

M365 Copilot Chat Overview



What is Copilot Chat

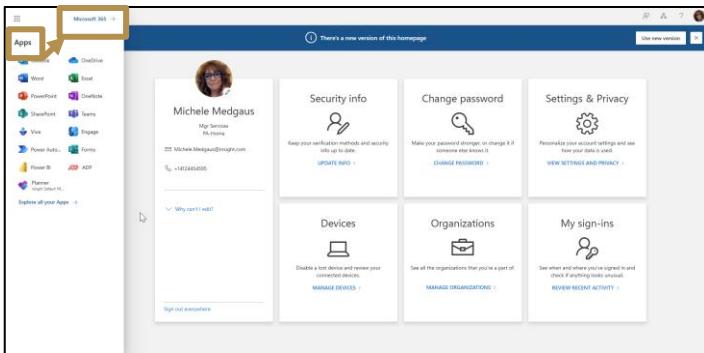
Copilot Chat is a conversational interface for quick help, brainstorming, and cross-app queries.

- **Conversational Interface:** Users can type questions or requests in everyday language, making it easier to get help without needing technical knowledge.
- **Task Assistance:** Copilot Chat can help draft emails, summarize documents, generate reports, and automate repetitive tasks within supported apps like Word, Excel, PowerPoint, and Outlook.
- **Context Awareness:** The chat function leverages context from your documents, emails, and conversations to provide more relevant and accurate responses.
- **Integration:** It is seamlessly integrated into Microsoft 365, allowing users to access Copilot Chat from within their workflow without switching applications.
- **Productivity Enhancement:** By handling simple queries and complex requests, Copilot Chat helps users save time and improve efficiency.

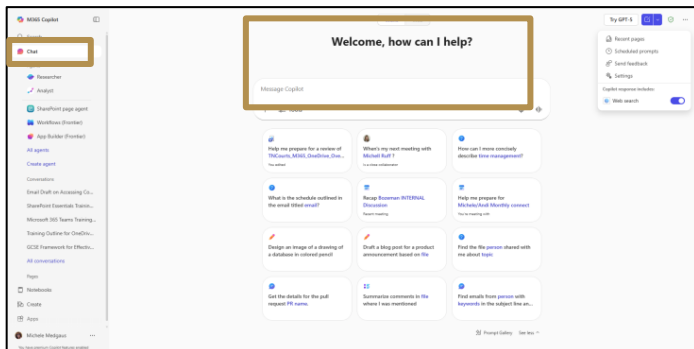
Access Copilot Chat

Accessing **Copilot Chat** through your web browser ensures that you can seamlessly integrate Copilot Chat into your workflow from any device with internet access, making it ideal for both in-office and remote work environments.

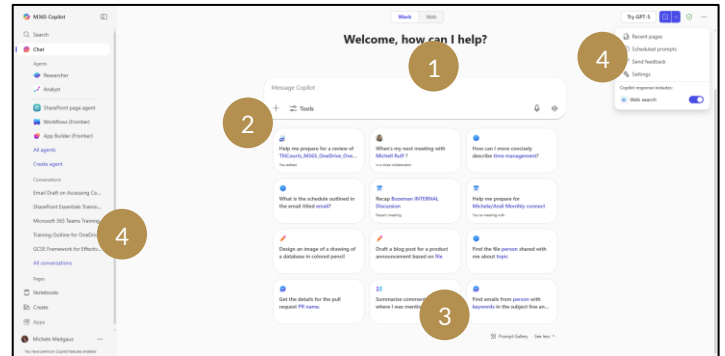
1. Type **myaccount.microsoft.com** into your internet browser, **M365** opens.
2. From the Navigation Pane select the **App Launcher (nine dots)**.
3. From the **Apps** section select **Microsoft 365 ->**.



4. **Copilot Chat** displays.



Copilot Chat Overview

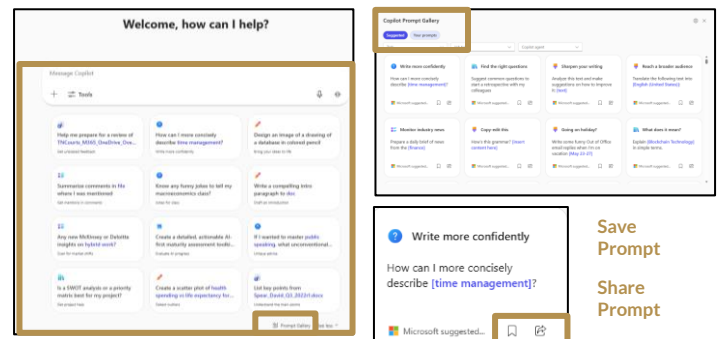


1. **Prompt Window:**
 - Displays where users type their prompts to interact with Copilot Chat.
2. **Adding Content:**
 - Users can add work content, upload images and files, or attach cloud files, making it easy to provide Copilot Chat with the necessary context for more accurate responses.
3. **Prompt Gallery:**
 - The Copilot Chat Prompt Gallery provides a variety of suggested prompts, helping users discover effective ways to leverage Copilot Chat for different tasks.
4. **Previous Prompts:**
 - Users can view their previous prompts and add references, supporting an iterative and collaborative workflow.

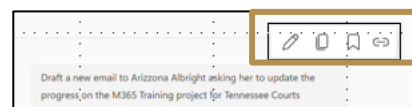
Prompt Gallery

Copilot Chat Prompt Gallery:

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



Edit, Copy, Save and Share Prompts



Prompts

Prompts are commands or questions that guide Copilot Chat to create, summarize, edit, analyze, or transform content.

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

- **Goal:** What 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?

Dos and Don'ts of Prompting

Copilot Chat is a powerful assistant; however, it requires clear, concise, and specific prompts to deliver accurate results.

- Verify facts generated by Copilot Chat and avoid treating it as an autopilot tool.
- Maintain a conversational tone and provide examples or background to improve the quality of responses.
- Do not give conflicting instructions, change topics, or using vague language and acronyms, as these can confuse the system and reduce output quality.

Keep Iterating to Improve Your Prompts:

- It's essential to keep iterating and refining your prompts. This process involves continuously improving the clarity, context, and specificity of your requests to ensure that Copilot Chat understands and responds accurately.

Questions to Ask:

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

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

Keep it Conversational:

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

Prompt Types

Information:

- Used when you're looking for facts, explanations, or summaries

Task-Oriented:

- These help you get something done such as writing, editing, planning, etc.

Creative:

- Used for storytelling, brainstorming, or generating creative content.

Conversational:

- These are more casual and open-ended, often used to explore ideas or just to chat.

Search- Based:

- These trigger a web search for up-to-date or location-specific info.

Image Generation:

- Used when you want to create a visual using AI.

Prompting Best Practices

Prompt length and clarity matter:

- If it's too short, you will get generic results.
- If it's too long, AI might not follow all your instructions.

Break down a problem into multiple steps:

- Step 1: "Generate an outline"
- Step 2: "Expand the section on"
- Step 3: "Provide statistics and case studies..."

Persona based prompting:

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

Ask Copilot Chat what they need from you:

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

Take a Holistic Approach with Copilot Chat

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

Be Curious:

- Experiment! Explore different prompt structures and approaches.

Test and refine:

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

How Can Copilot Chat Help You?

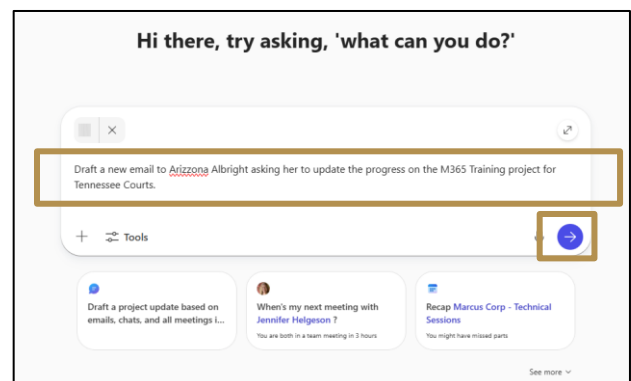
Copilot Chat's primary purpose is to assist users in accomplishing tasks, finding information, and generating content directly within their workflows through natural language conversations.

For example:

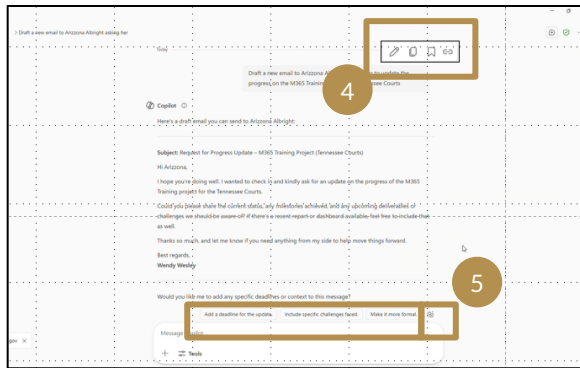
- Drafting emails
- Preparing for Meetings
- Summarizing and creating documents
- Creating graphics

Create an email Using Copilot Chat

1. Enter your prompt.
2. Click the **Arrow** to send.



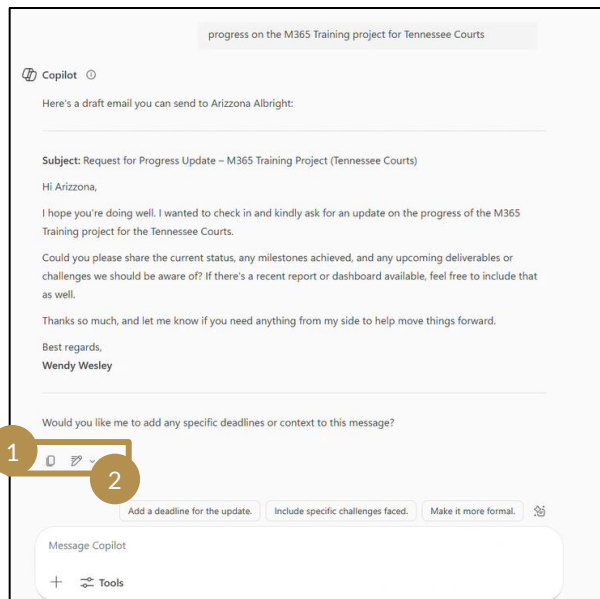
3. Copilot Chat creates a draft for the email.



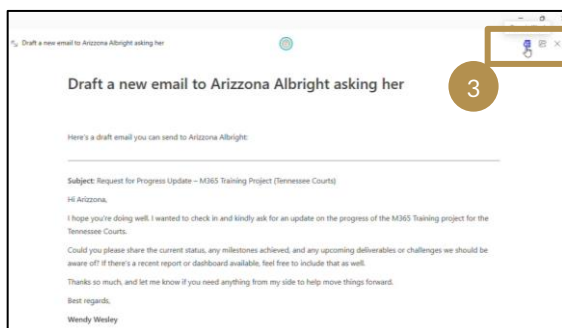
4. Hover over the prompt to **Edit**, **Copy**, **Save prompt** or **Copy prompt link**.
5. Select additional prompt suggestions or select the **Prompt Gallery** to access additional prompt suggestions or prompts that you have saved.

Copilot Chat Copy and Edit in Pages

1. Click **Copy** to copy the email content to the clipboard.
2. Click the **Edit in Pages (pencil)** icon to move the content from Copilot Chat directly into Word for more advanced editing.



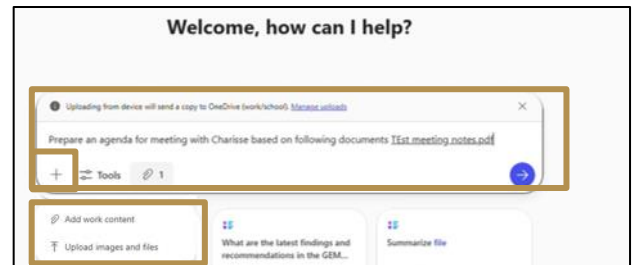
3. You can open **Word** or **Share** and co-edit the document with others using Word's collaboration features.



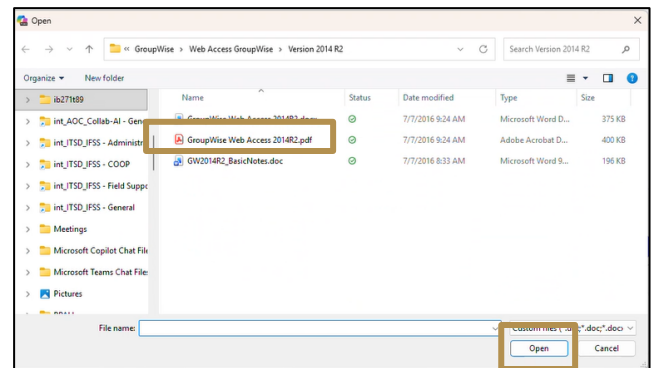
Prepare for a Meeting Using Copilot Chat

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

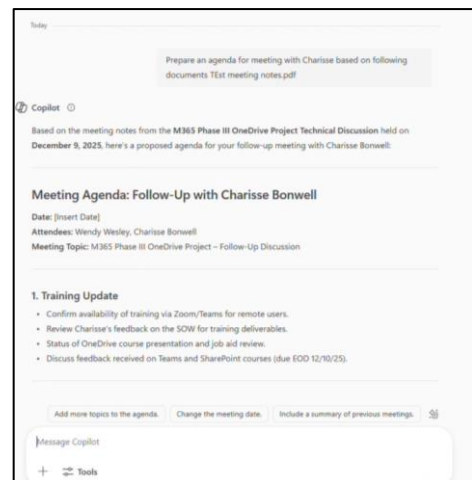
1. Ask Copilot Chat to prep the meeting.
2. Click the **+** sign to reference related files to pull the agenda and likely topics.



3. Locate your files and click **Open**.



4. Once the file is attached to the prompt, click the **Arrow** to send.

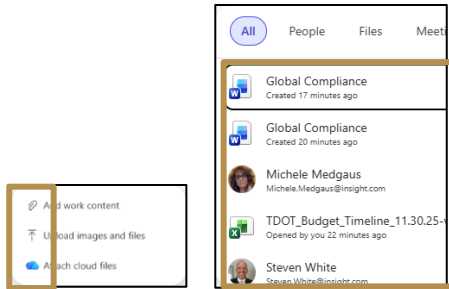


Use Copilot Chat to Summarize Documents

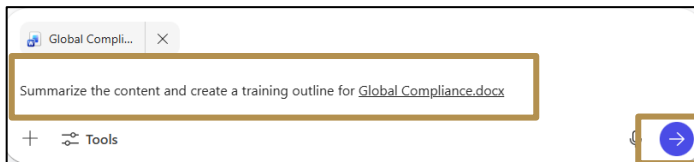
1. Enter your prompt and click the **Add content +** to attach a file.



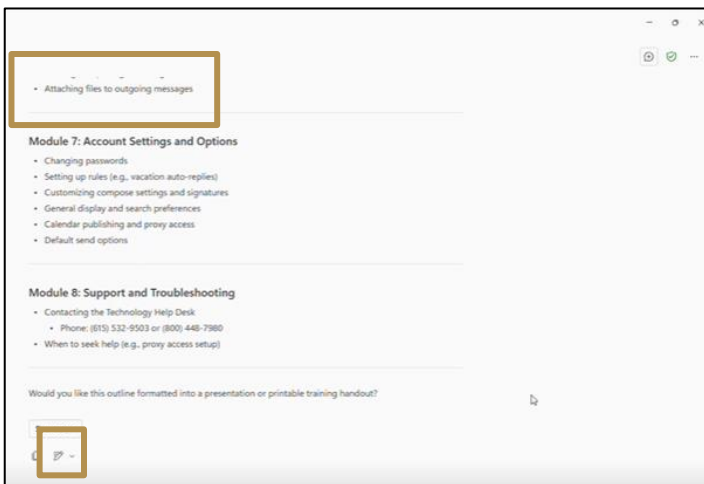
2. Click the **paperclip** to reference recent content or click to **Upload images and files** from your device or **Attach cloud files**.



3. Once the file is attached, click the **Arrow** to send.



4. 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.

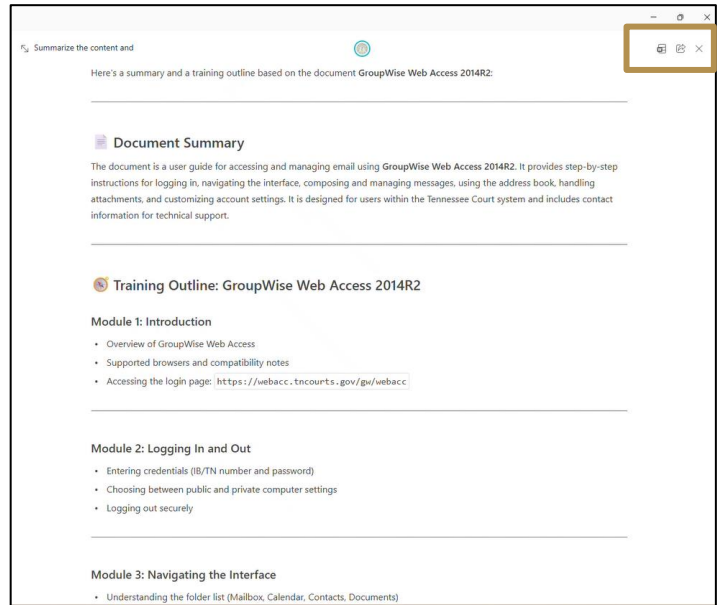


5. Click the **Edit in Pages (pencil)** to edit the content in pages which will allow you to share the chat output and collaborate with teammates.

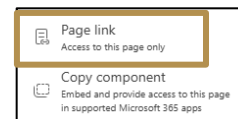
How to Use Edit in Pages

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.

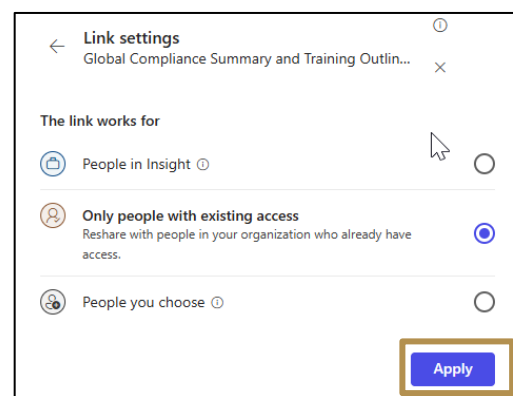
1. Click on the **Edit in Word** icon in the upper right to open in MS Word.
2. Click the **Share** icon in the upper right to collaborate without leaving Copilot Chat.



3. Select **Page link**.



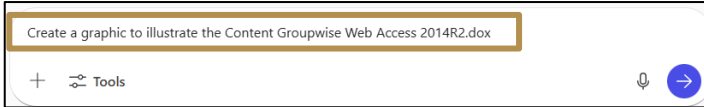
4. Click the **Settings** icon to refine permissions.
5. Click **Apply**.



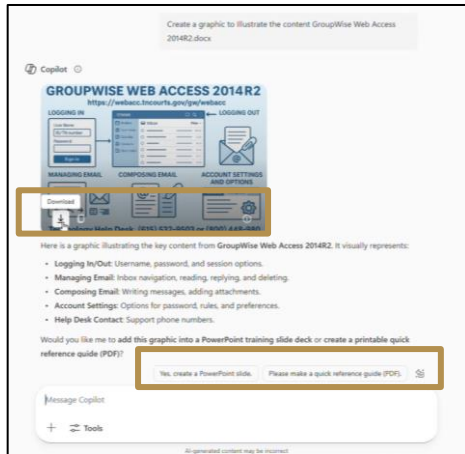
Recipients of the link can open the document directly in Word, where they can review, edit, and collaborate in real time if they have the appropriate permissions.

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.



Once the graphic is created, click on the graphic to edit, download, or copy the graphic.



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:
 - Preparing Training materials
 - Writing Improvement
 - AI-powered searches
 - Assisting with transcription, meeting notes, or translation (for non-sensitive content)
 - Drafting standard forms, presentation templates, or boilerplate language.