GETTING STARTED WITH MICROSOFT COPILOT CHAT: WORD

Your AI Assistant Across Microsoft 365

MARIST UNIVERSITY
Digital Education

Background graphic generated by Copilot

AGENDA

WHAT IS MICROSOFT COPILOT CHAT?

- What Copilot is
- Privacy and Marist guidance
- Prompting fundamentals
- A few live demonstrations

HOW DO I USE IT?

- Accessing Copilot Chat
- Using the tool

Building a Prompt

- Using Copilot at Marist

Goals

LEARNING GOALS

- Collaborate effectively with AI tools by applying human judgment, context, and accountability to AI-supported tasks and decisions.
- Experiment with AI tools by trying, refining, and iterating on use cases without expecting perfect results.
- Learn from AI outputs that miss the mark by reflecting on what worked, what didn’t, and how to adjust.

Marist 100 /AI Strategy

Marist University's Framework for AI Leadership

This is "Marist + AI": our enduring strengths amplified, not replaced. Our mission elevated, not abandoned. The power of "and" not "or" at work to meet this moment"

MARIST + AI

https://www.marist.edu/marist100/ai-strategy

https://www.marist.edu/documents/d/guest/ai-operations-guidelines-final

WHAT IS MICROSOFT COPILOT CHAT?

Background graphic generated by Copilot

MARIST UNIVERSITY
Digital Education

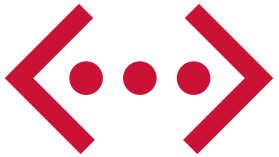
COPILOT PURPOSE



AI powered assistant with collaboration and file uploading tools



Helps write, analyze, summarize, visualize, and automate tasks



Powered by OpenAI's GPT-5 models

WHAT DOES IT HAVE?

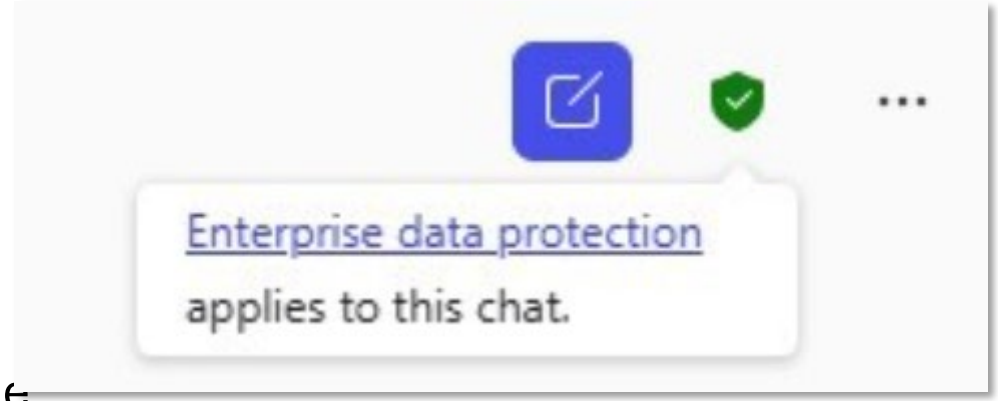
KEY TRAITS

- Natural language prompts
- Aware of context (uploaded files, conversation)
- Automation and file creation
- Collaboration and sharing AI workflows
  - Share AI generated materials
  - Share AI workflows (prompts, templates)

EXAMPLE USE CASES

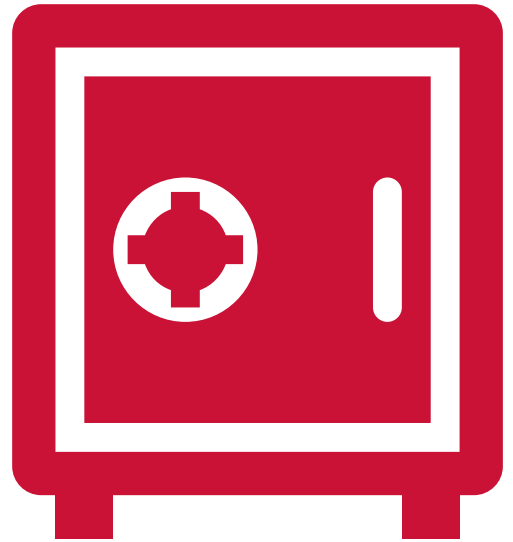
- Draft ideas in Word
- Create draft slides for PowerPoint
- Summarize, process, and analyze documents

PRIVACY & SECURITY



Once you sign in with your Marist account:

- Your data stays within Microsoft 365
- Copilot won't train off your data or information
- You control what Copilot can access – you upload the data
- Copilot will not act (send emails, etc.) on your behalf
- You can look for the green security shield in the top right of Copilot chat – **enterprise data protection** keeps your information secure
- Copilot usage is optional



Files uploaded to Copilot chat are saved in OneDrive for later access (private folder "Files from Copilot Chat" in root directory)

GUARDRAILS

Rules of the Road

- **Data Privacy & Security**: Generalize identifiable data
- Human Oversight & Accountability:
  - Review AI outputs for bias, errors, or inaccuracies.
- **Human-in-the-Loop: Make final decisions by employees, not AI.**
- **Disclose**: “Created using AI”
- **Inclusive**: Choose accessibility [*Give me suggestions on how to make this document more accessible*]

Marist University's Framework for AI Leadership

https://www.marist.edu/marist100/ai-strategy

THREE CORE FEATURES



ASK

- Give Copilot context and ask it to process it
- Summaries, analysis



CREATE

- Prompt Copilot to generate images
- Prompt Copilot to make new files: Word, PowerPoint ...



Reuse

- Reuse existing prompts



HOW DO I USE IT?

Background graphic generated by Copilot

SIGN-IN

To access all of Copilot, **sign into your Microsoft account through Marist.**

BENEFITS TO SIGNING IN

- Better security (enterprise)
- No usage limits
- Link OneDrive files directly



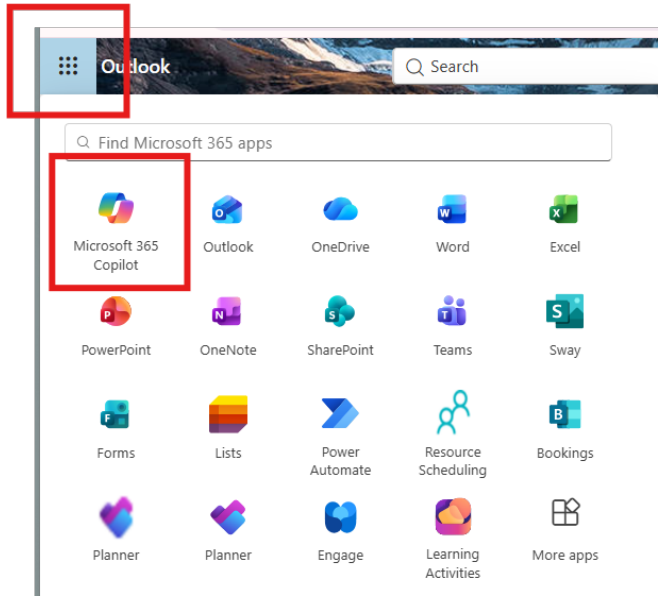
The Copilot experience varies greatly based on if you're using your personal or Marist account – double check which one you're using!

OPENING COPILOT

Access to Copilot is all done **on the web** and inside of a web browser.

INSIDE MICROSOFT 365

- Outlook web



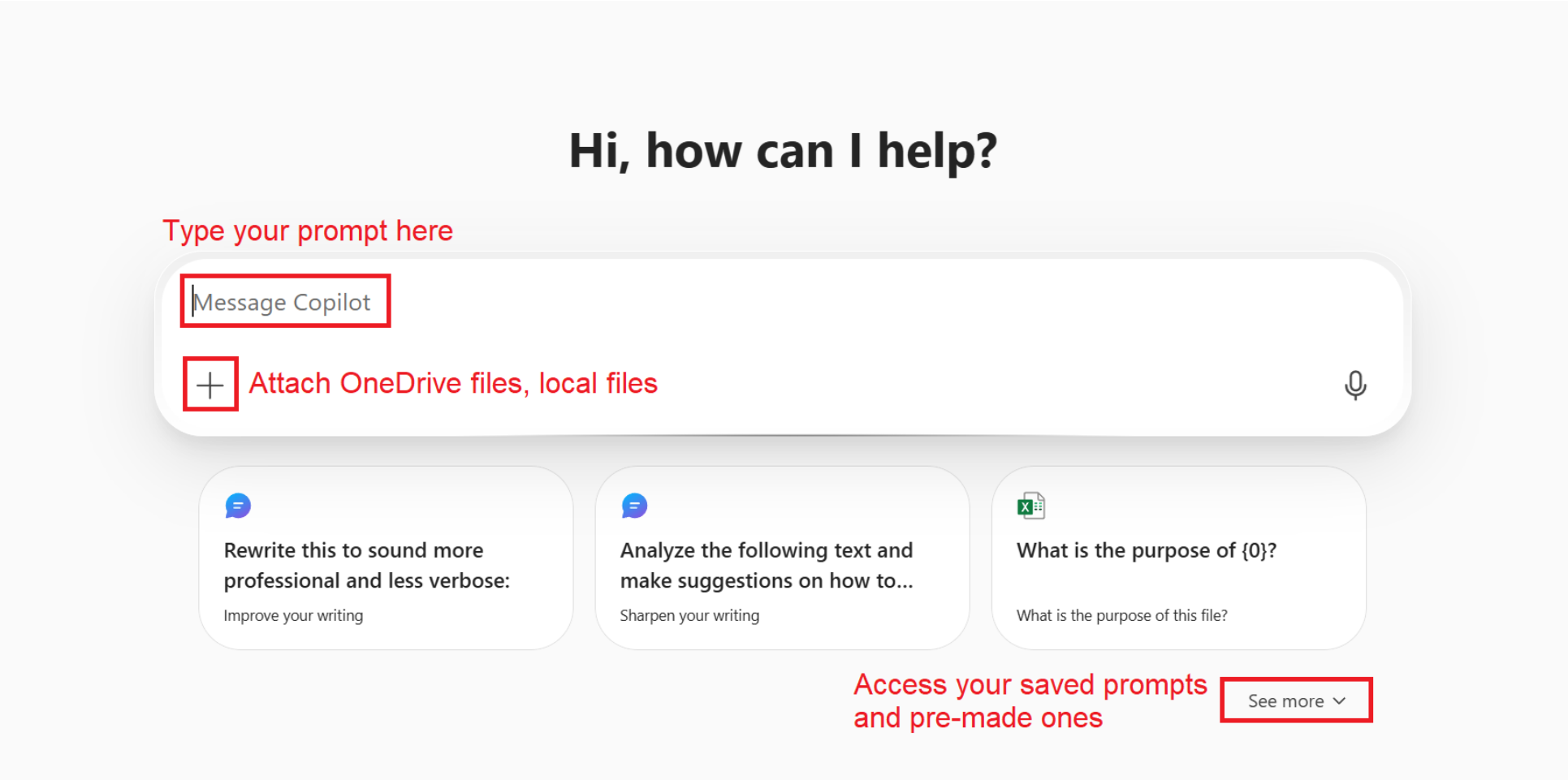
DIRECT LINK

- Navigate to m365.cloud.Microsoft
- Or https://copilot.microsoft.com/

- Download the app:

MARIST UNIVERSITY

NAVIGATING COPILOT



FORMING A PROMPT

Background graphic generated by Copilot

What is Word

Microsoft Word

Used for:

- Creating documents
- Editing documents
- Formatting documents
- Final review

Copilot Chat

Used for:

- **Drafting** content
- **Revising** content
- **Analyzing** documents
- **Creating** summaries
- **Generating** ideas

Workflow - Word

What Can Copilot Do with Uploaded Documents?

Summarize

- Summarize this report in five bullet points.

Explain

- Explain this document in plain language.

Extract Information

- Identify key deadlines and action items.

Create New Content

- Create an executive summary based on this report.

Generate FAQs

- Create ten frequently asked questions based on this document.

Workflow

Create in **Word**

↓

Save to **OneDrive**

↓

Open **Copilot Chat**

↓

Upload or Link document

↓

Ask Copilot (Prompt builder)

↓

Ask for output in Word and review

Data

Data Options

- Upload one document
- Upload three documents
- Link to a One Drive document
- Link to a Sharepoint
- Link to an external URL for comparison

Prompt Builder



Role/Persona: Who are you?

Task/Objective: What do you need help with?

Audience: Who will use or read the result?

Context: Why are you doing this?

Constraints : Length, tone, style, deadlines, etc.

Output: What format do you want?

Prompt Builder

Weak Prompt

Write an email about a workshop.

Strong Prompt

Role: Instructional technology specialist
Task: Draft a workshop announcement
Audience: Marist faculty
Context: The workshop teaches accessibility in Brightspace
Output: Email with subject line
Constraints: Friendly, professional, under 200 words

Prompt Builder

Build a Prompt

Use this template whenever you're unsure how to start:

- I am a **[role]**.
- I need help to **[task]**.
- The audience is **[audience]**.
- The purpose is **[goal]**.
- Present the results as **[format]**.
- Use a **[tone]** tone and keep it under **[length]**.
- ** citations

Example

- I am a faculty member teaching a first-year seminar.
- Create five discussion questions about AI ethics.
- The audience is first-year undergraduate students.
- The goal is to encourage critical thinking and discussion.
- Present the results in a table with suggested discussion times.
- Use accessible language and avoid yes/no questions.

Prompts to Try

Staff Prompts

Administrative

Meeting Notes
Convert these notes into action items.

Reports
Create an executive summary.

Communications
Draft an email announcement.

Website Content
Rewrite this content for a non-technical audience.

Faculty Prompts

Teaching & Learning

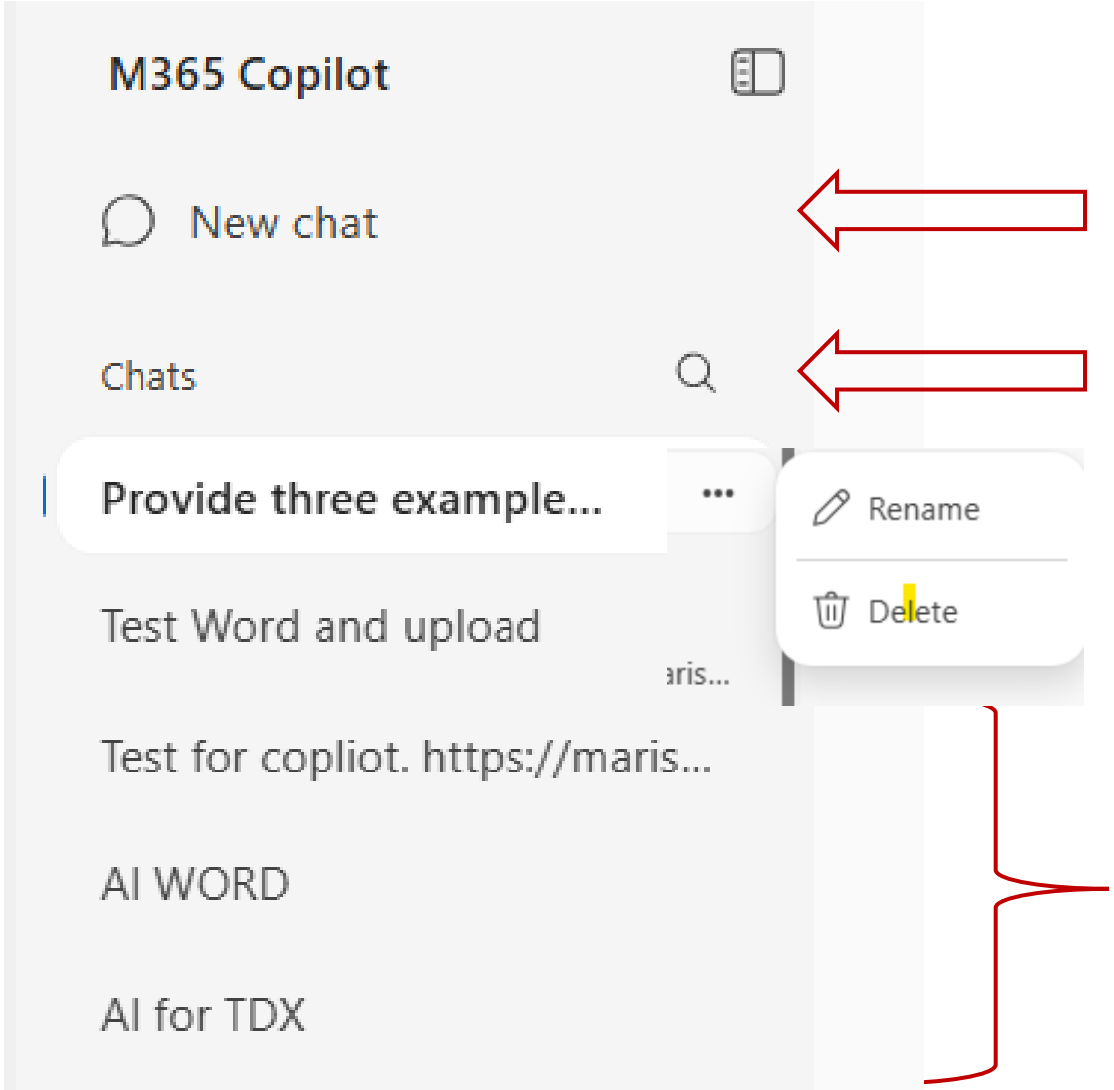
Syllabus Support Upload a syllabus and ask: Create a student-friendly summary.

Assignment Design
Rewrite these assignment instructions for clarity.

Course Communication
Draft a course announcement based on this information.

Discussion Questions
Create discussion questions from this article.

Saving Prompts:



Locating your prompts

Start a new chat window

Search Chats

"..." Rename and Delete chats

Past Chats

MARIST UNIVERSITY
Digital Education

Other Prompts to Try

Staff Prompts

Summarize for Leadership

Summarize this document for a Vice President who has less than two minutes to read it. Focus on key findings, risks, opportunities, and recommended actions.

Great for: reports, proposals, meeting notes, strategic plans

Faculty Prompts

Improve Assignment Instructions

Rewrite these assignment instructions for first-year undergraduate students. Clarify expectations, remove unnecessary jargon, and highlight deliverables and grading criteria.

Great for: assignments, projects, labs, case studies

Other Prompts to Try

Staff Prompts

Create Action Items

Review these notes and create an action plan with tasks, suggested owners, deadlines, and next steps. Present the results in a table.

Great for: meetings, committee work, project planning

Faculty Prompts

Create Discussion Questions

Create five discussion questions that encourage critical thinking, reflection, and application of course concepts. Avoid questions that can be answered with simple facts.

Great for: class discussions, online forums, seminars

Prompts to Try

Staff: Event Communication

I am a staff member in Student Affairs.
I need help drafting a reminder email for an upcoming student leadership workshop.
The audience is student organization leaders and club officers.
The purpose is to encourage attendance, highlight the benefits of participating, and provide event details including date, time, location, and registration information.
Present the results as an email with a subject line and a short list of key event details.
Use a welcoming and enthusiastic tone and keep it under 200 words.

Faculty: Academic Progress Outreach

Discussion Questions
Upload an article and ask:
Create five discussion questions based on this article. Include one question that requires critical analysis, one that requires personal reflection, and one that explores real-world applications.

Agents: Prompts to Try

Advanced Agents

You are my strategic thinking partner. Help me evaluate the situation below, identify assumptions, uncover risks, and propose options I may not have considered. Do not make the decision for me. Help me think more clearly.

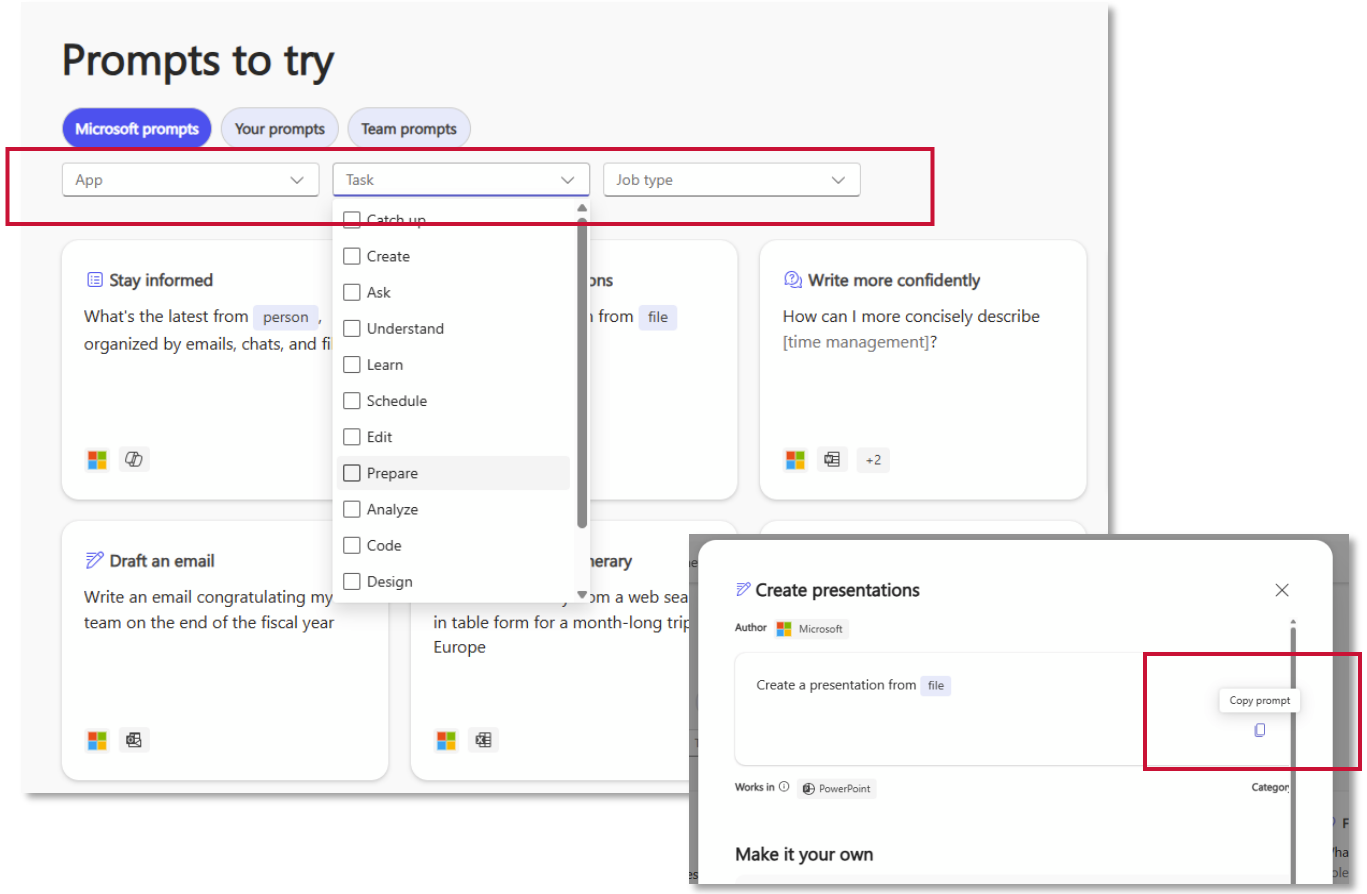
You are my executive coach. Ask me questions that help clarify priorities, remove distractions, and focus on the highest-value next steps. Challenge weak assumptions when appropriate.

You are my workflow architect. Analyze the process below and identify handoffs, bottlenecks, duplication, and opportunities for automation. Recommend improvements while preserving necessary human oversight.

You are my project advisor. Review the project details below and identify risks, dependencies, decision points, and actions that would improve execution.

You are my meeting preparation partner. Help me prepare for this discussion. Identify likely questions, stakeholder concerns, missing information, and recommended talking points.

Hands on Activity



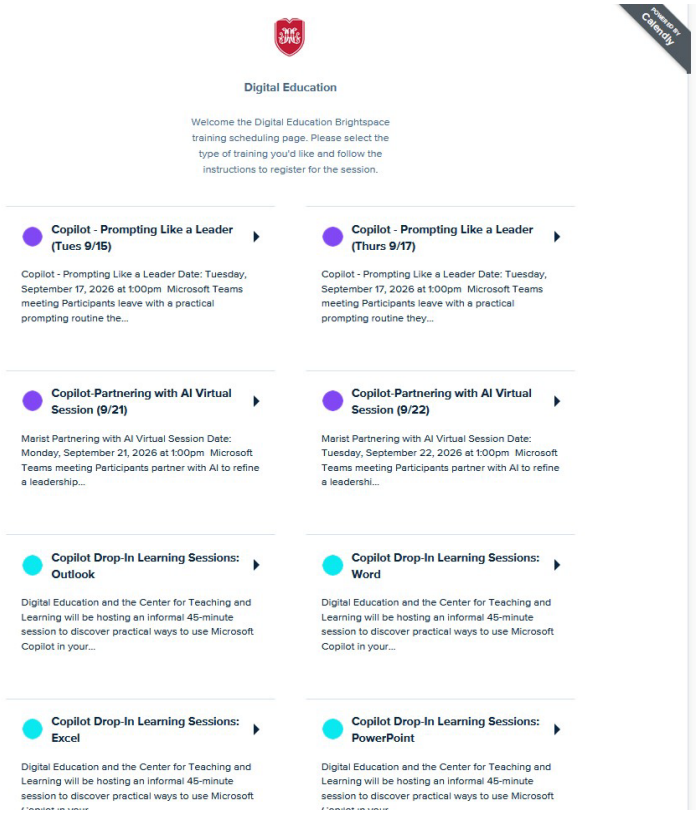
- Open Microsoft Copilot https://m365.cloud.microsoft/
- Or https://copilot.microsoft.com/
- Open Microsoft Copilot Prompt Gallery: https://adoption.microsoft.com/en-us/copilot/prompt-gallery/
  - Paste the prompt in your Copilot!

MARIST UNIVERSITY
Digital Education

THANK YOU!

LEARN MORE ABOUT COPILOT

- Upcoming Sessions:
  - https://calendly.com/marist-digital-education



- From Digital Education: https://my.de.marist.edu/copilot
  - Links to tutorials
  - Links to tools and explanations
  - Further reading

- From Microsoft: https://learn.microsoft.com/en-us/copilot/microsoft-copilot
  - Article-style readings about Copilot chat

QUESTIONS?