

Unlocking Productivity with Microsoft 365 Copilot Chat + Agents

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Sr. AI Business Solutions Specialist

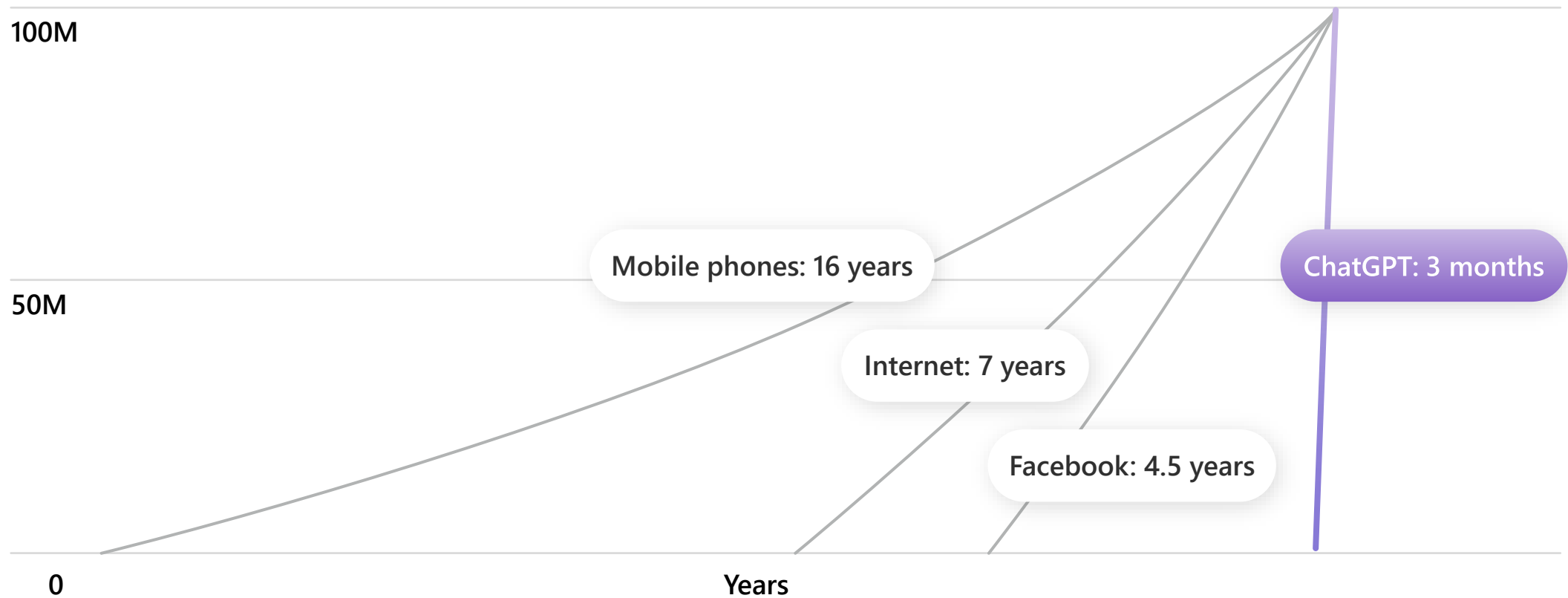


The State University
of **New York**



Generative AI technology is here

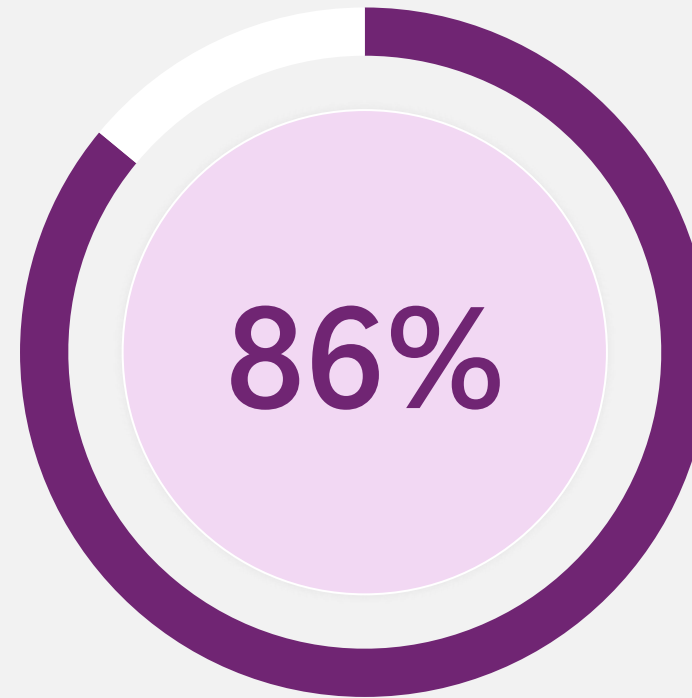
Time to reach 100M users





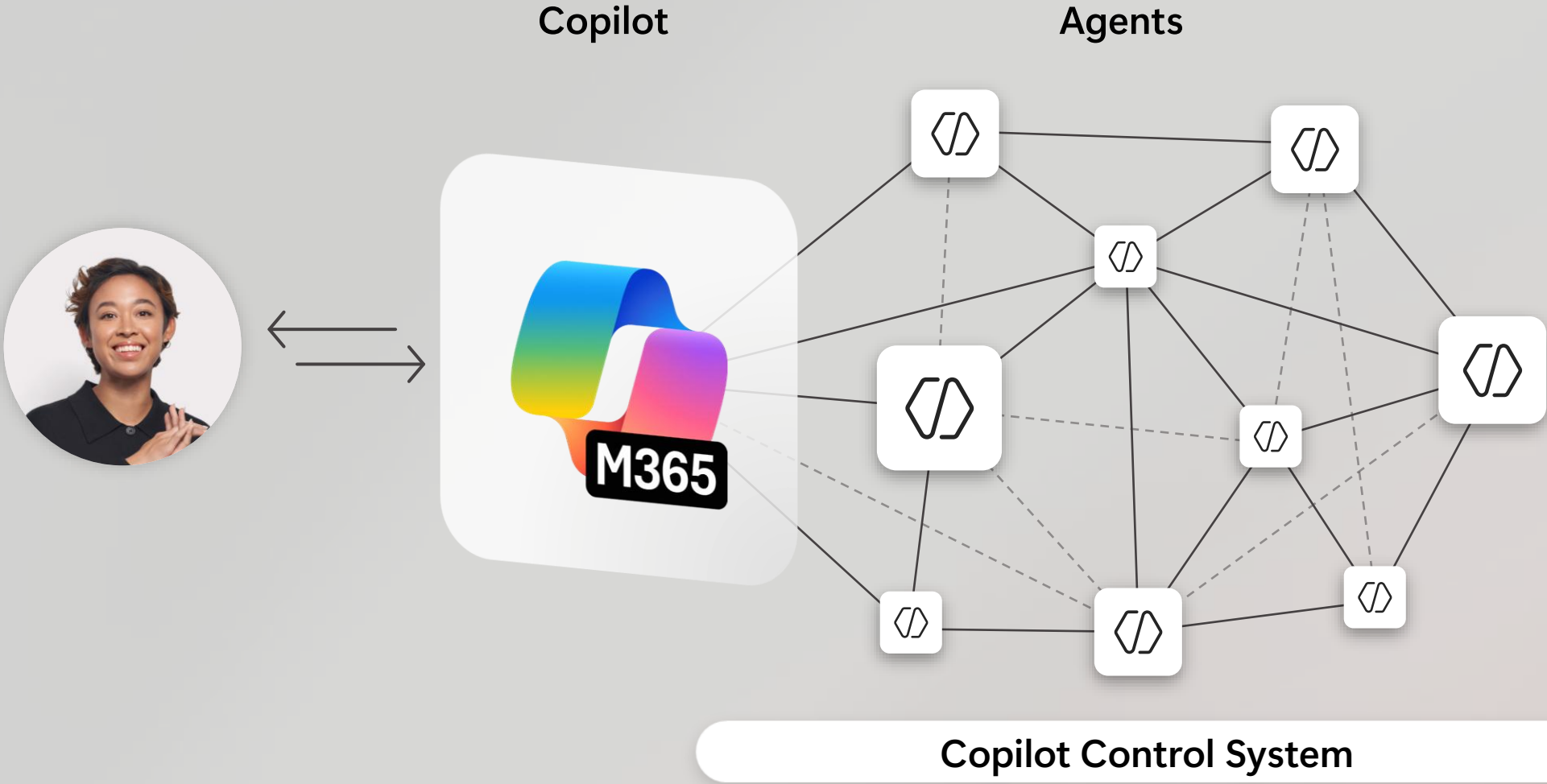
**Generative
AI usage in
education
jumped from**

45% in 2023 to



***in
2024***

Copilot is the UI for AI





Copilot

Human augmentation

Private, personal assistant

Everyone will have a Copilot



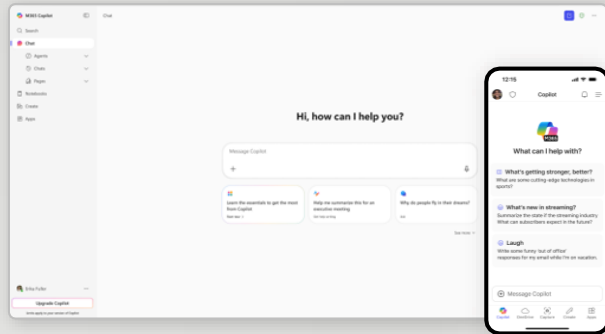
Agents

Connected to Copilot or autonomous

Automate tasks and processes

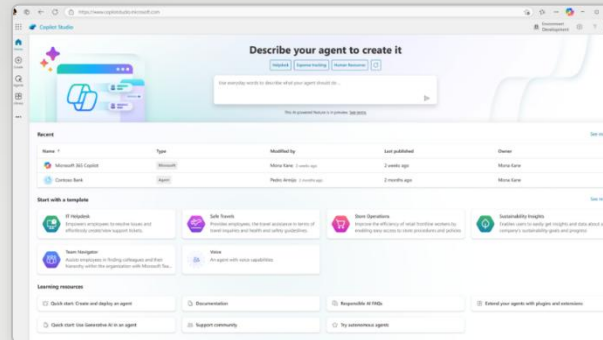
Every process will have an agent

Bring AI to education at no additional cost with Microsoft 365 Copilot Chat



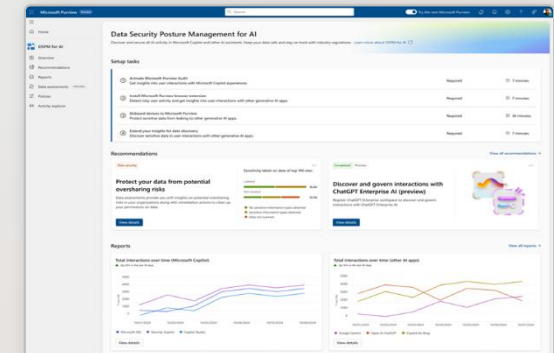
Chat

Secure web-grounded AI chat on the App and web, and in Microsoft 365 productivity apps



Agents

Integrated into the chat experience and paid for on a consumption basis



IT Controls

Enterprise Data Protection and agent management

What is enterprise data protection for prompts and responses?

Enterprise data protection (EDP) for prompts and responses offers the same enterprise terms¹ available in our Microsoft 365 commercial offerings.

EDP refers to controls² and commitments, under the [Data Protection Addendum](#) (DPA) and [Product Terms](#), that apply to customer data for users of Microsoft 365 Copilot and, starting mid-September, Microsoft Copilot.

With EDP, prompts and responses are protected by the same contractual terms and commitments widely trusted by our customers for their emails in Exchange and files in SharePoint.

¹Microsoft 365 Copilot supports HIPAA compliance for properly configured implementations. Microsoft Copilot is under review and does not support HIPAA compliance at this time.

²The specific controls will vary depending on the underlying subscription plan.

³[Microsoft 365 Copilot runs on the ISO 27018 certified Microsoft 365 platform](#)

Enterprise data protection

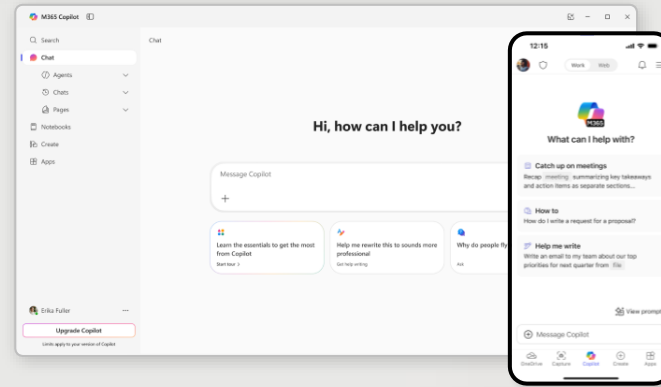
- **We secure your data:** [Encryption](#) at rest and in transit, rigorous physical security controls, and data [isolation](#) between tenants.
- **Your data is private:** We won't use your data except as you instruct. [Privacy](#) commitments include support for [GDPR](#), [ISO/IEC 27018](#)³, and [Data Protection Addendum](#).
- **Your access controls and policies apply to Copilot:** Copilot respects your [identity model](#), [permissions](#), [sensitivity labels](#), [retention](#) policies, [audit log](#), and follows administrative settings. The specific controls and policies will vary depending on the underlying subscription plan.
- **You are protected against AI security and copyright risks:** We help safeguard against AI-focused risks such as [harmful content](#) and [prompt injections](#). For content copyright concerns, we provide [protected material detection](#), and our [Customer Copyright Commitment](#).
- **Your data isn't used to train foundation models:** Prompts, responses, and data accessed through Microsoft Graph aren't used to train foundation models.

Microsoft 365 Service Boundary

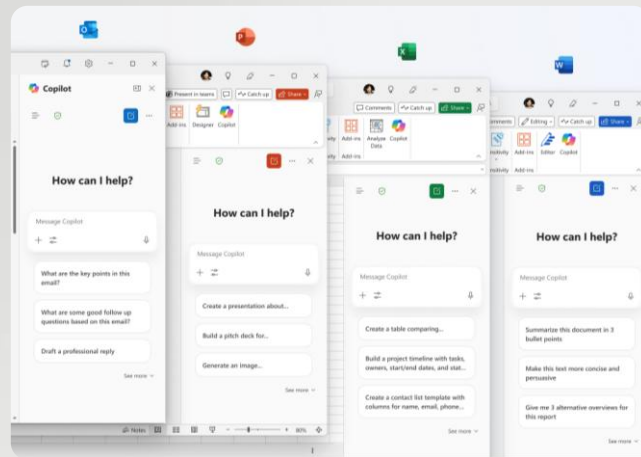
Access Copilot Chat where you work and learn



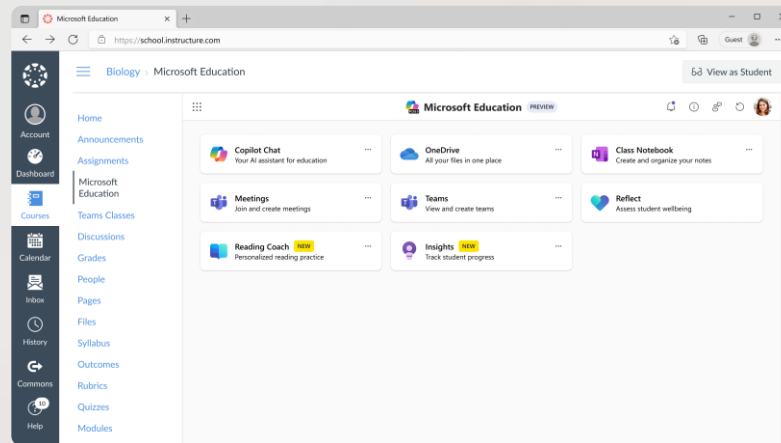
Web app and Edge browser



Desktop and mobile apps



Microsoft 365 apps



Learning Management Systems

Get to know Copilot Chat

The image shows the M365 Copilot Chat interface with several callouts pointing to specific features:

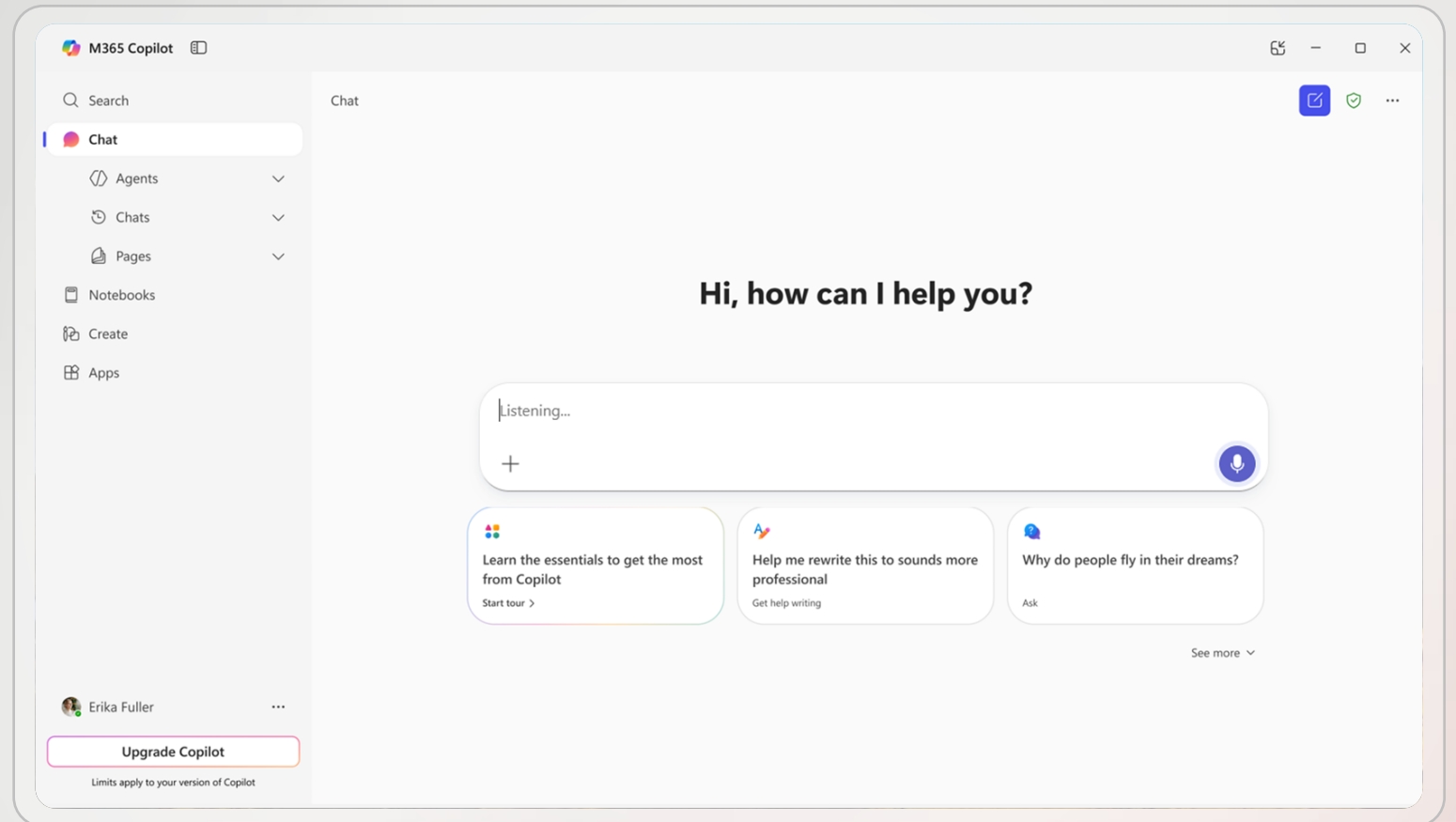
- Agents**
Use existing agents or create new ones
- Recent chats**
Return to a previous chat to continue the conversation
- Create**
Turn your idea into image, design, text draft, video, podcast or survey
- Upload files**
If you'd like Copilot to source responses from information in specific files, add them here.
- Start a new chat button**
Clear your past chat and start a new conversation.
- Copilot Prompt Gallery**
View additional prompt suggestions, including saved prompts.
- Suggested prompts**
If you're not sure what to ask, try or modify a sample prompt!

The interface includes a sidebar with 'Agents', 'Chats', 'Pages', 'Notebooks', 'Create', and 'Apps'. The main chat area displays 'Hi, how can I help you?' and a 'Message Copilot' input field. Below the input field are three suggested prompts: 'Learn the essentials to get the most from Copilot', 'Help me rewrite this to sounds more professional', and 'Why do people fly in their dreams?'. A 'See more' button is located at the bottom right of the suggested prompts section. The bottom of the interface shows the user's name 'Erika Fuller' and an 'Upgrade Copilot' button.

Chat

Powered by GPT-5

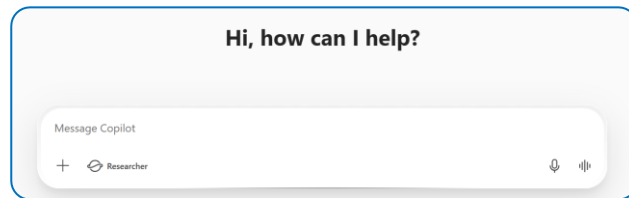
Secure AI chat powered
by the latest models available
and grounded in web data with
enterprise data protection



Copilot Chat powered by GPT-5

Try the latest model from OpenAI today

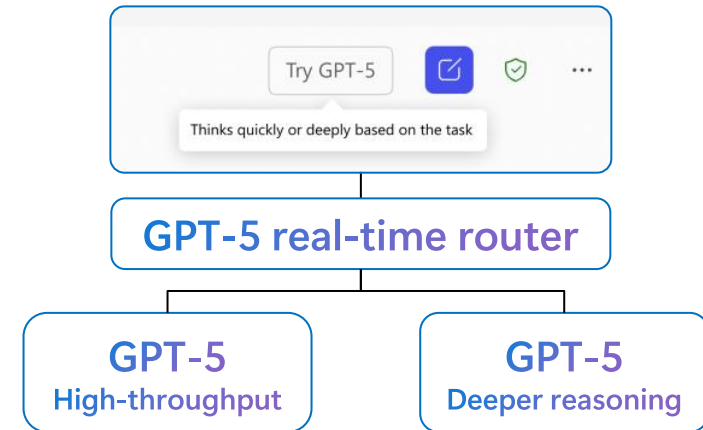
Copilot Chat with GPT-4o



GPT-4o

Prompt sent to GPT-4o

Copilot Chat with GPT-5



GPT-5 real-time router analyzes complexity of prompt
Simple prompts routed to GPT-5 high-throughput model
Complex prompts routed to GPT-5 deeper reasoning model

Both models are made secure with enterprise data protection and optimized for your use

Collaborate with Pages

Capture ideas instantly by moving Copilot Chat responses into a shared page

Work together in real time with colleagues or students to edit and expand content

Keep everything connected in a persistent workspace that saves automatically

The screenshot displays a Microsoft Copilot workspace with a persistent chat window on the left and a shared page on the right.

Chat Window (Left):

- Header: Microsoft logo, "New chat", and icons for chat, share, and settings.
- Table content:

Hazard	Risk Level	Control
Emergency evacuation	Low	Familiarize students with emergency exits; conduct a briefing on procedures.
Interaction with exhibits	Low	Instruct students on proper handling of exhibits; monitor their interactions.
Health issues (e.g., fainting)	Medium	Ensure access to water; have a first aid trained staff member present.

- Text: "Feel free to adjust any details as needed. Is there anything else you'd like to add or modify?"
- Buttons: "+ Add to page", "Copy", "Share", "Like", "Dislike", and a disclaimer "AI-generated content may be incorrect".
- Copilot logo and text: "Here's your new page: Risk assessment museum".
- Input field: "Ask me anything..."

Shared Page (Right):

- Header: "Risk assessment museum visit" and icons for share, print, and settings.
- Buttons: "Page link" (Access to this page only) and "Copy component" (Embed and provide access to this page in supported Microsoft 365 apps).
- Text: "Here's a risk assessment for your upcoming trip to the local science museum:"
- Table content:

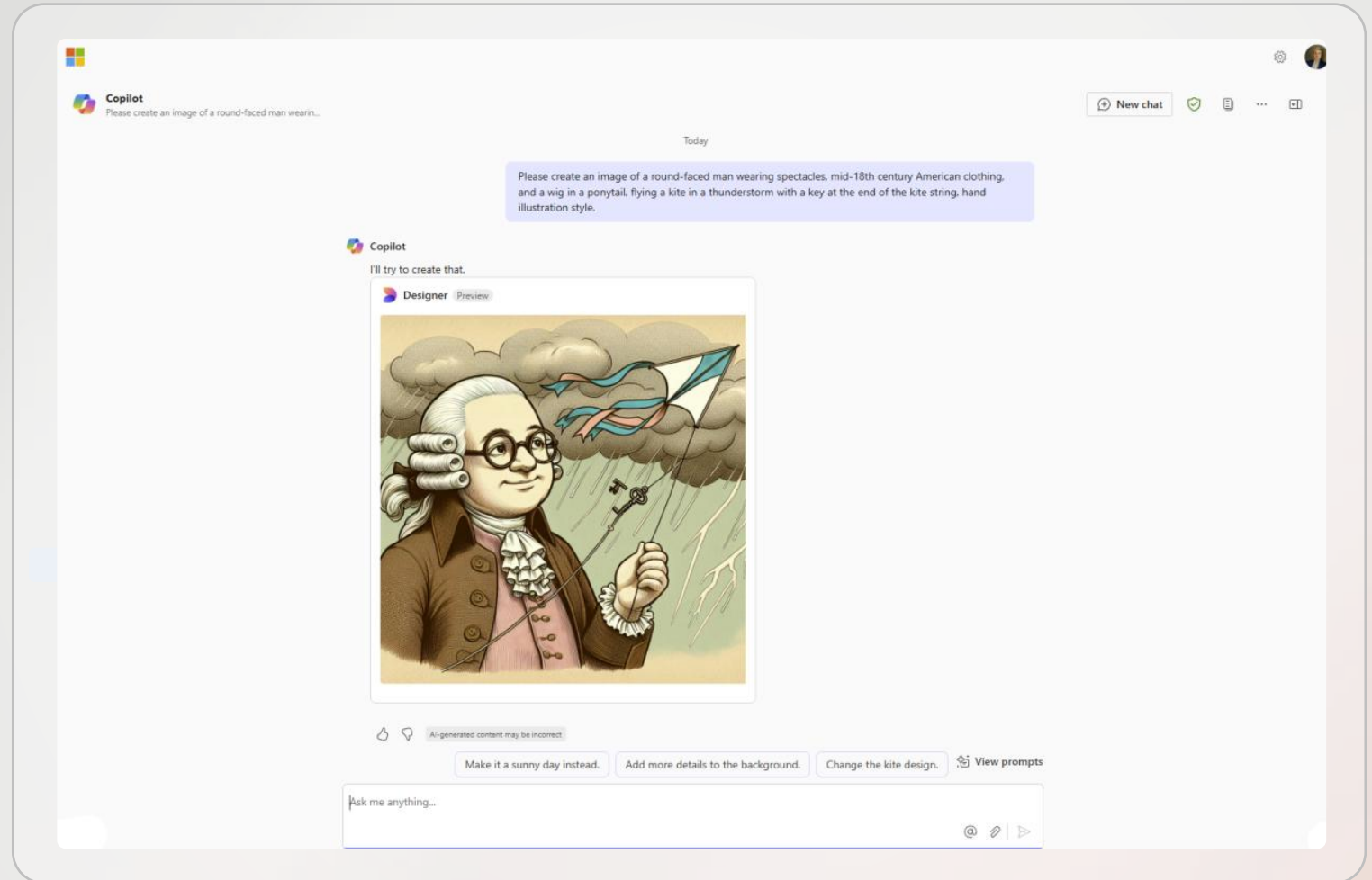
	Hazard	Risk Level	Control ...	Res
1	Transportation	Medium	Ensure all students are seated with seat belts <u>fastened</u> ; conduct headcounts.	
2	Slips, trips, and falls	Medium	Advise students to wear appropriate footwear; supervise movement in the museum.	
3	Lost students	High	Assign groups with chaperones; establish meeting points and times.	

Generate custom images

Bring abstract concepts to life with visuals of historic events, scientific phenomena, and more

Fuel project creativity with illustrations, storyboards, or design elements

Enrich course materials with images that make lessons more engaging and accessible

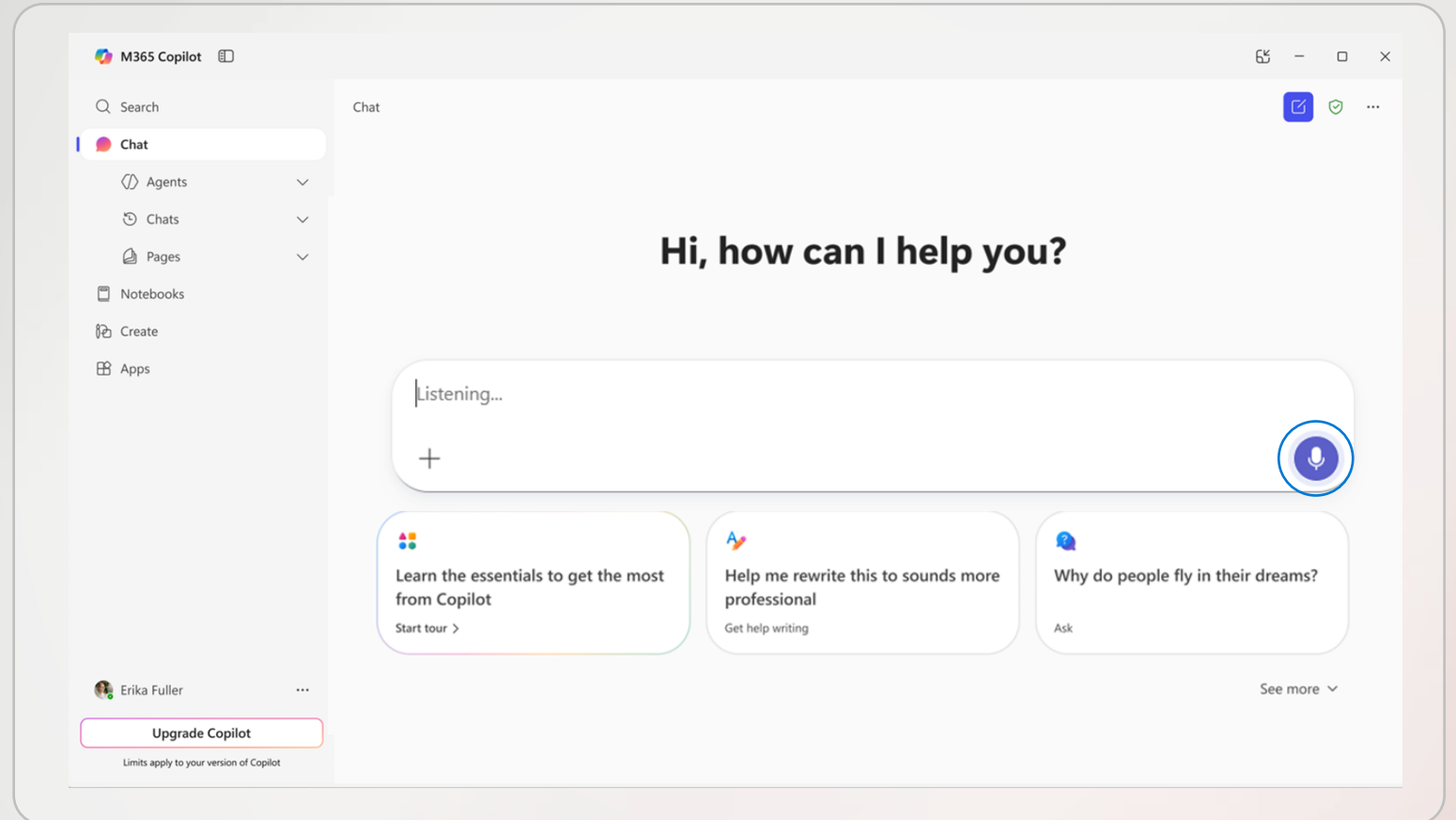


Interact with Copilot using voice features

Work hands-free by asking questions and creating content with your voice

Improve accessibility with responses that can be read aloud for learners

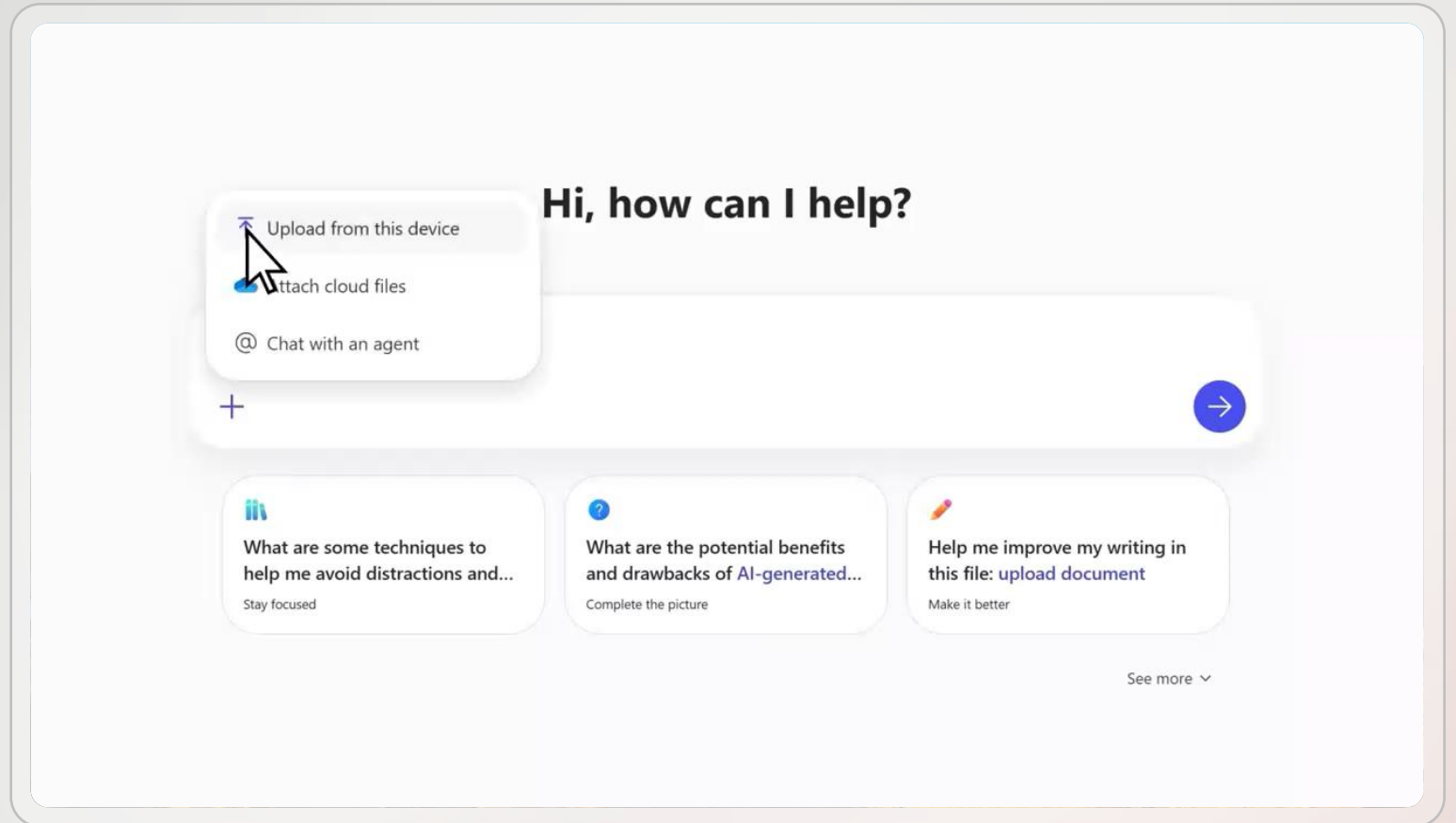
Practice presentations, brainstorm, and get coaching



Get insights from your files

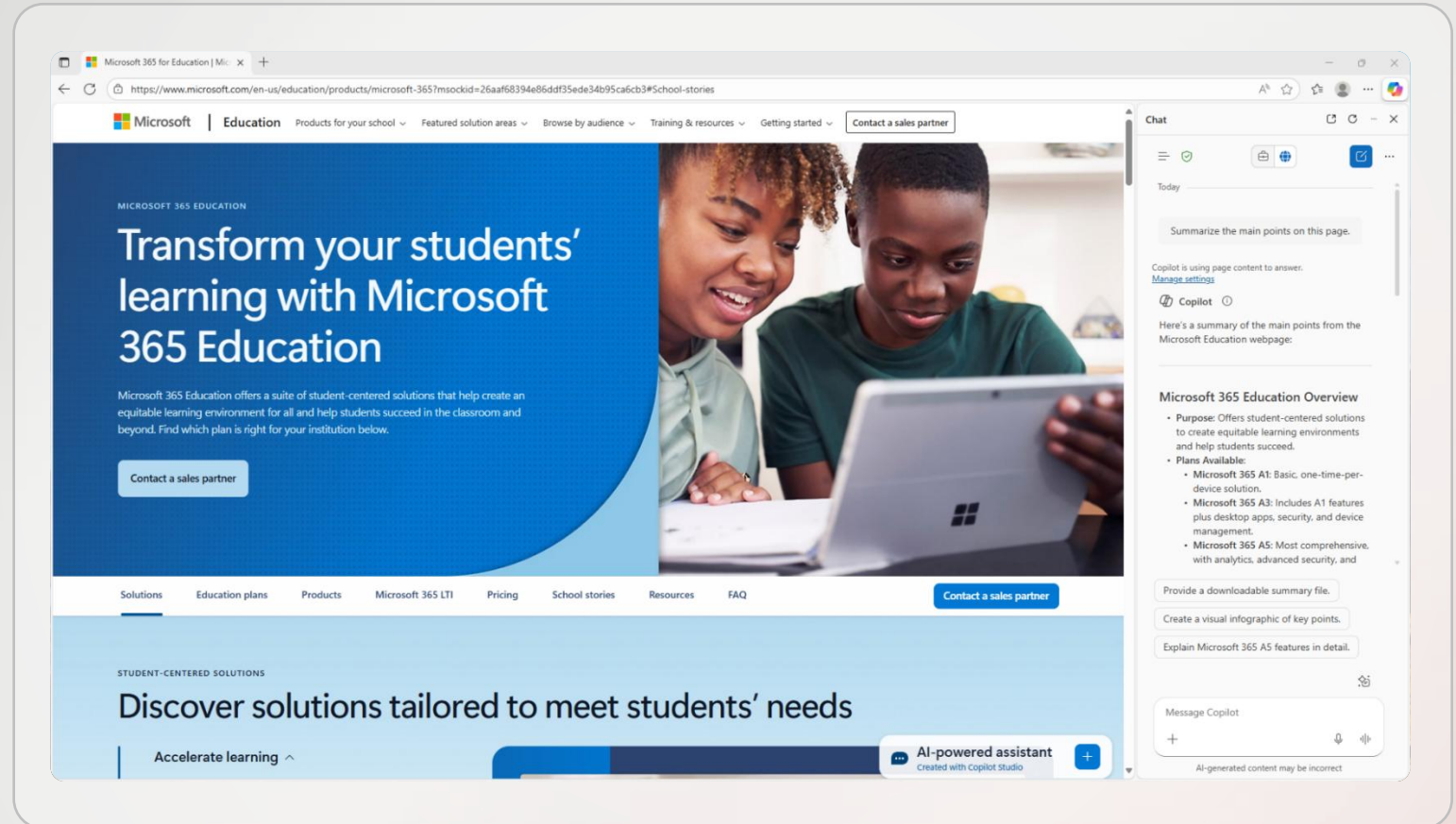
Upload files and ask Copilot Chat to provide summaries, answer questions, or assist with specific tasks

Add documents, pictures, or text and markup files



Summarize webpages and PDFs

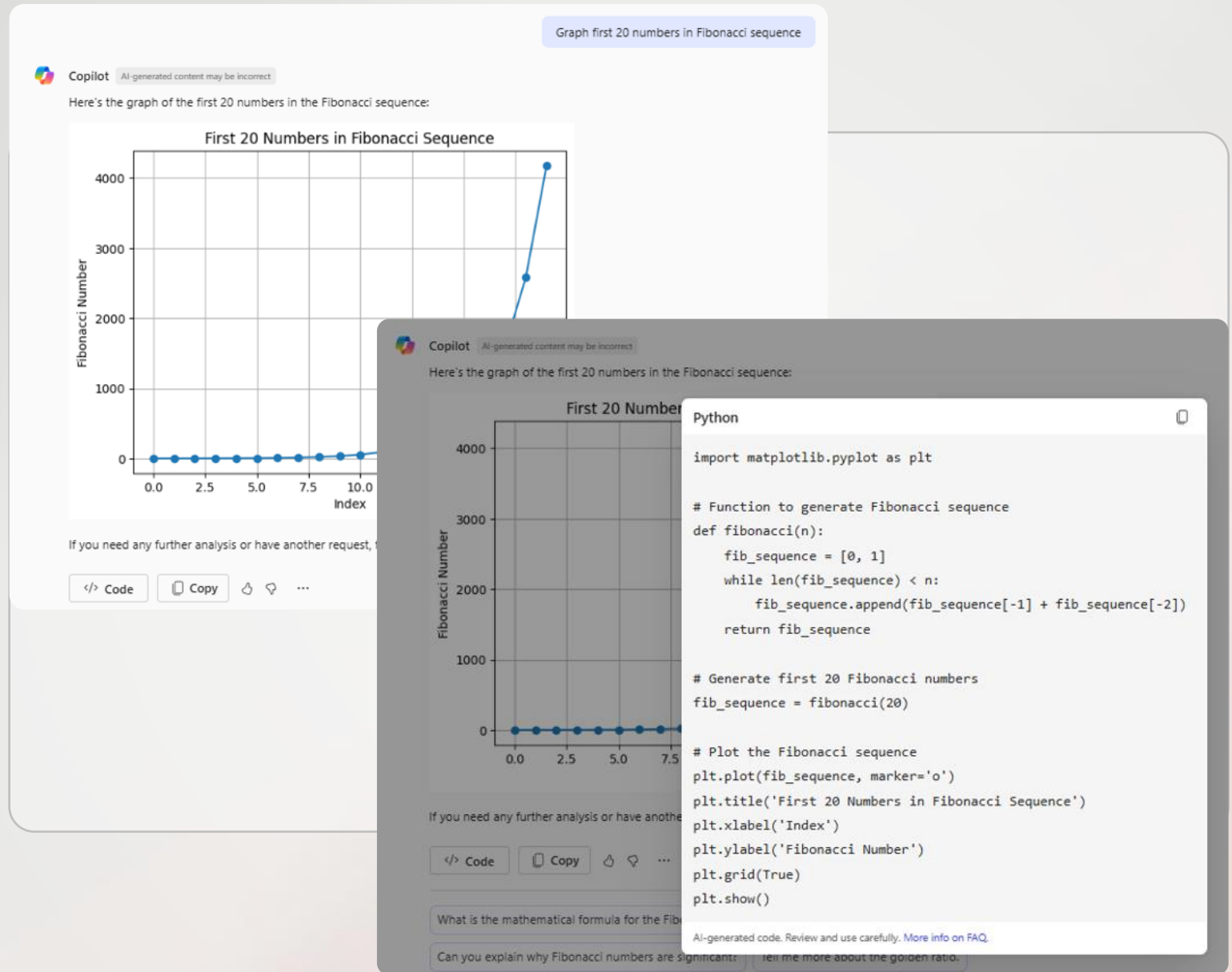
Use Copilot Chat in Edge to get
a quick summary of any
webpage or PDF



Perform complex calculations with code interpreter

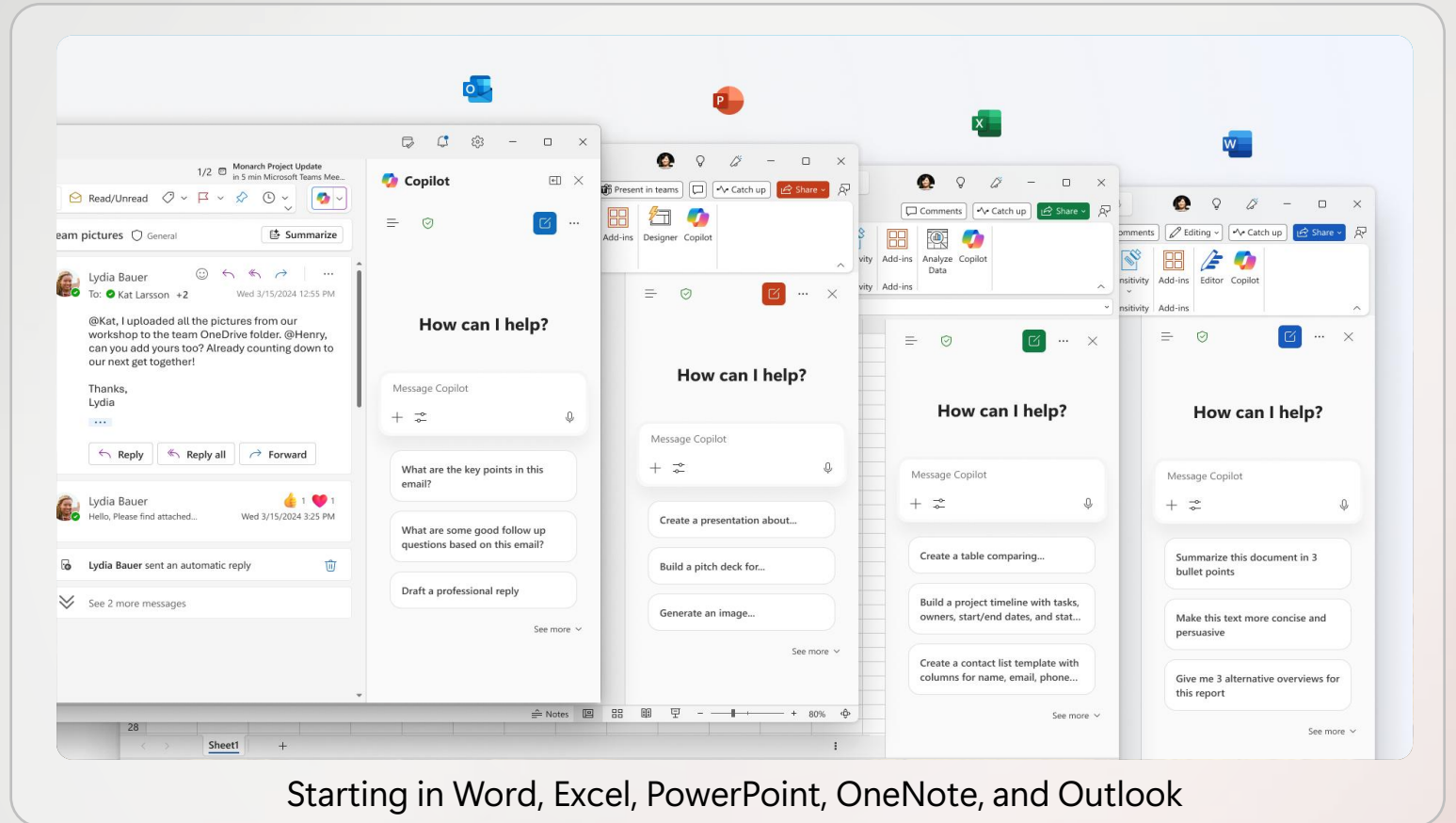
Simplify data analysis by processing student performance, attendance, and survey data from Excel or PDF files

Enhance student learning through interactive coding, math problem solving, and visualizations like graphs or word clouds



Copilot Chat in Microsoft 365 apps

Microsoft 365 users can use Copilot Chat with web data directly in the Microsoft 365 apps and reason over open files, uploaded files, and files added using "/"*.



Starting in Word, Excel, PowerPoint, OneNote, and Outlook

UI/UX is subject to change.

*For users without a Microsoft 365 Copilot license: Copilot in Outlook can reason over individual open emails, email threads, or attachments only, it cannot reason over your full inbox or calendar. Users will have standard access to file upload and "/" search based on service capacity. Accessible enterprise content via "/" search only includes files, and does not include chats, meetings, or emails.

Access Copilot Chat in your favorite Microsoft 365 Apps*



Outlook

Summarize email threads and draft responses



Teams

Catch up on unread chats and recap meetings



OneNote

Organize, summarize, and rewrite your notes for clarity



PowerPoint

Generate images and rewrite bullets for improved clarity



Word

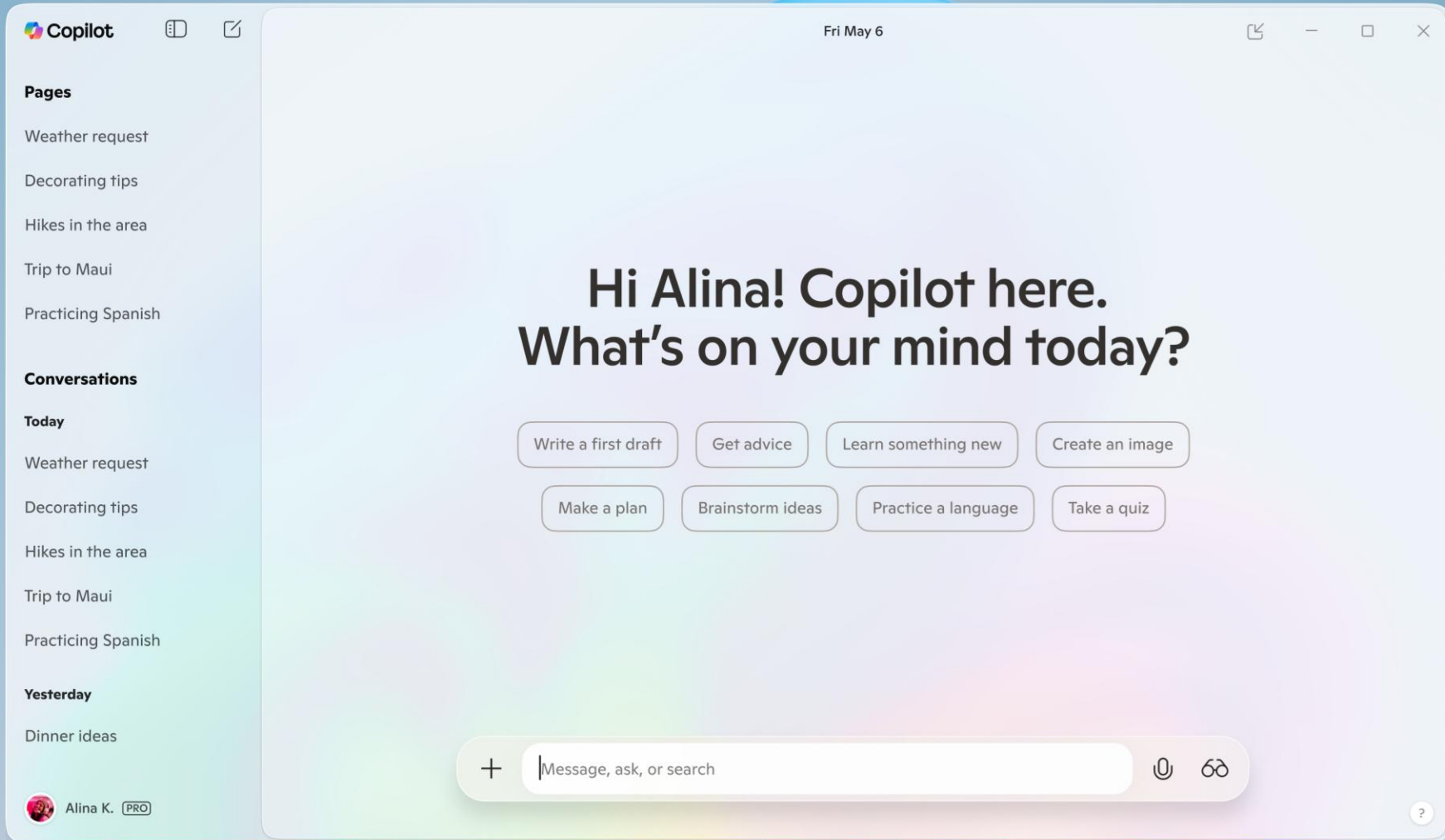
Extract key points from documents and quickly draft content



Excel

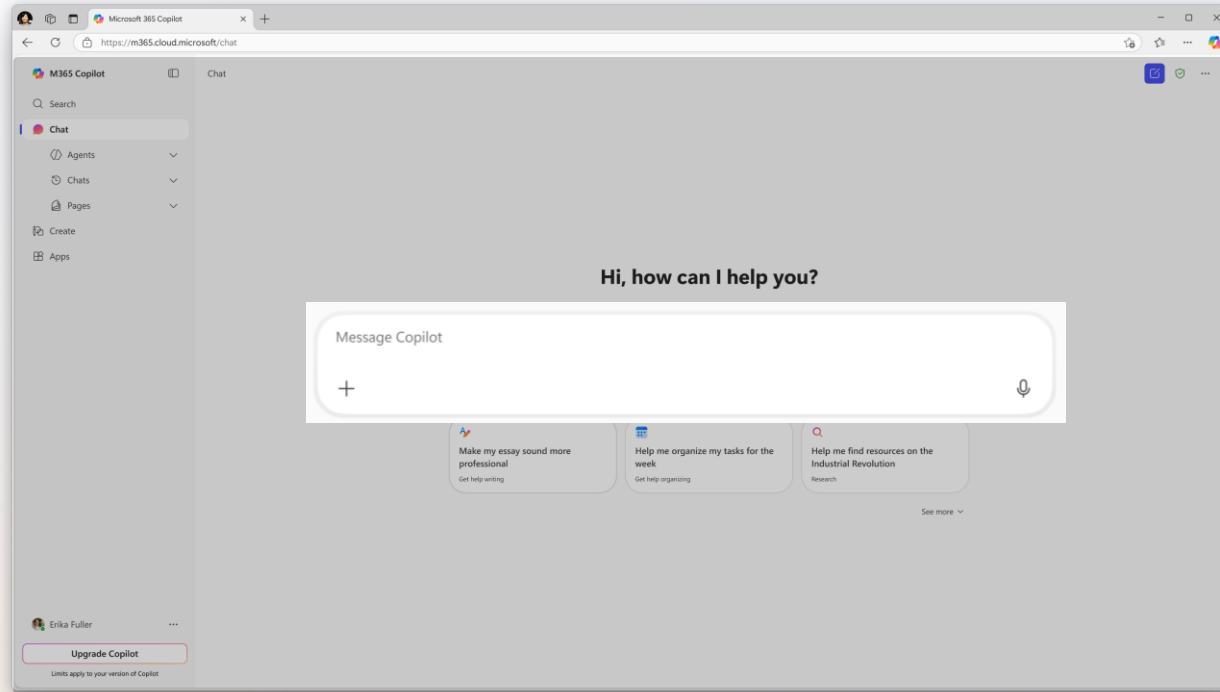
Create data visualizations and identify insights

* For users with an existing Microsoft 365 subscription



M365 Copilot Prompt Lab

What is a “prompt?”



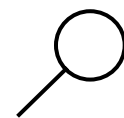
Prompts are how you have a conversation with Copilot

Use plain but clear language and provide context like you would with an assistant.

Enter your first prompt in the text box at the bottom of your screen, like *“Draft a cold call email to a customer.”*

Get started by entering your prompt in the text box

Let's give it a try... prompt!



Writing an effective prompt

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 prompts.

Context

Why do you need it and who is involved?

Goal

What responses do you want from Copilot?

Source

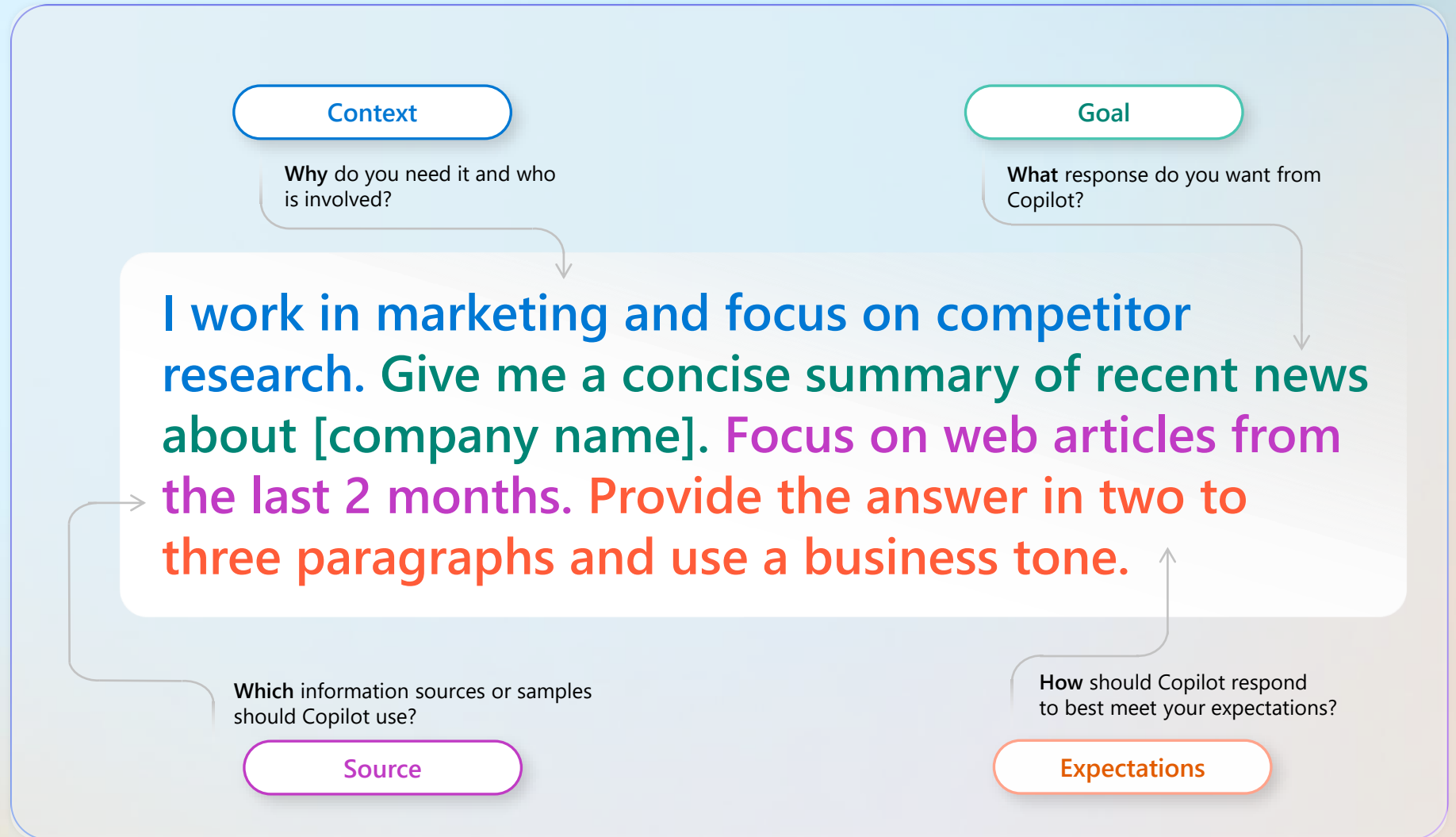
Which information sources or samples should Copilot use?

Expectations

How should Copilot respond to best meet your expectations?

Writing an effective prompt

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



Prompting Best Practices

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.

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."

3

Persona based prompting



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

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

4

Ask Copilot what they need from you



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

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

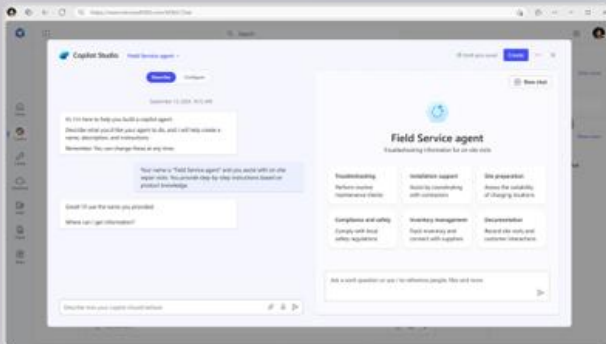
Agent Builder 101

A range of tools for agent creation

No code



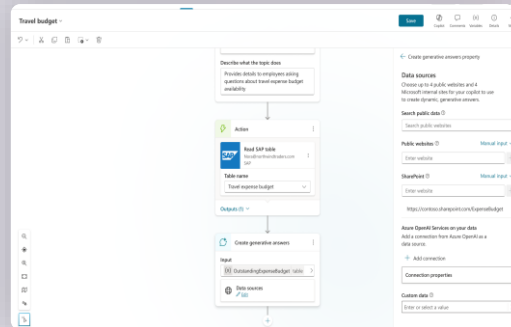
For End Users



Agent builder



For Makers

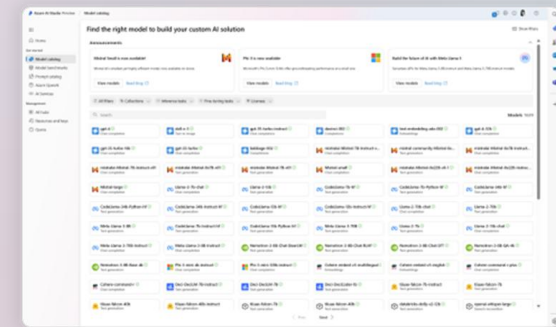


Copilot Studio



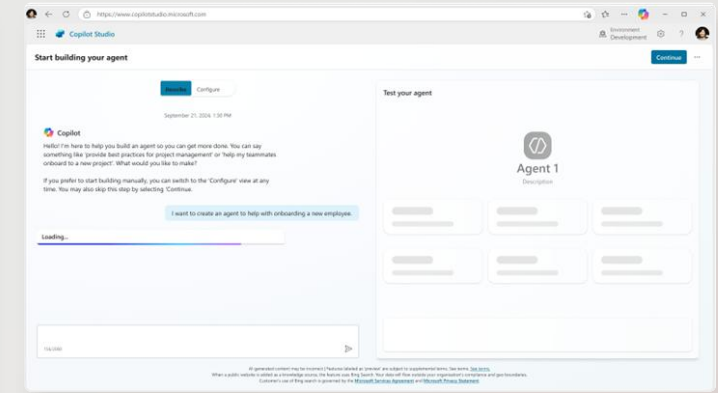
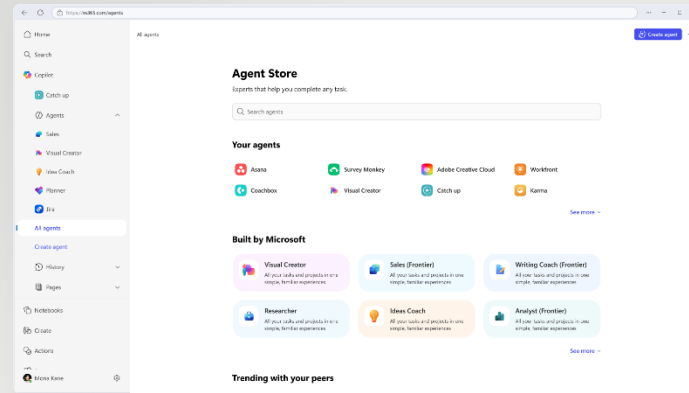
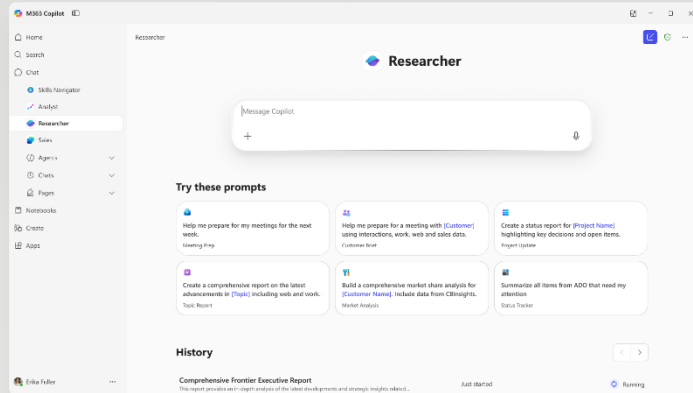
Pro code

For Developers



VS Code, Copilot Studio,
Azure AI Foundry

Agents



Use Microsoft agents

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

Discover agents

From Microsoft to trusted third party agents, Agent Store is where you find agents that are ready to work for you.

Build custom agents

Build your own agents with Copilot Studio using natural language or pro code tooling with the Microsoft 365 Agent SDK.

Create your own agents

Use natural language to easily build and configure your own agents with Copilot Studio

The screenshot displays the Copilot Studio interface for creating a custom agent. On the left, a sidebar for 'M365 Copilot' includes navigation options: Search, Chat, Agents, Explore agents, **Create agent** (highlighted), Conversations, Pages, Create, and Apps. The main area is titled 'Copilot Studio' with a breadcrumb 'My agents > Biology 101 Agent'. It features 'Describe' and 'Configure' tabs. Below these are three agent templates: 'Career Coach' (Microsoft), 'Customer Insights Assistant' (Microsoft), and 'Idea Coach' (Microsoft). A 'View all templates' link is at the bottom. A blue callout box prompts: 'Create an agent to answer student questions about biology class using information from the syllabus and course material'. The main configuration area shows a preview of the 'Biology 101 Agent' with a description: 'Answers student questions about biology class using the syllabus and course material.' Below this are six topic cards: 'Ask about class topics', 'Exam schedule', 'Assignment details', 'Grading policy', 'Lab information', and 'Contacting the instructor'. At the bottom is a 'Type your message' input field. The user 'Adele Vance' is logged in. A footer disclaimer states: 'AI-generated content may be incorrect | Copilot Studio capabilities in M365 are processed by the Copilot Studio service. By using this experience, you agree to these Terms | Privacy and cookies'.

Build agents with Copilot Studio in Microsoft 365 Copilot

1 **Description:** update the description as needed so users can quickly see how the agent can assist them

2 **Instructions:** indicate what tasks the agent should perform and how it completes them

3 **Knowledge:** determine the knowledge sources the agent will access

The screenshot displays the Copilot Studio interface for configuring an agent named 'Biology 101 Agent'. The interface is divided into several sections:

- Left Sidebar:** Contains navigation options: Search, Chat, Agents, Explore agents, Create agent (highlighted), Conversations, Pages, Create, and Apps.
- Top Bar:** Shows 'M365 Copilot' and 'Copilot Studio' with a dropdown for 'My agents > Biology 101 Agent'. It also includes a 'Draft auto-saved' status and a 'Create' button.
- Details Panel:** Contains three main sections:
 - Description:** A text box containing 'Answers student questions about biology class using the syllabus and course material.' (Step 1)
 - Instructions:** A list of instructions: 'Provide clear, accurate, and concise answers to student questions about biology class topics.', 'Use information from the syllabus and course material as the primary sources for responses.', 'Avoid speculation or providing information not found in the provided materials.', and 'Respond in a friendly, supportive, and educational manner.' (Step 2)
 - Knowledge:** A section with a link to 'Learn more' and a text box for entering a URL. (Step 3)
- Agent Preview:** On the right, a preview of the 'Biology 101 Agent' shows its name, description, and a grid of six topic cards: 'Ask about class topics', 'Exam schedule', 'Assignment details', 'Grading policy', 'Lab information', and 'Contacting the instructor'. Below the cards is a text input field for 'Type your message'.
- Footer:** At the bottom, it says 'Adele Vance' and a disclaimer: 'AI-generated content may be incorrect | Copilot Studio capabilities in M365 are processed by the Copilot Studio service. By using this experience, you agree to these Terms | Privacy and cookies'.

Build agents with Copilot Studio in Microsoft 365 Copilot

4 **Capabilities:** select if you'd like the agent to be able to interpret and respond with code, and if you would like it to generate images

5 **Suggested prompts:** provide prompt suggestions to help agent users get started

The screenshot displays the Copilot Studio interface for creating a new agent named 'Biology 101 Agent'. The interface is divided into several sections:

- Left Sidebar:** Contains navigation options: Search, Chat, Agents, Explore agents, Create agent (highlighted), Conversations, Pages, Create, and Apps.
- Top Bar:** Shows 'M365 Copilot' and 'Copilot Studio My agents > Biology 101 Agent'. It also includes a 'Draft auto-saved' status and a 'Create' button.
- Describe/Configure Section:** Features a search bar for 'Enter a URL' and a toggle for 'Prioritize the knowledge sources you added for agent knowledge-based queries.' (currently off).
- Capabilities Section (labeled 4):** Contains two toggle switches: 'Code interpreter' (off) and 'Image generator' (on).
- Suggested prompts Section (labeled 5):** A table of pre-defined prompts for the agent, each with a title, message, and delete icon.
- Agent Preview Section:** Shows the 'Biology 101 Agent' card with its icon and a brief description: 'Answers student questions about biology class using the syllabus and course material.' Below this are six categorized prompt cards: 'Ask about class topics', 'Exam schedule', 'Assignment details', 'Grading policy', 'Lab information', and 'Contacting the instructor'. Each card contains a specific question related to the category.
- Bottom Bar:** Includes a 'Type your message' input field and a 'Send' button.

At the bottom of the interface, there is a footer note: 'AI-generated content may be incorrect | Copilot Studio capabilities in M365 are processed by the Copilot Studio service. By using this experience, you agree to these Terms | Privacy and cookies'.

Copilot Agent Builder Demo



Build an agent...



You are going to act as a Copilot Agent expert creator. I am going to share an idea with you. You will analyze this idea and then you will create a description for a Copilot Agent based on this idea. You will also create Instructions for the behavior of this Copilot Agent based on that idea. Your audience is going to be [insert audience]. Are you ready?

Resources

Resource Links – Copilot Chat

[Copilot Chat Adoption Page](#)

[Copilot Chat Success Kit](#)

[Copilot Chat University Resources](#)

[Copilot Chat Promptathon](#)

Resource Links – Agents

[Agents Adoption Page](#)

[Education Use Cases](#)

[Agents Templates & Examples](#)

Resource Links – Additional Training

[Copilot Learning Hub](#)

[Upcoming Webinars](#)

[“Coffee in the Cloud” Videos](#)

Resource Links – Updates & Blogs

[M365 Roadmap](#)

[Microsoft Education Blog](#)

[Microsoft 365 Copilot Blog](#)

Thank you.

renataruiz@microsoft.com



Connect with me on LinkedIn