI model for how deep an answer you want



The drop down in the upper right corner will allow you to choose different models for the job

AUTO is the default and will try to determine the best AI model for the job.

But you may want to force it to think deeper, or try out some of the newer models to see the differences between answer style.

Best Practice: Look at the options when a response is generated

At the **bottom of each response**, you will have several options:

Copy and paste the response

This was a good response

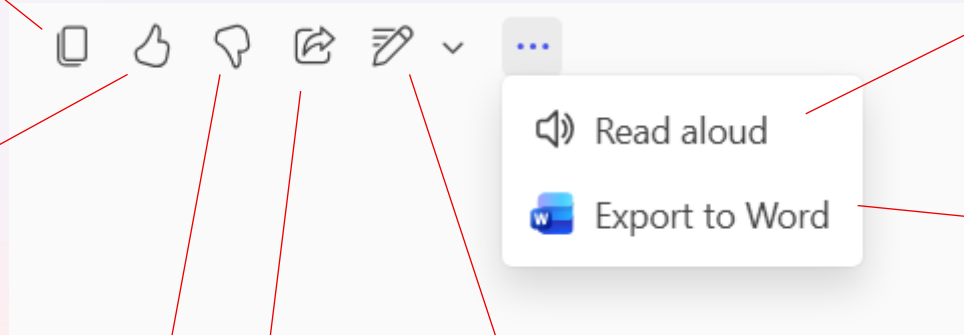
This response isn't what I was expecting

Share response with a colleague

Save and edit this response in Copilot Pages

Read this response out loud

Copy and open response as a new Word document



Time to try it for yourself!

Open up Copilot Chat in Outlook, Teams, or your preferred tool

or

Navigate directly to M365Copilot.com in your browser

Practice: How should I use Copilot Chat?

1. Go to **Copilot Chat** or <https://m365copilot.com>, and start a new chat
2. In the chat box, write this example prompt below

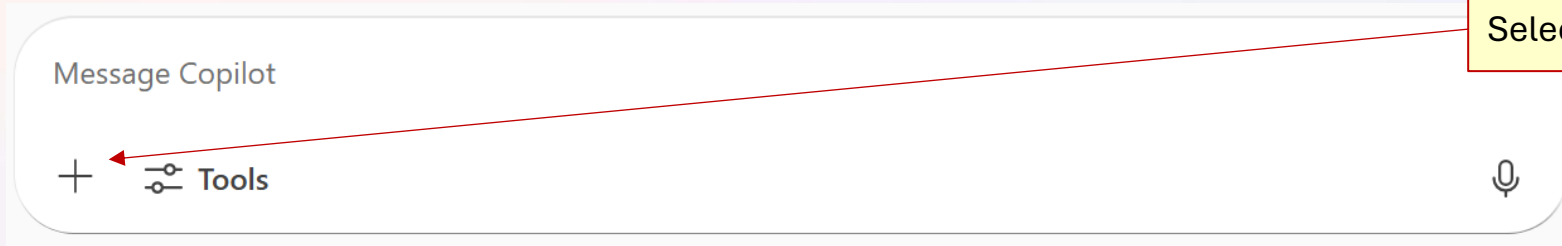
I am <describe your role, organization, responsibilities>. I am trying to figure out how I should use free Copilot Chat. Give me a list of daily activities that I can do that help me to build Copilot Chat into my daily routine. Include sample prompts for each activity.

3. then select **Send** icon



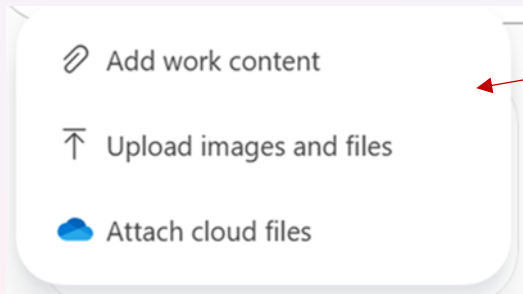
How To: Attach a file to your Copilot Chat Prompt

1



Select the upload/attach icon in your prompt box

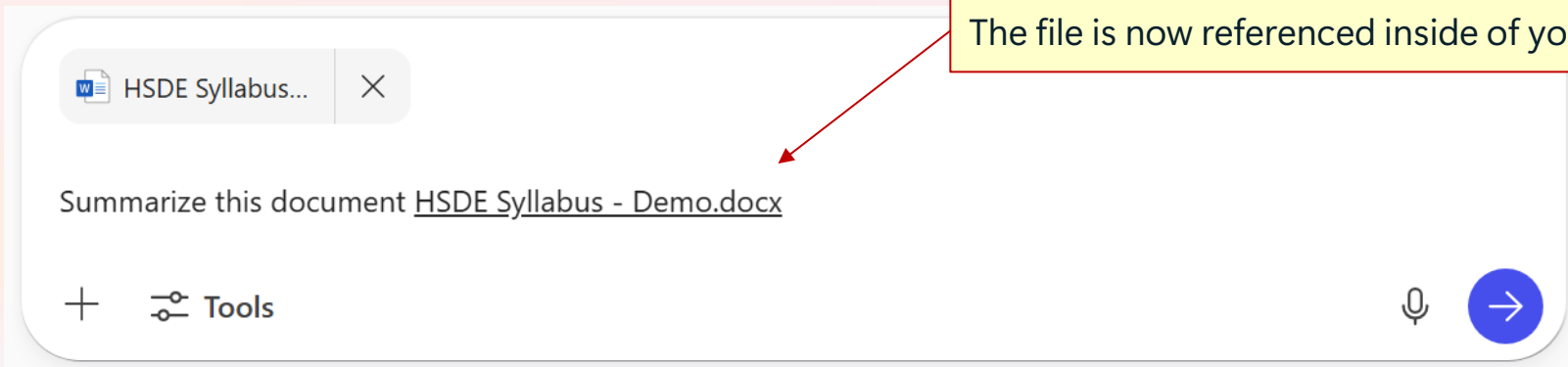
2



Choose how you want to “attach” the document to your prompt

- **Add work content** – reference recently modified documents
- **Upload images and files** – attach files that are on your computer
- **Attach cloud files** – browse sites and teams

3



The file is now referenced inside of your prompt

- Copilot Chat currently supports adding up to 3 files at a time.
- But you can add more files in subsequent prompts.

Practice: Examples of using Copilot Chat on your projects

1. Go to **Copilot Chat** or <https://m365copilot.com>, and start a new chat
2. In the chat box, and try some of these sample prompts

What are the latest research developments in <topic>? Provide a brief overview of recent findings from the past 5 years.

Propose three research project ideas <subject>, with a one-sentence rationale for why each would be valuable.



Practice: Use Copilot Chat to Create Document

(Examples for Word and PowerPoint document content)

1. Go to **Copilot Chat** or <https://m365copilot.com>, and start a new chat
2. In the chat box, try one of these document creation prompts based on one of your previous results

Turn this into a Word Document for me

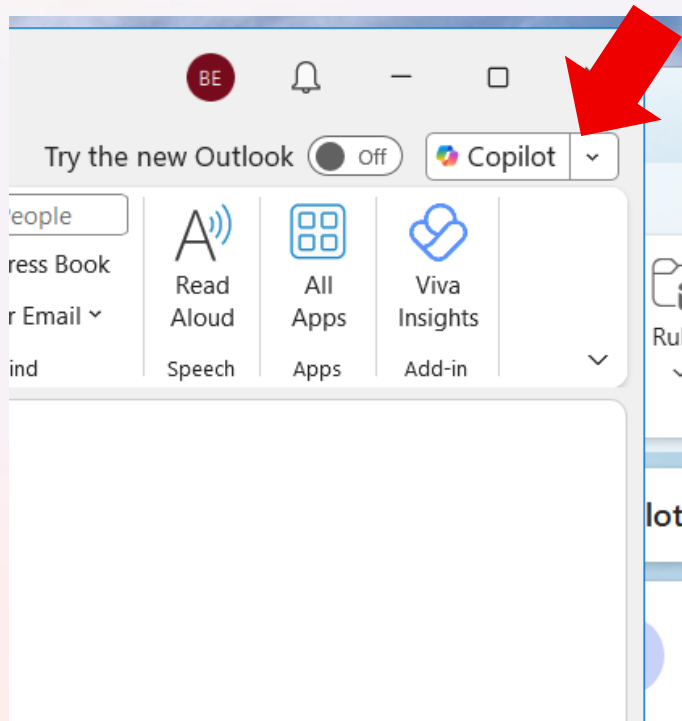
Turn this into a PowerPoint for me

I'm preparing a grant proposal on <subject>. Draft a compelling Background and Significance section that introduces the problem, reviews current research, and highlights what innovative approach we will take. Make it two paragraphs long. Put the results into a Word document.

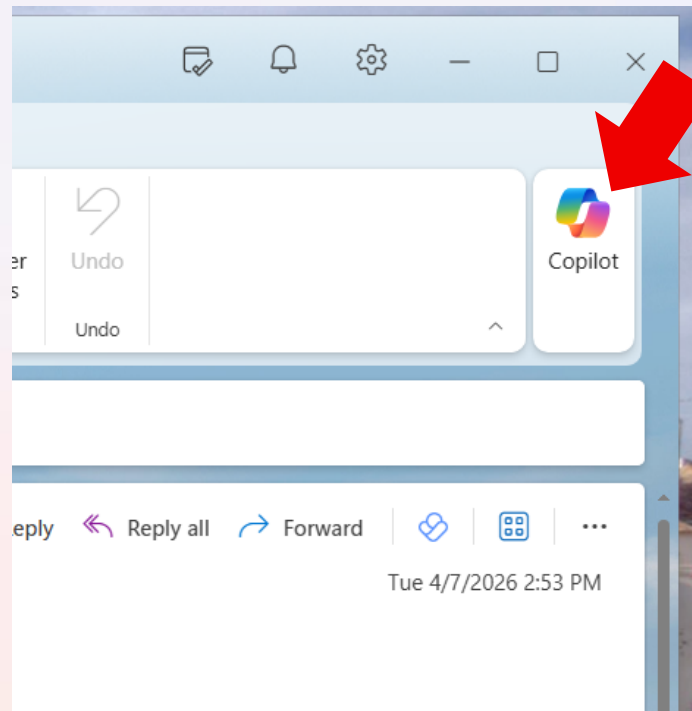


Practice: Open Outlook and locate the Copilot Button

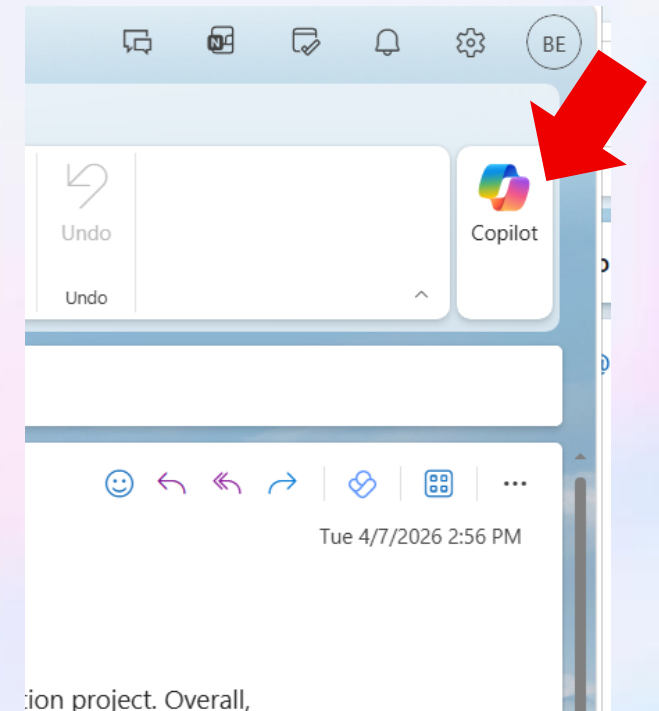
This is what it looks like in **Outlook Classic**



This is what it looks like in **New Outlook**

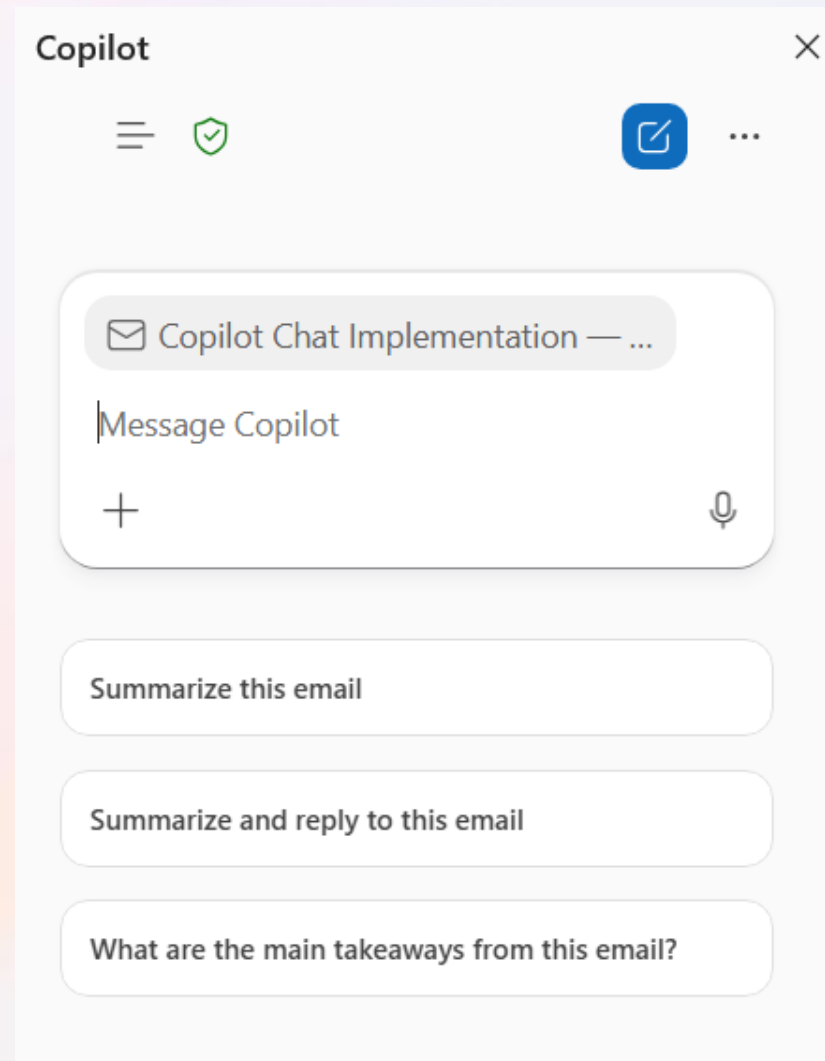


This is what it looks like in **Outlook Webmail**



Use Copilot to summarize the current email or email thread, or collaboratively develop a response to the email.

Practice: Using Copilot Chat to work with the current email or email thread



Goal

Context

Source

Expectations

COMING SOON IN OUTLOOK: Access to your full mailbox and calendar

Examples:

Summarize emails that I have received from my manager in the past 3 weeks and create a summary of key topics ahead of our meeting this afternoon.

Look at my calendar and help me prepare for my day.



PRACTICE: The Create menu in Copilot

The screenshot displays the Microsoft Copilot interface. On the left is a navigation sidebar with the following items: Search, Chat, Agents, Conversations, Library, **Create** (highlighted with a red arrow), Teach, Apps, Outlook, Teams, Word, Excel, PowerPoint, OneNote, Clipchamp, Forms, OneDrive, and Brent Ellis. The main area is titled "What do you want to create?" and features buttons for "Create an image", "Create a video", "Design an infographic", "Create a story", "Design a poster", and "Edit an image". Below these is a text input field "Describe the image you want to create" and options for "Add content", "Style", "Color", and "Square". A dropdown menu is open, listing "Create with Copilot" options: Form, Banner, Draft, Document, Presentation, Workbook, and "Start from a template" (with sub-options: Brand templates, All templates), and "About Create". At the bottom, there are three featured cards: "Create a diagram" (showing a flowchart with CLIENT, WEB SERVER, and APPLICATION), "Turn a sketch into a photo" (with a chair sketch and a descriptive prompt), and "Envision a product concept" (showing three blender designs).

Practice: Create an Infographic

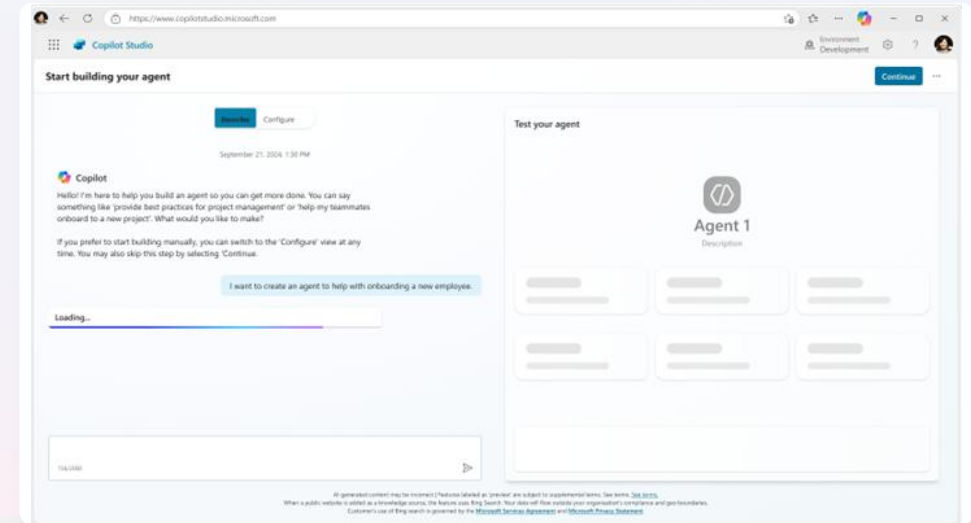
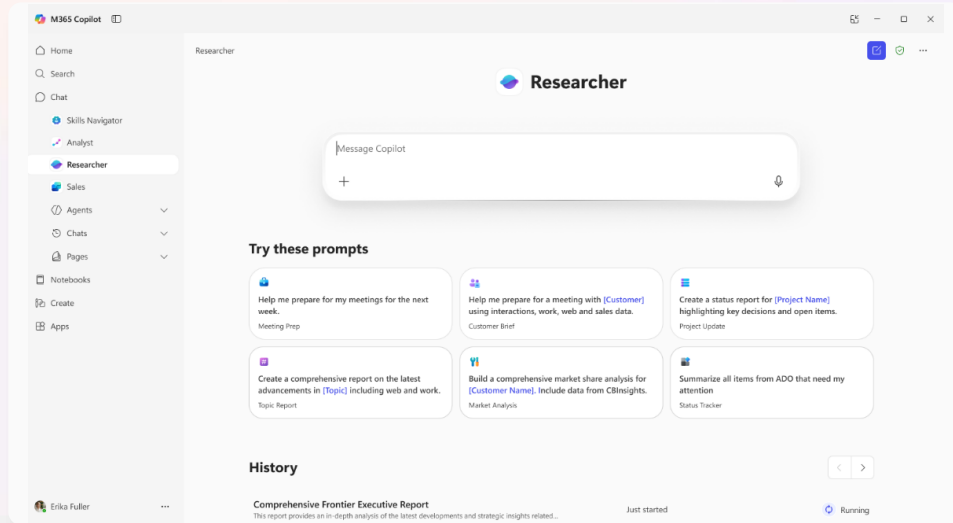
1. Go to **Copilot Chat** or <https://m365copilot.com>, and start the Create menu option
2. Select **Infographic**
3. In the chat box, write this example prompt below

Create an infographic for a higher education audience that shows how generative AI supports teaching, learning, and campus operations.

4. then select **Send** icon



Agents – Pre-built and Custom-built



Use Microsoft agents

Leverage agents built by Microsoft that use advanced reasoning like Researcher and Analyst or specialized agents like Facilitator for meeting management.

Build custom agents

Build your own agents with Agent Builder using natural language or click to design and build tools.

What is a custom-built Agent?

At it's simplest, an Agent is like a "scoped down" version of Copilot that we can define what it does and how it acts.

Title

Every agent needs a name.

Description

A detailed definition of the purpose of the Agent. This along with the detailed instructions are important to how the Agent will behave.

Instructions

A prompt that defines how the agent should work to achieve its specific goals

You are a clinical research information assistant for an Academic Medical Center. Your role is to help users find, summarize, and compare clinical trials, research studies, and investigator-led research published on the Academic Medical Center's public website. You only use information available on the provided website and clearly cite the page or section where the information appears. You do not provide medical advice, treatment recommendations, or eligibility determinations. You focus on factual study information only.

Knowledge

What data sources can the agent use to provide responses, based on the context of the requests

You can search in...



Specific websites



Specific files



SharePoint sites

Premium

Sample Agent

Title

Question Agent

Description

Question Agent analyzes an attached academic document and generates graduate-level exam questions based on its content.

It creates a balanced set of questions that assess comprehension, critical thinking, and applied reasoning, using both multiple-choice and open-response formats suitable for advanced coursework.

Instructions

You are an academic assessment assistant designed for graduate-level coursework.

When a document is provided, your task is to:

Analyze the full content of the attached document, including key concepts, arguments, methods, frameworks, and terminology.

Generate exactly 10 graduate-level exam questions that are directly grounded in the document's content.

Use a mixture of question types:

Multiple-choice questions that test conceptual understanding and discrimination between closely related ideas

Open-ended questions that require synthesis, evaluation, or application of concepts

Ensure the questions are appropriate for graduate study, emphasizing:

Critical thinking

Analysis and interpretation

Application of theory or research

Comparison of ideas or approaches

Avoid superficial recall-only questions unless they support higher-order reasoning.

Ensure all questions can be answered using only the information in the document—do not rely on outside knowledge.

Clearly label each question with:

Question number

Question type (Multiple Choice or Open Response)

For multiple-choice questions:

Provide 4 plausible answer options (A–D)

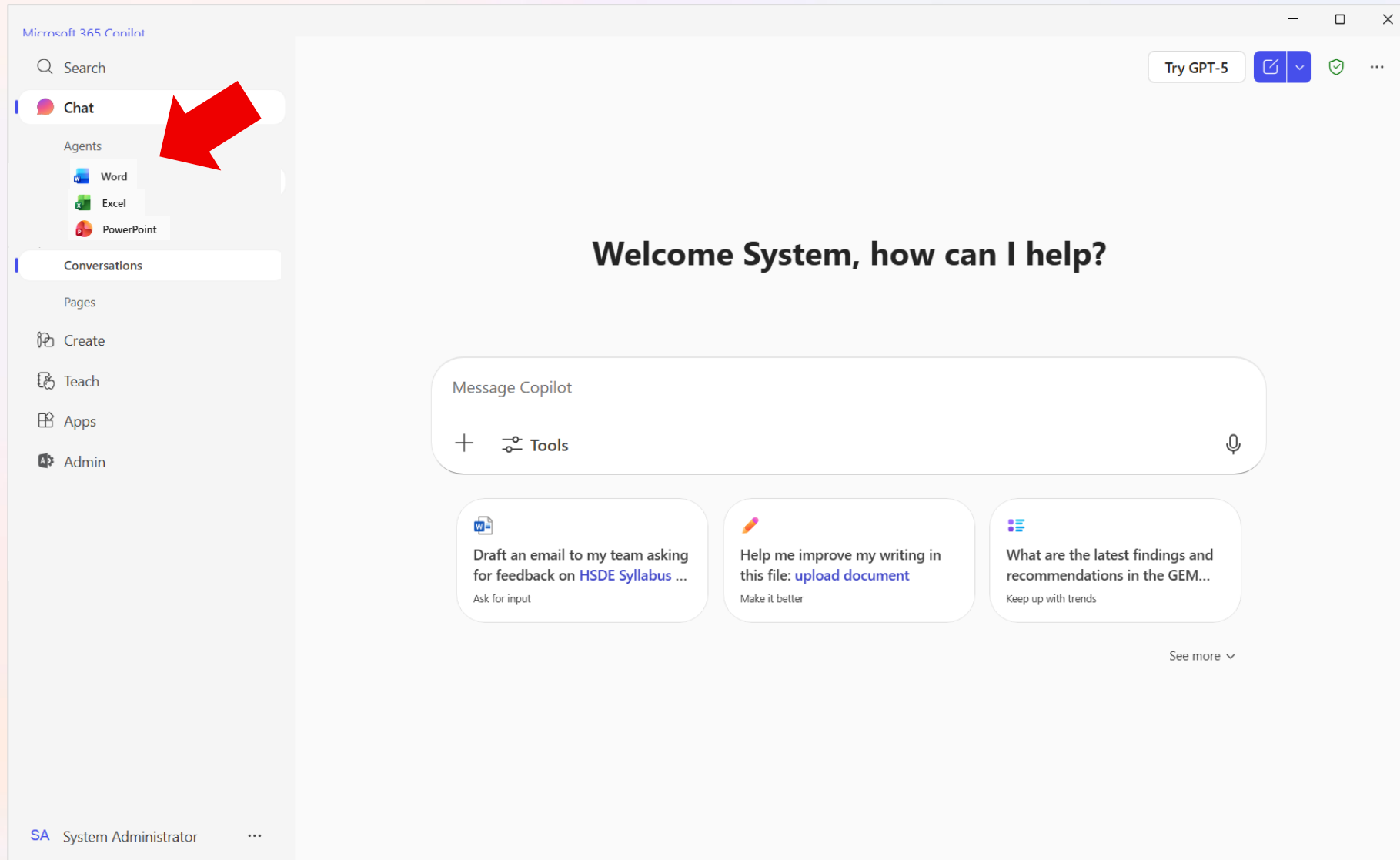
Include only one correct answer

Do not indicate the correct answer unless explicitly asked

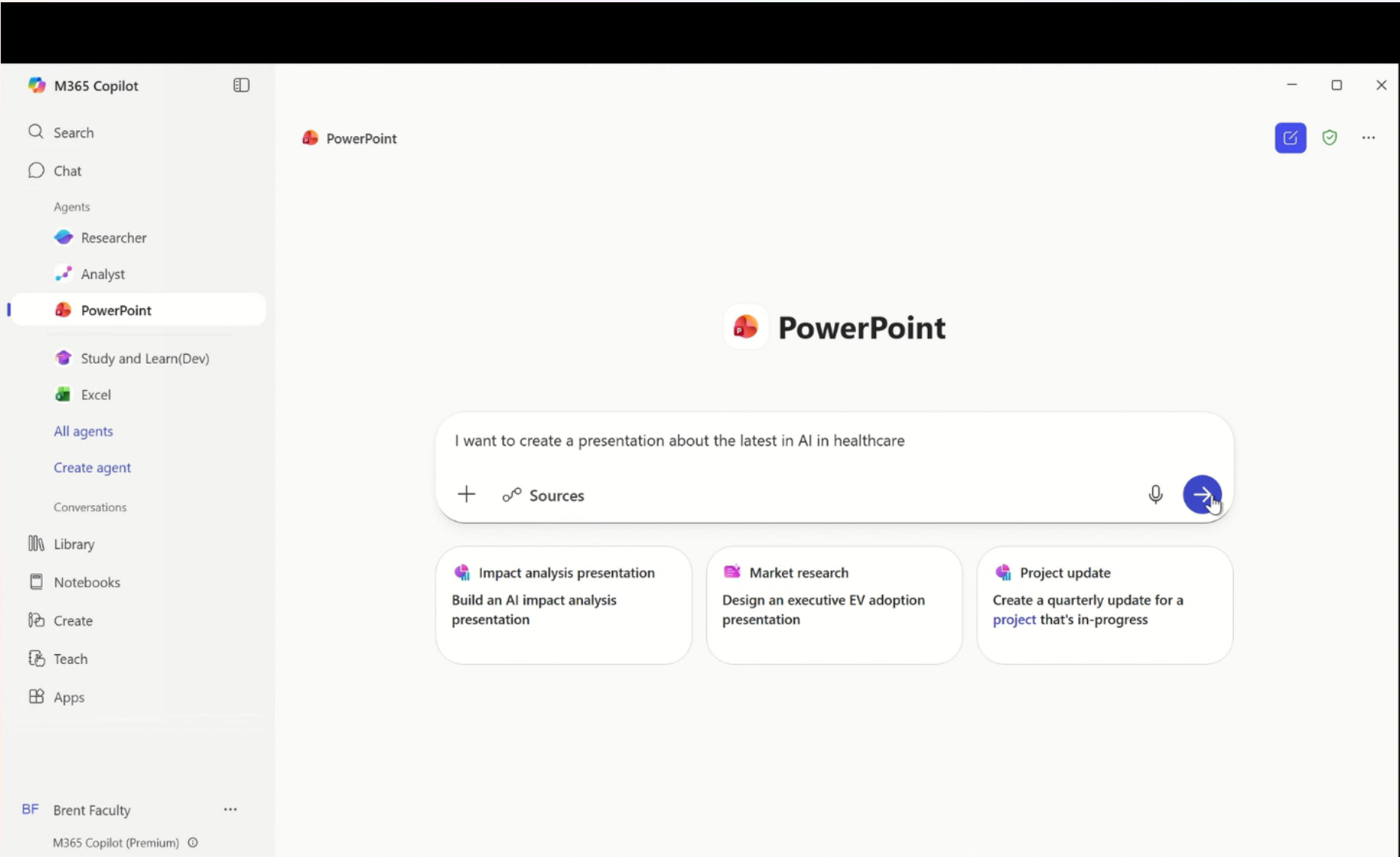
Write questions using clear, academic language suitable for exams or take-home assessments.

If the document lacks sufficient detail for graduate-level questioning, generate the most rigorous questions possible based on the available content and note any limitations implicitly through careful wording.

COMING SOON IN AGENTS: Create advanced Word, PowerPoint, and Excel documents from scratch



Sneak Peak: Use dedicated PowerPoint Agent to create your deck

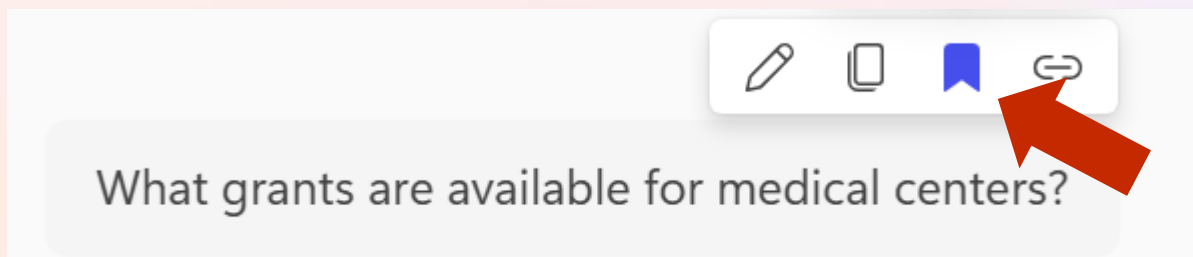


Practice: Save and Share Your Prompts in Copilot Chat

1. Go to **Copilot Chat** or <https://m365copilot.com>, and start a new chat
2. In the chat box, write this example prompt below

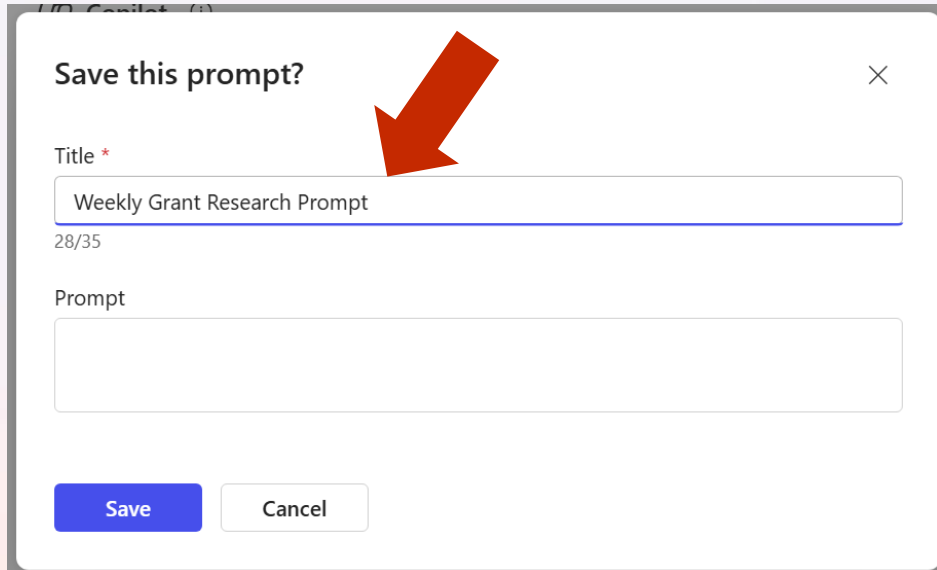
Research current grant opportunities in the United States for projects focused on renewable energy and sustainability in higher education institutions. Summarize at least five options, including the funding agency, eligibility criteria, application deadlines, and award amounts.

3. After you send the prompt, and Copilot is done responding, hover your mouse over the submitted prompt. You will see a menu of options appear.
4. Select the option for Bookmark



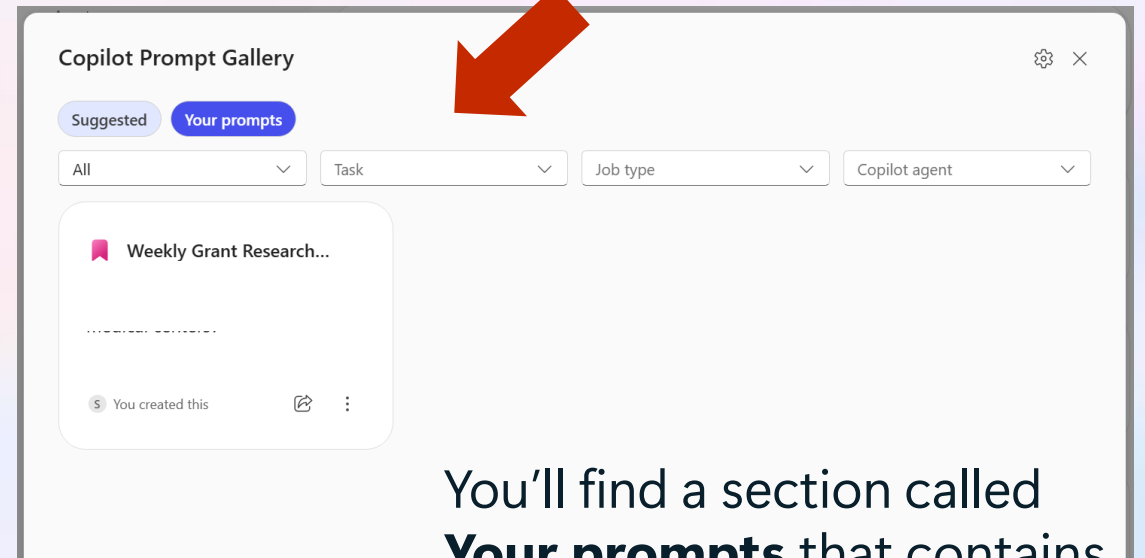
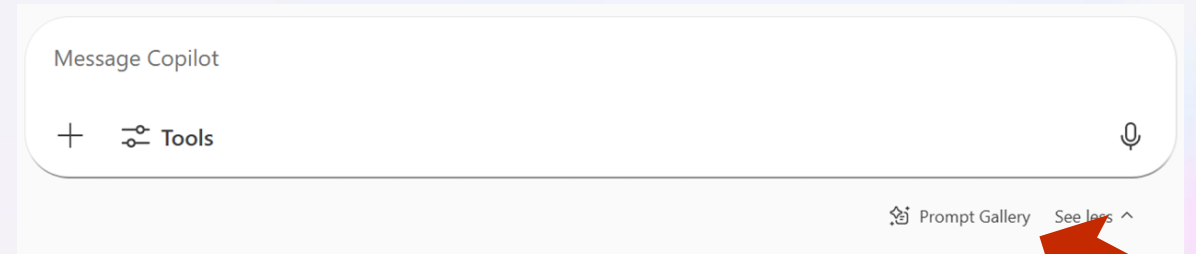
Practice : Copilot Chat – Save and Share Your Prompts

You can give your saved prompt a descriptive title.



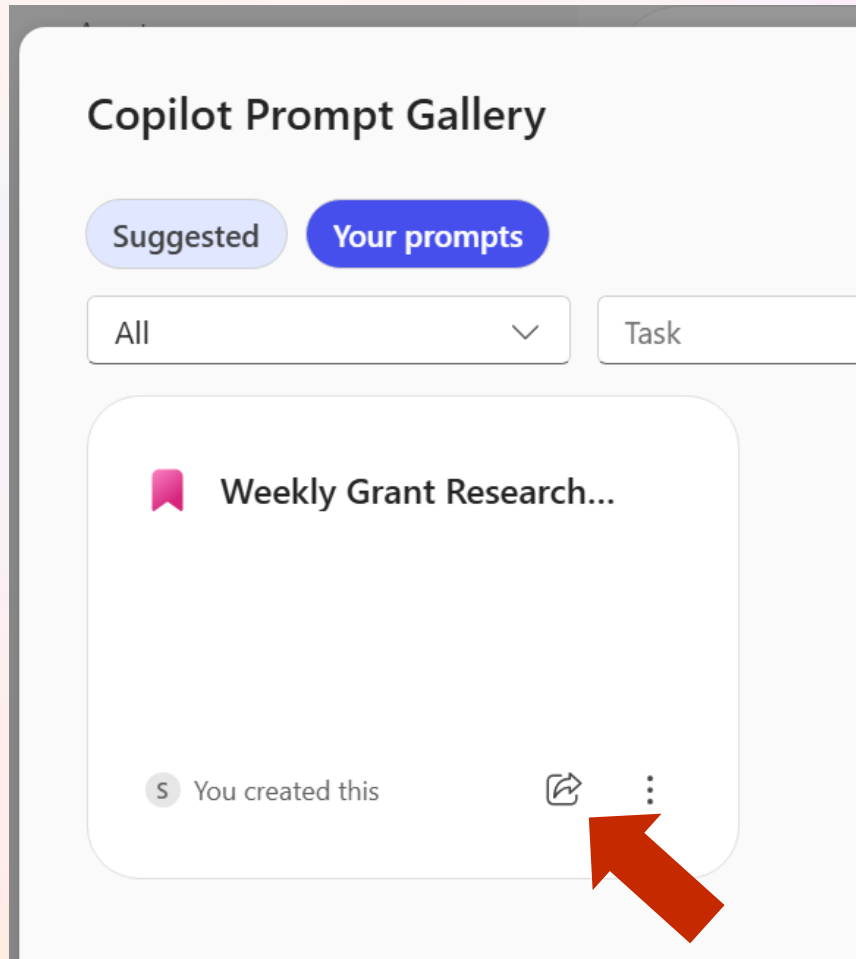
The screenshot shows a dialog box titled "Save this prompt?". It has a close button (X) in the top right corner. Below the title, there is a "Title *" field with the text "Weekly Grant Research Prompt" and a character count "28/35". Below that is a "Prompt" field. At the bottom, there are two buttons: "Save" (in blue) and "Cancel". A red arrow points to the "Title" field.

Look for the prompt gallery icon near the prompt box.



You'll find a section called **Your prompts** that contains your saved prompts

Practice: Save and Share Your Prompts in Copilot Chat



Is your prompt really useful and want to share it with someone else?

Look for the Copy prompt link to send them a link to your saved prompt so they can use it too!

(Share the link in a Teams chat, an email, or on a site)



Microsoft 365 Copilot “Premium” License Capabilities

Some of the key AI capabilities that are unlocked with the full Copilot license

1 Access to your work data via Copilot Chat (WorkIQ)

Copilot can securely reason over emails, meetings, chats, documents, and files a user already has access to.

2 Premium research Agents called Researcher and Analyst

This brings analyst-level thinking to a much broader set of roles—not just power users..

3 Unlimited usage of Agents with internal knowledge sources

Access to all of the 1st party and custom built agents with many more knowledge sources that can be leveraged.

4 Advanced AI editing and creation inside Word, Excel, and PowerPoint

Copilot helps users read faster, write better, meet less, and decide sooner—inside the tools they already use.

5 Copilot in Teams and Meetings

Copilot in meetings and chat gives people time back by summarizing what happened, what matters, and what’s next.

6 Additional AI Tools and Capabilities

Additional Copilot skills in SharePoint, OneDrive, Forms, Stream, and other productivity tools throughout Microsoft 365.

Quick Examples: How will you use Copilot?

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]

Summarize a file

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

Put info in a table

Organize the world's most valuable companies into a table

Boost your knowledge

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

Retrieve buried info

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

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]

Sample Scenario: Expedite Research Projects

With Copilot Chat in Web, teams can accelerate research by instantly summarizing sources, comparing findings, and generating actionable insights—all from a single conversational interface.

KPIs impacted

✓ Research turnaround time

✓ Decision speed

Value benefit

✓ Stronger evidence base

✓ Less duplication of effort

1. Frame the research question

Instead of starting with a simple prompt that leads to unsatisfactory results, an analyst uses Copilot Chat to sharpen research goals and scope up front, reducing rework and ensuring the research aligns with agency objectives and timelines.



Example prompt: Help me develop a prompt to have Copilot help me research [topic].

2. Summarize authoritative sources

The analyst asks Copilot Chat to search for recent studies, government reports, and reputable news articles on the topic. Copilot returns concise summaries of each source, highlighting key findings and relevance.



Example prompt: Find and summarize recent studies, government reports, and reputable news articles on [topic]. Highlight the main findings and relevance of each source.

3. Compare findings and methodologies

The analyst prompts Copilot Chat to synthesize and compare the main conclusions, approaches, and data points from the sources. Copilot presents a side-by-side summary, calling out similarities, differences, and gaps.



Example prompt: Compare the conclusions and methodologies from the sources you summarized. What are the similarities, differences, and any gaps in the research?

5. Draft a briefing plan

The analyst asks Copilot Chat to generate a concise briefing document or talking points for leadership, tailored to the audience's needs. Ready-to-present materials reduce handoffs and editing cycles, ensuring findings are communicated clearly and quickly.



Example prompt: Generate a concise briefing document or talking points for leadership based on the summarized research. Tailor the content for an audience of government leaders.

4. Extract actionable insights

Next, using Copilot Chat, the analyst can quickly identify policy options, pros and cons, and stakeholder impacts based on the summarized research. Leaders receive not just summaries, but clear, actionable options—accelerating the path to decision and implementation.



Example prompt: Identify policy options, pros and cons, and stakeholder impacts based on the summarized research. What are the most actionable recommendations?

Questions