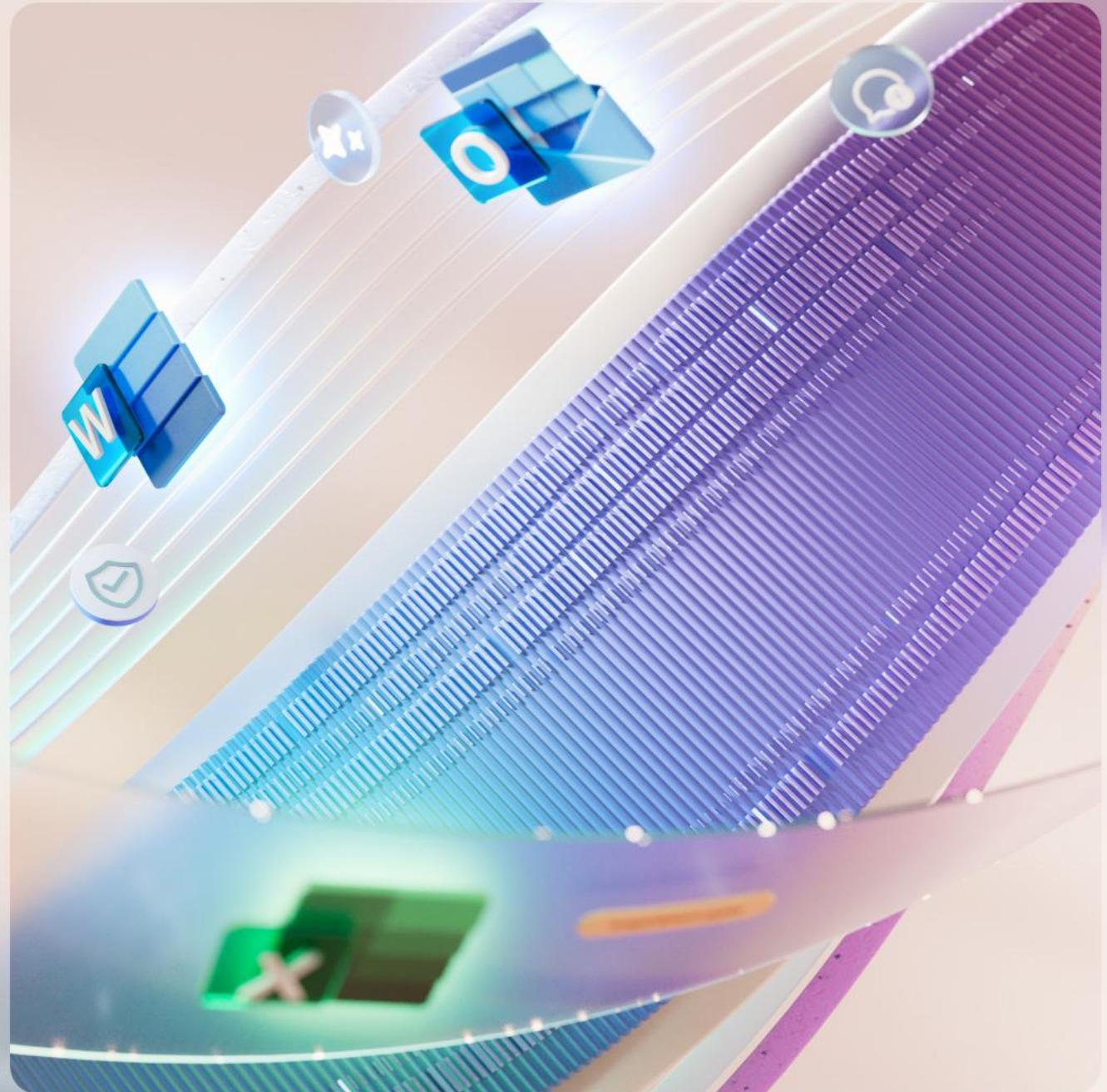


Unlocking Productivity with Microsoft 365 Copilot Chat + Agents

Renata Ruiz
Sr. AI Business Solutions Specialist

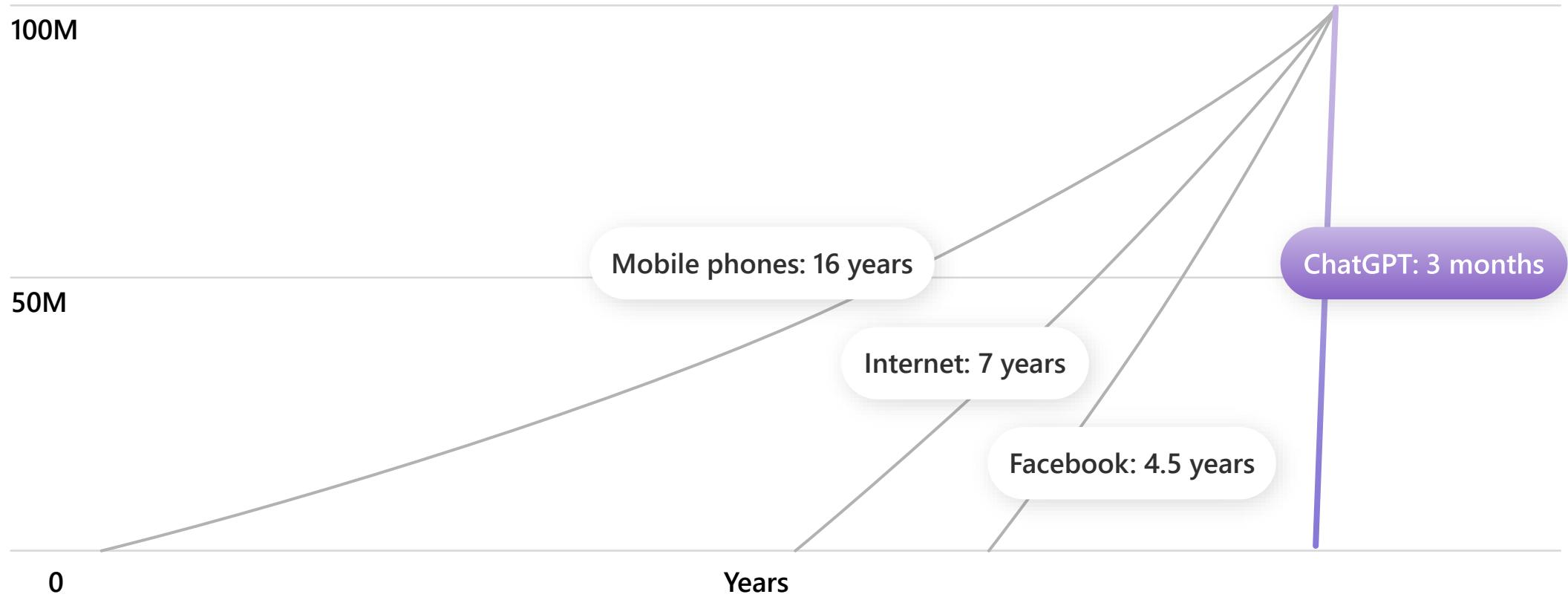


The State University
of **New York**



Generative AI technology is here

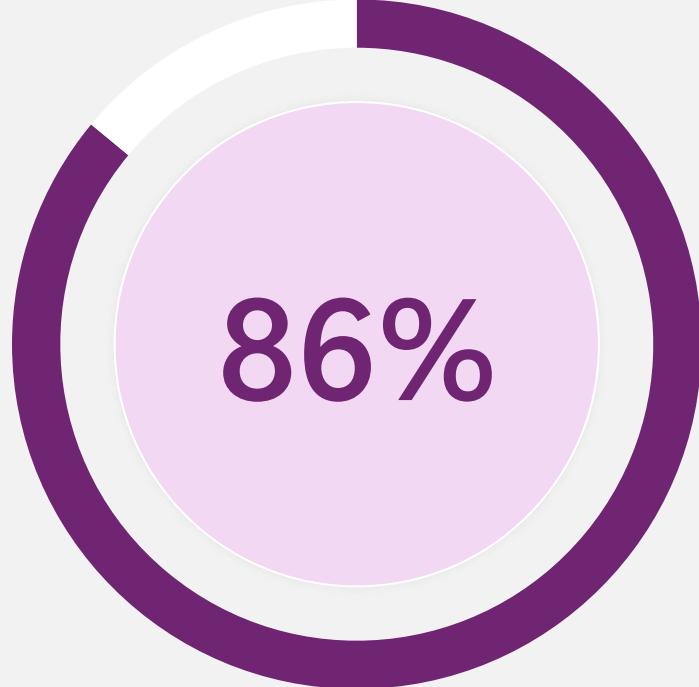
Time to reach 100M users





**Generative
AI usage in
education
jumped from**

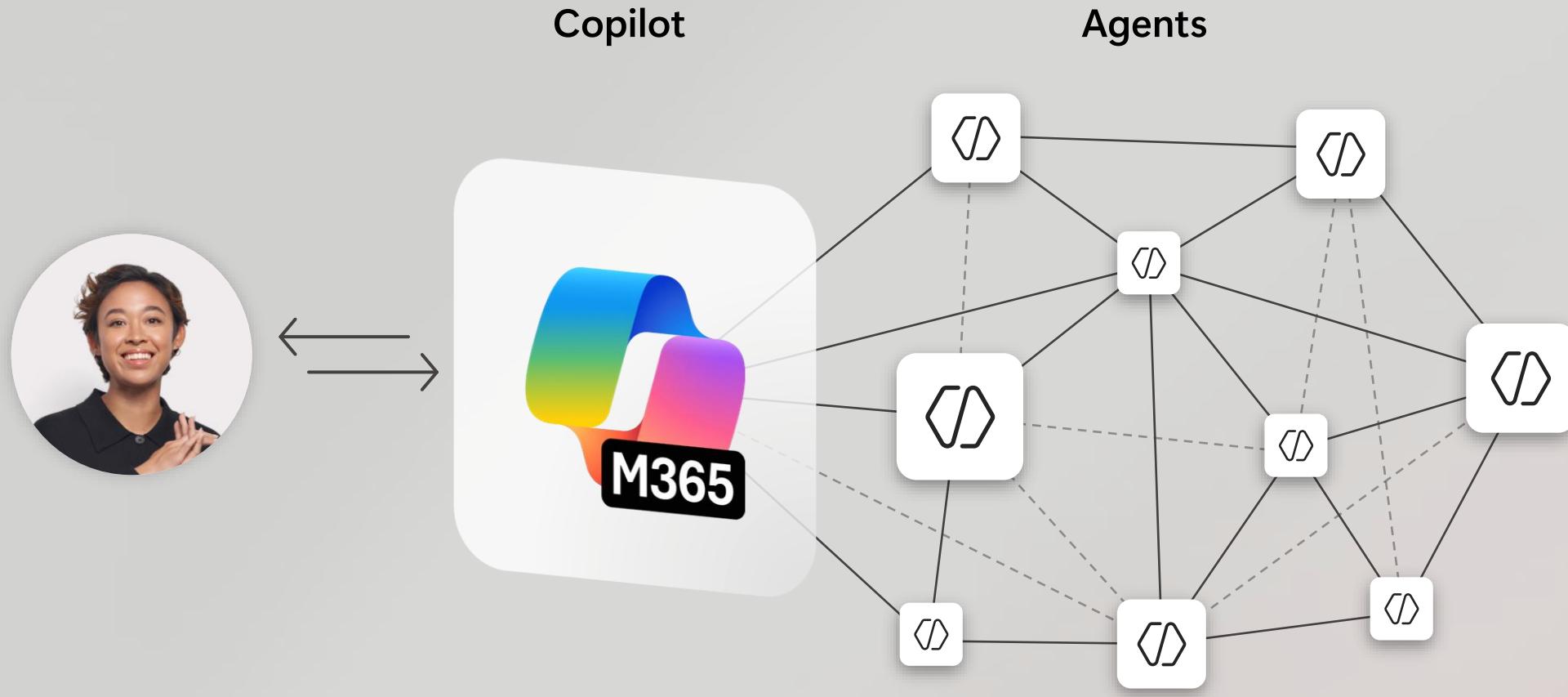
45% in 2023 to



86%

*in
2024*

Copilot is the UI for AI



Copilot Control System



Copilot

Human augmentation

Private, personal assistant

Everyone will have a Copilot



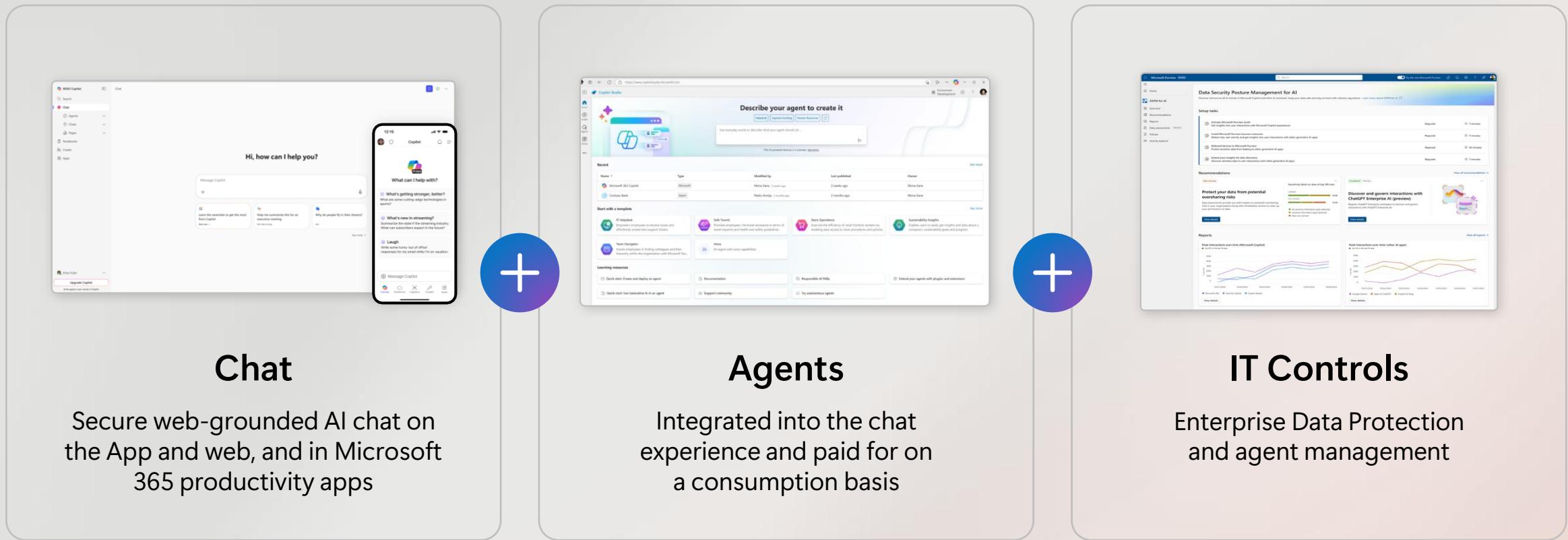
Agents

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



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.

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.

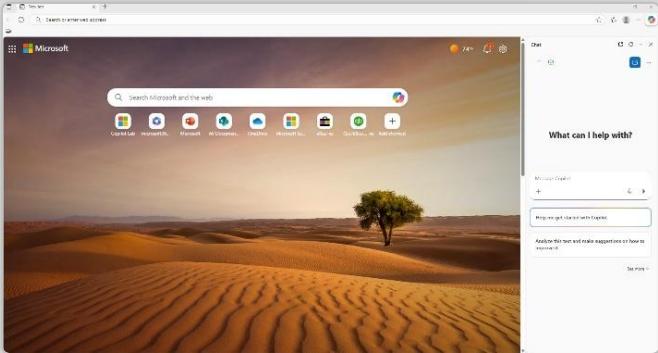
¹Microsoft 365 Copilot supports HIPAA compliance for properly configured implementations. Microsoft Copilot is under review and does not support HIPAA compliance at this time.

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

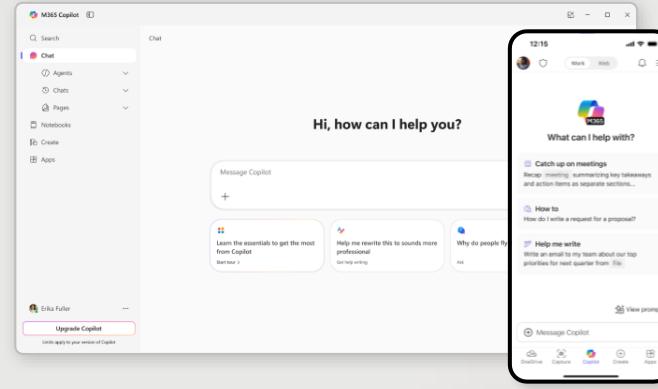
³Microsoft 365 Copilot runs on the ISO 27018 certified Microsoft 365 platform

Microsoft 365 Service Boundary

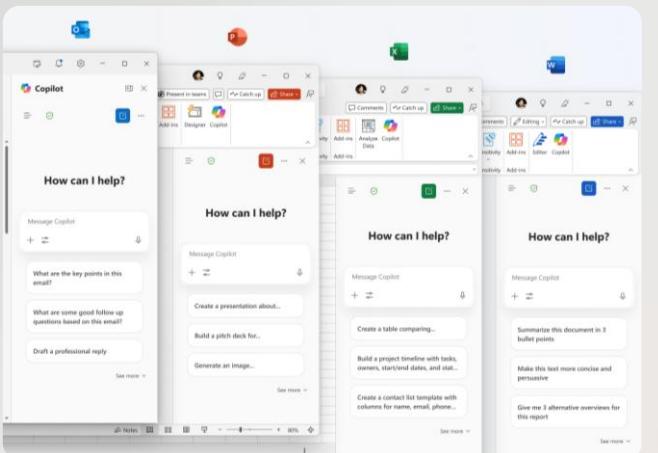
Access Copilot Chat where you work and learn



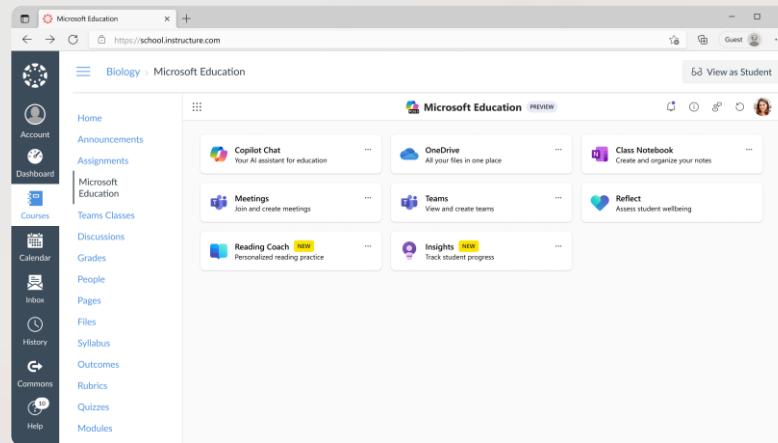
Web app and Edge browser



Desktop and mobile apps

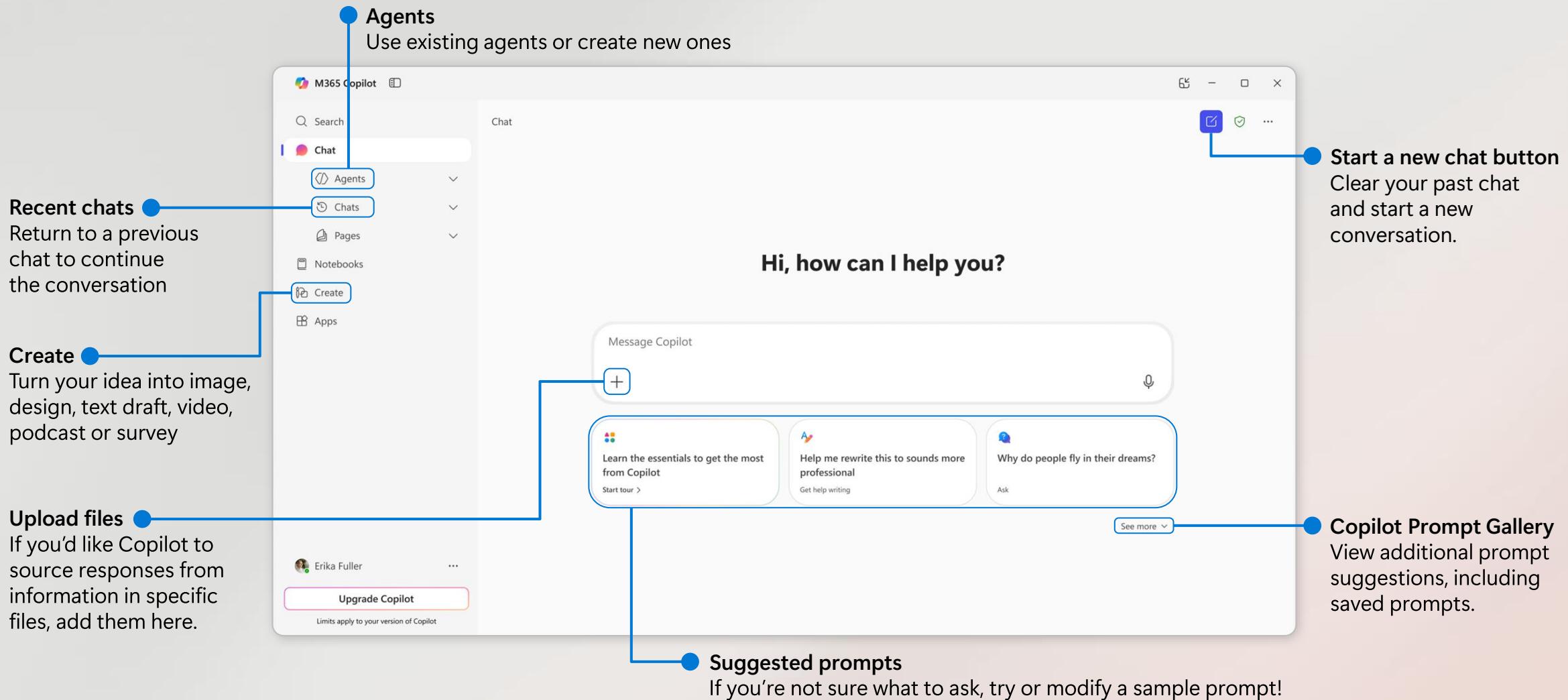


Microsoft 365 apps



Learning Management Systems

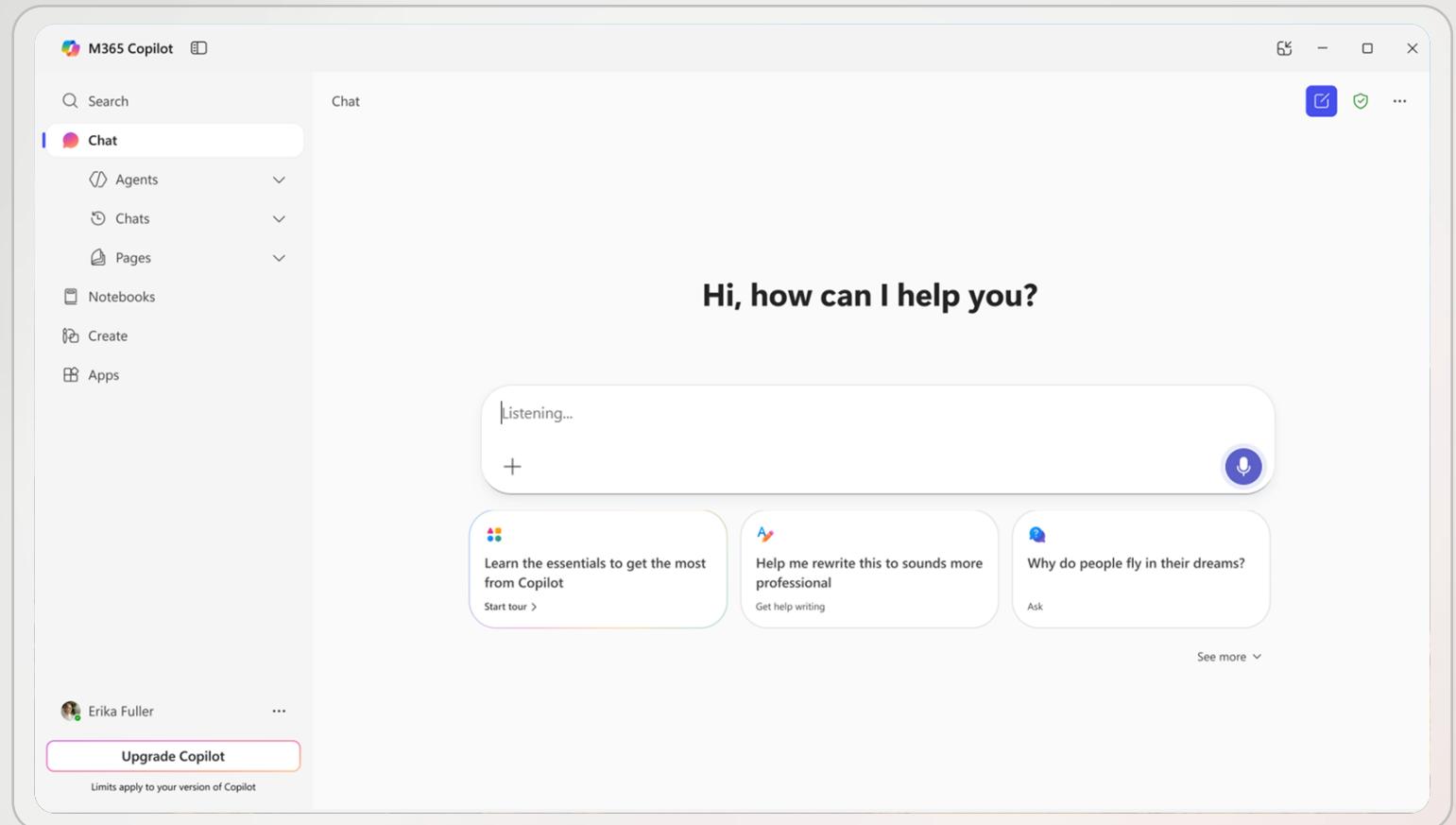
Get to know Copilot Chat



Chat

Powered by GPT-5

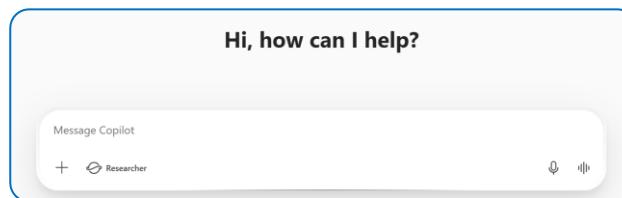
Secure AI chat powered by the latest models available and grounded in web data with enterprise data protection



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

Try GPT-5   ...

Thinks quickly or deeply based on the task

GPT-5 real-time router

GPT-5
High-throughput

GPT-5
Deeper reasoning

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 image shows a Microsoft Copilot Chat interface and a Microsoft Pages document side-by-side.

Copilot Chat Screenshot:

- A table with three rows:

Hazard	Risk Level	Control Measures
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.

- A message from Copilot: "Here's your new page: Risk assessment museum"
- A text input field: "Ask me anything..."

Microsoft Pages Document Screenshot:

- A table titled "Risk assessment museum vi" with three rows:

Hazard	Risk Level	Control Measures
Transportation	Medium	Ensure all students are seated with seat belts <u>fastened</u> ; conduct headcounts.
Slips, trips, and falls	Medium	Advise students to wear appropriate footwear; supervise movement in the museum.

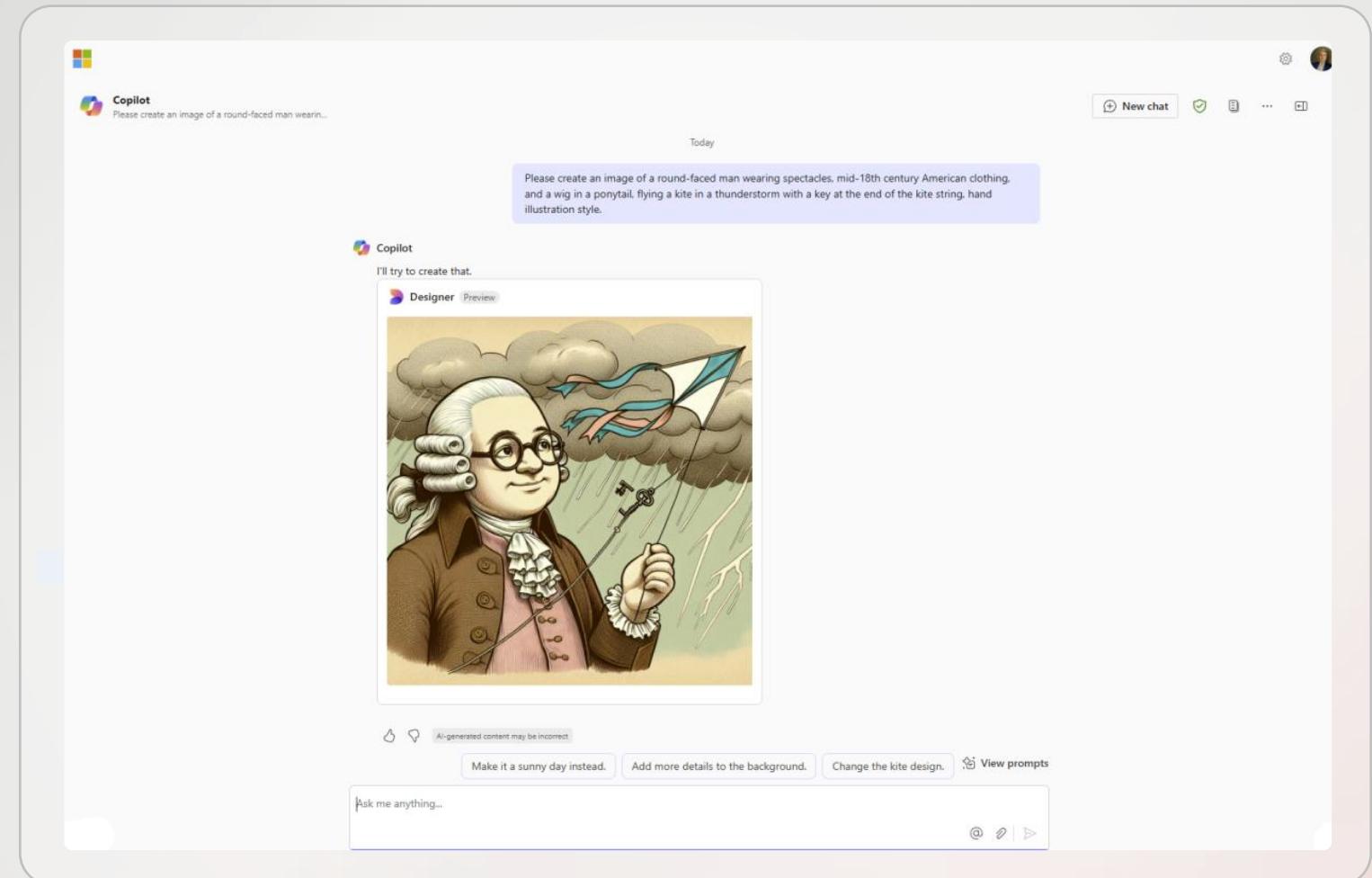
- A callout box for "Page link" with the sub-option "Copy component".
- A message: "Here's a risk assessment for your upcoming trip to the local science museum:"

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

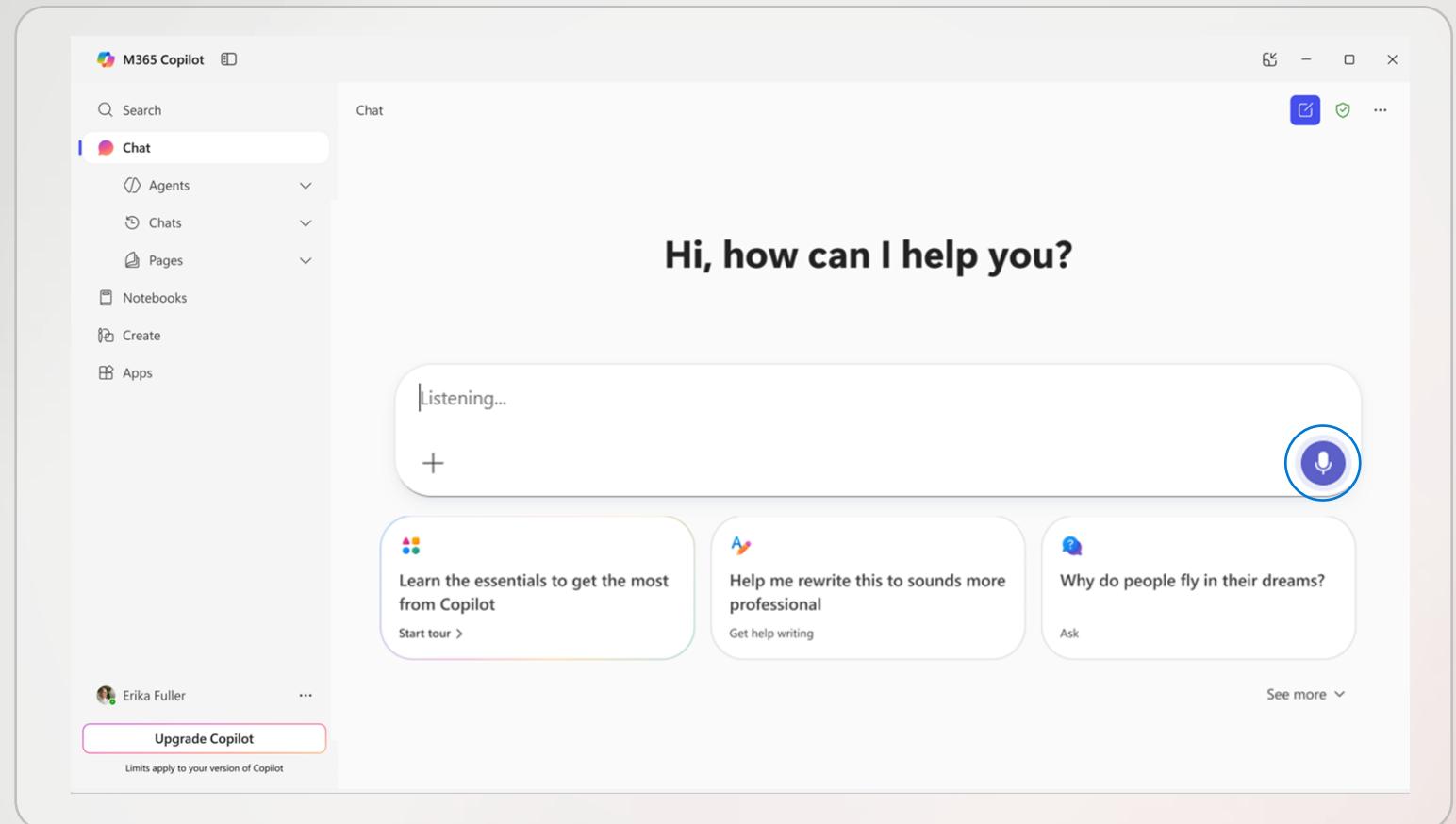


Interact with Copilot using voice features

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

Improve accessibility with responses that can be read aloud for learners

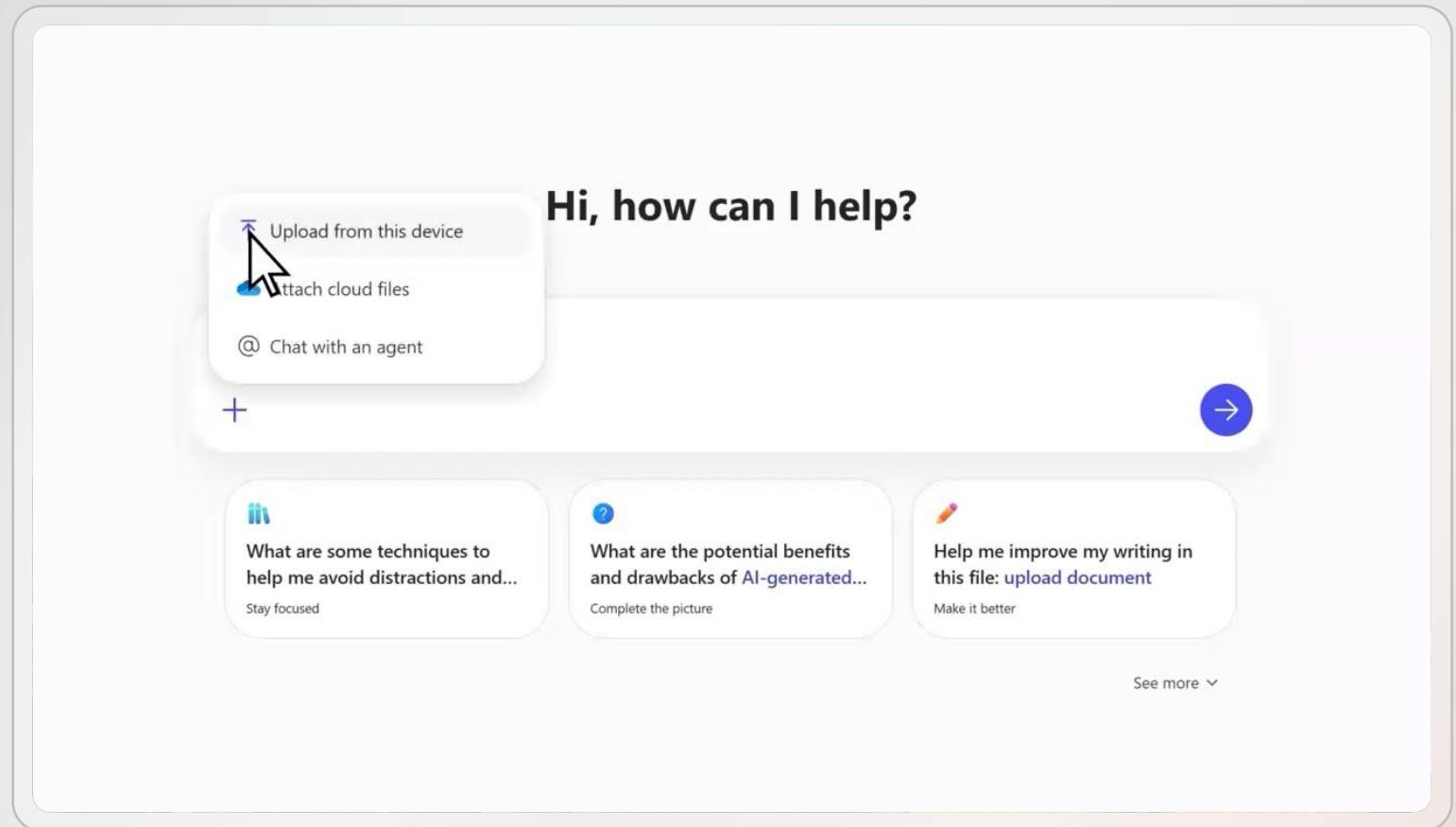
Practice presentations, brainstorm, and get coaching



Get insights from your files

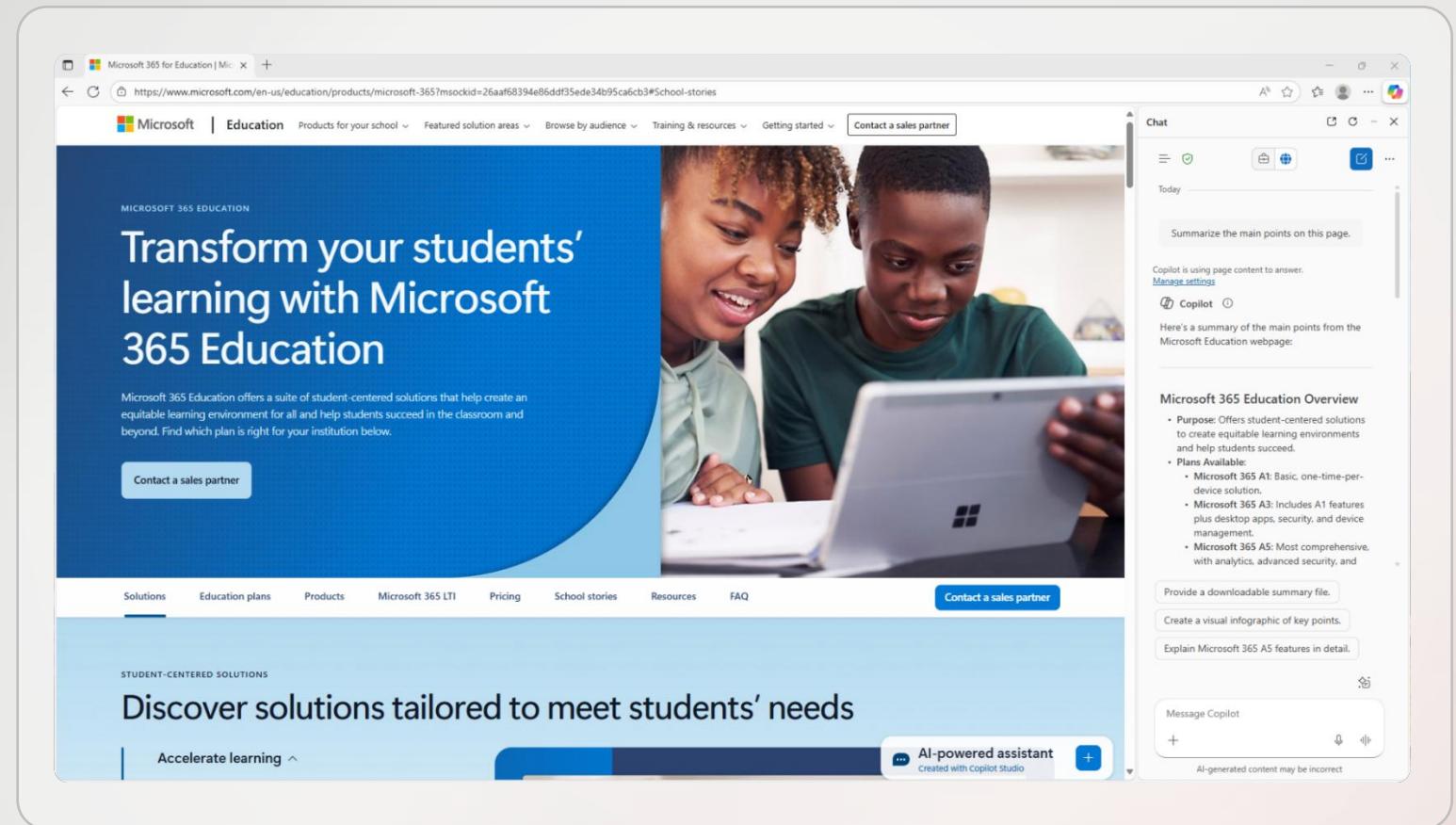
Upload files and ask Copilot Chat to provide summaries, answer questions, or assist with specific tasks

Add documents, pictures, or text and markup files



Summarize webpages and PDFs

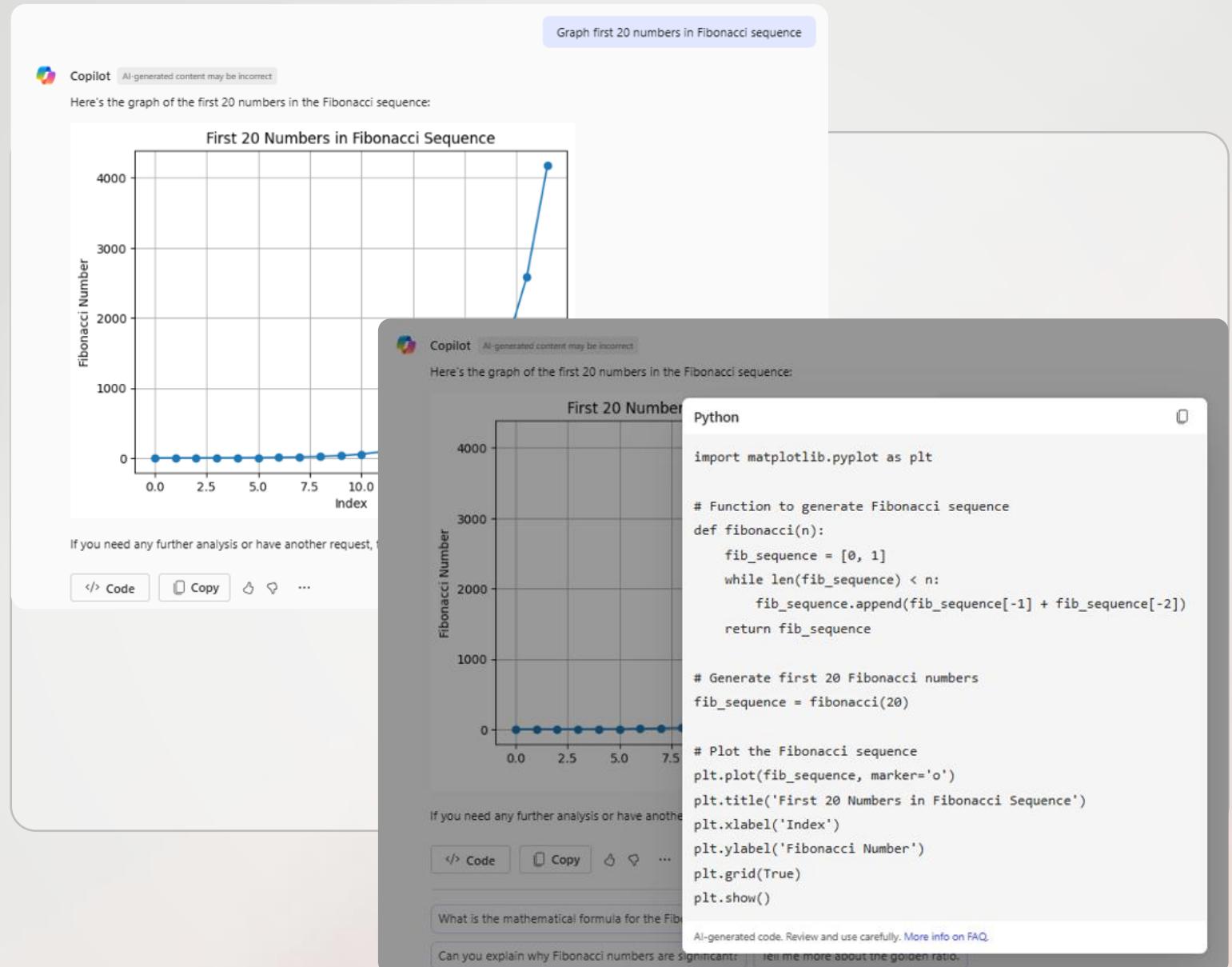
Use Copilot Chat in Edge to get a quick summary of any webpage or PDF



Perform complex calculations with code interpreter

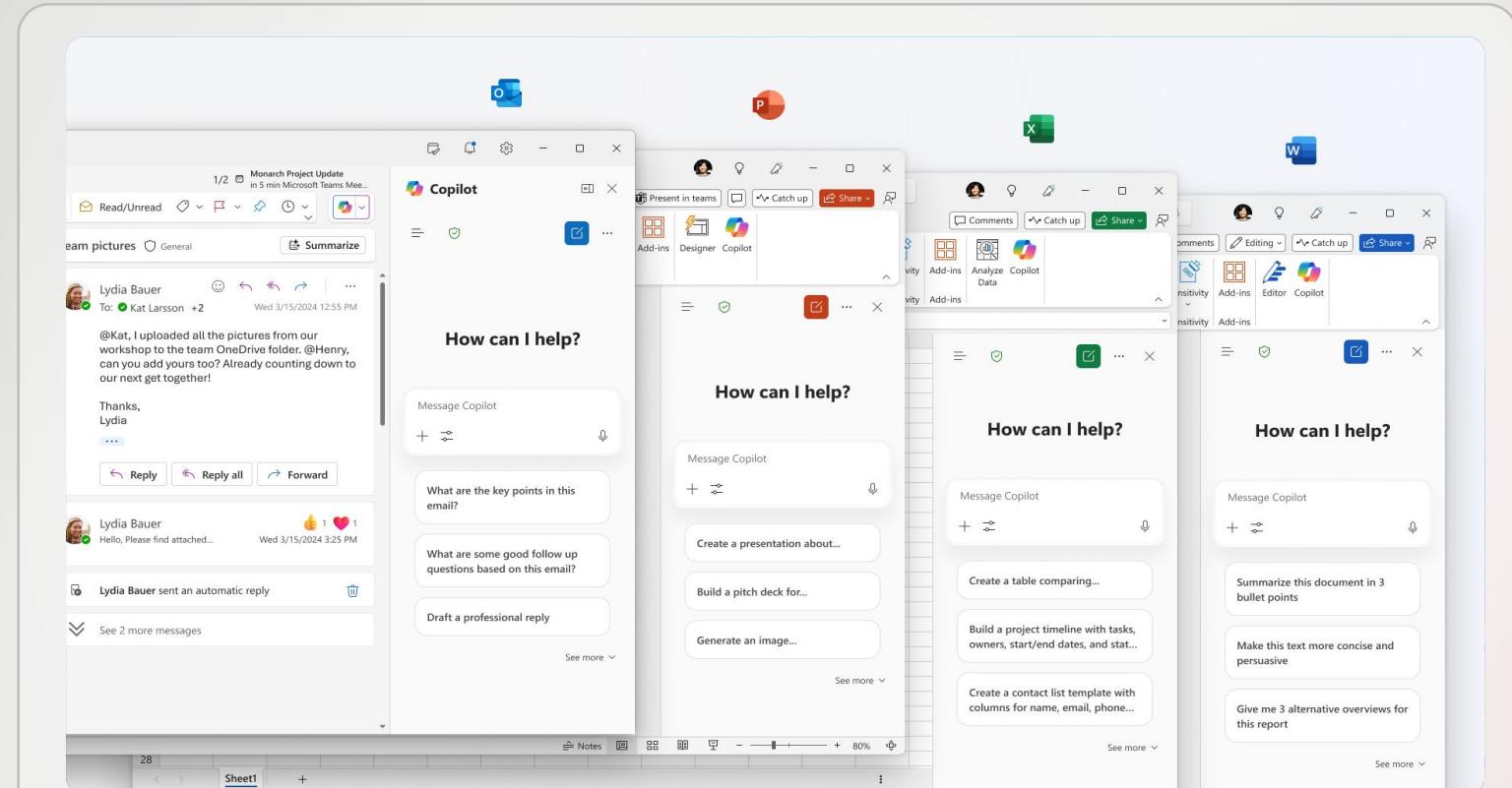
Simplify data analysis by processing student performance, attendance, and survey data from Excel or PDF files

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



PowerPoint

Generate images and rewrite
bullets for improved clarity



Teams

Catch up on unread chats
and recap meetings



Word

Extract key points from documents
and quickly draft content



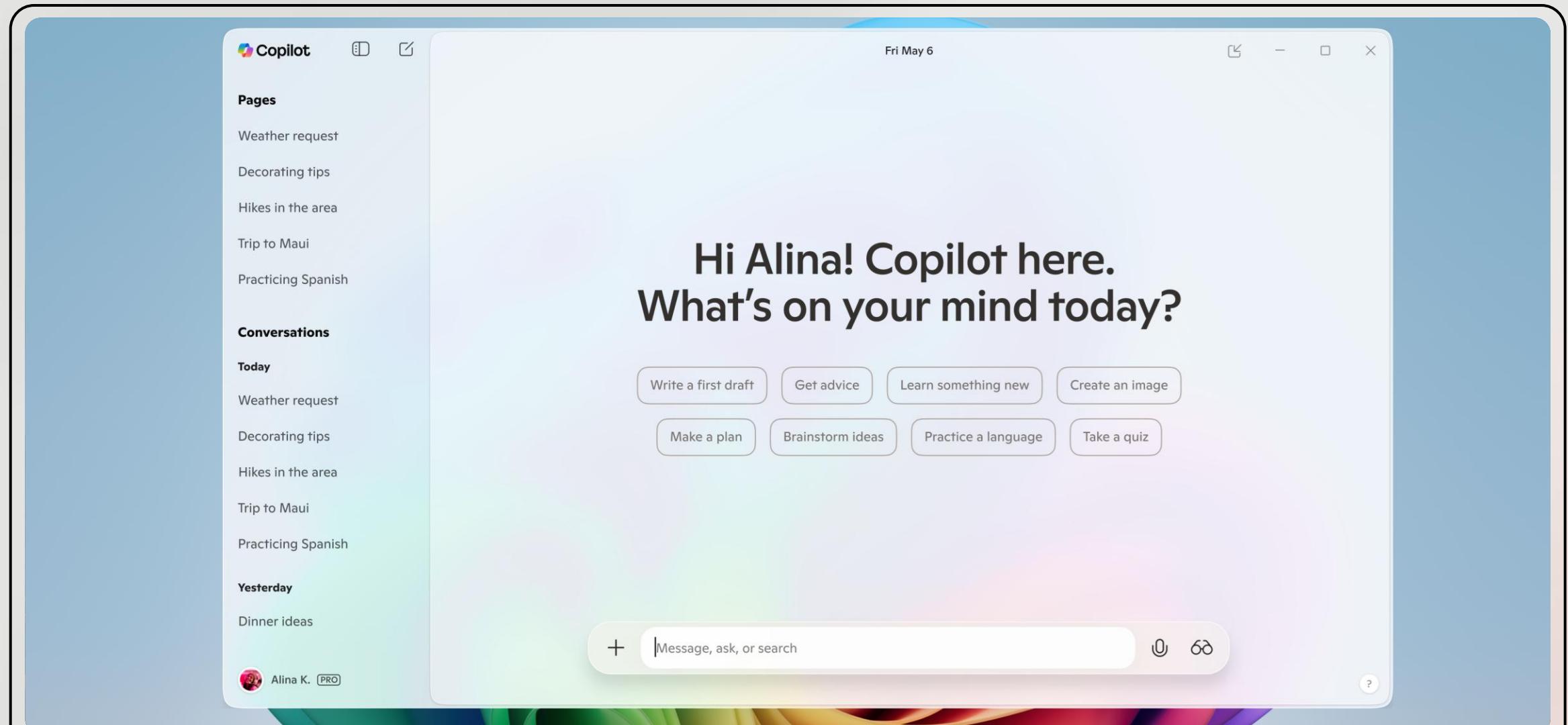
OneNote

Organize, summarize, and
rewrite your notes for clarity



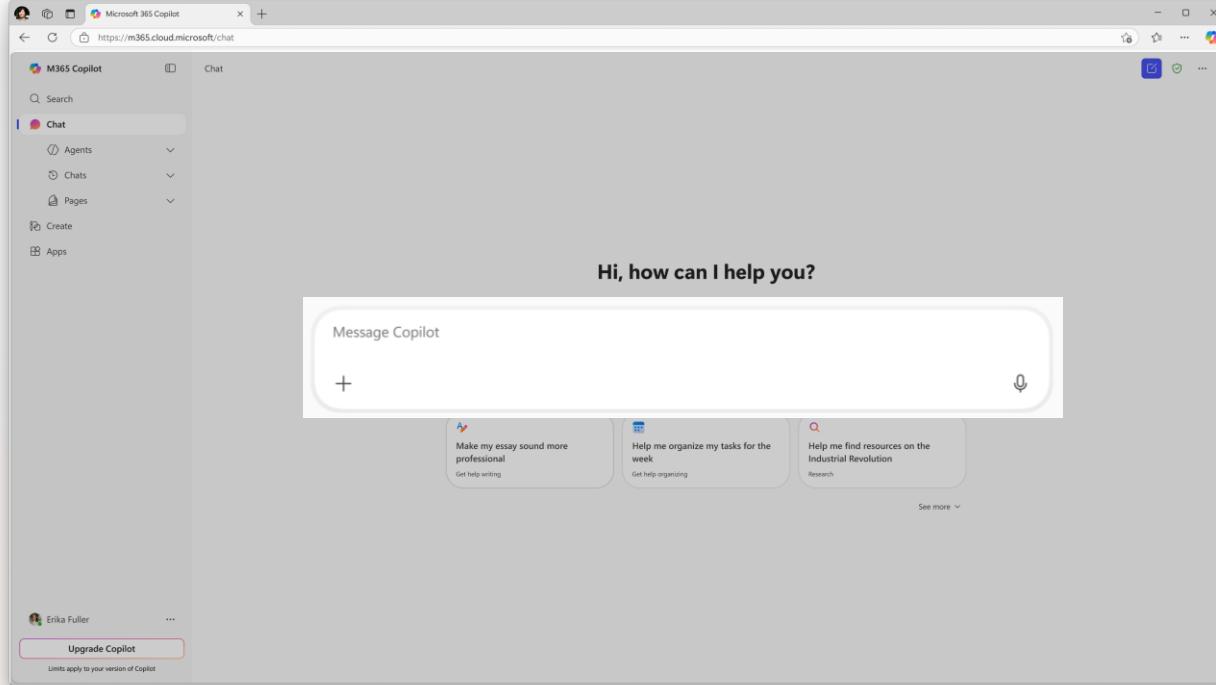
Excel

Create data visualizations
and identify insights



M365 Copilot Prompt Lab

What is a “prompt?”

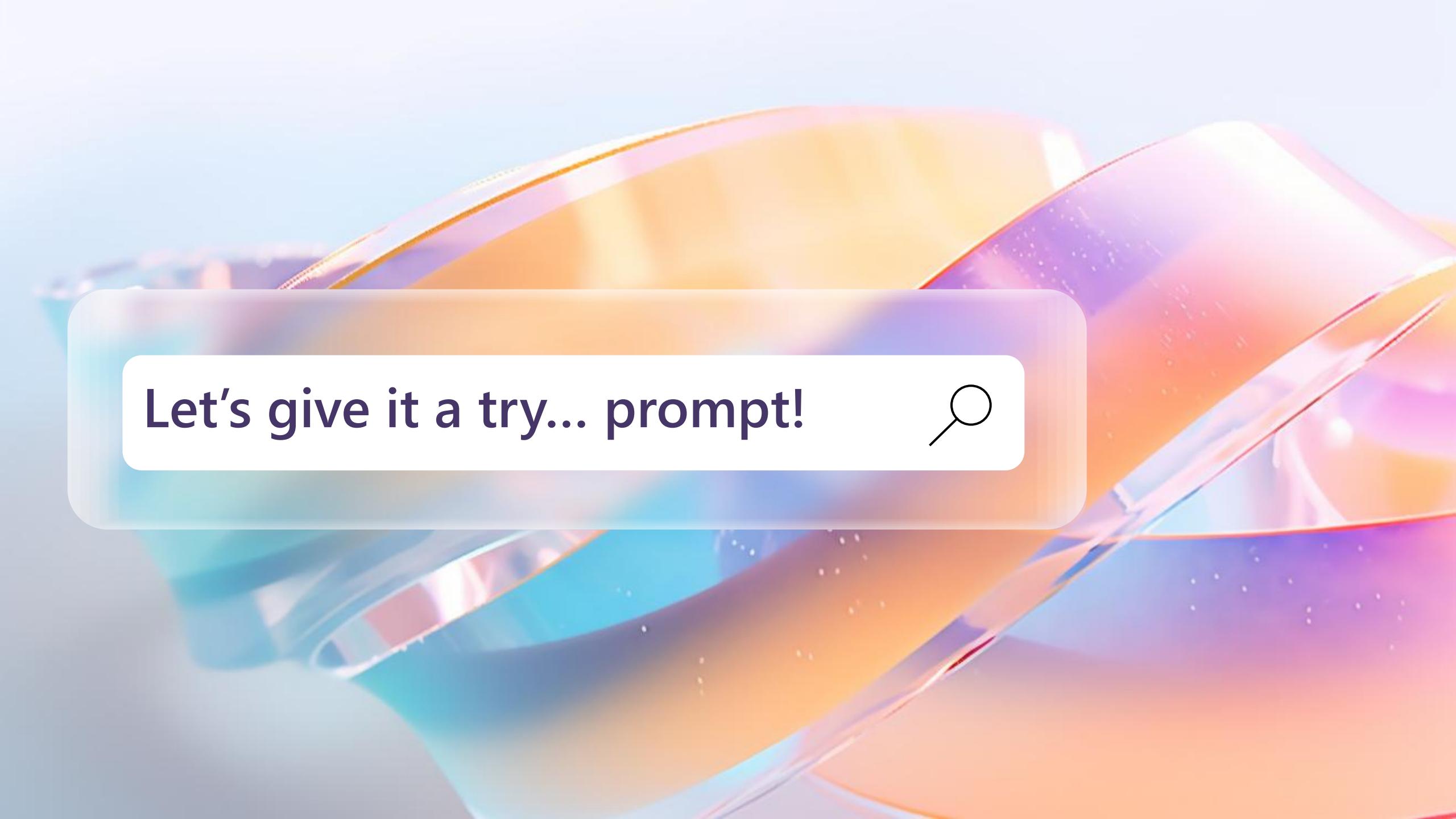


Get started by entering your prompt in the text box

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.”*



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

Goal

Source

Expectations

Why do you need it and who is involved?

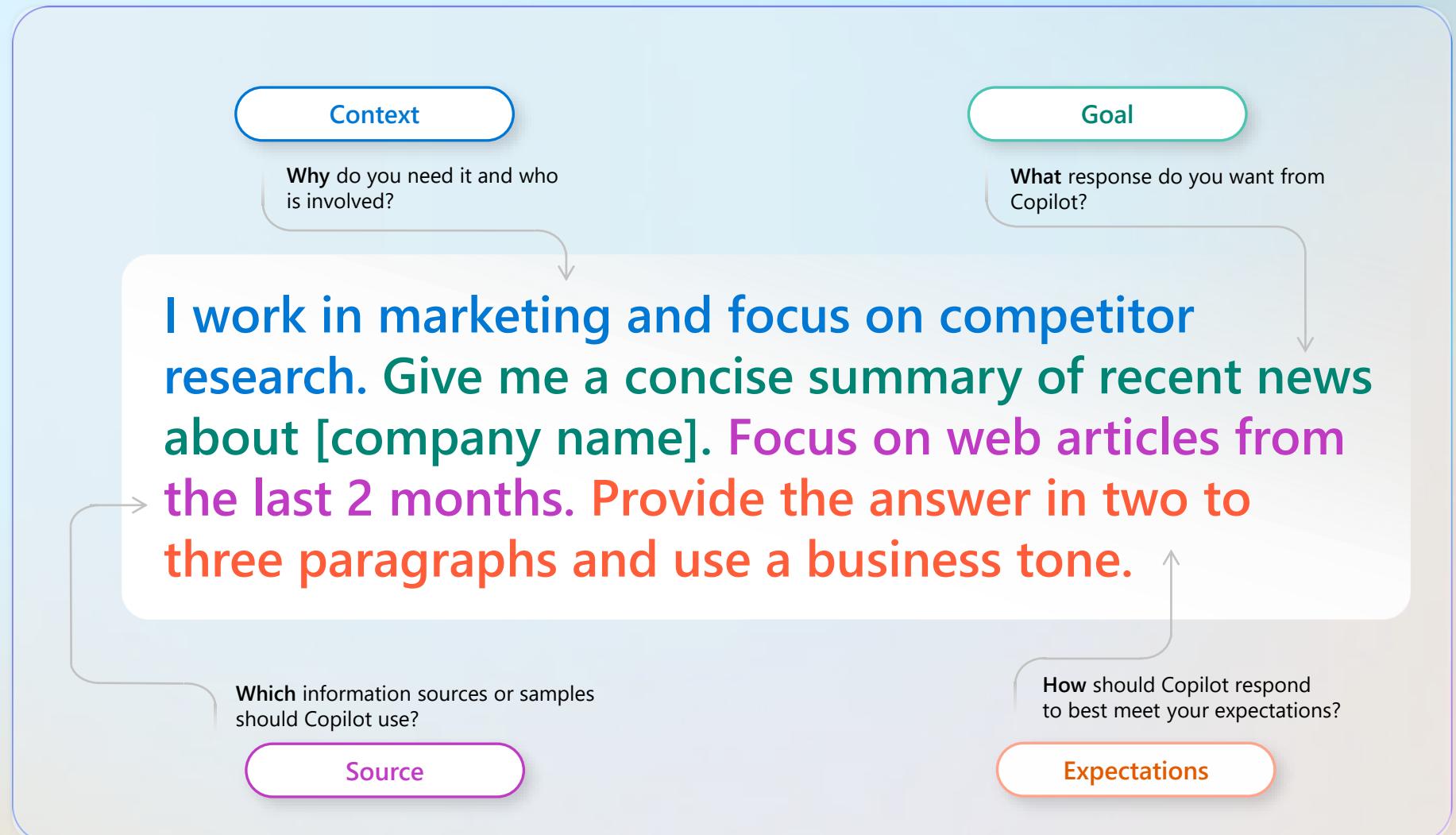
What responses do you want from Copilot?

Which information sources or samples should Copilot use?

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 needs 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?"

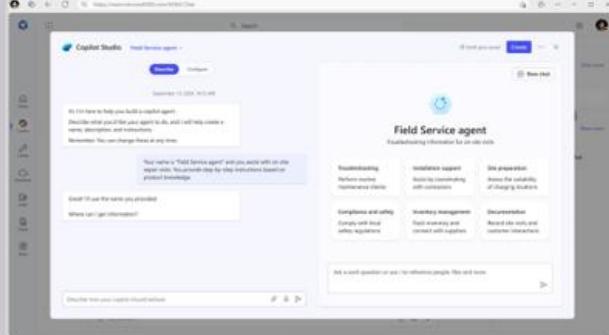
Agent Builder 101

A range of tools for agent creation

No code



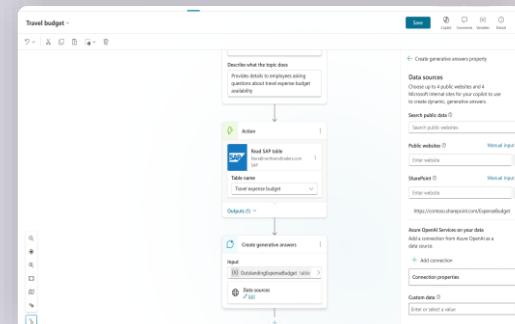
For End Users



Agent builder



For Makers

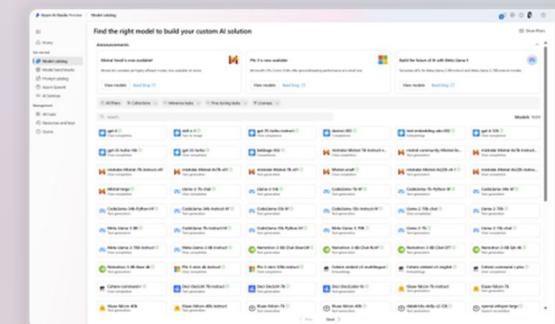


Copilot Studio



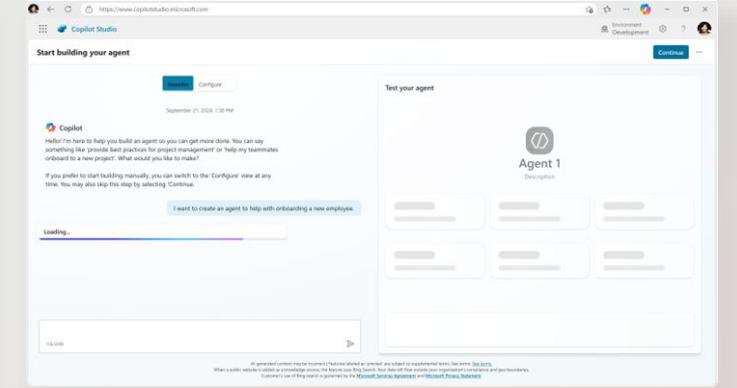
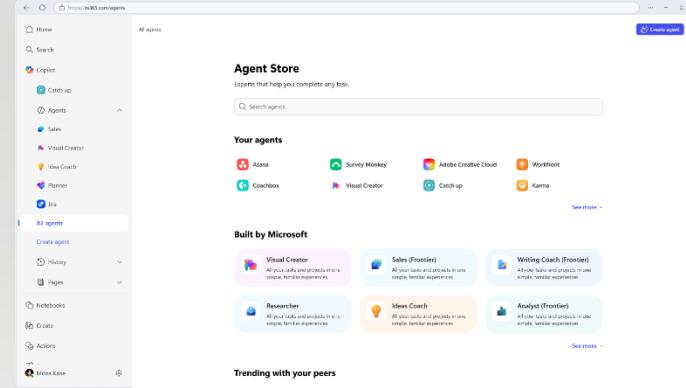
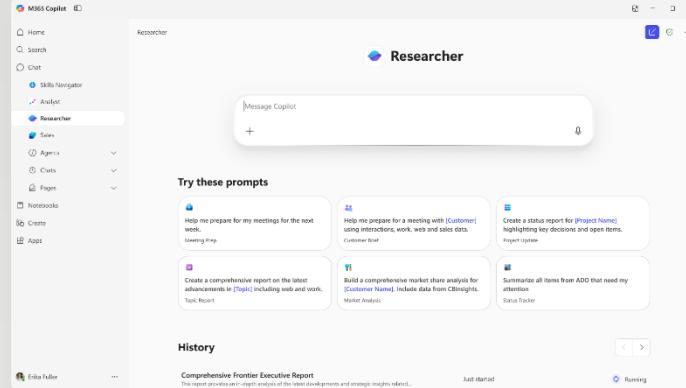
Pro code

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 shows the M365 Copilot interface with the Copilot Studio tab selected. The left sidebar includes options for Search, Chat, Agents, Explore agents, Create agent (which is selected and highlighted in blue), Conversations, Pages, Create, and Apps. The main area displays a list of pre-made agent templates: Career Coach (Microsoft), Customer Insights Assistant (Microsoft), and Idea Coach (Microsoft). Below this is a button to 'View all templates'. A callout box provides instructions: 'Create an agent to answer student questions about biology class using information from the syllabus and course material'. A message box states: 'Your agent is now set up to answer student questions about biology class, using the syllabus and course material as its sources. It will provide clear, accurate, and supportive responses focused on class topics, assignments, grading, labs, and instructor contact.' It then asks, 'Next, let's choose a name for your agent. I suggest "Biology Class Helper." Would you like to use this name, or do you have another name in mind?'. At the bottom, there's a message input field with 'Type your message' placeholder and a character count of '0/2000'. To the right, the 'Biology 101 Agent' is shown with a purple icon, described as 'Answers student questions about biology class using the syllabus and course material'. It includes sections for 'Ask about class topics', 'Exam schedule', 'Assignment details', 'Grading policy', 'Lab information', and 'Contacting the instructor'. A 'Type your message' input field is also present here.

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 image shows the Microsoft 365 Copilot Studio interface. On the left, a sidebar menu includes 'Search', 'Chat', 'Agents', 'Explore agents', 'Create agent' (which is highlighted in blue), 'Conversations', 'Pages', 'Create', and 'Apps'. A user profile 'Adele Vance' is at the bottom. The main area is titled 'Copilot Studio' with 'My agents > Biology 101 Agent'. It has tabs 'Describe' and 'Configure'. The 'Describe' tab is active, showing a 'Details' section with a placeholder icon and a 'Name' field containing 'Biology 101 Agent'. Below that is a 'Description' field with the text: 'Answers student questions about biology class using the syllabus and course material.' Step 1 is highlighted with a purple circle and a number 1. The 'Instructions' tab is the next step, showing a list of guidelines: '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 is highlighted with a purple circle and a number 2. The 'Knowledge' tab is the final step, showing a placeholder for entering URLs: 'Click below or enter public website URLs to add content for your agent to reference in responses. [Learn more](#)'. Step 3 is highlighted with a purple circle and a number 3. To the right, a preview window shows the 'Biology 101 Agent' card with a placeholder icon, the name 'Biology 101 Agent', and a description: 'Answers student questions about biology class using the syllabus and course material.' Below the card are sections for 'Ask about class topics', 'Exam schedule', 'Assignment details', 'Grading policy', 'Lab information', and 'Contacting the instructor', each with a question and a placeholder text box. A message input field at the bottom says 'Type your message'. A small note at the bottom of the main area says '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 illustrates the Microsoft 365 Copilot interface for building agents with Copilot Studio. On the left, the 'M365 Copilot' sidebar includes options for Search, Chat, Agents, Explore agents, Create agent (which is selected and highlighted in blue), Conversations, Pages, Create, and Apps. The main area shows the 'Copilot Studio' interface with the title 'Biology 101 Agent'. It features a 'Describe' and 'Configure' button, a search bar for URLs, and a section for prioritizing knowledge sources. Two buttons are highlighted with purple circles: '4' over the 'Capabilities' section and '5' over the 'Suggested prompts' section. The 'Capabilities' section includes toggles for 'Code interpreter' (off) and 'Image generator' (on). The 'Suggested prompts' section lists several prompts with their messages, such as 'Ask about class topics' (Message: 'What topics will be covered in the biology class'), 'Exam schedule' (Message: 'When are the exams for this biology course?'), and 'Assignment details' (Message: 'What are the requirements for the next biology assignment?'). A button at the bottom of this section says '+ Add a suggested prompt'. To the right, a large preview of the 'Biology 101 Agent' is shown, featuring a purple icon, the agent's name, and a list of sample questions and answers. At the bottom of the interface, a note 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](#)'.

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